

We are currently updating our site; thank you for your patience.

# SERVICE

# **CALLS - ASSIGNMENTS**

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the Call Centre Mode notes.

A **Call Assignment** is work that is given to a technician to do. This could be handled differently on the system depending on whether <u>Tech Connect</u> is used.

On Tech Connect, the Technician will see the list of assignments and <u>Accept</u> <u>the Assignment</u> when about to travel to the client. Work and resources can be logged as the technician performs the required job. He may need to <u>Reject</u> <u>the Assignment</u> if the client is not available or out of his logistical route.

The work can be Accepted on behalf of the Technician using the Force Accept option in the Call Assignments listing, or Rejected on behalf of the Technician.

If not using Tech Connect, work assignments are automatically accepted by the system. However, the current assignments can be viewed and additional assignments added. In the case of calls, one assignment is done at a time with another assignment following a prior resolution.

Ribbon Select Service > Calls

<sup>1</sup>BPO2 v2.5.1.3 or higher





The Call Listing screen will be displayed.

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	67 Westwood Dynam	c 15/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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G AL E CN0000963	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
	63 Westwood Dynam		UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
E (N0001963	Hope Works (Ptv)	.td 19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
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• Click on the relevant **Site** for the calls you wish to view.



• Select the **Call** you wish to work with.

Image: Note:         Note:        Note:         Note:	w.						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
	Home Equipment / Los	cations Contract	Finance / HR Invento	ry Maintenance	/ Projects Manufa	cturing Procurem	ent Sales	Service Reporting Utilities							
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D         D	formation	E CN0001003	Young Bectric	13/12/2022	Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
	Durban	E CN0001002	Samanthas Diner	12/12/2022	Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
No. 2011         No. 2012	O New	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
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B         0.00009         Histockof Sprame         1.100207         Multigrad         08.000         Mediafration-technologing         94         Schedule Strammark         0         Oceans Contex - Histockof Sprame		E CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
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The management of the second s		FR CN0000954	Green Tea Supples	17/09/2019	Unissimed		08:00:00	2MS - 2 month service	9M	Scheduled Maintenance			NFW 1234		
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		Count: 38	6												

• Click on the **Edit** button.

						Call	Listing - BPO: Version 2.5.1.4 - Example Company							
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vetoria Nere	EI CN0000985	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONP	Configuration	sin123		
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Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
A	E CN0000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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In Draman	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
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Pendina	E CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		08:00:00	2MS - 2 month service	514	Scheduled Maintenance			147807		
AI (	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	Unitssigned		03:00:00	Tier - Commercial Tier Test	DVST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	SathSinNaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	Unitssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	EE CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
							Red Robert Roberts Red Harden	-						
	Count: 38	5												
											Line	Bianca 30.005	/2023 Version - 2.5.1.4	Eva

Short cut Key: Double click in the row of the call you wish to edit.

• The **Call maintenance: Call ref. -** [call ref. number] screen will be displayed.



- Call maintenance : Call ref. CN0005298 BPO: Version 2.5.0.4 Example Company v2.5.0.0 \_ **D** X \$ Ŧ 5 Home Equip nt / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement 8 X 💾 🔇 🔇 🚱 🞿 🌗 🐯 🚩 🥕 P ۲ 2 Save Layout Workspaces Note Back Close Complete Assign Hold Pending Release Reinstate Save Print Maintair Format Print Info Process 6 Links Relates To : 厚 Equipme Customer Hope Works (Pty) Ltd P ... + \* ReferenceType

  Serial No ReferenceNo 1020-10101 • ... م Contact Kelly Jones Prior Call Reference Call Request Reference ent Info Functions Contact No. 031 123 4567 Address Plot 91Leaf Road , P ... A Leaf Hills Pink Town Durban South + Contract No CO0000050 SLAs Location Project Reference Quote Reference Invoice Reference User Defined Call Type Repair • Work In Progress Order Reference Error Code Paper Jam + Description Paper not feeding through rollers Cust Call Date Time 14/12/2021 10:23:41 + Priority 3 🛊 \* Prior Calls : CallReference CN0005298 
   CallDate
   CallTime
   Description

   14/12/2021
   10:23:41
   Paper not feeding through rollers
   SLA Date Required 14/12/2021 • CN0000543 CN0000519 17/11/2017 13:15:48 07/08/2017 14:19:10 test call swap out po statu Full set of toners required Order No PO12345 
   03/08/2017
   15:21:01
   Test all functions on the copier

   13/07/2017
   08:45:37
   Test call for invoice and transaction processing checks

   29/06/2017
   66:14:01
   Loan unit - Alternate Issue

   23/05/2017
   08:00:00
   T1010 - Daily, colour 1000 - Call per WO
   CN0000516 CN0000510 Logged By JulandaK CN0000501 Status N - New CN0000647 Optional No ACCTS002 On Site Info 4 Meters User : JulandaK 13/01/2022 Version : 2.5.0.4 Example Company v2.5.0.0 Open Windows +
- Click on the Assignments tile.

## VIEW ASSIGNMENTS

The **Call Assignments** listing displays any call assignments that have been created.





## **FORCE ACCEPT**

This feature is solely for companies using the **Tech Connect** Mobile Device System.

If the technician **is** using Tech Connect, he will accept the call on his device. Force Accept is used when the technician, does not accept the call, then call centre will accept the call on his behalf, by issuing a force accept.

- The Assignment Listing for Call, Ref no: [call ref number] screen will be displayed.
- Click on the **row** of the **technician** you wish to **accept** the call for.
- Click on Force Accept.
- A Delete Call Assignment message box will display to confirm;
  - Are you sure you want to accept this call assignment?
- Click on Yes.

	Assignment Listing fo	r Call Ref no : CN00	05298 - BPO: Versi	on 2.5.0.4 - Ex	ample Compa	any v2.5.	0.0			_		x
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Add Delete Force Brocessing 2 mat	paces Refresh											\$
Drag a column header here to group by that column												
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Theo Peterson Sasha Jones	12/01/2022	15:37:45	Paper not f	0.00	0.00	N						
		Are you sure you	want to accept this	No	×							
Open Windows 👻				Us	er : JulandaK	13/01/20	22 Vers	ion: 2.5.0.4	Example C	ompany v2	2.5.0.0	

Help v2024.5.0.7/1.0 - Pg 5 - Printed: 21/08/2024



#### • Close the Assignment Listing for Call screen.

4	) <del>-</del>	Ass	ignment Listing fo	or Call Ref no : CN000529	8 - BPO: Vers	ion 2.5.0.4 - Ex	ample Compa	any v2.5.0.	0		_	
	Home Equip	ment / Locations Contract	Finance / HR 1	Inventory Maintenance	/ Projects M	lanufacturing	Procurement	Sales	Service Re	porting L	Jtilities —	8 ×
(			<b>Reference</b>									
	Add Delete Porce Accept	Save Layout Workspaces	Reffesh								12	
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•	Theo Peterson	Sasha Jones	12/01/2022	15:37:45		0.00	0.00	A				
				Canture screenshot		1	14-14	10/01/000	2 4		1.0	
C	Ipen Windows 🔻			Capture screenshot.		U	ser : JulandaK	13/01/202	2 Version : :	2.5.0.4 E	cample Company v2.	5.0.0 //.

- You will return to the Call Listing screen.
- Change the **Status** to **In Progress**, to view the call.



Help v2024.5.0.7/1.0 - Pg 6 - Printed: 21/08/2024



## Calls - Assignments

Information       Nord Calls       N	Ŧ		15	Cal	Listing - BPO: Version 2	.5.0.4 - Example Com	pany v2.5.0.0			
Important	Home Eq	uipment / Locatio	ns Contract	Finance / HR	inventory Maintenance	/ Projects Manufactu	ring Procuren	nent Sales Service Reporting	Utilities	_ 8 3
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Prind       Intermedian       Call Type								al come al colore (al		////
CallReference       CallState       Technican       CallTime       Description       CallTime       CallTime       Description       CallTime       CallTime       Description       CallTime       CallTim	Find O i	Filter								1
Information       No Of Calls       Image: Comparison of the comparison			CallRefere	ence CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDe
Information       No Of Cals       Image: Cal			P # C	=	8 <b>.</b> C	RBC	a 🛛 c	R C	a 🛛 c	REC
Ourban       30       *       Commercial Tier Test       INST       Insta         O New       27       In Progress       3       Commercial Tier Test       INST       Insta         O Hold       0       Complete       0       Complete       0       New       0       0       <	Information	No Of Calls	► CN000	5298 14/12/2021	Accepted	Theo Peterson	10:23:41	Paper not feeding through rollers	REP	Repair
New       27       In Progress 3         In Progress 3       In Progress 0         Conglete 0       Cosed 0         In Progress 0       In Progress 0         In Progress 0       In Progress 0         Complete 0       Cosed 0         All 0       Complete 0         Cosed 0       Cosed 0         All 0       Complete 0         Cosed 0       Cosed 0         All 0       Cosed 0         Cosed 0       Cosed 0         Co	Durban	30	CN000	5291 16/10/2021	Accepted	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
In Progress 3         O Hold 0         O Pending 0         O Cosplete 0         O Al 30         Pending 0         O New 0         In Progress 0         O Hold 0         O Pending 0         O Cosplete 0         O Rew 0         O In Progress 0         O Hold 0         O Rew 0         O In Progress 0         O Hold 0         O Cosplete 0         O To For 0         O To For 0         O To For 0      <	New New	27	E CN000	5274 01/10/2021	Accepted	Mary Thompson	14:52:46	PROJ406OR002	NDS	New Deal S
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	van Windows -						Licer + Julan	dak 12/01/2022 Version : 2 E 0.4	Evample Com	0.00 V V2 E 0.0

## **ASSIGN CALL ASSIGNMENT**

- From the Assignment Listing for Call Ref no : [call ref. number] screen.
- Click on Add.





- The **Call Assignment** maintain screen will come up, with the following fields populated:
  - Detail: The Call Description.
  - Assignment Date and Time: 2 days from current date and time.
  - Assigned By: The employee who is currently logged on.
- Complete the details as follows:
  - Assigned To: Select the employee who will be doing this work.
  - **Detail:** This is pre-populated with the call description, but the detail can be added to for further instruction to the technician.



#### WORK ORDER ASSIGNMENT LINK

• Next you will select to either link the assignment to the existing open work order or create a new work order. Do no select both flags.

#### Link to Open Work Order

- For new calls, you will be linking the assignment to the existing Open Work Order.
- Click on the check box in front of the relevant **Open Work Order**.

#### **Create New Work Order**

- This feature is used if the technician needs to follow up on the same call, but for a different task, for instance when a call has been re-assigned. The assignment detail needs to be changed accordingly.
- Click on the Create new Work Order check box.
- Click on the **Save** button.



• •	3	Call Assignment : F	Reference No	o. : CN0005292 - BPO: Ve	rsion 2.5.0.8 - Ex	ample Compa	ny v2.5.0.8	3				x
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Detail	2MS - 2 month service			*								
				-								
Assignment Date	10/05/2022 - 13:27:	49 🌲 *										
Assigned By	Julanda Kessler	* *										
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#### **REJECT CALL ASSIGNMENT**

- From the Assignment Listing for Call Ref no : [call ref number] screen,
- Click on the **row** of the assignment you wish to remove.
- Click on Delete.
- When you receive the **Delete Call Assignment** message to confirm;
  - Are you sure you want to reject this call assignment?
- Click on Yes.



## Calls - Assignments

Home Equipment / Locations Contract	Finance / HR Inv Refresh	entory Maintenance j	/ Projects Ma	anufacturing	Procurement	Sales Se	rvice Reporting	Utilities	_ & ×
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Open Windows •	Delete Ca	II Assignment	t to reject this	Call assignmen	t?	10/05/2022	Version : 2.5.0.8	Example Col	many v2 5.0.8

- Next you will receive the **Rejection Comments** screen.
- Click in the comments section and type the rejection comments.
- Click on Save.

• •	Assignment Listing	for Call Ref no : CN00052	92 - BPO: Versi	on 2.5.0.8 - Ex	ample Compa	ny v2.5.0	.8				
Home Equipment / Locat	tions Contract Finance / HR	Inventory Maintenance	/ Projects M	anufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ X
Add Delete Force Accept Processing 4	ut Workspaces										\$
AssigneeName AssignorN	ame AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status					
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- The Status has been updated to  ${\bf R}$  Rejected.
- Close the screen to return to the Call maintenance screen

Γ	<b>⊉</b> =	Assi	gnment Listing for (	all Ref no : CNG	0005292 - BPO: Version 2	5.0.8 - Examp	le Company v	v2.5.0.8			_ <b>D</b> X
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l	<ul> <li>John Twain</li> </ul>	Julanda Kessler	10/05/2022	13:27:49	Call was incorrectly assig	0.00	0.00	Stat	hie		
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