

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 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.

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.

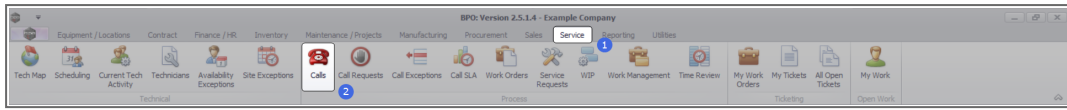
On Tech Connect, the Technician will see the list of assignments and [Accept the Assignment](#) when about to travel to the client. Work and resources can be logged as the technician performs the required job. He may need to [Reject the Assignment](#) if the client is not available or out of his logistical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

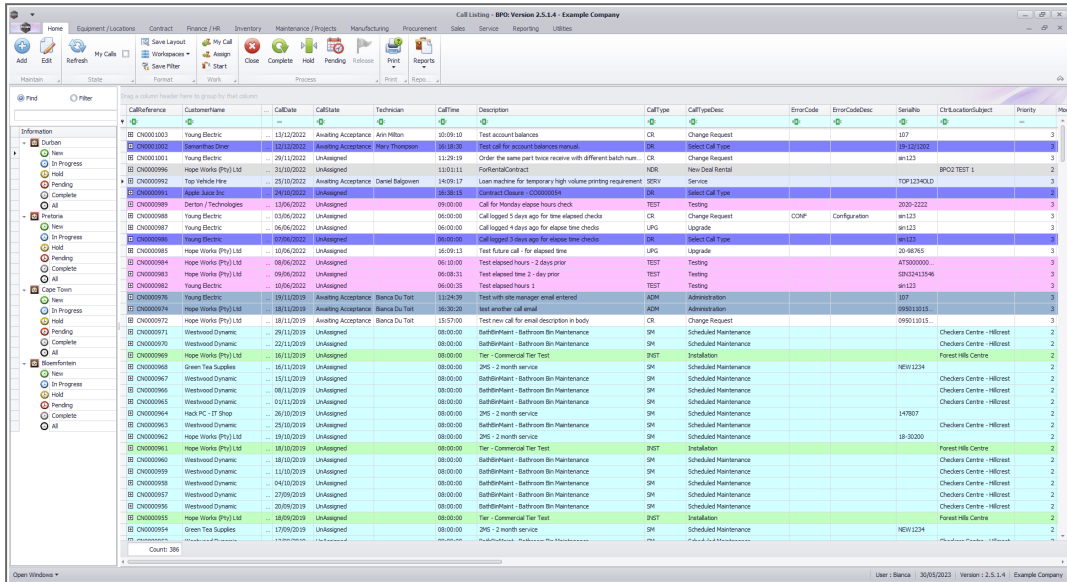
If not using Tech Connect, work assignments are automatically accepted by the system. However, the current assignments can be viewed and additional assignments added. In the case of calls, one assignment is done at a time - with another assignment following a [prior resolution](#).

Ribbon Select **Service > Calls**

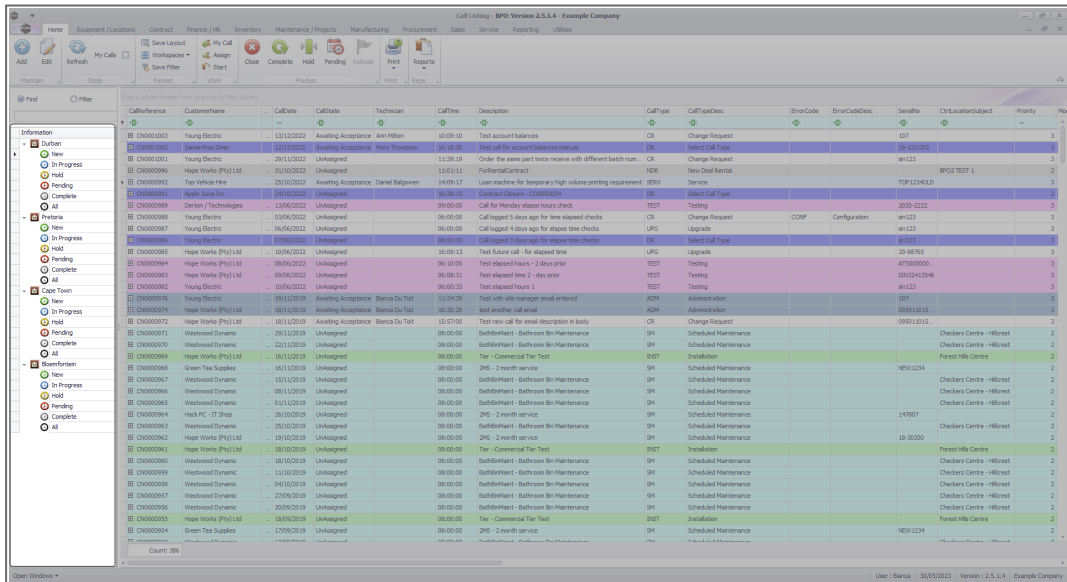
¹BPO2 v2.5.1.3 or higher



- 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.

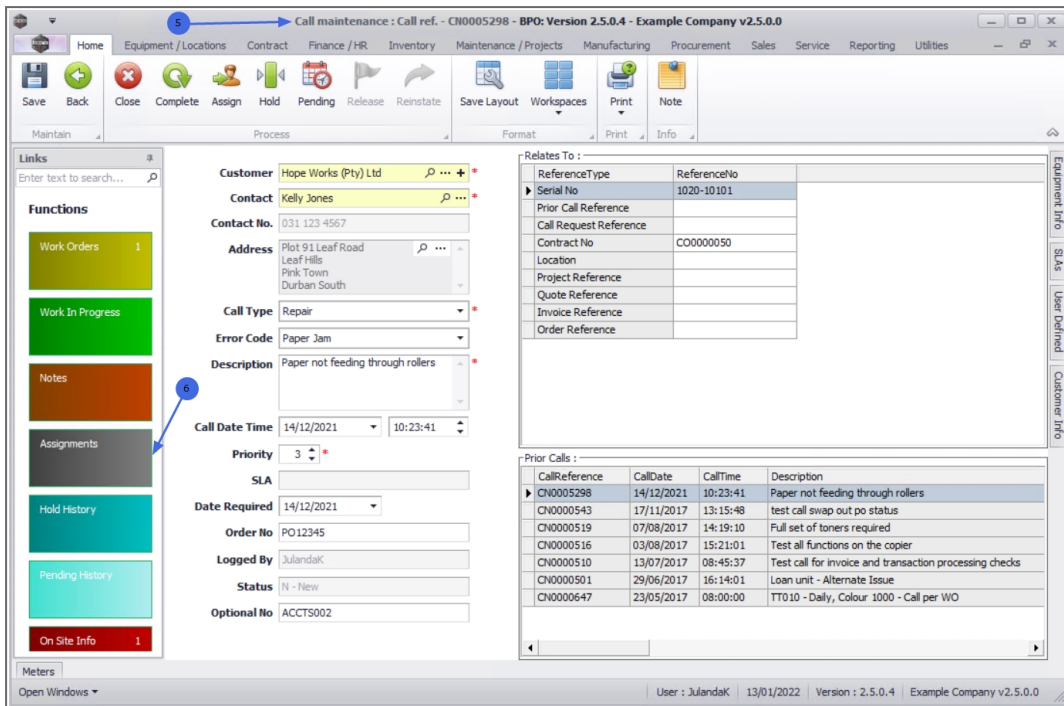
CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallTypeDesc	ErrCode	ErrCodeDesc	SerialNo	ChkLocationSubject	Priority
BN0001003	Young Electric	13/12/2022	09:00:00	Ash Milan	Test account balance	CR	Change Request			107		3
BN0001002	Semantic Drive	12/12/2022	09:30:00	Nery Thompson	Test call for account balance manual	CR	Select Call Type			IP-121202		3
BN0001001	Young Electric	20/12/2022	11:25:19		Order the same part twice receive with different batch num.	CR	Change Request			ip123		3
BN0000996	Hope Works Pty Ltd	20/10/2022	14:16:11		SubNet/Router	TCR	New Deal Rental				BPO2 TEST 1	3
BN0000992	Top Vehicle Hire	20/10/2022	14:59:17	Daniel Edgewood	Loan machine for temporary high volume printing requirement	SRV	Service				TOP1234567	3
BN0000991	Adelk Jaso Inc	20/10/2022	09:38:15		Contact Closure - C0000054	CR	Select Call Type					3
BN0000989	Derton / Technologies	13/06/2022	09:00:00		Call for Monthly expense hours check	TEST	Testing			2020-2222		3
BN0000988	Young Electric	05/06/2022	06:00:00		Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	ip123		3
BN0000987	Young Electric	06/06/2022	06:00:00		Call logged 4 days ago for expense time checks	UPG	Upgrade			ip123		3
BN0000986	Young Electric	07/06/2022	06:00:00		Call logged 3 days ago for expense time checks	CR	Select Call Type			ip123		3
BN0000985	Hope Works Pty Ltd	06/06/2022	06:00:00		Test future call - for elapsed time	UPG	Upgrade			20-8076		3
BN0000984	Hope Works Pty Ltd	06/06/2022	06:00:00		Test elapsed hours - 2 days prior	TEST	Testing			AT700000		3
BN0000983	Hope Works Pty Ltd	06/06/2022	06:00:00		Test elapsed time 2 - day prior	TEST	Testing			SN121413946		3
BN0000982	Young Electric	05/06/2022	06:00:00		Test elapsed hours 1	TEST	Testing			ip123		3
BN0000978	Young Electric	18/11/2019	11:24:28		Test with message email entered	ADM	Administration			107		3
BN0000974	Hope Works Pty Ltd	18/11/2019	06:30:20		test another call email	ADM	Administration			095012151		3
BN0000972	Hope Works Pty Ltd	18/11/2019	15:57:00		Test new call for email description in body	CR	Change Request			095012151		3
BN0000971	Westwood Dynamic	20/11/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000970	Westwood Dynamic	22/11/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000969	Hope Works Pty Ltd	16/11/2019	08:00:00		Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000968	Green Tea Supplies	16/11/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN0000967	Westwood Dynamic	15/11/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000966	Westwood Dynamic	08/11/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000965	Westwood Dynamic	02/11/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000964	HOA PC - IT Shop	26/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN0000963	Westwood Dynamic	21/10/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000962	Hope Works Pty Ltd	19/10/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN0000961	Hope Works Pty Ltd	18/10/2019	08:00:00		Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000960	Westwood Dynamic	18/10/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000959	Westwood Dynamic	11/10/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000958	Westwood Dynamic	04/10/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000957	Westwood Dynamic	27/09/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000956	Westwood Dynamic	20/09/2019	08:00:00		SubNet/Router - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HiWest	2
BN0000955	Hope Works Pty Ltd	18/09/2019	08:00:00		Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN0000954	Green Tea Supplies	17/09/2019	08:00:00		2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

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

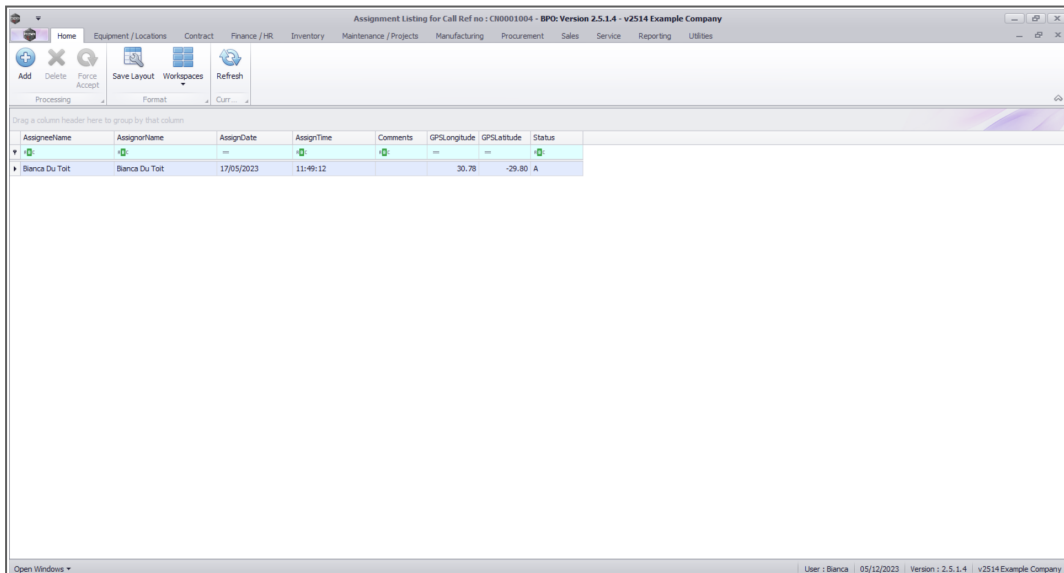
- The **Call maintenance: Call ref. - [call ref. number]** screen will be displayed.

- Click on the **Assignments** tile.



VIEW ASSIGNMENTS

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

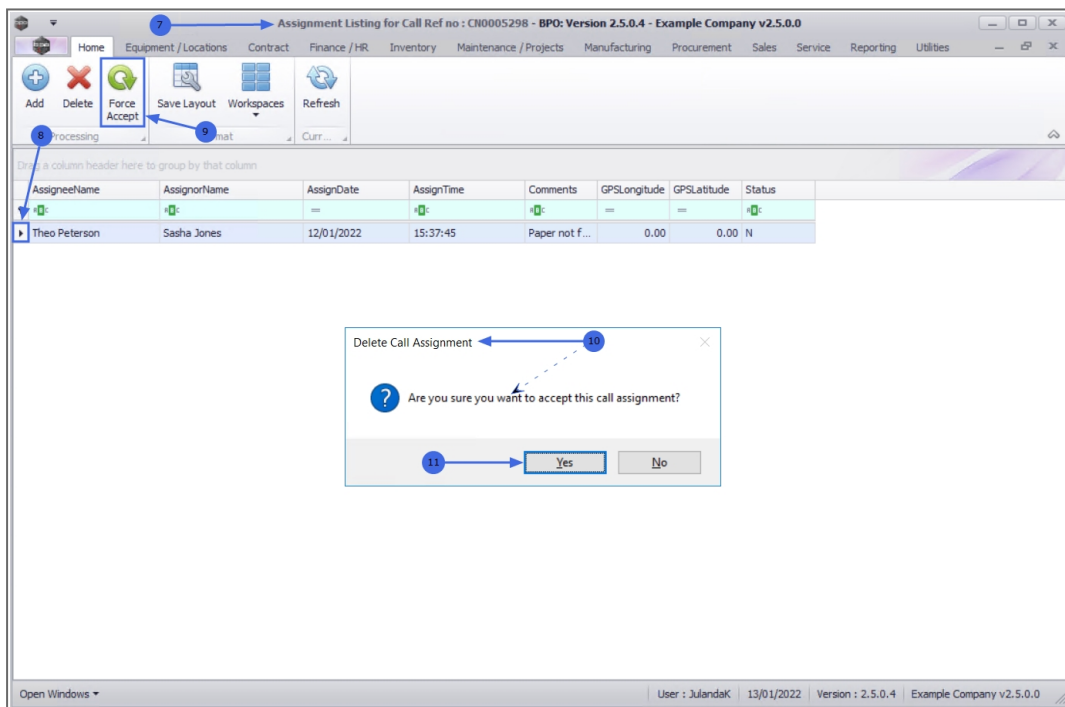


FORCE ACCEPT

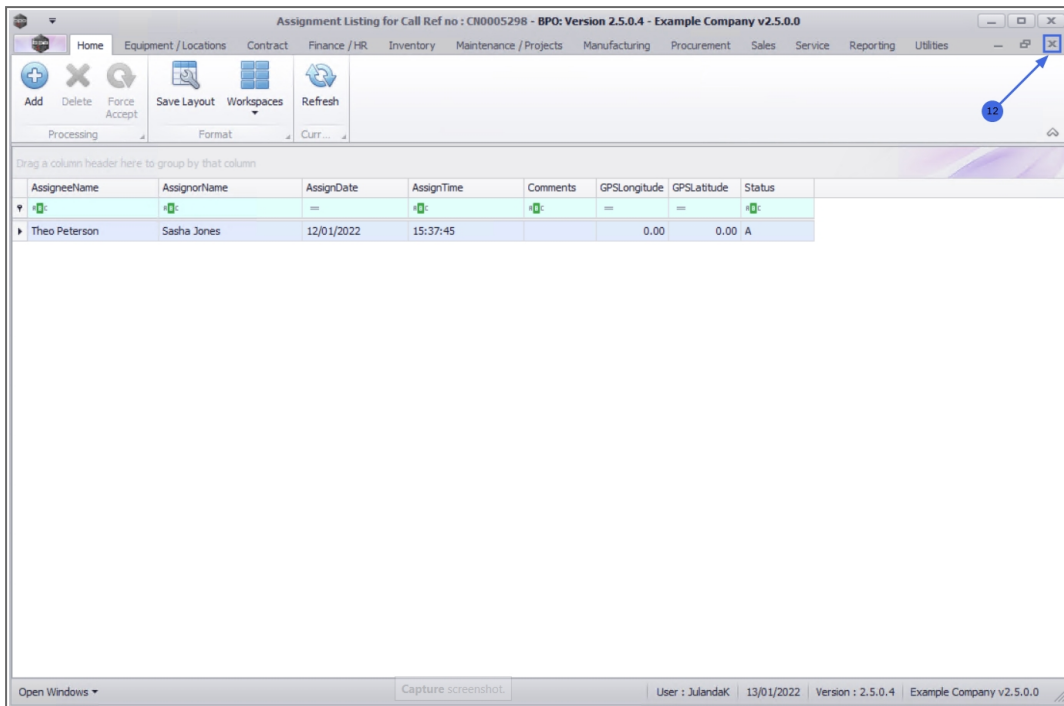
This feature is solely for companies using the Tech Connect Mobile Device System.

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**.



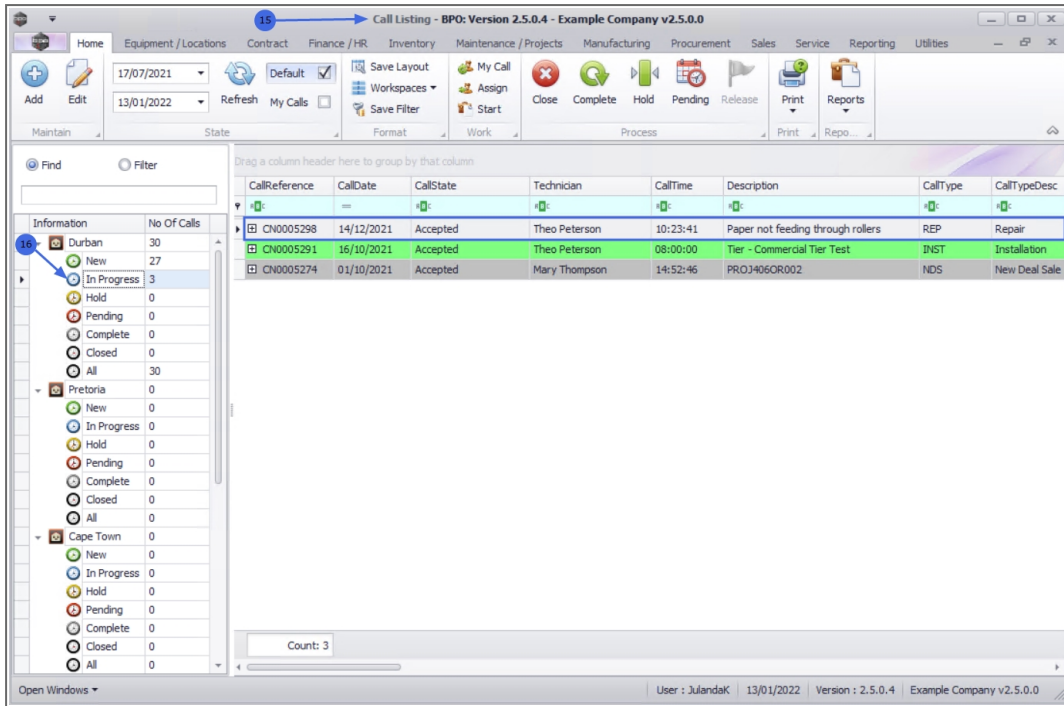
- Close the **Assignment Listing for Call** screen.



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

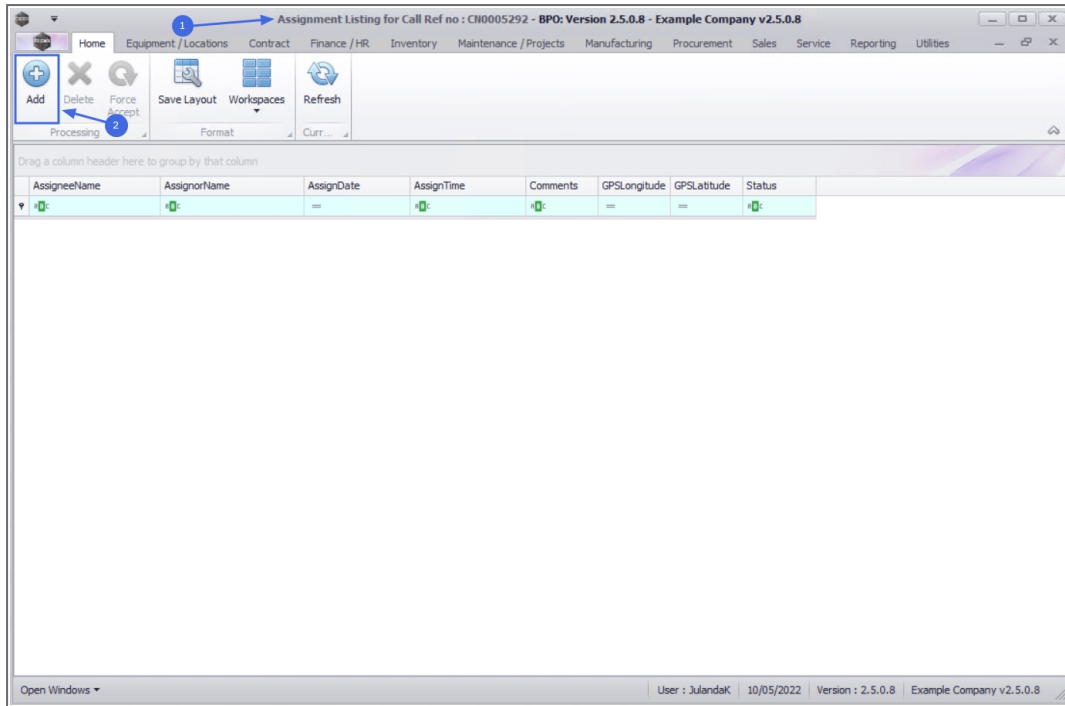


Note that the **Call State** has changed to **Accepted**.



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

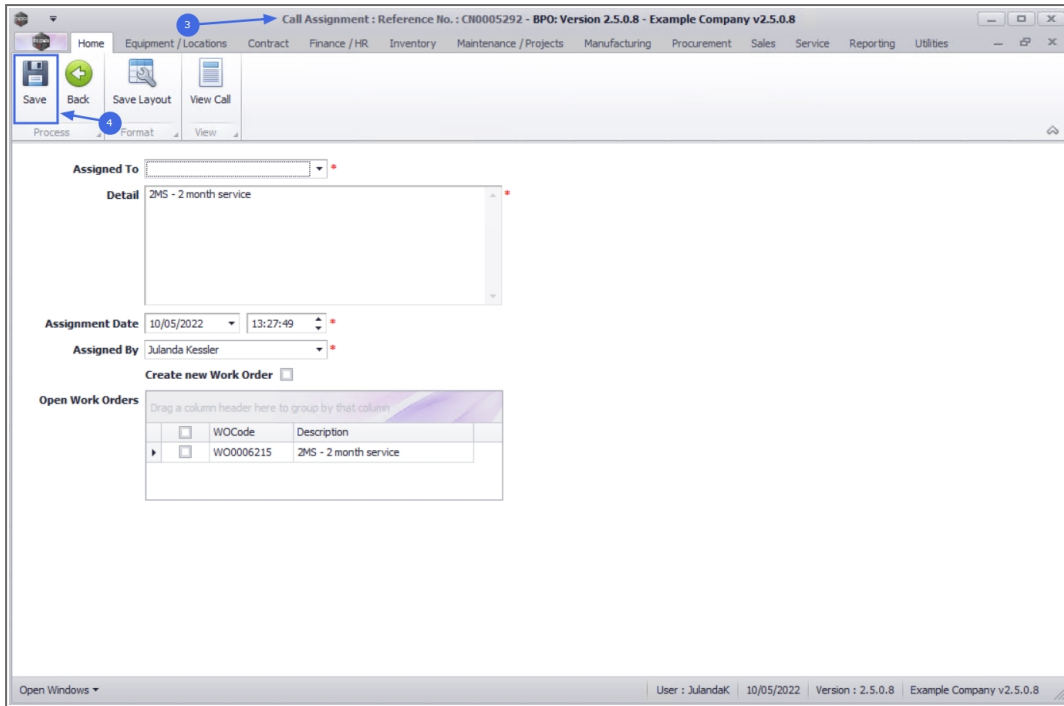
- Next you will select to either link the assignment to the existing open work order or create a new work order. Do not select both flags.

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**.

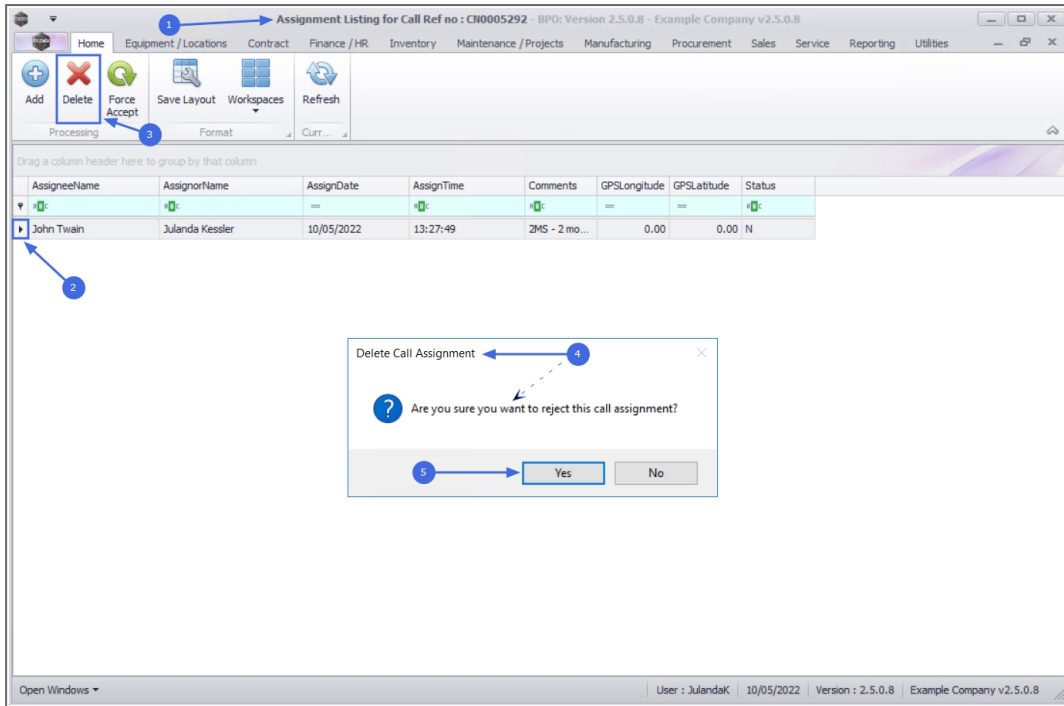
Create New Work Order

- 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.

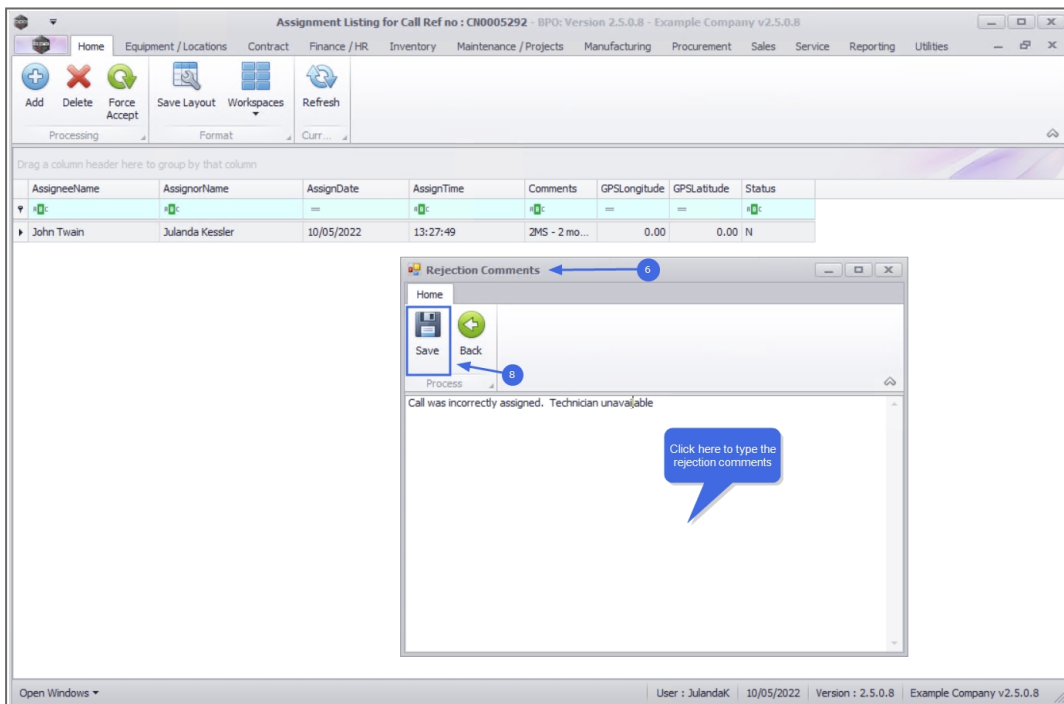


REJECT CALL ASSIGNMENT

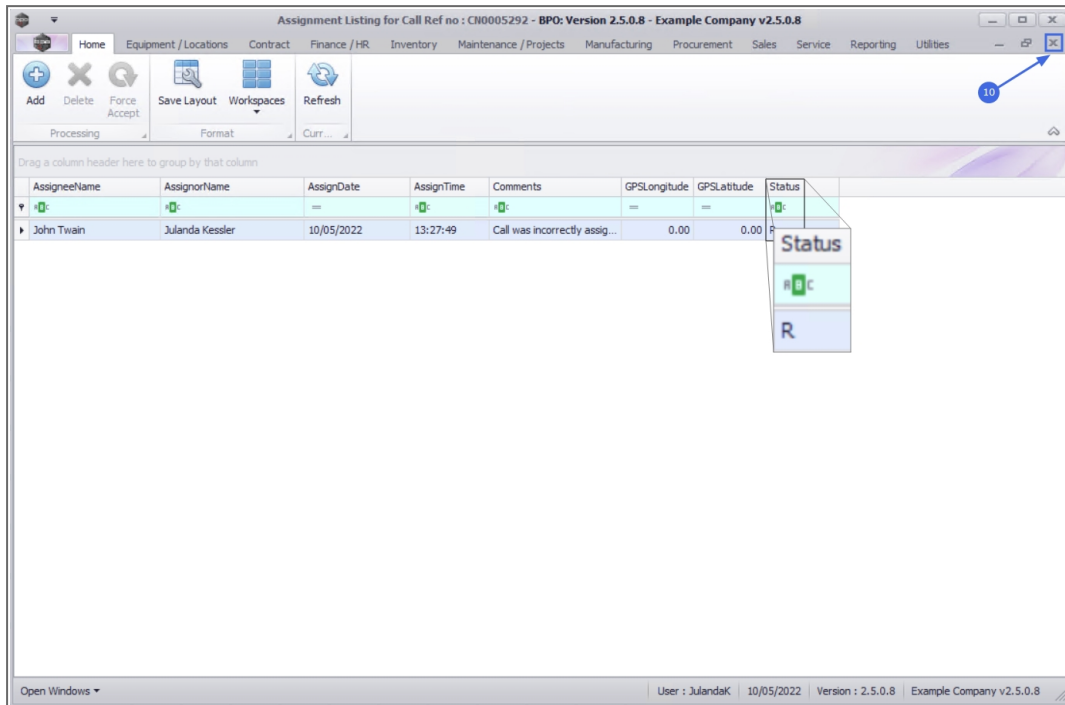
- From the **Assignment Listing for Call Ref no : [call ref number]** screen,
- Click on the **row** of the assignment you wish to remove.
- Click on **Delete**.
- When you receive the **Delete Call Assignment** message to confirm;
 - **Are you sure you want to reject this call assignment?**
- Click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