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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 shows 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** (green button)
- Supportfälle für Nummer** (green button with a search input field and a green checkmark icon)
- Abgeschlossene Supportfälle** (green button)
- Supportfälle heute** (green button)
- Supportfälle für Kunden** (green button with a search input field and a green checkmark icon)
- Abgeschlossene Calls** (green button)
- Meine Supportfälle** (green button)
- Calls für Kunden** (green button with a search input field and a green checkmark icon)
- Offene Supportfälle** (green button)
- Meine Aufgaben** (green button)
- Überfällige Supportfälle** (green button)
- Meine Todo-Listen** (green button)

The screenshot shows the 'CallCenter' module interface. At the top, there is a navigation bar with tabs: Standard, Modules (selected), Tasks, Infomarket, Project List, Risk, Portfolio, Customers, Projects, and Staff. Below the navigation bar, there are navigation icons (back, home, forward, refresh) and the title 'CallCenter'. The main area contains several buttons and input fields:

- New call** (yellow button)
- Text search** (yellow button with a search input field and a green checkmark icon)
- Latest calls** (green button)
- Issues by Id** (green button with a search input field and a green checkmark icon)
- Closed issues** (green button)
- Issues today** (green button)
- Issues for customer** (green button with a search input field and a green checkmark icon)
- Closed calls** (green button)
- My issues** (green button)
- Calls for customer** (green button with a search input field and a green checkmark icon)
- Open issues** (green button)
- My todo's** (green button)
- Issues overdue** (green button)
- My todo lists** (green button)

Call Email 12.10.2009 12:14:14 TLC Telecommunications Corporation To-do list for the introduction

Document Edit View Back references

Master data Misc

CallType Out

CallMedia Email

CallState 1 - Recorded

Date 12.10.2009 12:14:14

Customer TLC Telecommunications Corpor

Contact Williams George

HandledBy Conner Jane

Note To-do list for the introduction

IssuesCall

IssueState	Priority	DeadlineIssue	Name
1 - Recorded	2 - Normal	12.10.2009	To-do list for introduction

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-State:** The state 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	<div>1 - 1 / 1</div> <table><thead><tr><th></th><th>Datum</th><th>Ein-Aus</th><th>Text</th></tr></thead><tbody><tr><td>1</td><td>09.01.2007 13:42:46</td><td>Ausgang</td><td>To-Do-Liste</td></tr></tbody></table>		Datum	Ein-Aus	Text	1	09.01.2007 13:42:46	Ausgang	To-Do-Liste
	Datum	Ein-Aus	Text						
1	09.01.2007 13:42:46	Ausgang	To-Do-Liste						

Supportcase To-do list for introduction 12.10.2009

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ID 1255342725645-0

Call Email 12.10.2009 12:14:14 TLC Telecommunications Corporation To-do list for the introduction

Name To-do list for introduction

Priority 2 - Normal ▾

IssueState 1 - Recorded ▾

DeadlineIssue 12.10.2009 ▾

Note
The to-do list for the introduction should be edited with John Wright

Ticket New introduction to project planning 02 🔍 📄 ✕ 📄

Responsible ▾ Conner Jane ▾ 🔍 📄 ✕ 📄

Messages

	Date	InOut	Text
1	12.10.2009 12:21:27	Out	Edit to-do list

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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