

SERVICE

INTRODUCTION TO CALL CLOSURE EXCEPTIONS

The **Call Closure Exceptions** screen is a new screen (in BPO2)¹ that displays the list of Close Call Exceptions returned by the (Auto Close Call Service)², with the corrective action. You can easily access the call, as well as the call related functions and transaction tiles. These exceptions can then be processed on BPO, and once flagged as processed, the call can then either be closed manually or left to be auto closed by the Close Call Service.

The Call Closure Exceptions List

- New part requests requires approval (where approval is required).
- Open part requests need to be actioned.
- Open sub contracts need to be received.
- Invoices need to be printed.
- Credit notes need to be authorised.
- Loan unit out against the call.
- Non billable serialized stock issues.
- Meters attached with no readings captured (where meter reading required is yes)
- Open warranty claims have not been processed.
- Unreviewed hours (where TimeReview flag is Yes)
- Items to Invoice:

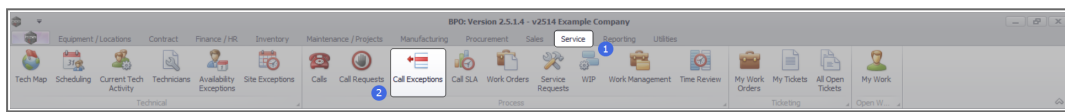
¹BPO2 v2.5.1.3 or higher,

²v3.0.0.1

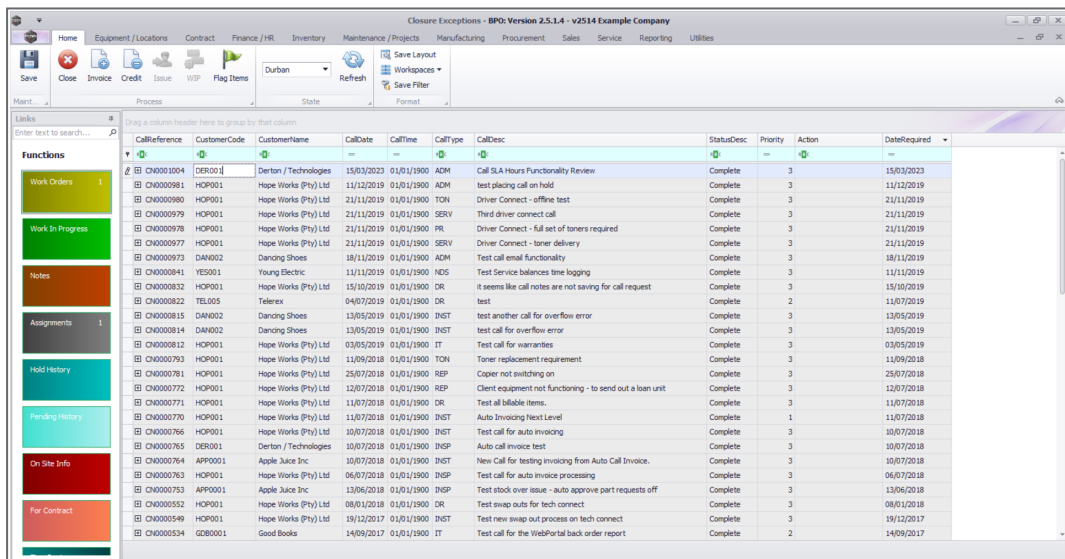
- Part requests
- Travel
- Warranties
- Sub-contracts
- Services
- Work expense
- Labour

THE CALL CLOSURE EXCEPTIONS LISTING SCREEN

Ribbon Select *Service* > *Call Exceptions*



- The ***Closure Exceptions Listing*** screen will be displayed, listing all Completed calls with completed work orders that have closure exceptions.



CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call SLA Hours Functionality Review	Complete	3		15/03/2023
CH0000981	HOP001	Hope Works (Pty) Ltd	11/12/2019	01/01/1900	ADM	test placing call on hold	Complete	3		11/12/2019
CH0000980	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	TON	Driver Connect - offline test	Complete	3		21/11/2019
CH0000979	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Third driver connect - call	Complete	3		21/11/2019
CH0000978	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of toners required	Complete	3		21/11/2019
CH0000977	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete	3		21/11/2019
CH0000973	DAN002	Dancing Shoes	18/11/2019	01/01/1900	ADM	Test call email functionality	Complete	3		18/11/2019
CH0000841	YES001	Young Electric	11/11/2019	01/01/1900	NDS	Test Service balances time logging	Complete	3		11/11/2019
CH0000832	HOP001	Hope Works (Pty) Ltd	15/10/2019	01/01/1900	DR	it seems like call notes are not saving for call request	Complete	3		15/10/2019
CH0000822	TEL005	Telenex	04/07/2019	01/01/1900	DR	test	Complete	2		11/07/2019
CH0000815	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test another call for overflow error	Complete	3		13/05/2019
CH0000814	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test call for overflow error	Complete	3		13/05/2019
CH0000812	HOP001	Hope Works (Pty) Ltd	03/05/2019	01/01/1900	IT	Test call for warranties	Complete	3		03/05/2019
CH0000793	HOP001	Hope Works (Pty) Ltd	11/09/2018	01/01/1900	TON	Toner replacement requirement	Complete	3		11/09/2018
CH0000781	HOP001	Hope Works (Pty) Ltd	25/07/2018	01/01/1900	REP	Copier not switching on	Complete	3		25/07/2018
CH0000772	HOP001	Hope Works (Pty) Ltd	12/07/2018	01/01/1900	REP	Client equipment not functioning - to send out a loan unit	Complete	3		12/07/2018
CH0000771	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DR	Test all billable items.	Complete	3		11/07/2018
CH0000770	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	INST	Auto Invoicing Next Level	Complete	1		11/07/2018
CH0000766	HOP001	Hope Works (Pty) Ltd	10/07/2018	01/01/1900	INST	Test call for auto invoicing	Complete	3		10/07/2018
CH0000765	DER001	Derton / Technologies	10/07/2018	01/01/1900	INSP	Auto call invoice test	Complete	3		10/07/2018
CH0000764	APP0001	Apple Juice Inc	10/07/2018	01/01/1900	INST	New Call for testing invoicing from Auto Call Invoice.	Complete	3		10/07/2018
CH0000763	HOP001	Hope Works (Pty) Ltd	06/07/2018	01/01/1900	INSP	Test call for auto invoice processing	Complete	3		06/07/2018
CH0000753	APP0001	Apple Juice Inc	13/06/2018	01/01/1900	INSP	Test stock over issue - auto approve part requests off	Complete	3		13/06/2018
CH0000552	HOP001	Hope Works (Pty) Ltd	08/01/2018	01/01/1900	DR	Test swap outs for tech connect	Complete	3		08/01/2018
CH0000549	HOP001	Hope Works (Pty) Ltd	19/12/2017	01/01/1900	INST	Test new swap out process on tech connect	Complete	3		19/12/2017
CH0000534	GBR001	Good Books	14/09/2017	01/01/1900	IT	Test call for the WebPortal back order report	Complete	2		14/09/2017

QUICK CALL ACCESS

- You can double click on a call to view the Call Details.

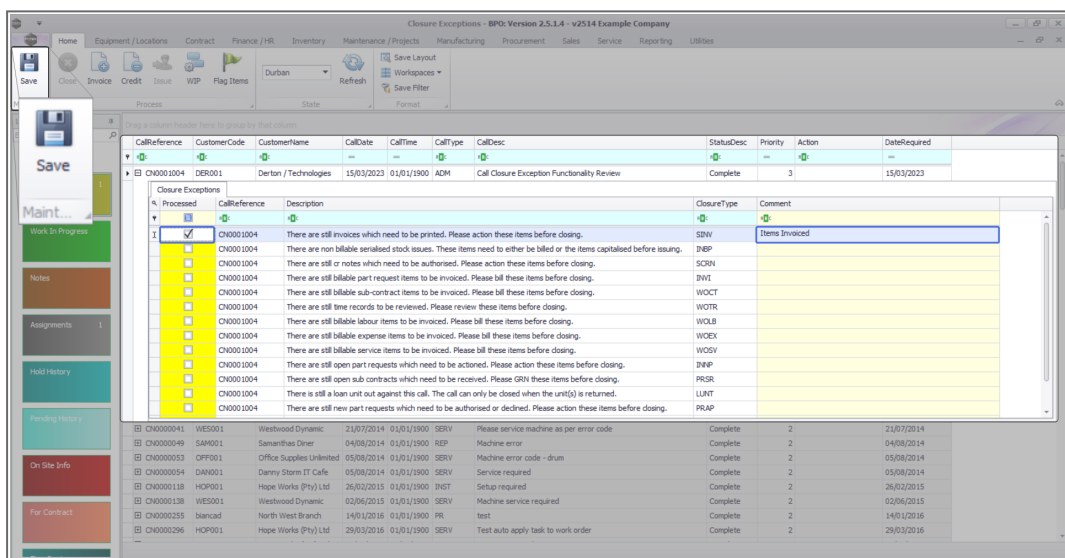


For a detailed handling of this topic refer to [Service - Closure Exceptions - View Call Details](#)

RIBBON ACTION BUTTONS

MAINTAIN ACTION BUTTON

- From the Closure Exception Screen you can **Save** Comments or note whether the Processed for each Closure Exception item. Refer to [Add a Comment](#) or [Calls - Edit a Call](#)



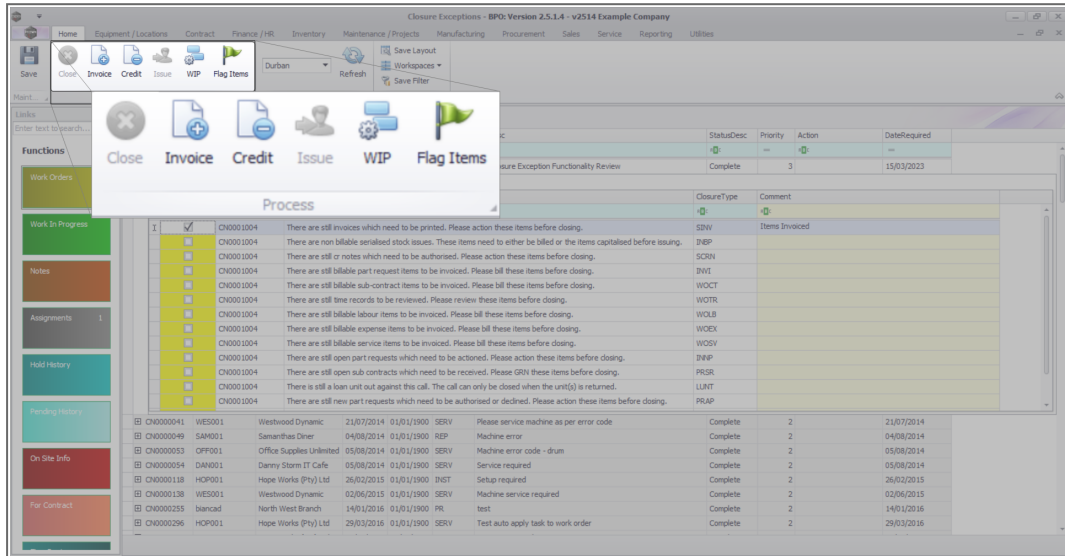
CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Deron / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023

Processed	CallReference	Description	ClosureType	Comment
<input checked="" type="checkbox"/>	CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SRNV	Items Invoiced
<input checked="" type="checkbox"/>	CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP	
<input checked="" type="checkbox"/>	CH0001004	There are still or notes which need to be authorised. Please action these items before closing.	SCRN	
<input checked="" type="checkbox"/>	CH0001004	There are still billable part request items to be invoiced. Please bill these items before closing.	INVT	
<input checked="" type="checkbox"/>	CH0001004	There are still billable sub-contract items to be invoiced. Please bill these items before closing.	WOCT	
<input checked="" type="checkbox"/>	CH0001004	There are still time records to be reviewed. Please review these items before closing.	WOTR	
<input checked="" type="checkbox"/>	CH0001004	There are still billable labour items to be invoiced. Please bill these items before closing.	WOLB	
<input checked="" type="checkbox"/>	CH0001004	There are still billable expense items to be invoiced. Please bill these items before closing.	WOEX	
<input checked="" type="checkbox"/>	CH0001004	There are still billable service items to be invoiced. Please bill these items before closing.	WOSV	
<input checked="" type="checkbox"/>	CH0001004	There are still open part requests which need to be actioned. Please action these items before closing.	INRP	
<input checked="" type="checkbox"/>	CH0001004	There are still open sub contracts which need to be received. Please GRN these items before closing.	PRSR	
<input checked="" type="checkbox"/>	CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT	
<input checked="" type="checkbox"/>	CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before closing.	PRAP	

PROCESS ACTION BUTTONS

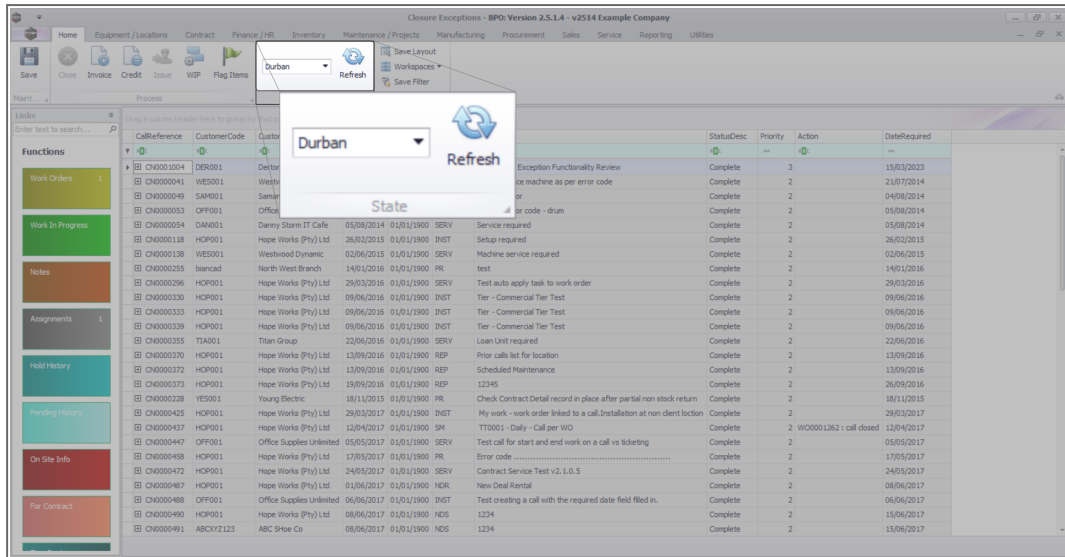
- Close a call when there are no further outstanding items on the call.
- [Invoice](#) all billable items on the call underlying work orders.

- **Credit** invoices raised against the call or underlying work orders.
- Issue stock against open part requests.
- View Work In Progress Items linked the call underlying work orders.
- Flag Items for closure processing.



STATE ACTION BUTTONS

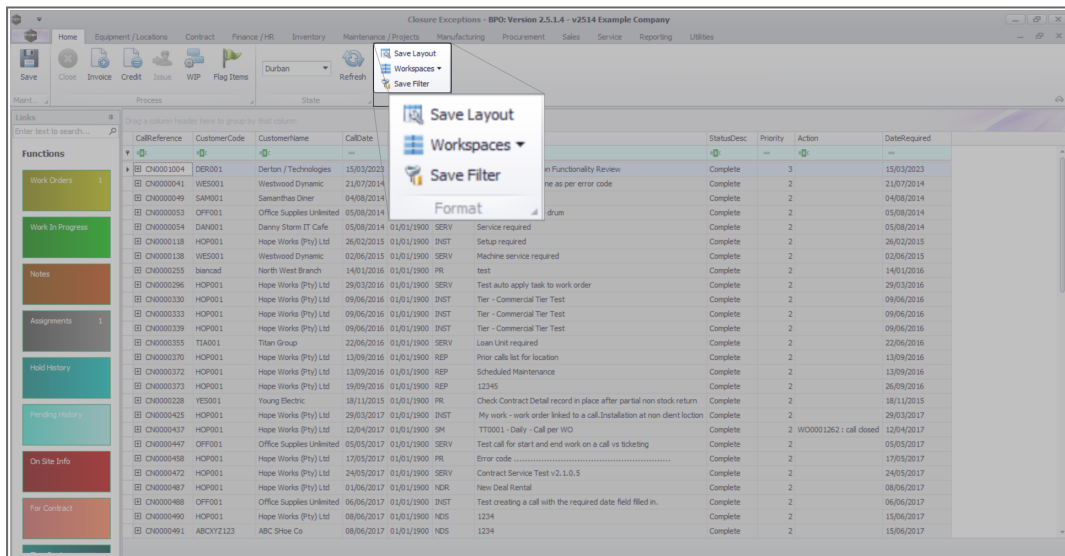
- The Closure Exceptions listing can be **Refreshed**.
- Calls can be filtered by **Site**.



CallReference	CustomerCode	CustomerName	CallDate	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	Complete	3	Exception Functionality Review	15/03/2023
CH0000041	WES001	Westwood Dynamic	21/07/2014	Complete	2	Machine as per error code	21/07/2014
CH0000049	SAM001	Samanthas Diner	04/08/2014	Complete	2	or code - drum	04/08/2014
CH0000053	OFF001	Office Supplies Unlimited	05/08/2014	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	Complete	2	Service required	05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	Complete	2	Setup required	26/02/2015
CH0000138	WES001	Westwood Dynamic	02/06/2015	Complete	2	Machine service required	02/06/2015
CH0000255	blancd	North West Branch	14/01/2016	Complete	2	test	14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	Complete	2	Test auto apply task to work order	29/03/2016
CH0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000355	TTA001	Titan Group	22/06/2016	Complete	2	Loan Unit required	22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	Prior calls list for location	13/09/2016
CH0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	Scheduled Maintenance	13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	12345	13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	12345	13/09/2016
CH0000228	YES001	Young Electric	18/11/2015	Complete	2	Check Contract Detail record in place after partial non stock return	18/11/2015
CH0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	Complete	2	My work - work order linked to a call. Installation at non client location	29/03/2017
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	Complete	2	TT0001 - Daily - Call per WO	12/04/2017
CH0000447	OFF001	Office Supplies Unlimited	05/05/2017	Complete	2	Test call for start and end work on a call vs ticketing	05/05/2017
CH0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	Complete	2	Error code	17/05/2017
CH0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	Complete	2	Contract Service Test v2.1.0.5	24/05/2017
CH0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	Complete	2	New Deal Rental	01/06/2017
CH0000488	OFF001	Office Supplies Unlimited	06/06/2017	Complete	2	Test creating a call with the required date field filled in.	06/06/2017
CH0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	Complete	2	1234	08/06/2017
CH0000491	ABCIYZ123	ABC Shoe Co	08/06/2017	Complete	2	1234	08/06/2017

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.



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CH0001004	DER001	Derton / Technologies	15/03/2023	Complete	3	Exception Functionality Review	15/03/2023
CH0000041	WES001	Westwood Dynamic	21/07/2014	Complete	2	Machine as per error code	21/07/2014
CH0000049	SAM001	Samanthas Diner	04/08/2014	Complete	2	or code - drum	04/08/2014
CH0000053	OFF001	Office Supplies Unlimited	05/08/2014	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	Complete	2	Service required	05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	Complete	2	Setup required	26/02/2015
CH0000138	WES001	Westwood Dynamic	02/06/2015	Complete	2	Machine service required	02/06/2015
CH0000255	blancd	North West Branch	14/01/2016	Complete	2	test	14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	Complete	2	Test auto apply task to work order	29/03/2016
CH0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	Complete	2	Tier - Commercial Tier Test	09/06/2016
CH0000355	TTA001	Titan Group	22/06/2016	Complete	2	Loan Unit required	22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	Prior calls list for location	13/09/2016
CH0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	Scheduled Maintenance	13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	13/09/2016	Complete	2	12345	13/09/2016
CH0000228	YES001	Young Electric	18/11/2015	Complete	2	Check Contract Detail record in place after partial non stock return	18/11/2015
CH0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	Complete	2	My work - work order linked to a call. Installation at non client location	29/03/2017
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	Complete	2	TT0001 - Daily - Call per WO	12/04/2017
CH0000447	OFF001	Office Supplies Unlimited	05/05/2017	Complete	2	Test call for start and end work on a call vs ticketing	05/05/2017
CH0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	Complete	2	Error code	17/05/2017
CH0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	Complete	2	Contract Service Test v2.1.0.5	24/05/2017
CH0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	Complete	2	New Deal Rental	01/06/2017
CH0000488	OFF001	Office Supplies Unlimited	06/06/2017	Complete	2	Test creating a call with the required date field filled in.	06/06/2017
CH0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	Complete	2	1234	08/06/2017
CH0000491	ABCIYZ123	ABC Shoe Co	08/06/2017	Complete	2	1234	08/06/2017

Related Topics

- [Service - Introduction to Call Closure Exceptions](#)
- [Service - View Call Closure Exception Details](#)
- [Service - Closure Exceptions - View Call Details](#)
- [Service - Closure Exceptions - Invoice Call](#)
- [Service - Closure Exceptions - Credit Call](#)
- [Service - Closure Exceptions - Issue Stock](#)
- [Service - Closure Exceptions - WIP](#)
- [Service - Closure Exceptions - Flag Items](#)

BPO.MNU.125