SERVICE

CALL SLA MANAGEMENT – ASSIGN A CALL

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 Reject the Assignment if the client is not available or out of his logistical route.

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.
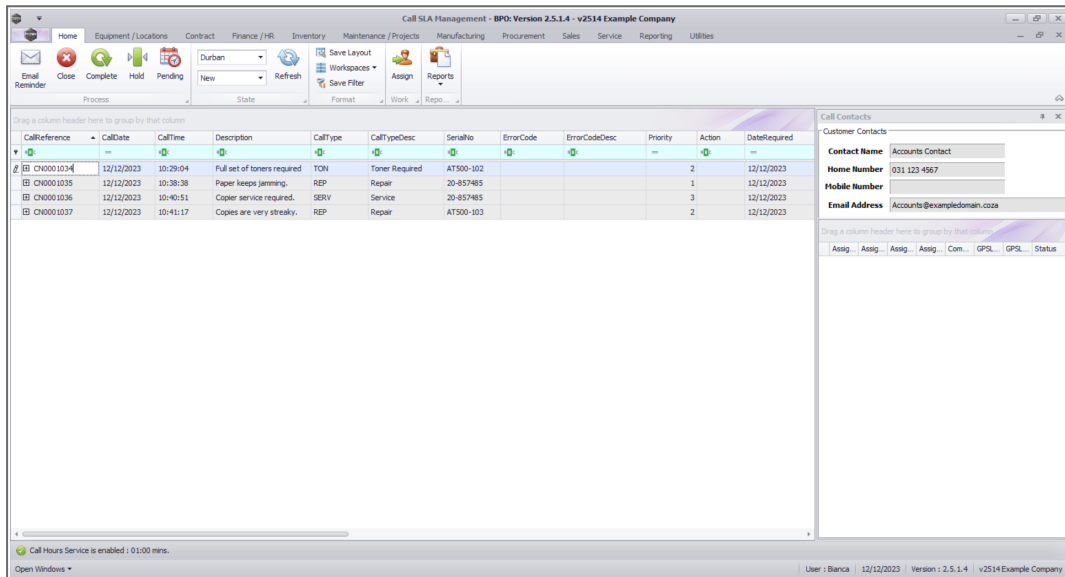
The call can be re-assigned.

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.

THE CALL SLA MANAGEMENT LISTING SCREEN

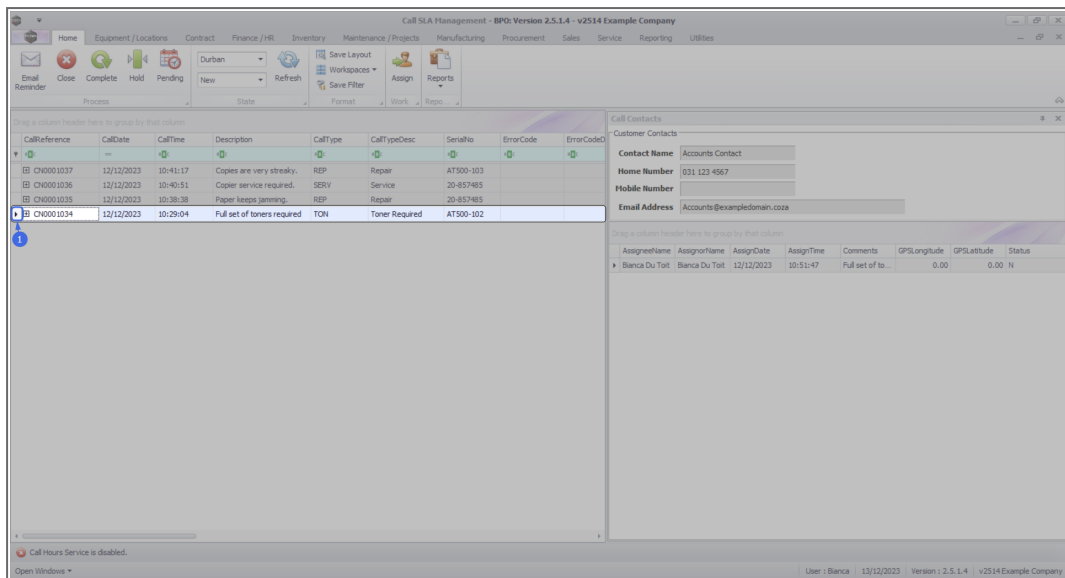*Ribbon* Select *Service > Call SLA*
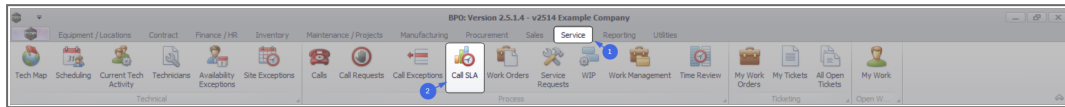
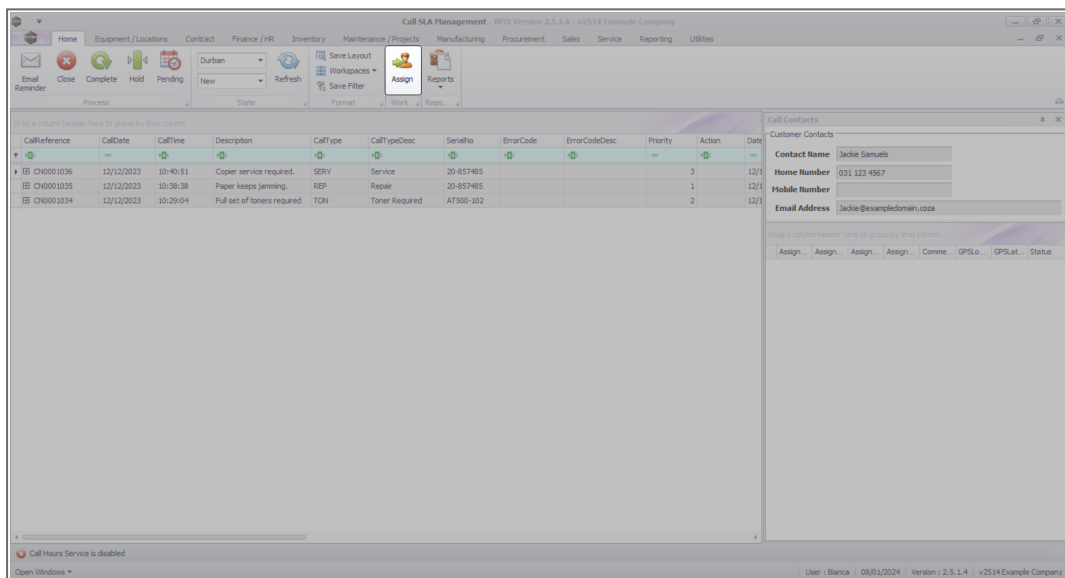- The **Call SLA Management** Listing screen will display.

ASSIGN A CALL

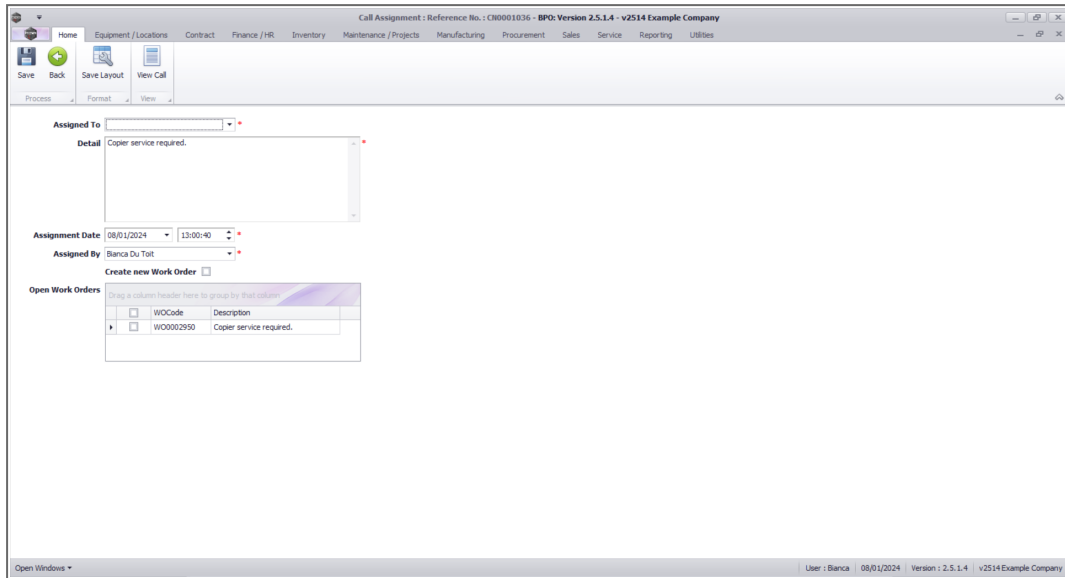- Click on the row selector in front of the Call.
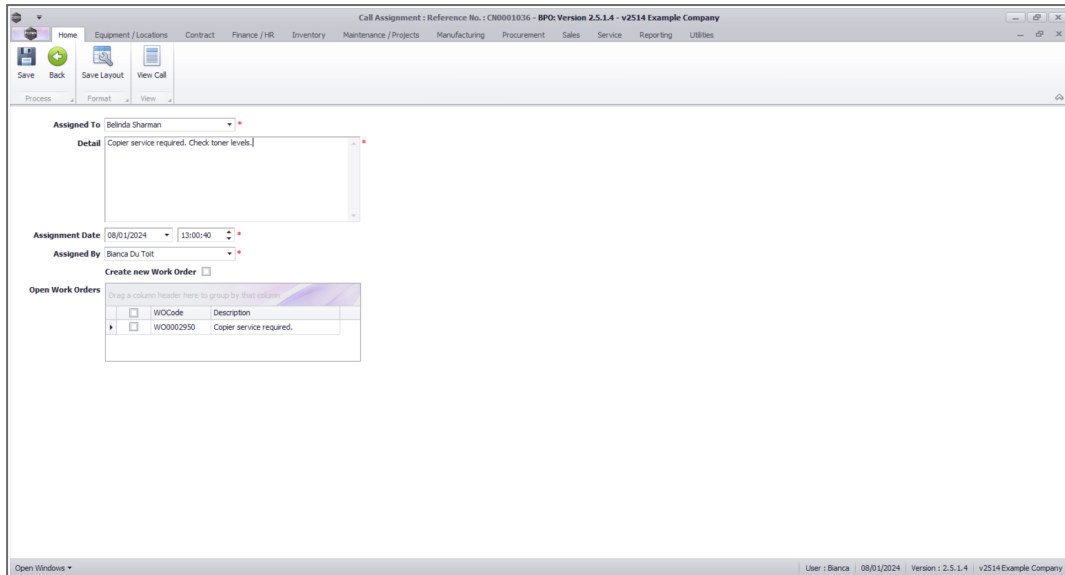
- Click on the **Assign** button.

- 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.
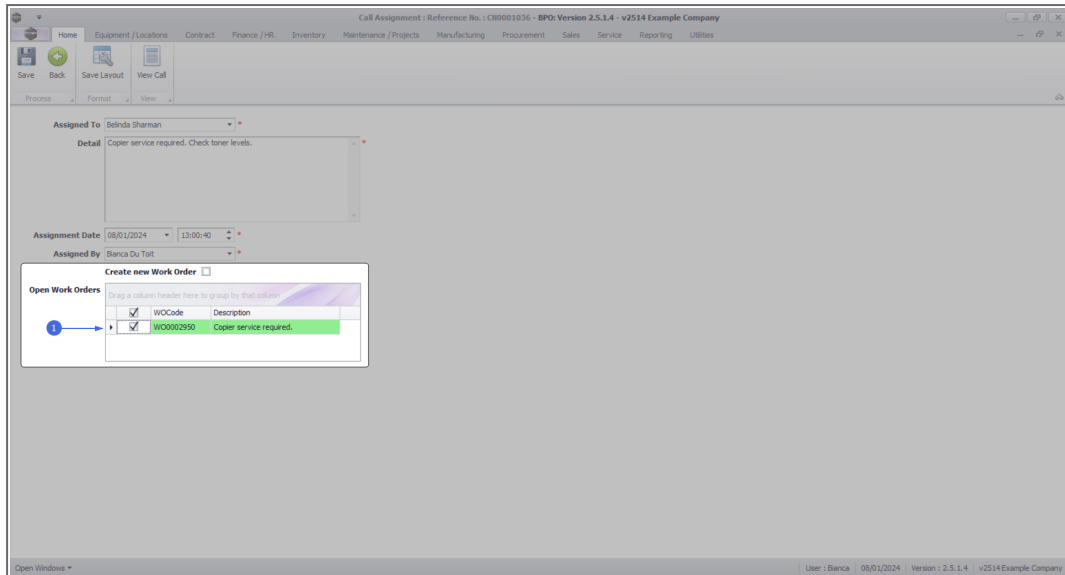
WORK ORDER ASSIGNMENT LINK

- 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*.
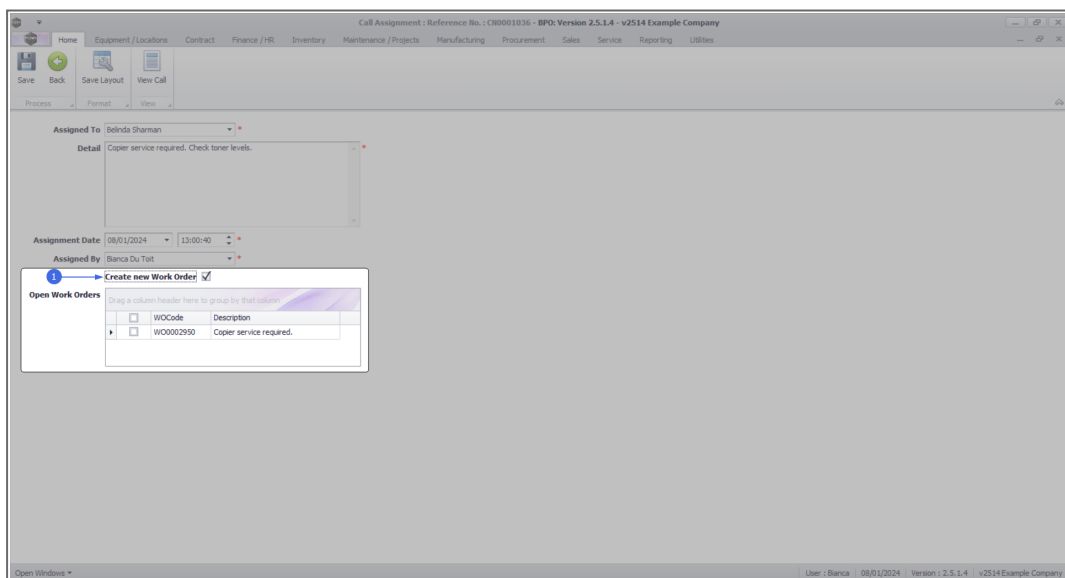
Create New Work Order

- 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.
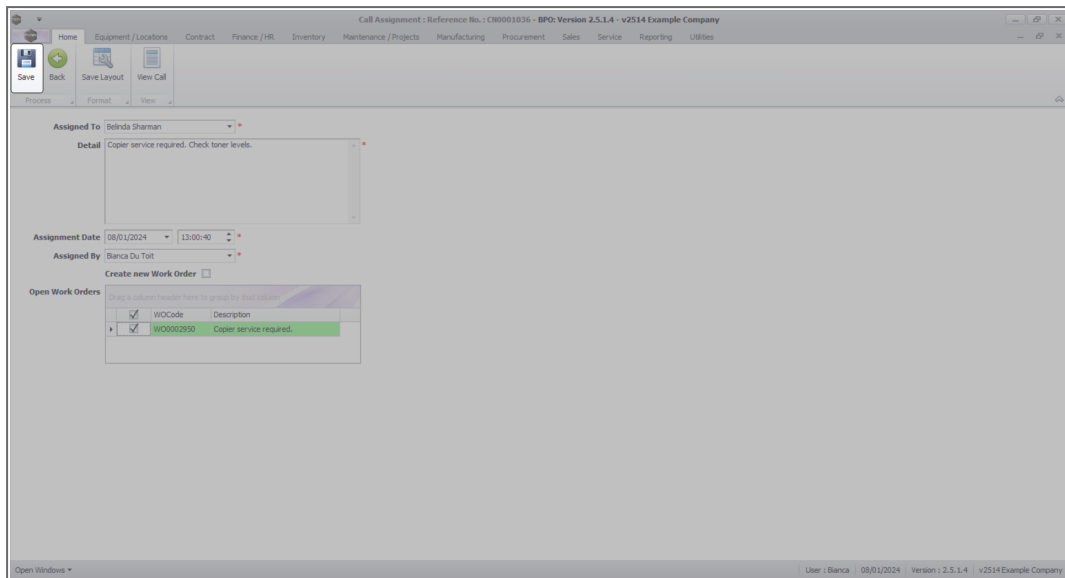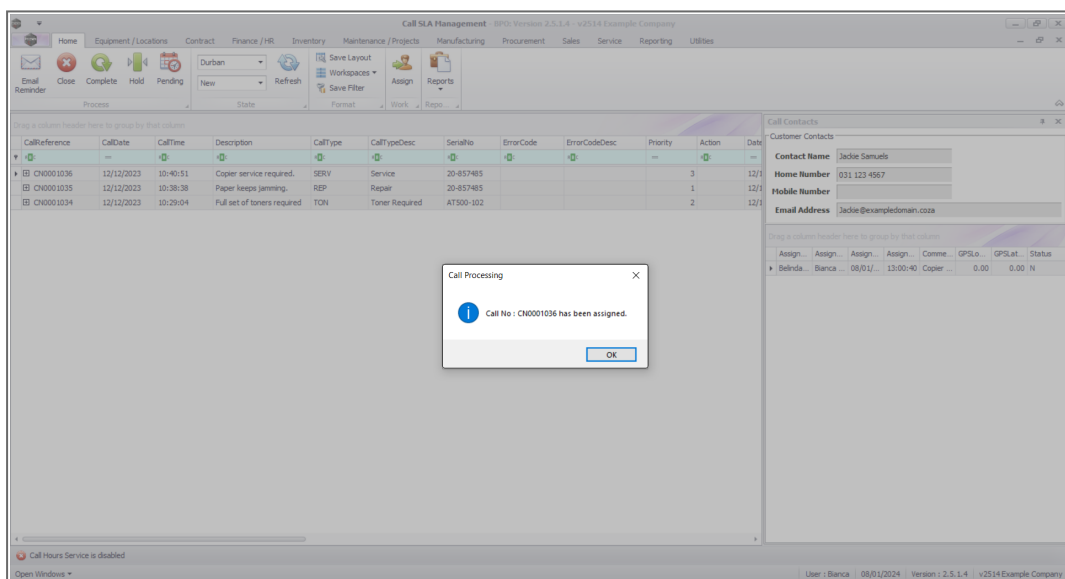
- Click on the **Save** button.

- A message box will come up, noting:

  - **Call No: *[call ref no]* has been assigned.**

- If using Tech Connect (Auto Accept Call Assignment company con-figuration flag set to **No**), the call will remain in status **New**, with the updated call State: **Awaiting Acceptance**. The call will display
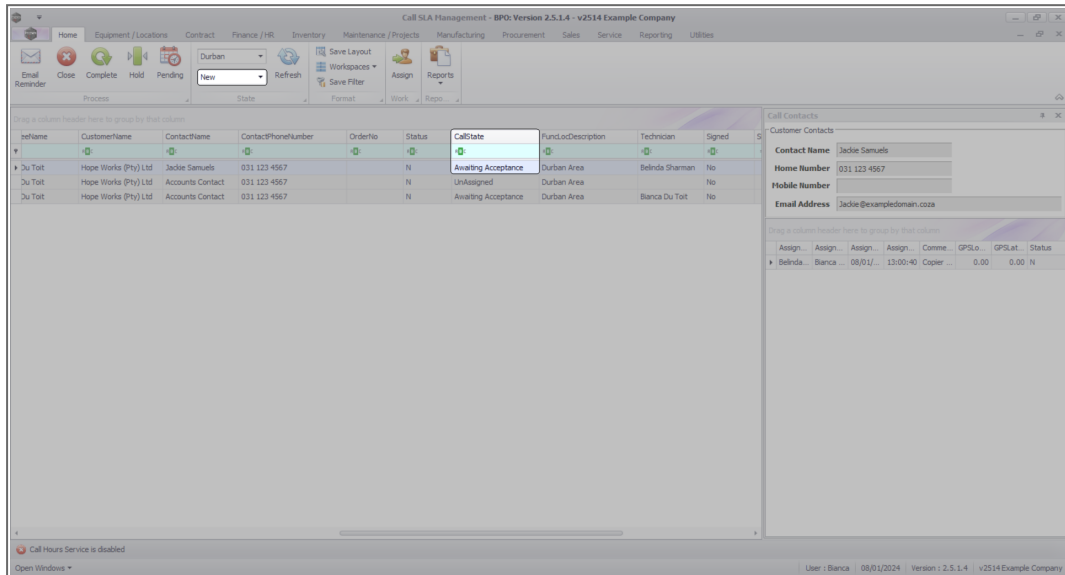
on the Technician's call list on Tech Connect, where it can be accepted or rejected.

- Otherwise, the call will automatically be accepted and move to the **In Progress** status.

Related Topics

- Service - Introduction to Call SLA Management
- Service - Call SLA Management - Email Reminder
- Service - Call SLA Management - Close Call
- Service - Call SLA Management - Complete Call
- Service - Call SLA Management - Hold a Call
- Service - Call SLA Management - Pend a Call
- Service - Call SLA Management - Assign a Call
- Service - Call SLA Management - Call Hours Service Status
- Introduction to Call Hours Service

MNU.127.006