

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 Compatibility¹. 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.

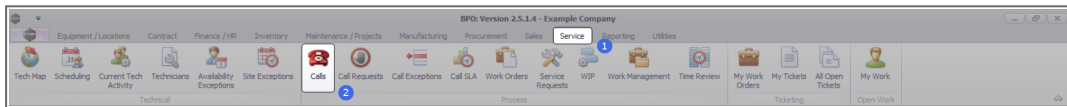
¹BPO2 v2.5.1.3 or higher

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 resolution**.

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.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hillan	00:09:10	Test account balance	CR	Change Request			107		3
IB CN0001002	Opentek/Brexit	10/02/2023	Awaiting Acceptance	Nery Thompson	00:00:00	Test call for account balance request	SM	Scheduled Call Type			18-121202		3
IB CN0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			in123		3
IB CN0000998	Hope Works (Pty) Ltd	24/10/2022	Unassigned		11:01:11	ForRentContract	NCR	New Deal Rental				BPO2 TEST 1	2
IB CN0000992	Top Hubs Free	20/10/2022	Awaiting Acceptance	Daniel Balgoven	14:01:17	Loan machine for temporary high volume printing requirement	DRN	Service			TDP12345LD		3
IB CN0000991	Hope Works (Pty) Ltd	24/10/2022	Unassigned		00:38:13	Contract Closure - C0000004	CR	Select Call Type					3
IB CN0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday closure hours check	TEST	Testing			2020-2202		3
IB CN0000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	in123		3
IB CN0000987	Young Electric	16/06/2022	Unassigned		06:00:00	Call logged 9 days ago for elapsed time checks	LRG	Upgrade			in123		3
IB CN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 3 days ago for elapsed time checks	CR	Select Call Type			in123		3
IB CN0000985	Hope Works (Pty) Ltd	18/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	LRG	Upgrade			20-46765		3
IB CN0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			475020000		3
IB CN0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:13	Test elapsed time - 2 day prior	TEST	Testing			020214254		3
IB CN0000982	Young Electric	18/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			in123		3
IB CN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		3
IB CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:20:28	test another call email	ADM	Administration			08618945		3
IB CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095019155		3
IB CN0000971	Westwood Dynamic	28/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	TEST	Installation				Forest Hills Centre	2
IB CN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1254		2
IB CN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000965	Westwood Dynamic	01/12/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000964	Hoek PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
IB CN0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1P-30200		2
IB CN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	TEST	Installation				Forest Hills Centre	2
IB CN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllrest	2
IB CN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	TEST	Installation				Forest Hills Centre	2
IB CN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1254		2

- 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.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balance	CR	Change Request			107		3
BN0001002	Sherwood Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	06:38:20	Test call for account balance manual	CR	Select Call Type			05-12/202		3
BN0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different bath-num	CR	Change Request			an123		3
BN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Fontinala/Cartridge	TKR	New/Def Central				BPO2 TEST 1	3
BN0000992	Top Hubs Pty	20/10/2022	Awaiting Acceptance	Daniel DeGouvea	14:59:17	Loan machine for temporary high volume printing requirement	SRV	Service				TOP123456	3
BN0000991	Adtek Java Pty	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000554	CR	Select Call Type					3
BN0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday closure hours check	TEST	Testing			2020-2222		3
BN0000988	Young Electric	10/06/2022	Unassigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BN0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	CR	Select Call Type			an123		3
BN0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		06:09:13	Test future call - for elapsed time	LPG	Upgrade			20-48365		3
BN0000983	Hope Works (Pty) Ltd	09/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			470200006		3
BN0000982	Young Electric	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			52023412546		3
BN0000980	Young Electric	10/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN0000979	Young Electric	10/06/2022	Unassigned		11:24:26	Test with site manager email entered	ADM	Administration			107		3
BN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bernca Du Toit	06:30:20	test another call email	ADM	Administration			059519151		3
BN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bernca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			059519151		3
BN0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000964	HOA PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN0000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

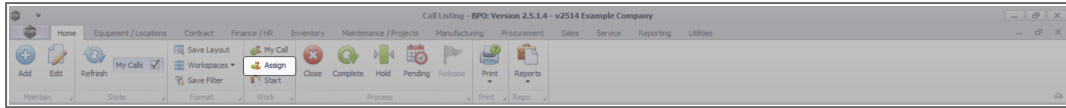


Note that only calls in the New status can be assigned.

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

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balance	CR	Change Request			107		3
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BN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Fontinala/Cartridge	TKR	New/Def Central				BPO2 TEST 1	3
BN0000992	Top Hubs Pty	20/10/2022	Awaiting Acceptance	Daniel DeGouvea	14:59:17	Loan machine for temporary high volume printing requirement	SRV	Service				TOP123456	3
BN0000991	Adtek Java Pty	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000554	CR	Select Call Type					3
BN0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday closure hours check	TEST	Testing			2020-2222		3
BN0000988	Young Electric	10/06/2022	Unassigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BN0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	CR	Select Call Type			an123		3
BN0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		06:09:13	Test future call - for elapsed time	LPG	Upgrade			20-48365		3
BN0000984	Hope Works (Pty) Ltd	09/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			470200006		3
BN0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			52023412546		3
BN0000982	Young Electric	10/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN0000979	Young Electric	10/06/2022	Unassigned		11:24:26	Test with site manager email entered	ADM	Administration			107		3
BN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bernca Du Toit	06:30:20	test another call email	ADM	Administration			059519151		3
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BN0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000964	HOA PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN0000963	Westwood Dynamic	21/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Sub/BinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/Rest	2
BN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Assign** button.

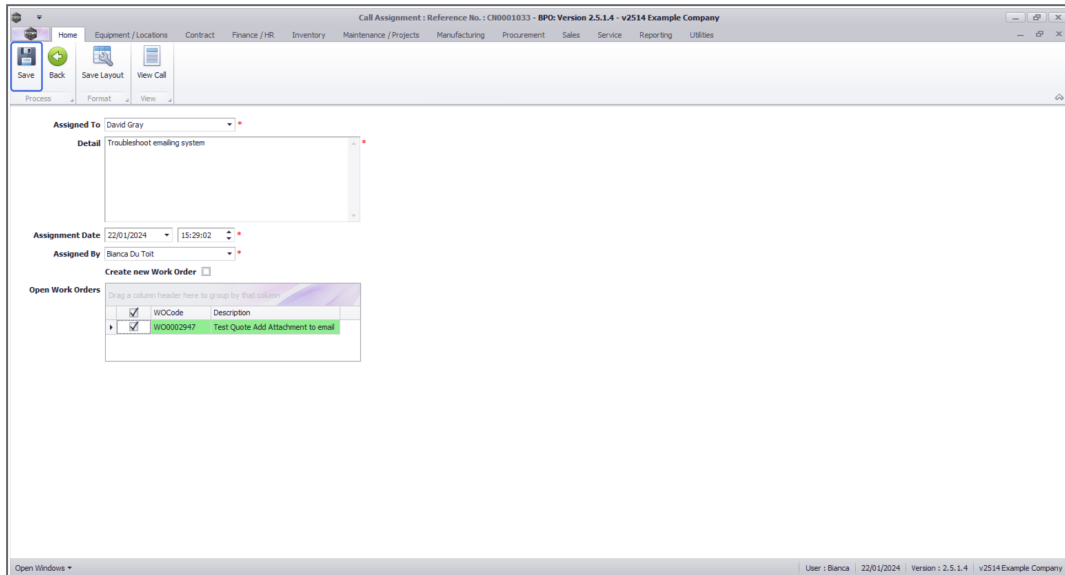


- The **Call Assignment: Reference No:** [call ref number] screen will be displayed.
 - **Assigned To:** Click on the down **arrow** to select the employee from the menu.
 - **Assignment Detail:** This field will populate with the call reference description. Add the technician assignment details as required.
 - **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**.

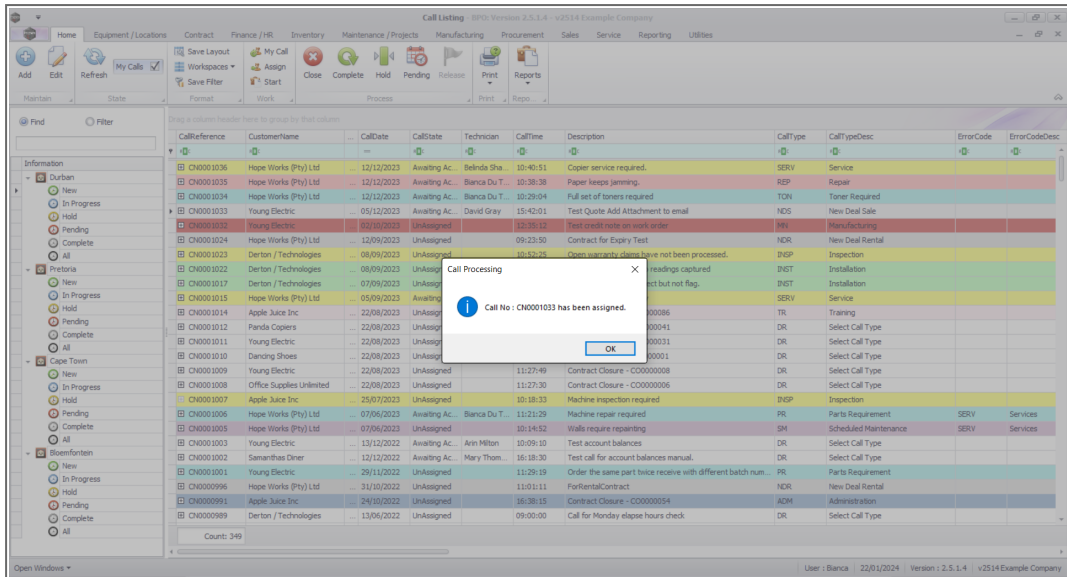


This feature is used if the technician needs to follow up on the same call, but for a different task, for instance when a call has been re-assigned. The assignment detail needs to be changed accordingly.

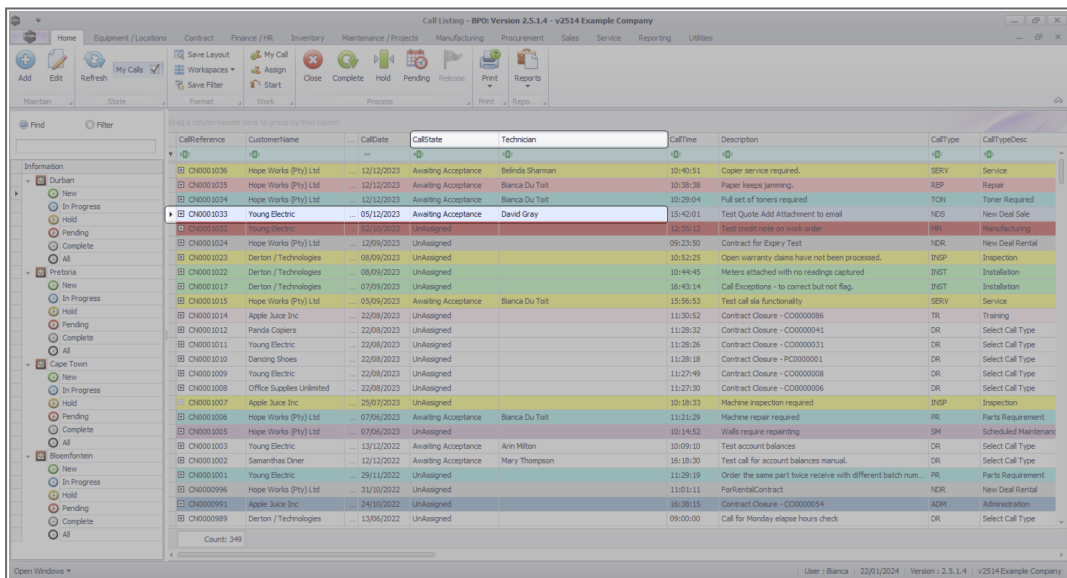
- **Open Work Orders:** Click to select the Work Order Code to link the employee to the current open work order.
- When you have finished adding details to this screen, click on **Save**.



- 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](#)

MNU.122.005

