

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

SERVICE

CALL ADMINISTRATION - ASSIGN A CALL

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

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

If Tech Connect is <u>not</u> 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 <u>Reject the Assignment</u> 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 <u>prior resolution</u>.

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.

THE CALL ADMINISTRATION SCREEN

Ribbon Select Service > Call Administration



• The Call Administration screen will be displayed.

Home Eq	ipment / Locations C	ontract Finance / HR	Inventory	Malabasa	nce / Projects			rsion 2.5.1.4 - v2514 Example Company rement Sales Service Reporting Utilities					8
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uncoons	► E CN0000040	Westwood Dynamic	40 21/0		waiting Ac	-	13:26:10	Service machine S/N: 1912-102036	SERV	Service			
	CN0000040	Samanthas Diner	42 21/0		waiting Ac		13:59:38	Machine repair needed	REP	Repair			
	E CN0000044	Office Supplies Unlimited	44 28/0			Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			
	E CN0000047	Titan Group	47 31/0		-	George Jam	14:13:49	Service required	SERV	Service			
Work In Progress	E CN0000051	Westwood Dynamic	51 05/0		waiting Ac		13:00:23	Toner for delivery	TON	Toner Required			
work at Progress	E CN0000055	Titan Group	57 07/0			Belinda Sha		Toner required	TON	Toner Required			
	E CN0000056	Young Electric	58 07/0			Belinda Sha		Contract Closure - CO0000021	DR	Select Call Type			
	E CN0000057	Westwood Dynamic	59 08/0			Belinda Sha		Deliver full set of toners	TON	Toner Required			
Notes	E CN0000058	Samanthas Diner	60 08/0		ivalting Ac		11:52:16	New machine	NDS	New Deal Sale			
	E CN0000060	Westwood Dynamic	62 08/0		-	Wesley Har		Machine Rental Deal	NDR	New Deal Rental			
	E CN0000063	Young Electric	65 20/0		waiting Ac		12:26:58	Machine service required	SERV	Service			
Assignments 2		Danny Storm IT Cafe	69 23/0			Daniel Balgo		Test BPO fin tran	NDS	New Deal Sale			
	E CN0000069	Danny Storm IT Cafe	71 23/0			Daniel Balgo		Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/0		-	Daniel Balgo		Service machine	SERV	Service			
	E CN0000072	Derton / Technologies	74 25/0			Karlien Jessi		Machine service required	SERV	Service			
		Derton / Technologies	75 25/0			Karlien Jessi		test	NDS	New Deal Sale			
	E CN0000075	Derton / Technologies	77 26/0			Karlien Jessi		Service and toner required	SERV	Service			
Pending History	E CN0000084	Titan Group	86 11/1			George Jam		Magenta toner required	TON	Toner Required			
	CN0000085	Panda Copiers	87 11/1			George Jam		CO789	NDS	New Deal Sale			
		Westwood Dynamic	96 08/0			George Jam.		staple unit for rental on current contract	NDR	New Deal Rental			
On Site Info	E CN0000099	Bothas Networking inc			InAssigned	ocorge som.	16:40:32	test first work order	SERV	Service			
On Site Info	E CN0000109	Titan Group			waiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair			
	E CN0000125	Derton / Technologies			waiting Ac		09:37:02	test	REP	Repair			
For Contract	E CN0000127	Derton / Technologies			waiting Ac		10:09:53	test	SERV	Service			
	E CN0000135	Mary Contrary			waiting Ac		08:45:05	New customer contact call	DR	Select Call Type			
	Count: 3	81											
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• Click on the row selector of the call you would like to work with.



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		CalReference	CustomerName	CalDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	
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		E CN0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac	Belinda Sha	13:26:10	Service machine S/N: 1912-102036	SERV	Service			
		E CN0000042	Samanthas Diner	42 21/07/2014				Machine repair needed	REP	Repair			
		E CN0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac	Belinda Sha	11:34:37	1 black toner for collection	TON	Toner Required			
		▶ E CN0000047	Titan Group	47 31/07/2014	Awaiting Ac	_	_	Service required	SERV	Service			
		E CN0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac	Belinda Sha	13:00:23	Toner for delivery	TON	Toner Required			
			Titan Group	57 07/08/2014	Awaiting Ac	Belinda Sha	12:14:38	Toner required	TON	Toner Required			
			Young Electric	58 07/08/2014	Awaiting Ac	Belinda Sha	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
Notes		Westwood Dynamic	59 08/08/2014	Awaiting Ac	Belinda Sha	11:39:50	Deliver full set of toners	TON	Toner Required				
		Samanthas Diner	60 08/08/2014	Awaiting Ac	Wesley Har	11:52:16	New machine	NDS	New Deal Sale				
		Westwood Dynamic	62 08/08/2014	Awaiting Ac	Wesley Har	13:12:15	Machine Rental Deal	NDR.	New Deal Rental				
		E CN0000063	Young Electric	65 20/08/2014	Awaiting Ac	Wesley Har	12:26:58	Machine service required	SERV	Service			
			Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac	Daniel Balgo.	11:23:30	Test BPO fin tran	NDS	New Deal Sale			
			Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac	Daniel Balgo.	. 13:16:20	Toner for delivery	TON	Toner Required			
_	_	E CN0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac	Daniel Balgo.	13:45:10	Service machine	SERV	Service			
		E CN0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac	Karlien Jessi.	. 11:04:32	Machine service required	SERV	Service			
			Derton / Technologies	75 25/09/2014	Awaiting Ac	Karlien Jessi.	11:41:18	test	NDS	New Deal Sale			
_		E CN0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac	Karlien Jessi.	12:07:35	Service and toner required	SERV	Service			
			Titan Group	86 11/11/2014	Awaiting Ac	George Jam.	. 16:17:59	Magenta toner required	TON	Toner Required			
			Panda Copiers	87 11/11/2014	Awaiting Ac	George Jam.	. 16:21:59	CO789	NDS	New Deal Sale			
			Westwood Dynamic	96 08/01/2015	Awaiting Ac	George Jam.	15:07:45	staple unit for rental on current contract	NDR	New Deal Rental			
On Site	Info		Bothas Networking inc	13/01/2015	UnAssigned		16:40:32	test first work order	SERV	Service			
	E CN0000109	Titan Group	26/02/2015	Awaiting Ac	Carolina Su	09:52:00	Test machine	REP	Repair				
	E CN0000125	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	09:37:02	test	REP	Repair				
For Contract	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac	Carolina Su	10:09:53	test	SERV	Service				
	E CN0000135	Mary Contrary	27/05/2015	Awaiting Ac	Carolina Su	08:45:05	New customer contact call	DR	Select Call Type				
		Count: 38	81										

ASSIGN THE CALL

• Click on the **Assign** button.

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ks 4												
er text to search 🖇	CalReference	CustomerName	CalDate	CallState	Technician	CalTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	
unctions	Y 10:	10:			10:	10:	0	10:	10:	0	10:	
	► E CN0000069	Danny Storm IT Cafe	71 23/09/2014				Toner for delivery	TON	Toner Required			
	E CN0000070	Derton / Technologies	72 23/09/2014		Daniel Balgo		Service machine	SERV	Service			
	E CN0000072	Derton / Technologies	74 25/09/2014				Machine service required	SERV	Service			
	E CN0000075	Derton / Technologies		Awaiting Ac			Service and toner required	SERV	Service			
Work In Progress	E CN0000084	Titan Group	86 11/11/2014				Magenta toner required	TON	Toner Required			
	E CN0000099	Bothas Networking inc	13/01/2015	UnAssigned	occi ye romi	16:40:32	test first work order	SERV	Service			
	E CN0000109	Titan Group	26/02/2015		Carolina Su	09:52:00	Test machine	REP	Repair			
Notes	E CN0000125	Derton / Technologies		Awaiting Ac			test	REP	Repair			
Notes	E CN0000127	Derton / Technologies	06/03/2015	Awaiting Ac		10:09:53	test	SERV	Service			
	E CN0000135	Mary Contrary	27/05/2015		Carolina Su	08:45:05	New customer contact call	DR	Select Call Type			
	E CN0000194	Hack PC - IT Shop	22/10/2015	Awaiting Ac	Karlien Jessi	13:56:55	Contract Closure - CO0000028	DR	Select Call Type			
Assignments 1	E CN0000196	Green Tea Supplies	23/10/2015	Awaiting Ac	Belinda Sha	09:10:06	Contract Closure - CO0000030	DR	Select Call Type			
	CN0000198	Just In Time	29/10/2015	UnAssigned		13:34:41	test	INST	Installation			
		Dolf Primary	29/10/2015	Awaiting Ac	Belinda Sha	14:26:35	2	NDS	New Deal Sale			
Hold History	E CN0000209	Young Electric		Awaiting Ac	Wesley Har	14:09:39	reject call test	NDS	New Deal Sale			
	CN0000215	Green Tea Supplies		Awaiting Ac	Bianca Du T	08:42:00	test	π	IT Requirement			
	E CN0000217	Derton / Technologies	17/11/2015	Awaiting Ac	Belinda Sha	10:55:04	Contract Closure - CO0000005	DR	Select Call Type			
		Young Electric	17/11/2015	Awaiting Ac	Belinda Sha	17:00:07	Check sp_bpoGetPRCHOpenPOItemsTest	REP	Repair			
	CN0000250	North West Branch	11/01/2016	Awaiting Ac	Belinda Sha	11:40:50	test new call from web connect	IT	IT Requirement			
		North West Branch	15/01/2016	Awaiting Ac	Belinda Sha	12:10:05	test renamed customer connect	NDR	New Deal Rental			
On Site Info	E CN0000292	Bothas Networking inc	24/03/2016	Rejected by	Bianca Du T	13:32:32	Return all from short term contract STC0000009.	DR	Select Call Type			
		Dancing Shoes	29/03/2016	Ended Work	Bianca Du T	16:28:15	test	NDS	New Deal Sale			
	E CN0000304	Tinas Coffee Shop	12/04/2016	Awaiting Ac	Belinda Sha	16:51:44	Return all from short term contract STC0000012.	DR	Select Call Type			
For Contract	⊞ CN0000305	Tinas Coffee Shop	12/04/2016	Rejected by	Bianca Du T	16:51:45	Return all from short term contract STC0000012.	DR	Select Call Type			
		Westwood Dynamic	08/06/2016	Awaiting Ac	Belinda Sha	09:12:31	Machine keeps switching on and off	REP	Repair			
	Count: 34	9										
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For a detailed handling of this topic refer to Calls - Assignments

Related Topics



- Service Introduction to Call Administration
- Call Administration Edit a Call
- Call Administration My Calls
- Call Administration Assign a Call
- Call Administration Start or End Work
- Call Administration Close a Call
- Call Administration Complete a Call
- Call Administration Hold a Call
- Call Administration Pend a Call
- Call Administration Release a Call
- Call Administration Reinstate a Call

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