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[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.

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

On Tech Connect, the Technician will see the list of assignments and Accept the Assignment when about to travel to the client. 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.

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.
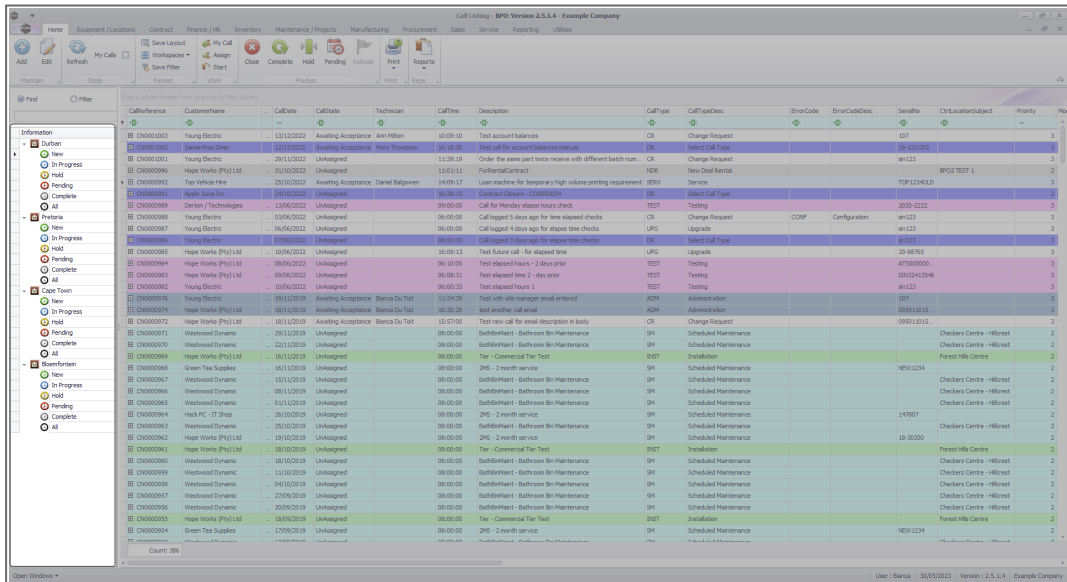
Ribbon Select **Service > Calls**

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[1]BPO2 v2.5.1.3 or higher
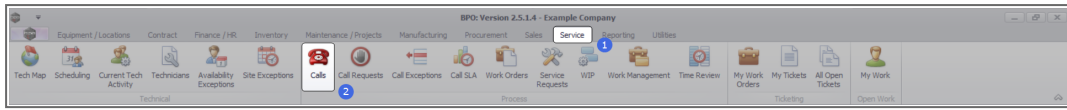
- The **Call Listing** screen will be displayed.
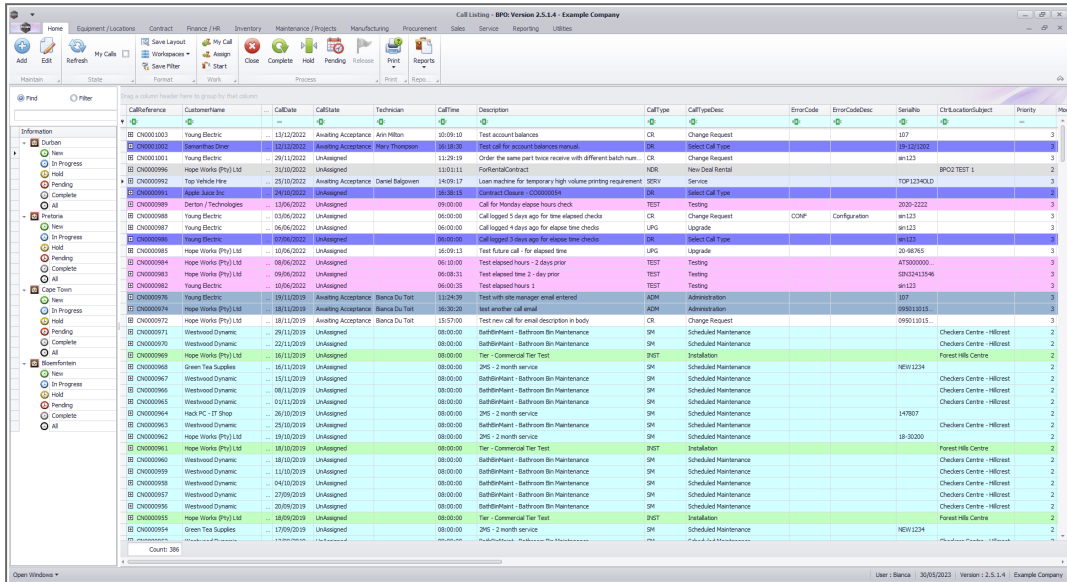
- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.
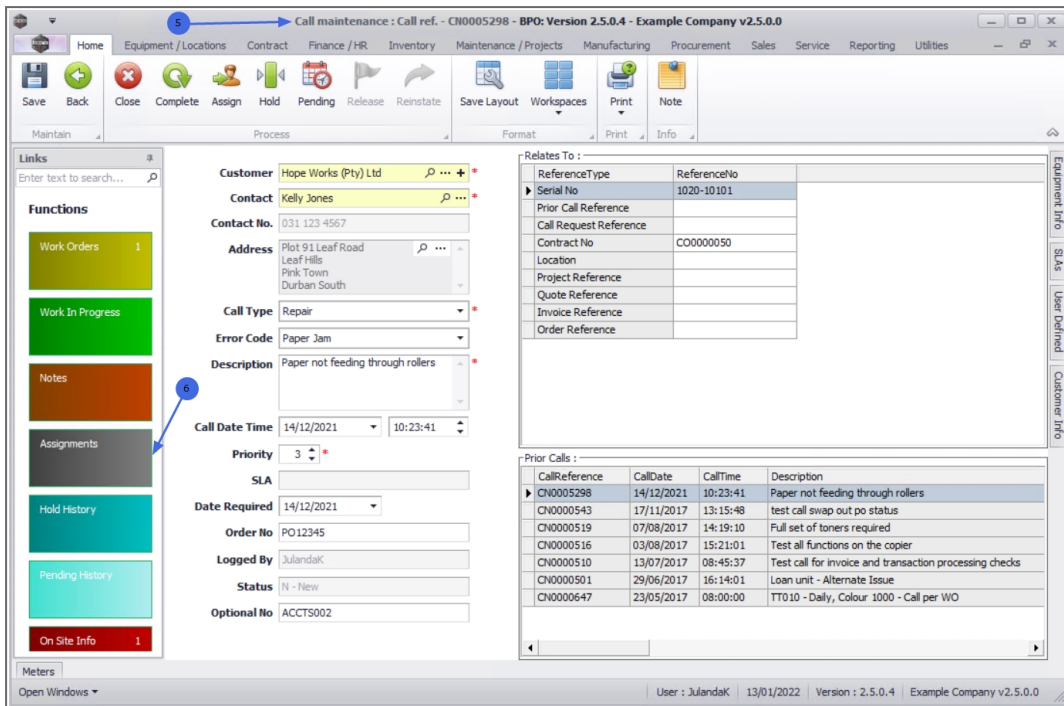
- Select the **Call** you wish to work with.

- Click on the **Edit** button.

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.

- Click on the **Assignments** tile.

VIEW ASSIGNMENTS

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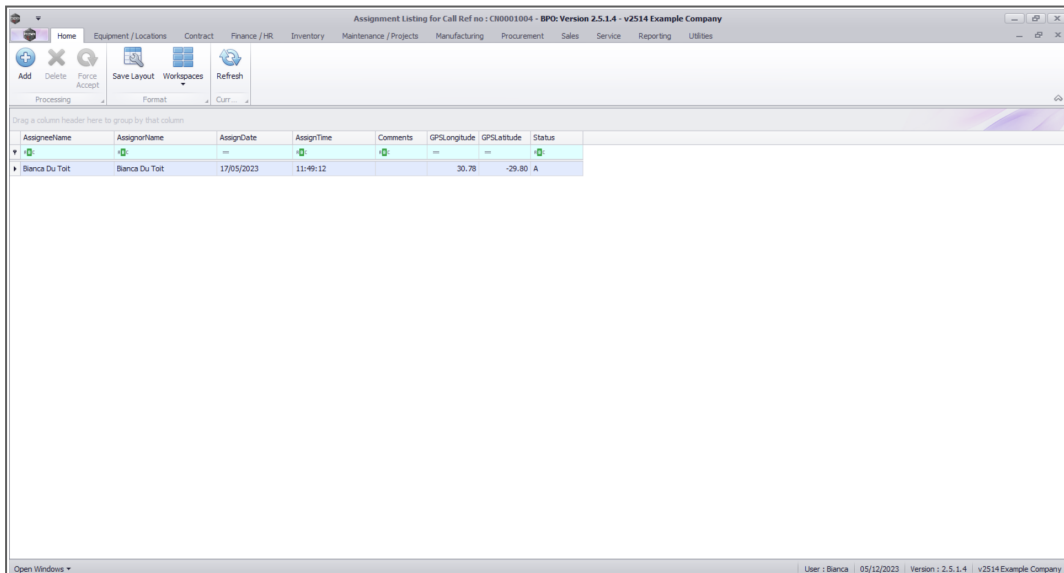
FORCE ACCEPT

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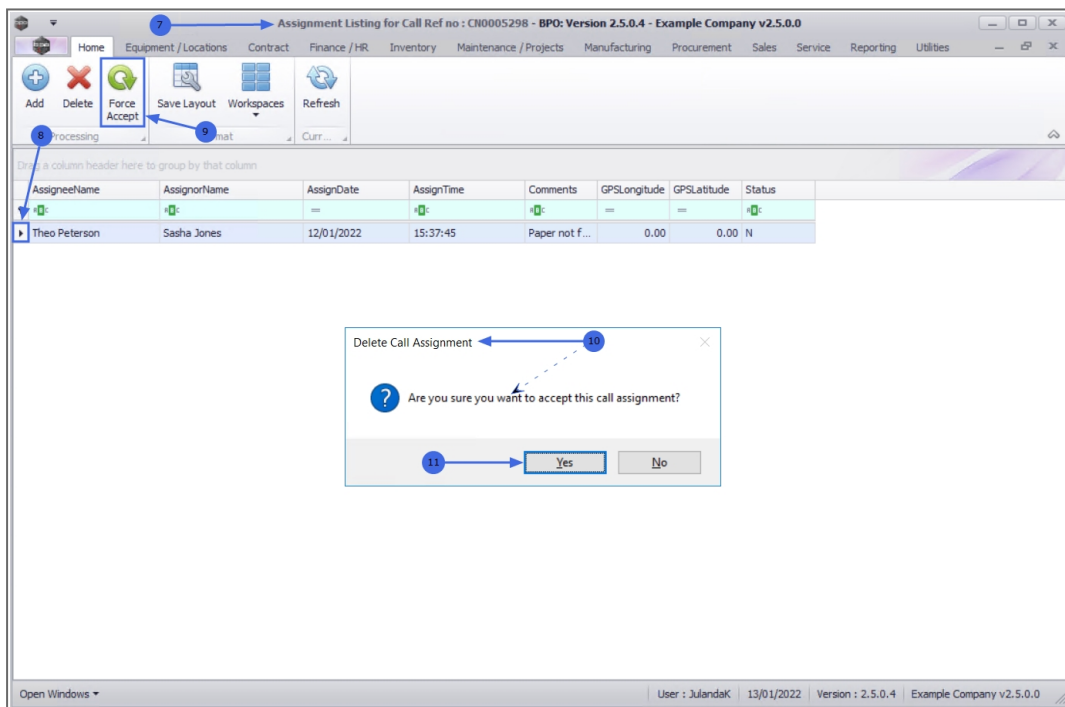
- **Close** the **Assignment Listing for Call** screen.
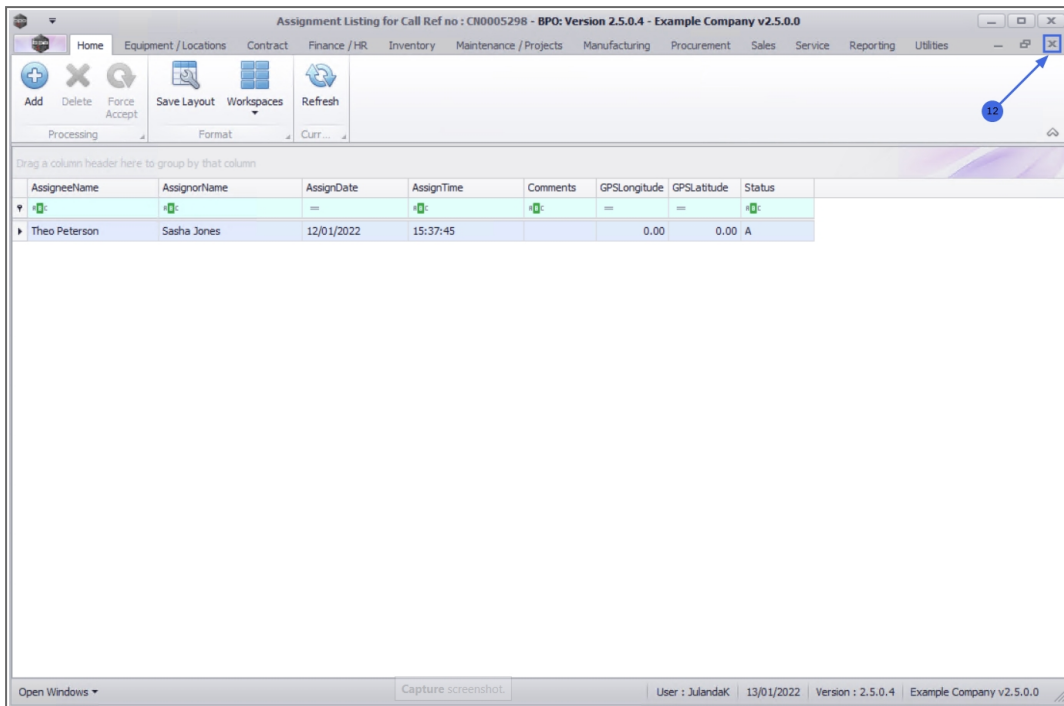
- You will return to the **Call Listing** screen.
- Change the **Status** to **In Progress**, to view the call.

> ✏ **Note** that the **Call State** has changed to **Accepted**.

ASSIGN CALL ASSIGNMENT

- From the **Assignment Listing for Call Ref no :** [call ref. number] screen.
- Click on **Add**.
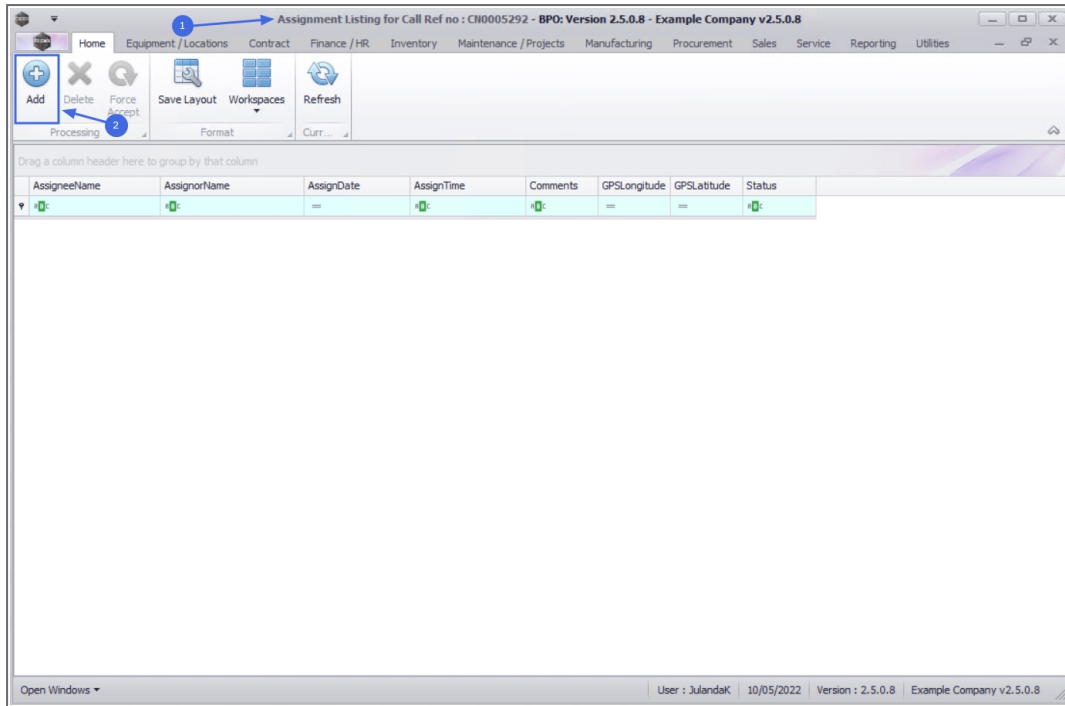
- The **Call Assignment** maintain screen will come up, with the following fields populated:
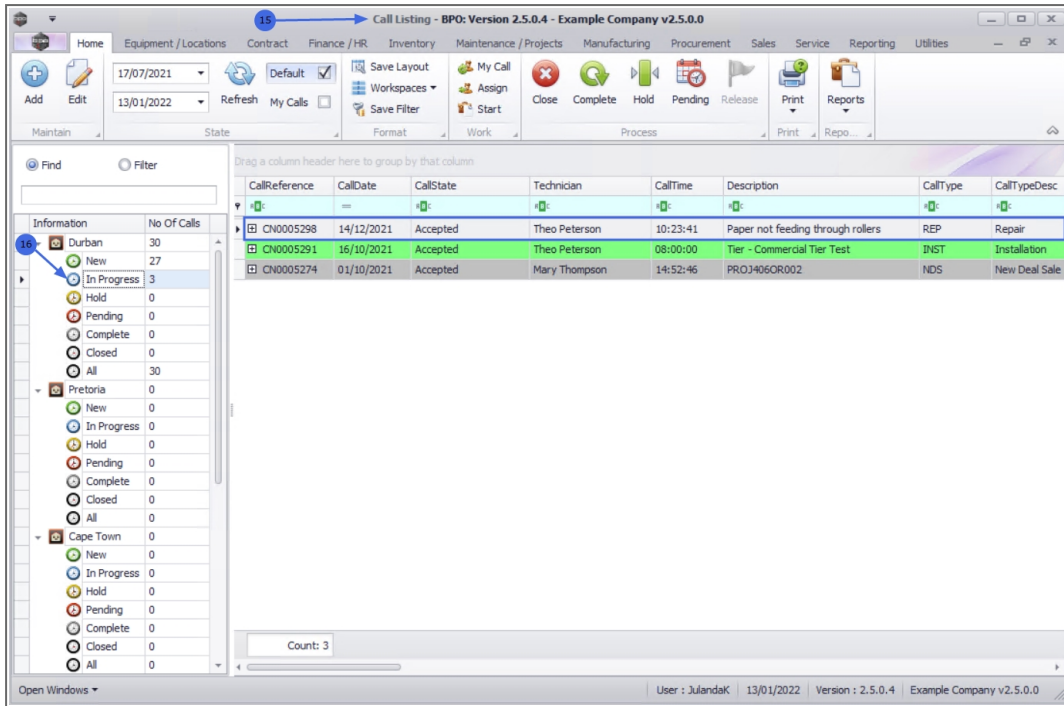 - **Detail:** The Call Description.
  - **Assignment Date and Time:** 2 days from current date and time.
  - **Assigned By:** The employee who is currently logged on.

- 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.

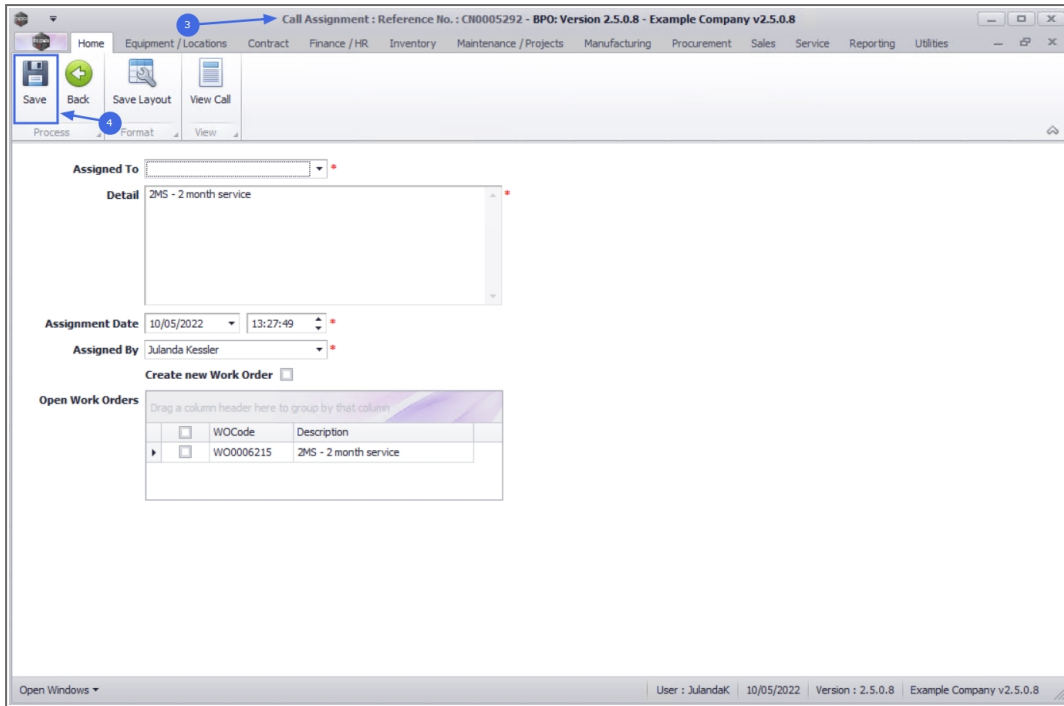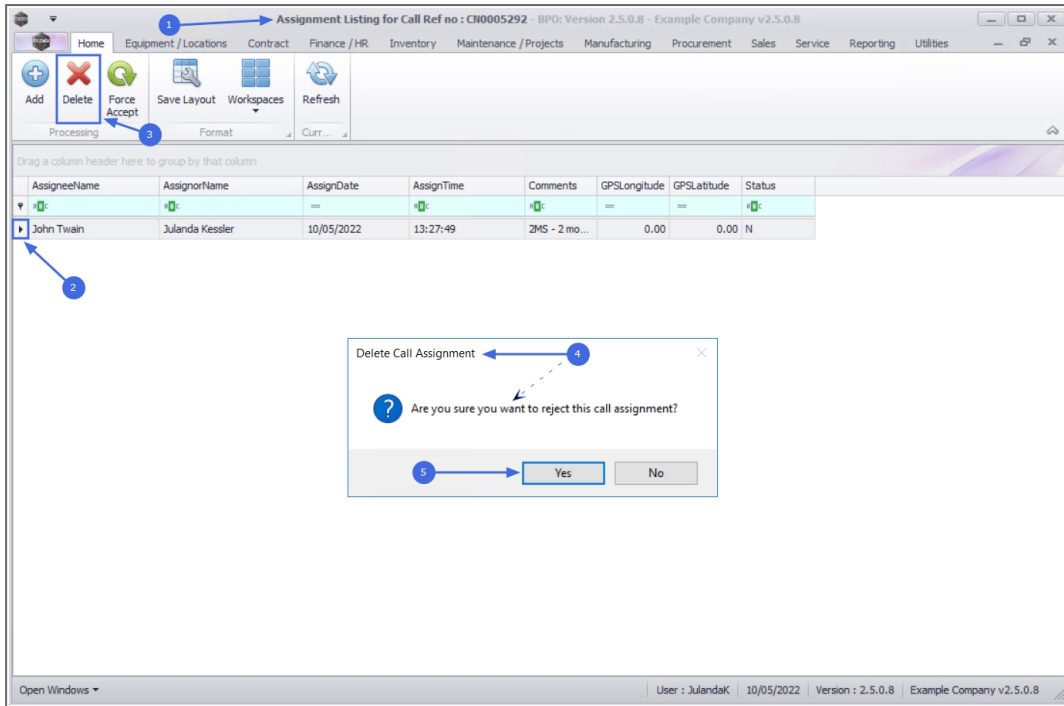- Click on the **Save** button.
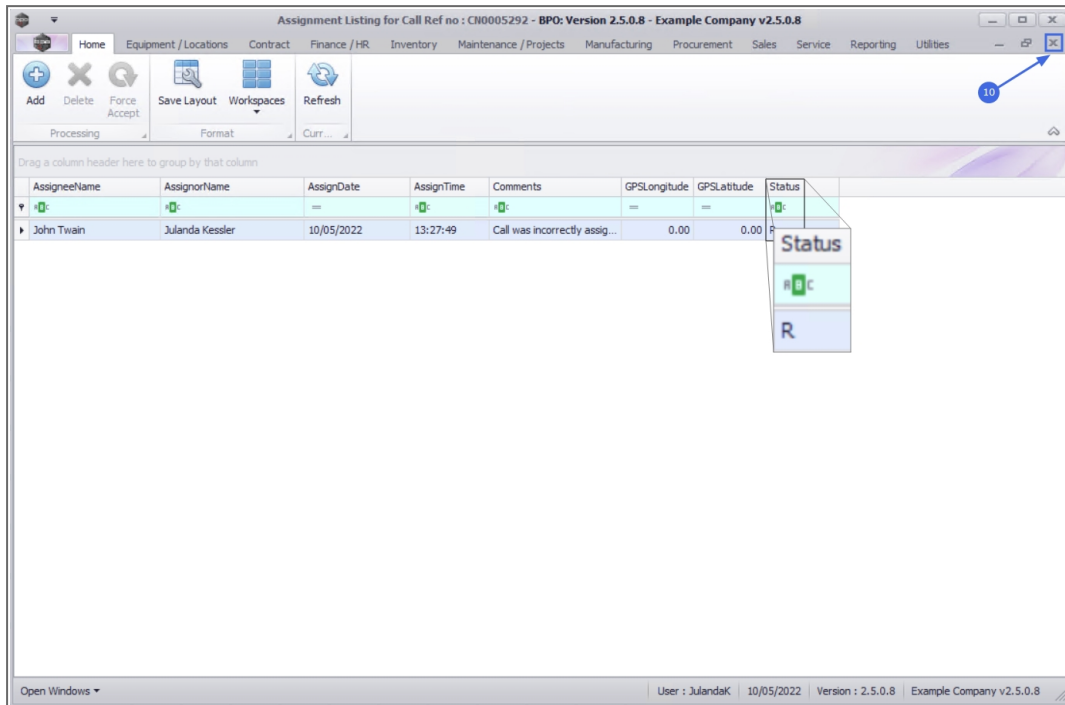
REJECT CALL ASSIGNMENT

- 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**.

- Next you will receive the **Rejection Comments** screen.
- Click in the comments section and type the rejection comments.
- Click on **Save**.
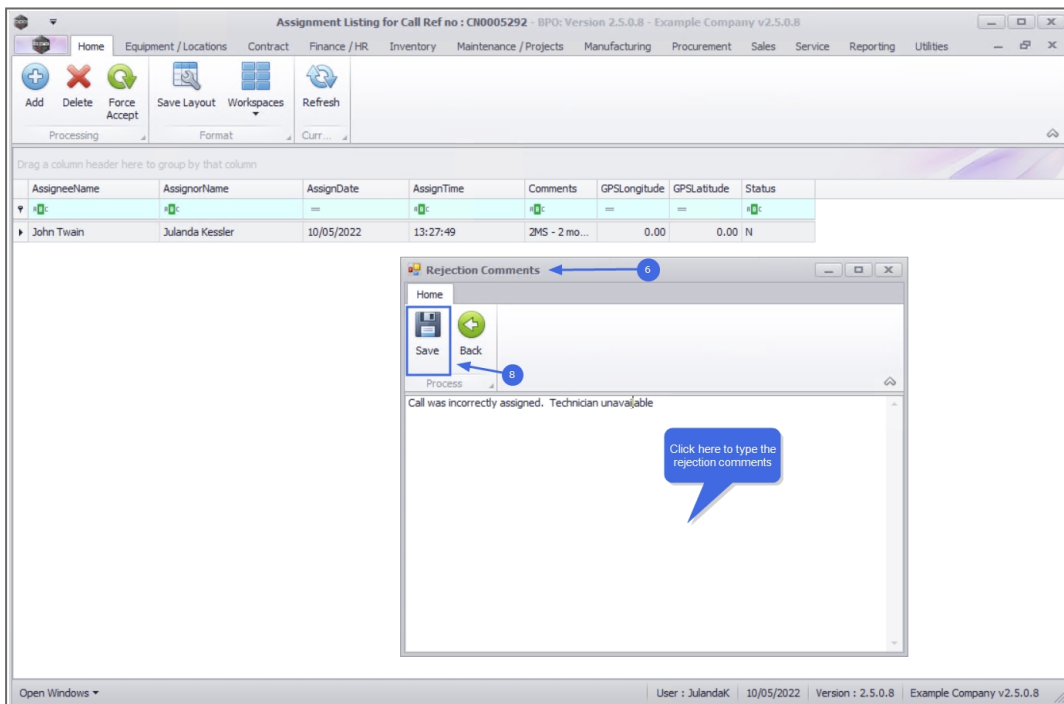
- The Status has been updated to **R** - Rejected.
- **Close** the screen to return to the Call maintenance screen

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