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

SERVICE

CALLS - ASSIGN A CALL

> **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[1]. 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.

By assigning a Technician, Driver, or Responsible Person to a call, identifies who will be working on the call.

If Tech Connect is not used, then the call will move to the **In Progress** status. The call centre person will accept the call on the Technician's behalf.

If the technician uses Tech Connect - he will accept the call on his device, and only then will the call move to **In Progress**.

Refer to the **Call State** column on the Call Listing screen, to see if the call has been assigned or not.

The call can be in either:

- status **New** with Call State **Unassigned**
- status **New** with Call State **Awaiting Acceptance**

Work and resources can be logged as the technician performs the required job. He may need to Reject the Assignment if the client is not available or out of his logistical route.
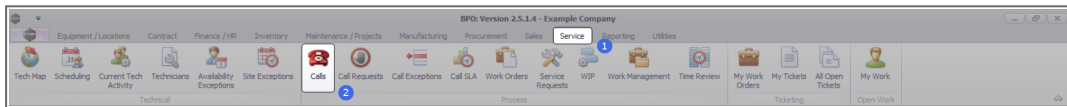
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[1]BPO2 v2.5.1.3 or higher

A technician can only be assigned to one call at a time. He will **End Work** then **Accept** the next call. Each additional assignment will follow a prior res-olution.

The call can be re-assigned.

Set up the employee as a technician, if the person you wish to assign to a call, is an employee, but does not display on the list when searching in the assign screen.

Ribbon Select **Service > Calls**

- The **Call Listing** screen will be displayed.

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

✏ **Note** that only calls in the **New** status can be assigned.

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

- Click on the **Assign** button.
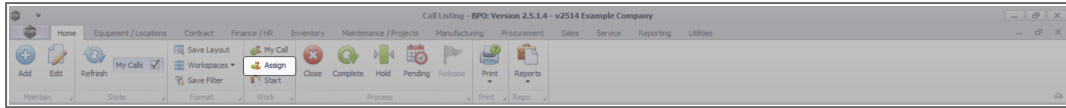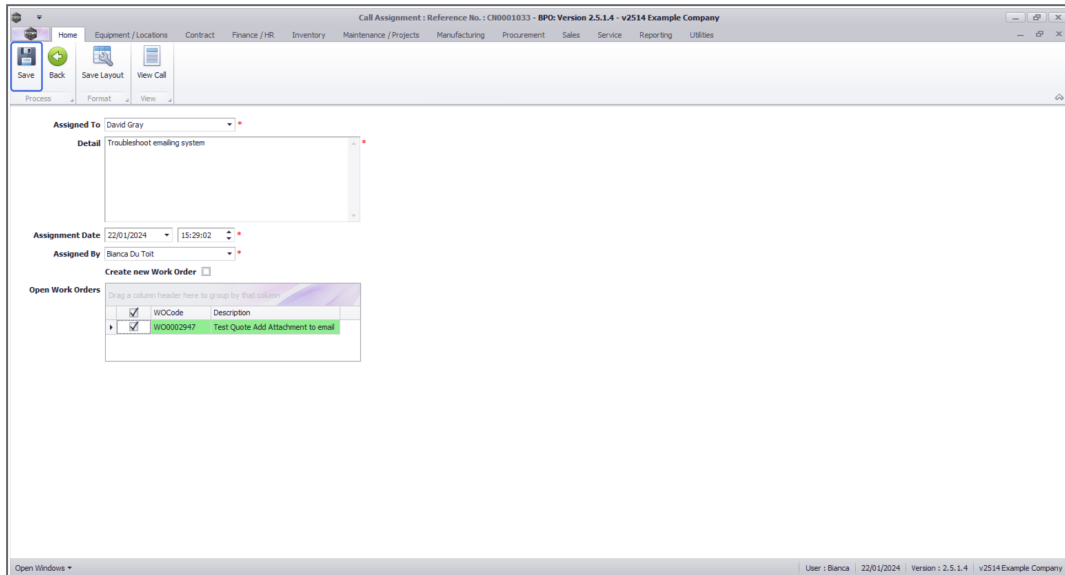
- The **Call Assignment: Reference No: [**call ref number**]** screen will be displayed.
    - **Assigned To:** Click on the down **arrow** to select the employee from the menu.
    - **Assignment Detail:** This field will populate with the call reference description. Add the technician assignment details as required.
    - **Assignment Date:** The current date and time will display.
        - **Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.
        - **Time:** Type in or use the **arrow** indicators to select an alternative time, if required.
    - **Assigned By:** The person currently logged onto the system, and assigning the call, will display in this field. Click on the down **arrow** to select a different employee from the drop-down list, if required.
    - **Create new Work Order:** Click on the check box if you need to create a **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.

- **Open Work Orders:** Click to select the Work Order Code to link the employee to the current open work order.
- When you have finished adding details to this screen, click on **Save**.

- You will return to the **Call Listing** screen.
- When you receive the **Call Processing** message to confirm;
  - **Call No: [**call ref. number**] has been assigned.**
- Click on **OK**.
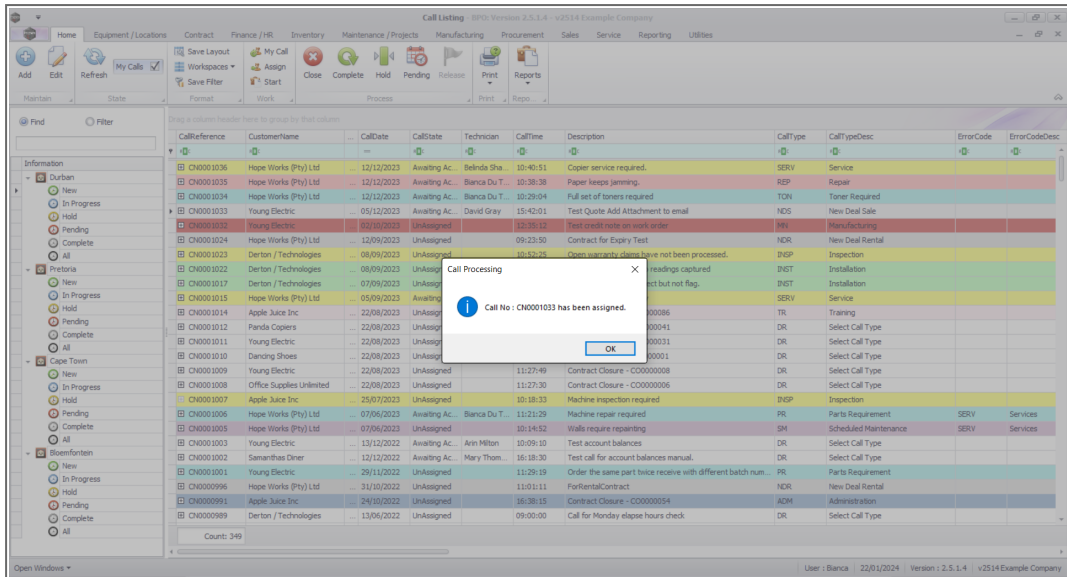
- The call has now been assigned. Note the changes to the example;

  - the Status - Is set to **New** (as before)
  - the State - Is now **Awaiting Acceptance**
  - the Technician column - now has an Assigned **Technician Name**
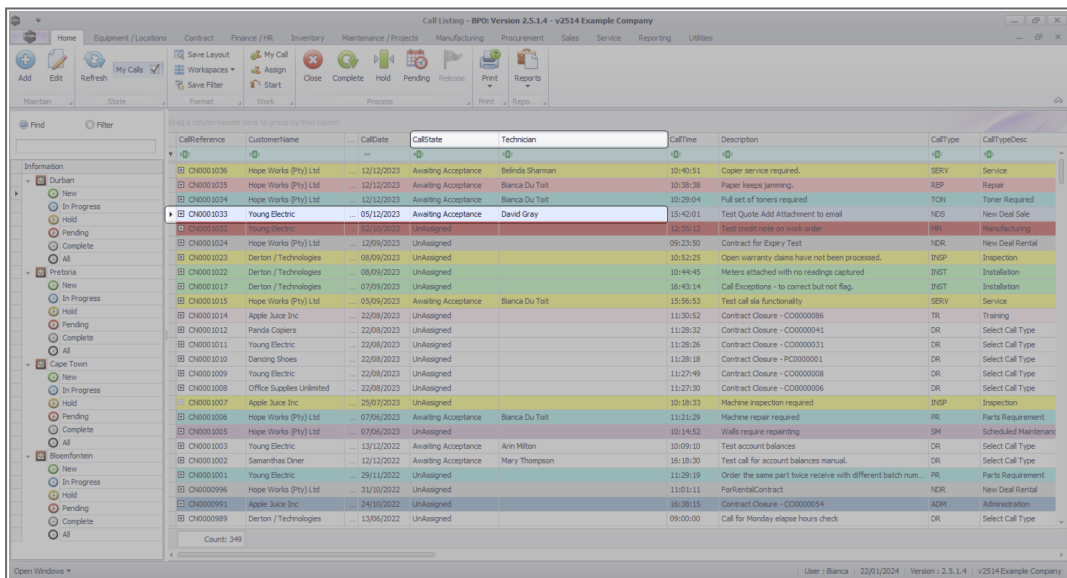
Reminder:

- If the technician uses Tech Connect - he will accept the call on his device, and only then will the call move to the **In Progress** status.
- If the technician does not use Tech Connect - the call centre person will accept the call on his behalf and it will move to the **In Progress** status.

Related Topics

- Service - Scheduling
- Calls - Assignments

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