SERVICE

INTRODUCTION TO CALLS

> **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.

Calls are primarily created when customers phone in for service related requirements.

Notes on Calls

- The **Call Listing** screen is used to log billable and non-billable **Service Calls** against contract and non-contract items, whether these are Assets or Locations.

- One or multiple Work Orders can exist within a call. Work Orders are likened to Job Cards or Work Instructions. Work In Progress transactions will be recorded against these work orders for the work that is required including Labour Time Booking, Parts, Expenses, Travel, Services and Sub Contract Work.

- Generally either an Asset or Location must be selected when logging the Call, and a Work Order is auto created when saving the Call. But this is dependant on your Company's system configuration. Refer to Specialized Call Configuration for more details about processing outside the standard processing.

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[1]BPO2 v2.5.1.3 or higher

- New Deal Sale and New Deal Rental processing will also process through the call centre screen to enforce the Work In Progress transactions for installation of Sale or Rental Items.

- Calls are Assigned to employees (such as Technicians or Drivers) in order to perform the work required. An employee must be set as a Technician in order to be available for assignment. Refer to TechConnect for more information related to our mobile application that Technicians can use out in the field.

- Once work has been completed Work In Progress transactions can then be Invoiced if required, dependant on the scenario.

Call Centre Mode

Extended Call Centre - Version Compatibility[1]

Two screens have been added for SLA Management and Call Closure Exceptions. to assist with call screen performance enhancements and to have dedicated screens where these functions are managed.

In addition, an Extended Call Centre mode has been introduced, which can be used for larger customer-user bases where Call processing functionality has been split into two screens: Calls Lite and Call Administration Introduction topics. The Calls Lite is a simplified Call screen with increased performance enhancements.

For smaller customer-user bases, the original Call Listing screen can be used, with some modifications for speed gains.

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[1]BPO2 v2.5.1.3 or higher.

MODIFIED CALL LISTING SCREEN (EXTENDED CALL CENTRE OFF)

Configuration

- Extended Call Centre - configuration flag = 'No'
- User rights:
  - BPO > Service
    - Calls - Full Access
    - Calls Lite - No Access
    - Call Administration - No Access

Modifications

- Call status counts have been removed.
- Closed call listing has been removed.
- Date range search removed.
- SLA counts have been removed.
- Search by call reference will now open the call maintain screen if the matched call is closed.

CALLS LITE LISTING SCREEN (EXTENDED CALL CENTRE ON)

Configuration

- Extended Call Centre - configuration flag = 'Yes'
- User rights:
  - BPO > Service
    - Calls RIB_SCAL - No Access
      - Hold, Pending, Start and End Work rights can be restricted where Calls Lite users do not

need this access, i.e. segregation of duties is enforced and these functions will be handled by the Users who have access to the Call Administration screen.

- Calls Lite - Full Access - for Users who Log, Edit and Assign Calls
- Call Administration - Full Access - for Users who will Manage Calls

Modifications

- Call status counts have been removed.
- Closed call listing has been removed.
- Date range search removed.
- SLA counts have been removed.
- Call processing features removed.
- Search by call reference will now open the call maintain screen if the matched call is closed.
- Underlying work orders and assignments for calls have been removed.

THE CALL LISTING 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.
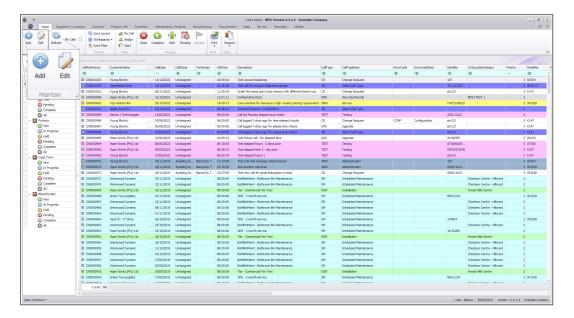- Click on the relevant *Site* for the calls you wish to view.
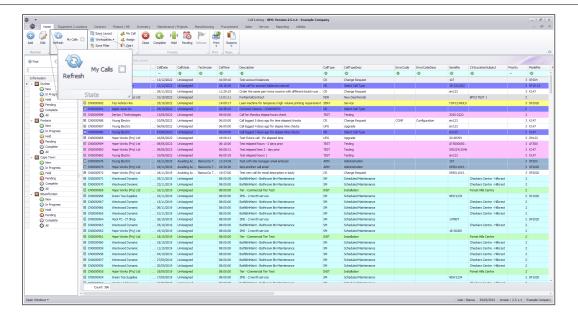
RIBBON ACTION BUTTONS

MAINTAIN ACTION BUTTONS

- From the Call Screen click on *Add* or *Edit* to be directed to the *Call maintenance* screen. Refer to Calls - Log a Call or Calls - Edit a Call
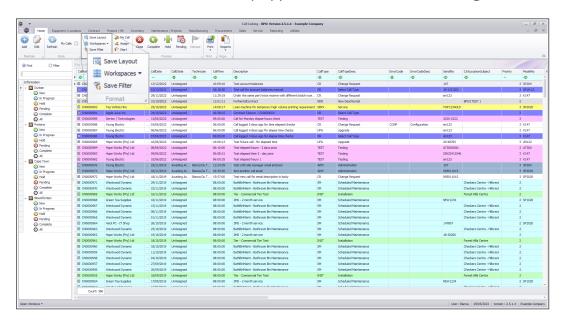

STATE ACTION BUTTONS

- The call listing can be **Refreshed**.
- Calls can be filtered by selecting *My Calls*. Refer to Calls - My Calls
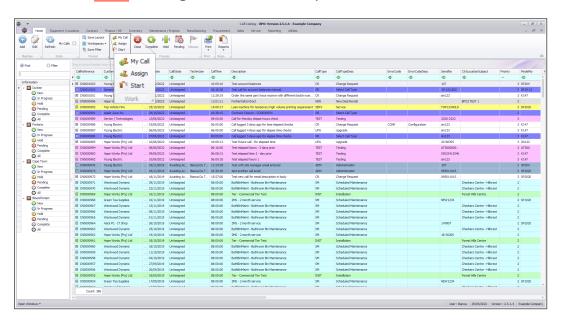
FORMAT BUTTONS

- **Save Layout** - Saves any changes made to the data grid, such as changing column width.
- **Workspaces** - Saves layout preferences.
- **Save Filter** - Saves any applied filters set on the data grid.

WORK ACTION BUTTONS

- **My Call** will assign a call to the user who is currently logged onto BPO.
- **Assign** will assign a call to an employee and will move the call to the In Progress status.
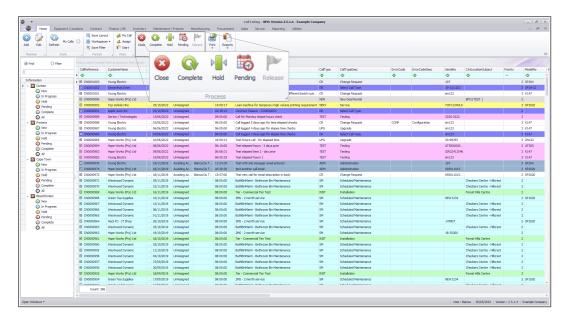- **Start** will begin the Start Work process for the Call.

PROCESS ACTION BUTTONS

- **Close** a call when there are no further outstanding items on the call. Closed calls can only be viewed in the All status and cannot be re-opened once they have been closed.
- **Complete** a call once a technician has completed the required work. Outstanding admin work, like updating or Invoicing the call, can still be done.
- **Hold** will place a call on hold when work needs to be stopped while a customer issue is being resolved. The SLA monitor will be "paused" until the call has been released from hold.
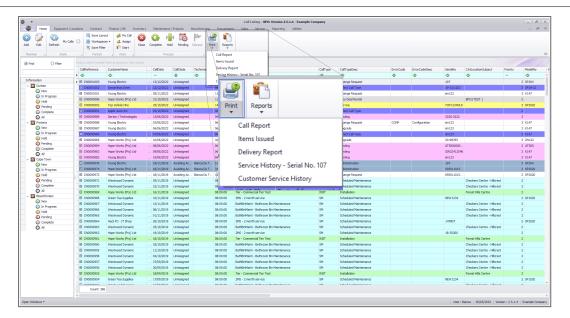
- <u>Pending</u> differs from hold, in that work will be stopped to resolve an internal company issue, such as unavailability of stock. The SLA Monitor will continue to run for calls in this status.
- <u>Release</u> a call that has been placed on hold or pending. The call will move back to the New status where it can be re-assigned.

REPORTS

5. The Print action button will display a drop-down menu with report options that can be selected for a call;

- Call Report
- Items Issued
- Delivery Report
- Service History
- Customer Service History
- Work Order Report

THE SITE / STATUS PANEL

This panel shows all the sites that have been configured on the system, with a separate status list for each site.
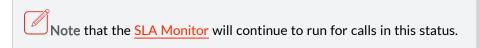
> ✏ **Note** that you do not need to select the site or a status before creating a Call. The system will place the Call in the site where the *asset* is located.

- **New:** The total number of new Calls logged. These call have not yet been assigned to and accepted by a technician.
- **In Progress:** The total number of Calls that are assigned, or have been accepted by Technicians.
- **Hold:** The total number of Calls placed on Hold due to *client issues*, e.g. a technician may not be able gain access to a site location as the client is unavailable to open the building.
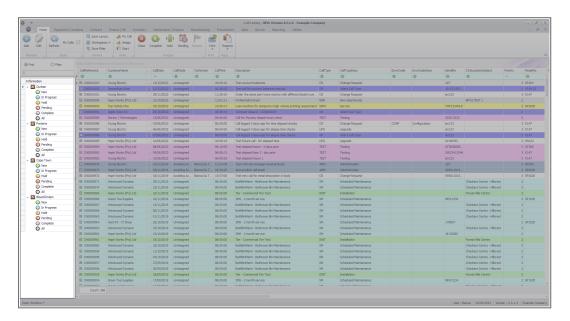
> ✏ **Note** that the SLA Monitor will be paused for calls in this status.

- **Pending:** The total number of Calls placed in pending due to a company issue, e.g. a technician may not have boot stock to complete a job on site.

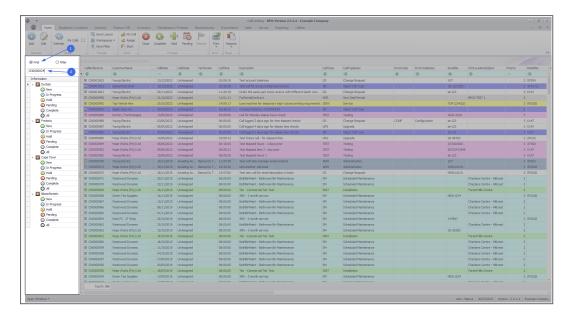> Note that the SLA Monitor will continue to run for calls in this status.

- **Complete:** The total number of Calls where technicians have completed the work required. The service centre can now complete Call updates and invoice the Call, where required.

- **All:** The total number of all the calls for the site is listed, except for closed Calls, for speed enhancements. However, you can use the Find Call functionality to find a closed call (Search by call reference will now open the call maintain screen if the matched call is closed).
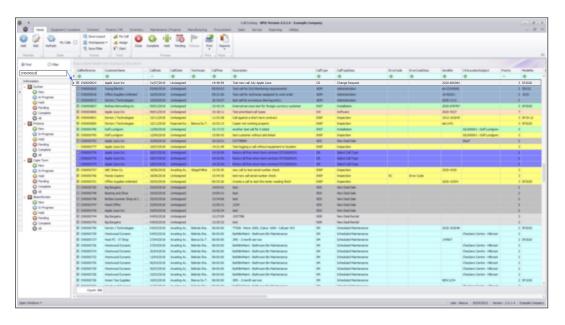

FIND A CALL

You can find any call, regardless of the site or status.

1. Click on the *Find* radio button.
2. Type in the *call number* you wish to locate in the *text box*.
3. Press *Enter*.

4. The *row* containing the call number you have searched for, will be selected in the call list screen. (Search by call reference will now open the call maintain screen if the matched call is closed).
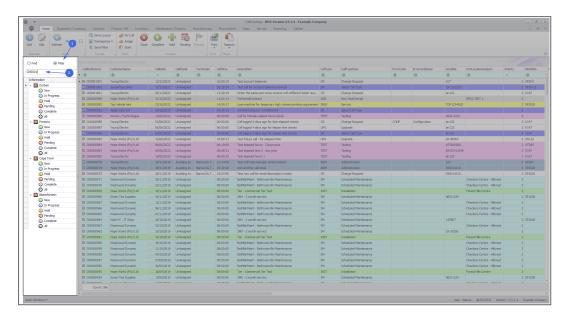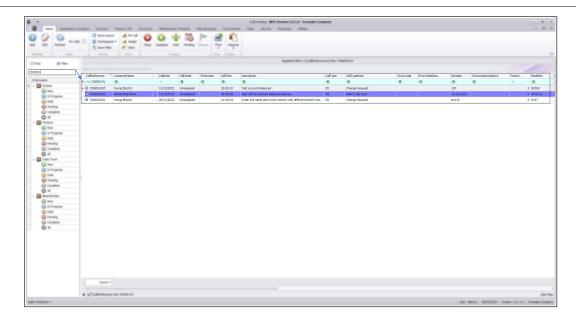
CALL FILTER

You can filter a range of calls that contains a specific prefix.

1. Click on the *Filter* radio button.
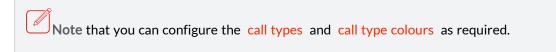2. Type in the *prefix* you wish to filter the call list by, in the *text box*.
3. Press *Enter*.

4. The call numbers that match the prefix you have specified, will be listed in the call list screen.
5. To *remove* the filter, click on the '**x**' in the Call Reference line.
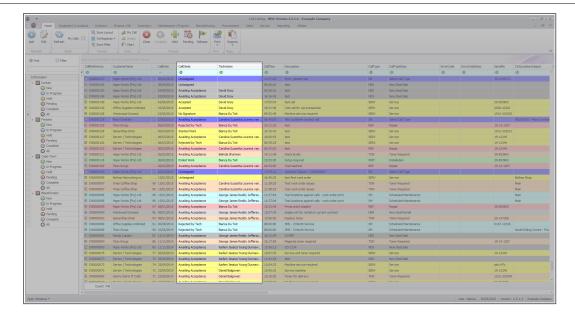
CALL LIST DATA GRID

1. The data grid displays a list of all the calls within the selected *site*, *status* and *date range*.

2. The calls are colour-coded by *Call Type*.

> **Note** that you can configure the call types and call type colours as required.
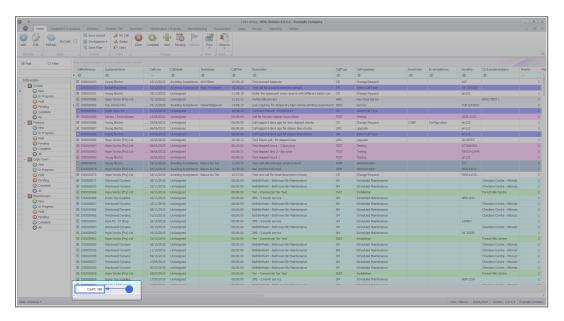
ASSIGNED TECHNICIANS

- The *last assigned technician* for each call, can be viewed in the **Technician** column, as well as the Call State which displays whether the call has been assigned, accepted by the technician, rejected,
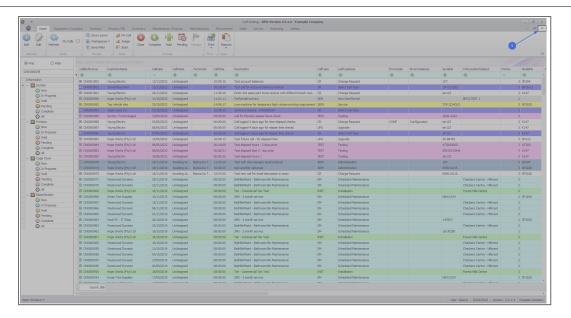
CALL COUNT

Count: at the bottom of the call data grid, will display the number of calls listed in the data grid.

CLOSE SCREEN

- *Close* the screen when done.

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