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2.12.03 Call-Center

With the **Call Center** module incoming and outgoing calls, the support cases/requests resulting from the calls and the assigned messages can be administered. On the entry screen of the “Module view”, the functionalities can be opened with the menu “Add-On modules”.

The screenshot displays the 'Call-Center' module interface. At the top, there is a navigation bar with tabs: 'Standardansicht', 'Modulansicht' (selected), 'Termine', 'Portfolioreport', 'Projektliste', 'Risikomanagement', 'Vertrieb (charts)', 'Vertrieb (reports)', 'Projekte', 'Kunden', and 'Mitarbeiter'. Below the navigation bar, there are navigation icons (back, home, forward, refresh) and the title 'Call-Center'. The main area contains several buttons and input fields:

- Neuer Call** (yellow button)
- Textsuche** (yellow button with a search input field and a green checkmark icon)
- Aktuellste Calls** (light green button)
- Supportfälle für Nummer** (light green button with a search input field and a green checkmark icon)
- Abgeschlossene Supportfälle** (dark green button)
- Supportfälle heute** (light green button)
- Supportfälle für Kunden** (light green button with a search input field and a green checkmark icon)
- Abgeschlossene Calls** (dark green button)
- Meine Supportfälle** (light green button)
- Calls für Kunden** (light green button with a search input field and a green checkmark icon)
- Offene Supportfälle** (light green button)
- Meine Aufgaben** (dark green button)
- Überfällige Supportfälle** (light green button)
- Meine Todo-Listen** (dark green button)

Tip: For more on this subject see chapter [3.12 Call-Center](#).

✕ ? ☎ Call Email 12.10.2005 14:00:00 Jökler Software GmbH To-Do-Liste für Einführung

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Stammblatt Sonstiges Alle

Call-Typ

Ausgang

Call-Medium

Email

Call-Status

5 - Warten auf Antwort

Datum

12.10.2005 14:00:00

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Kontakt

Jökler Software GmbH

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Ansprechpartner

Jökler Helga

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Bearbeitet von

Schaub Peter

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Bemerkung

To-Do-Liste für Einführung

Supportfälle

📄 1 - 1 / 1 🔍

☑	Problemstatus	Priorität	Zieltermin	Name
1 <input type="checkbox"/> 📄	5 - Warten auf Antwort	2 - Normal	04.01.2007	To-Do-Liste für Einführung

The **Call** form contains the following elements:

- **Call-Type:** This field specifies the type of call (incoming, outgoing, ToDo lists, ...). The call types can be defined and modified in Collections (CallTypes)
- **Call-Media:** This field specifies the media of the call (e-mail, private, telephone, ...). The call media can be defined and modified in Collections (CallMedia).
- **Call-Status:** The status of the call is automatically listed by the system. Herewith, the status results from the minimum of the issue state information in the assigned support cases. The status in the standard version is 1 - Recorded, 2 - Waiting for approval, 3 - Waiting for processing, 4 - Being processed, 5 - Waiting for answer, 6 - Closed. The call status can be defined and modified in Collections (IssueStates).
- **Date:** The date field specifies the date and the time of the call. By default, the current date is pre-set by the system here.
- **Customer:** This field specifies the customer of the call. The customers can be defined and modified in the contact menu (with contact type customer).
- **Contact Person:** The field contact person specifies the contact person for the call. This field is populated with the contact person after a customer is selected.
- **Handled by:** The employee responsible for the call is preset by the system here. The employee is administered in the employee menu.
- **Comments:** This field is designated for information regarding the call.
- **Issues Call:** Each call can consist of any amount of support cases. These support cases that correlate to the call are assigned with priority, issue state, issue deadline and responsibilities.

!!!! Diese Supportfälle sind auf den Call bezogene Aufgaben mit Priorität, Status, Zieltermin und Zuständigkeiten.

Supportfall To-Do-Liste für Einführung 04.01.2007

Dokument Bearbeiten Ansicht Aktionen

Nummer 1120134756312-0

Call Email 12.10.2005 14:00:00 Jöckler Software GmbH To-Do-Liste für Einführung

Name To-Do-Liste für Einführung

Priorität 2 - Normal

Problemstatus 5 - Warten auf Antwort

Zieltermin 04.01.2007

Bemerkung
Die To-Do-Liste für die Einführung muß noch mit Frau Jöckler bearbeitet werden, speziell die Integration DATEV

Änderungsantrag

Verantwortlicher Schaub Peter

Nachrichten 1 - 1 / 1

	Datum	Ein-Aus	Text
1	09.01.2007 13:42:46	Ausgang	To-Do-Liste

The **Support Case** form contains the following elements:

- **Number/ID:** This number key field specifies the support case uniquely.
- **Call:** In the call field the assigned call for the support case is entered here. If a support case is generated from a call, the system transfers the assigned call automatically. The calls are administered in the calls form.
- **Name:** This field specifies the support case in short form with maximum 50 characters.
- **Priority :** This field specifies the priority of the selected support case.
- **Issue State:** The status of the support case is entered by the user here. The status in the standard version is 1 - Recorded, 2 - Waiting for approval, 3 - Waiting for processing, 4 - Being processed, 5 - Waiting for answer, 6 - Closed. The call status can be defined and modified in Collections (IssueStates).
- **Deadline Issue:** This date field specifies the requested date for completion of the support case.
- **Comments:** The comments field is designated for information regarding the support case.
- **Ticket:** This field consists of the tickets assigned to the support case. These tickets define the tickets/change requests (extensions, reductions and troubleshooting, ...)!!!!!!(Erweiterungen, Reduzierungen, Fehlerbehebungen, ...). The tickets are

administered in the tickets form.

- **Responsible Person:** The person responsible for the support case is preset by the system here. The employees are administered in the employee form.
- **Messages:** For each support case any amount of messages can be stored, to document the support case in detail.

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