

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.

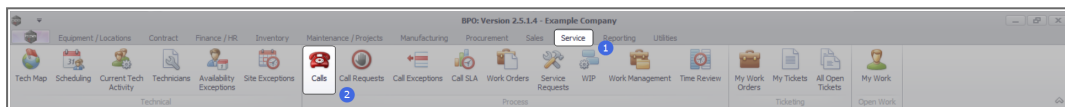
¹BPO2 v2.5.1.3 or higher

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.

Call Listing - BPO Version 2.5.14 - Example Company													
Sales Service Reporting Utilities													
Home													
Support Locations Contract Finance HR Inventory Maintenance Projects Manufacturing Resources													
Add Edit Refresh													
My Call													
Save Layout Workspaces Assign Call Cost Complete Hold Pending Release Print Reports													
Main Filter													
Name State													
Find Filter													
Show columns hidden by default													
CallReference CustomerName CallDate CallTime Technician CallTime Description CallType CallDesc ErrorCode ErrorDesc SerialNo CtrLocationSubject Priority													
Information	BN00000003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hillan	10:09:10	Test account balance			107		3	
	BN00000002	Seamless Drive	12/12/2022	Awaiting Acceptance	Myr Thompson	09:38:30	Test call for account balance request	CR	Select Call Type	107	19-12/2022		
	BN00000001	Young Electric	20/11/2021	Unassigned		11:28:19	Order the same part twice receive with different batch num.	CR	Change Request	107			
New	BN00000006	Young Electric	20/11/2021	Unassigned		11:01:11	FortentContract	NDR	New Deal Rental	107	BPO TEST 1		
	BN00000002	Top Hubs Pty	25/10/2022	Awaiting Acceptance	Daniel Bdgwen	14:59:17	Loan machine for temporary high volume printing requirement	SDR	Service	107	TOP12H40LD		
	BN00000001	Asaka Asia Inc	24/10/2022	Unassigned		20:36:13	Contact Closure - C000000019	CR	Select Call Type	107			
Hold	BN00000009	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday close hours check	TEST	Testing	107	2020-2222		
	BN00000008	Young Electric	03/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	107	123
	BN00000007	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapsed time checks	UPG	Upgrade	107	107	123	3
All	BN00000008	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 3 days ago for elapsed time checks	CR	Select Call Type	107			
	BN00000005	Hope Works (Pty) Ltd	15/04/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade	107	20-46765		
	BN00000004	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing	107	AT7000000		
New	BN00000003	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:08:11	Test elapsed time 2 - day prior	TEST	Testing	107	0302412146		
	BN00000002	Young Electric	10/04/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing	107	107	123	3
	BN00000015	Young Electric	13/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration	107			
All	BN00000016	Hope Works (Pty) Ltd	08/11/2019	Awaiting Acceptance	Bianca Du Toit	06:28:28	Test another call email	ADM	Administration	107	086918816		
	BN00000017	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:17:00	Test new call for email description in body	CR	Change Request	107	095019151		
	BN00000018	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000019	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000020	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation	107		Forest Hills Centre	2
	BN00000021	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000022	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000023	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000024	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000025	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000026	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000027	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000028	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000029	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000030	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000031	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000032	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000033	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000034	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000035	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000036	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000037	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000038	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000039	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000040	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000041	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000042	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000043	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000044	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000045	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000046	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000047	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000048	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000049	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000050	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000051	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000052	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000053	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000054	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000055	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000056	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000057	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000058	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000059	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000060	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000061	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000062	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000063	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000064	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000065	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000066	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000067	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000068	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000069	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000070	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000071	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000072	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
New	BN00000073	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000074	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000075	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
Hold	BN00000076	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000077	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000078	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
All	BN00000079	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000080	Westwood Dynamic	09/11/2019	Unassigned		08:00:00	BathRoom - Bathroom Bin Maintenance	SM	Scheduled Maintenance	107		Checkers Centre - Hillcrest	2
	BN00000081												

Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	10:09:10	Test account balances	CR	Change Request			107		3
BI CH0001002	Silverstone Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balances manual	SR	Select Call Type			09-101202		3
BI CH0001001	Young Electric	26/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	BPO2 TEST 1	3
BI CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:01:11	PrintPartContract	NR	New Deal Rental					3
BI CH0000992	Top Video Hire	20/10/2022	Awaiting Acceptance	Daniel Belgreen	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BI CH0000991	Askle Juss Inc	24/10/2022	Unassigned		05:08:15	Contact Closure - C0000354	SR	Select Call Type					3
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	10/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	05/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765		3
BI CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02415546		3
BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	13:24:36	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	Test another call email	ADM	Administration			095015515		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:17:00	Test new call for email description in body	CR	Change Request			095015515		3
BI CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000962	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2



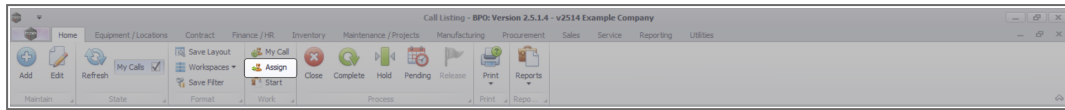
Note that only calls in the **New** status can be assigned.

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

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CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
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BI CH0000992	Top Video Hire	20/10/2022	Awaiting Acceptance	Daniel Belgreen	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234567		3
BI CH0000991	Askle Juss Inc	24/10/2022	Unassigned		05:08:15	Contact Closure - C0000354	SR	Select Call Type					3
BI CH0000989	Derton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	10/06/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	05/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/06/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-86765		3
BI CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SR02415546		3
BI CH0000982	Young Electric	10/06/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	13:24:36	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:30:20	Test another call email	ADM	Administration			095015515		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:17:00	Test new call for email description in body	CR	Change Request			095015515		3
BI CH0000971	Westwood Dynamic	26/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000962	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			1B-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Assign** button.

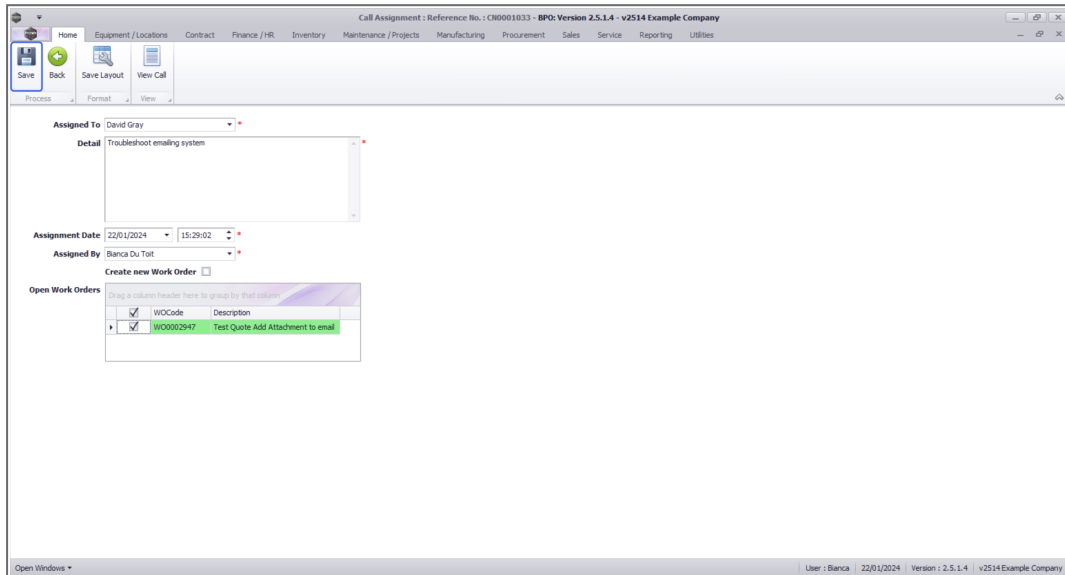


- The **Call Assignment: Reference No: [call ref number]** screen will be displayed.
 - **Assigned To:** Click on the down **arrow** to select the employee from the menu.
 - **Assignment Detail:** This field will populate with the call reference description. Add the technician assignment details as required.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



Call Assignment : Reference No.: CH0001033 - BPO: Version 2.5.1.4 - v2514 Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout View Call

Assigned To: David Gray

Detail: Troubleshoot emailing system

Assignment Date: 22/01/2024 15:29:02

Assigned By: Blanca Du Toit

Create new Work Order ☐

Open Work Orders

WOCODE	Description
W00002947	Test Quote Add Attachment to email

User : Blanca | 22/01/2024 | Version : 2.5.1.4 | v2514Example Company

- 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 screenshot shows the CO3 Call Listing interface. A dialog box titled "Call Processing" is open, displaying the message: "Call No: CN0001033 has been assigned." The dialog has an "OK" button. In the background, the table shows the call status has changed from "Unassigned" to "Awaiting Ac..." (Awaiting Acceptance) and a technician name "David Gray" has been assigned to the call.

- 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**

The screenshot shows the CO3 Call Listing interface after the call assignment. The call status is now "Awaiting Acceptance" and the technician column shows "David Gray". The table also shows other calls with various statuses and technicians assigned.



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

