

SERVICE

CALL ADMINISTRATION - CLOSE A CALL

The Call Administration screen is part of the Extended Call Centre - Version Compatibility¹

A call that has been closed, can only be viewed in the **All** status.

A Call can be re-instated after it has been closed.

If you need to process something on a work order linked to a closed call, e.g. raise a Credit Note, then the work order will need to be re-instated. The work order can then be close again.

The system will notify you of any outstanding items, e.g. billable items not yet invoiced, for the call. You will have to act on the relevant messages before the call can be closed.

The Call Closure Exceptions List

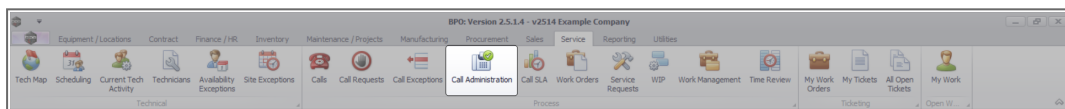
- New part requests requires approval (where approval is required).
- Open part requests need to be actioned.
- Open sub contracts need to be received.
- Invoices need to be printed.
- Credit notes need to be authorised.
- Loan unit out against the call.
- Non billable serialized stock issues.
- Meters 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)

¹BPO2 v2.5.1.3 or higher.

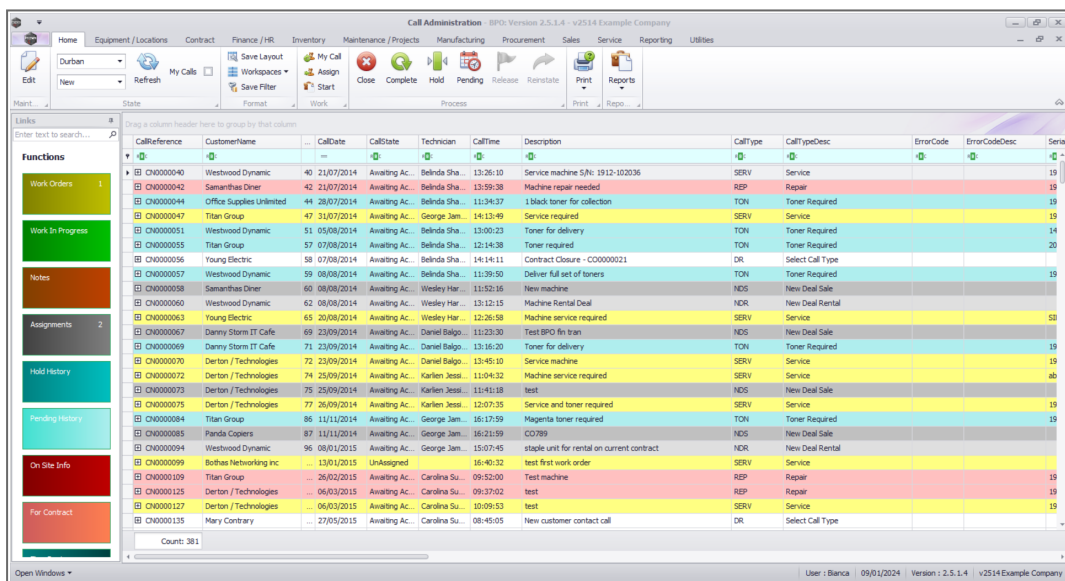
- Items to Invoice:
 - Part requests
 - Travel
 - Warranties
 - Sub-contracts
 - Services
 - Work expense
 - Labour

THE CALL ADMINISTRATION SCREEN

Ribbon Select *Service* > *Call Administration*

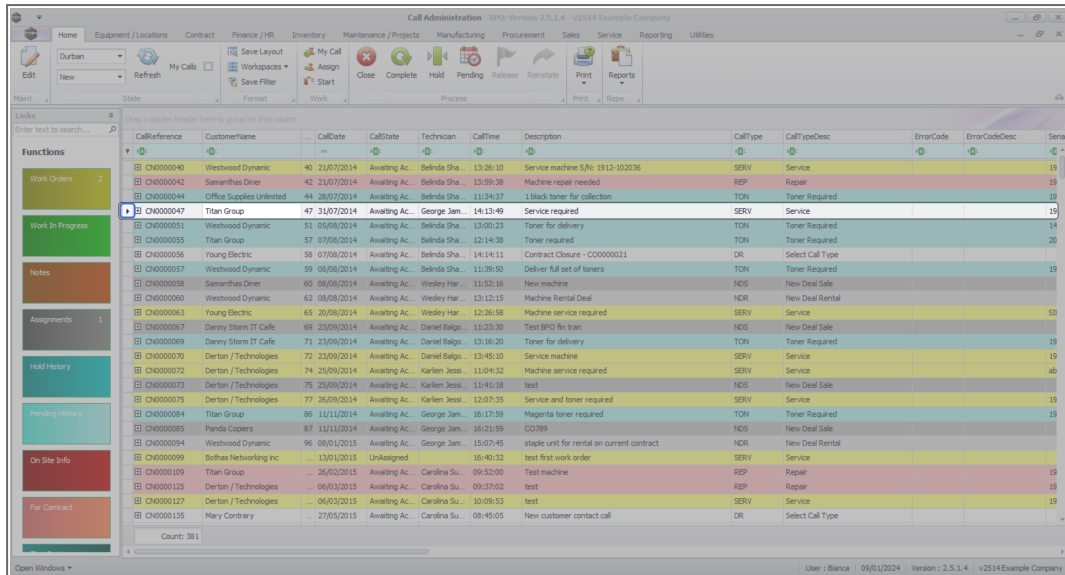


- The **Call Administration** screen will be displayed.



CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha...	13:26:10	Service machine 5/N: 1912-102036	SERV	Service			19
CH0000042	Samanthas Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha...	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha...	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jam...	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 01/08/2014	Awaiting Ac.	Belinda Sha...	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 01/08/2014	Awaiting Ac.	Belinda Sha...	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 01/08/2014	Awaiting Ac.	Belinda Sha...	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha...	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samanthas Diner	60 08/08/2014	Awaiting Ac.	Wesley Har...	11:52:16	New machine	NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har...	13:12:15	Machine Rental Deal	NDR	New Deal Rental			
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har...	12:26:58	Machine service required	SERV	Service			58
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo...	11:23:30	Test BPO fin tran	NDS	New Deal Sale			
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo...	13:16:20	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo...	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlen Jessi...	11:04:32	Machine service required	SERV	Service			46
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlen Jessi...	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlen Jessi...	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jam...	16:17:59	Magenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jam...	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam...	15:07:45	single unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bothea Networking Inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Carolina Su...	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su...	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Carolina Su...	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Carolina Su...	08:45:05	New customer contact call	DR	Select Call Type			

- Click on the row selector of the call you would like to work with.



Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Call My Call Assign Close Complete Hold Pending Release Reworkable Print Reports

State: Work

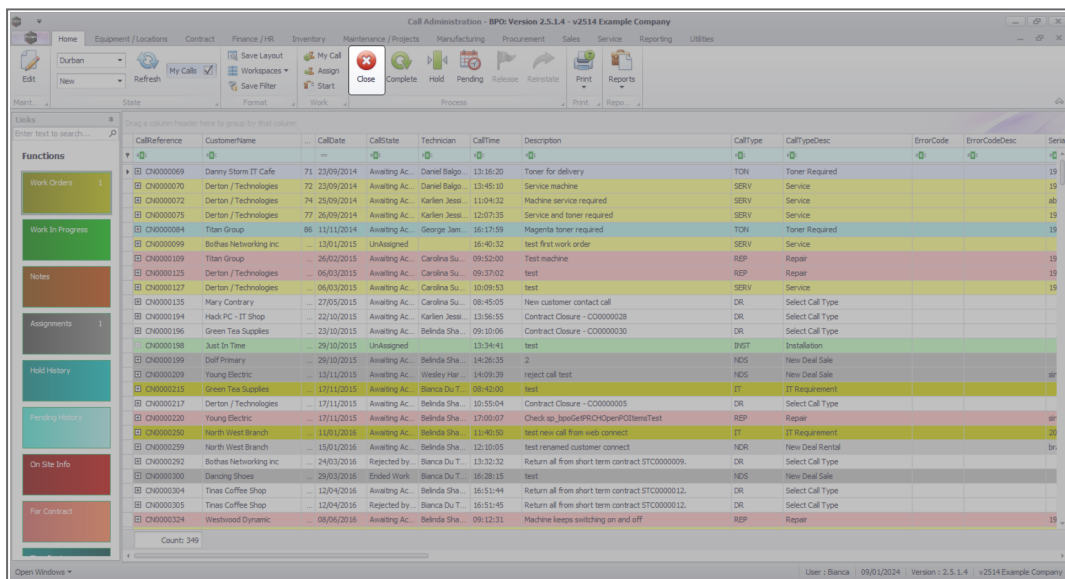
Count: 381

CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 5/No 1912-102036	SERV	Service			19
CH0000042	Samantha's Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 21/07/2014	Awaiting Ac.	George Jan.	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			19
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure - CO0000021	DR	Select Call Type			19
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.	Belinda Sha.	11:39:50	Deliver full set of toners	TON	Toner Required			19
CH0000058	Samantha's Diner	60 08/08/2014	Awaiting Ac.	Wesley Har.	11:52:16	New machine	NDS	New Deal Sale			19
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.	Wesley Har.	13:12:15	Machine Rental Deal	NDR	New Deal Rental			19
CH0000063	Young Electric	65 20/08/2014	Awaiting Ac.	Wesley Har.	12:26:58	Machine service required	SERV	Service			19
CH0000067	Danny Storm IT Cafe	69 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:23:30	Test BPO fit train	NDS	New Deal Sale			19
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:30	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlens Jess.	11:04:32	Machine service required	SERV	Service			ab
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlens Jess.	11:41:18	test	NDS	New Deal Sale			19
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlens Jess.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan.	16:17:59	Naganta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jan.	16:21:59	CO789	NDS	New Deal Sale			19
CH0000094	Westwood Dynamic	96 08/10/2015	Awaiting Ac.	George Jan.	15:07:45	shade unit for rental on current contract	NDR	New Deal Rental			19
CH0000099	Bothan Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			19
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Caroline Su.	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Caroline Su.	08:45:05	New customer contact call	DR	Select Call Type			19

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514 Example Company

CLOSE CALL

- Click on the **Close** button.



Call Administration - BPO Version 2.5.1.4 - v2514 Example Company

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

My Call My Call Assign Close Complete Hold Pending Release Reworkable Print Reports

State: Work

Count: 349

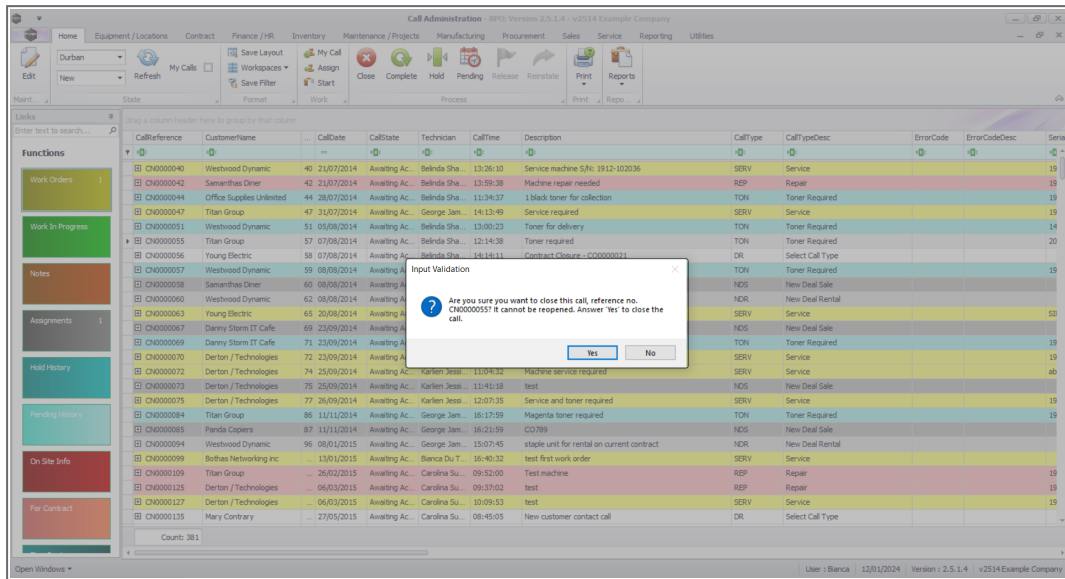
CallReference	CustomerName	CalDate	CalState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000069	Danny Storm IT Cafe	71 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:16:30	Toner for delivery	TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.	Daniel Balgo.	13:45:10	Service machine	SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlens Jess.	11:04:32	Machine service required	SERV	Service			ab
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlens Jess.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jan.	16:17:59	Naganta toner required	TON	Toner Required			19
CH0000099	Bothan Networking inc	13/01/2015	Unassigned		16:40:32	test first work order	SERV	Service			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Caroline Su.	08:45:05	New customer contact call	DR	Select Call Type			19
CH0000194	Hack PC - IT Shop	22/10/2015	Awaiting Ac.	Karlens Jess.	13:56:55	Contract Closure - CO0000028	DR	Select Call Type			19
CH0000196	Green Tea Supplies	23/10/2015	Awaiting Ac.	Belinda Sha.	09:10:06	Contract Closure - CO0000030	DR	Select Call Type			19
CH0000198	Just In Time	29/10/2015	Unassigned		13:34:41	test	INST	Installation			19
CH0000199	Duff Primary	29/10/2015	Awaiting Ac.	Belinda Sha.	14:26:35	2	NDS	New Deal Sale			19
CH0000209	Young Electric	13/11/2015	Awaiting Ac.	Wesley Har.	14:09:39	reject call test	NDS	New Deal Sale			19
CH0000215	Green Tea Supplies	17/11/2015	Awaiting Ac.	Belinda Sha.	08:42:00	test	IT	IT Requirement			19
CH0000217	Derton / Technologies	17/11/2015	Awaiting Ac.	Belinda Sha.	10:55:04	Contract Closure - CO0000003	DR	Select Call Type			19
CH0000220	Young Electric	17/11/2015	Awaiting Ac.	Belinda Sha.	17:00:07	Check up 3p0004PPOChoverPOTomeTest	REP	Repair			19
CH0000226	North West Branch	11/01/2016	Awaiting Ac.	Belinda Sha.	11:40:50	test new call from web connect	IT	IT Requirement			19
CH0000229	North West Branch	15/01/2016	Awaiting Ac.	Belinda Sha.	12:10:05	test renamed customer connect	NDR	New Deal Rental			19
CH0000292	Bothan Networking inc	24/03/2016	Rejected by	Bianca Du T.	13:32:32	Return all from short term contract STC0000009	DR	Select Call Type			19
CH0000300	Dancing Shoes	29/03/2016	Ended Work	Bianca Du T.	16:28:15	test	NDS	New Deal Sale			19
CH0000304	Tinas Coffee Shop	12/04/2016	Awaiting Ac.	Belinda Sha.	16:51:44	Return all from short term contract STC0000012	DR	Select Call Type			19
CH0000305	Tinas Coffee Shop	12/04/2016	Rejected by	Bianca Du T.	16:51:45	Return all from short term contract STC0000012	DR	Select Call Type			19
CH0000324	Westwood Dynamic	08/06/2016	Awaiting Ac.	Belinda Sha.	09:12:31	Machine keeps switching on and off	REP	Repair			19

User : Bianca | 09/01/2024 | Version : 2.5.1.4 | v2514 Example Company

- A message box will come up, asking:
 - Are you sure you want to close this call, reference no. [call ref no]? It cannot be reopened. Answer 'Yes'

to close the call.

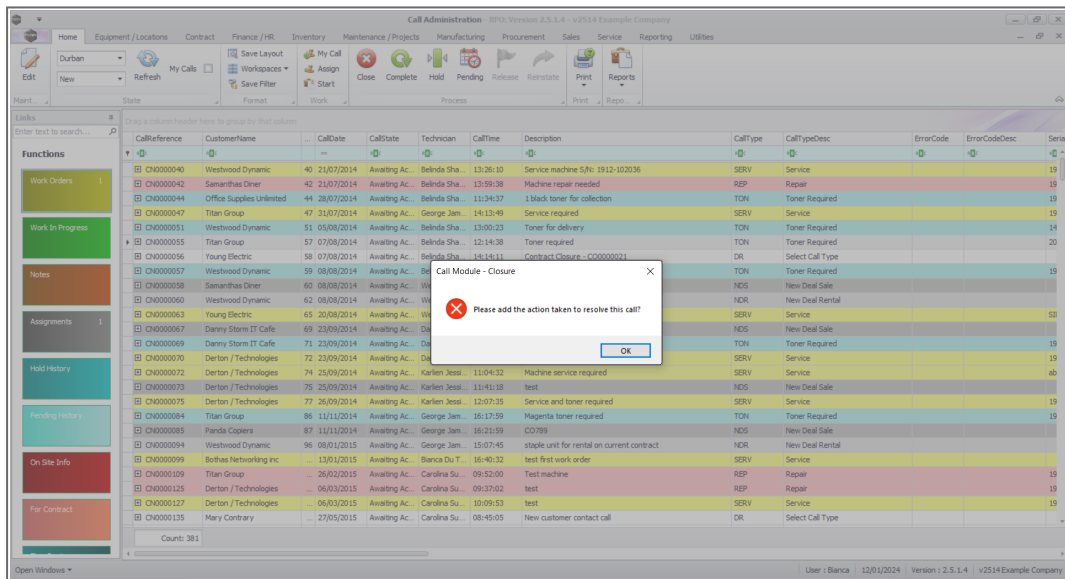
- Note that the call can be reinstated, if required.



The screenshot shows the CO3 Call Administration software interface. The main window displays a list of calls with columns for CallReference, CustomerName, CallDate, CallTime, Technician, CallTime, Description, CallType, CallTypeDesc, ErrorCode, ErrorCodeDesc, and Serial. A dialog box titled 'Input Validation' is open, asking: 'Are you sure you want to close this call, reference no. CH0000057? It cannot be reinstated. Answer 'Yes' to close the call.' The dialog has 'Yes' and 'No' buttons.

CallReference	CustomerName	CallDate	CallTime	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 5/N: 1912-102036	SERV	Service			19
CH0000042	Samantha Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jam.	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure: CH0000057	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.				TON	Toner Required			19
CH0000058	Samantha Diner	60 08/08/2014	Awaiting Ac.				NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.				NDR	New Deal Rental			
CH0000063	Young Electric	63 20/08/2014	Awaiting Ac.				SERV	Service			52
CH0000067	Denny Storm IT Cafe	69 23/09/2014	Awaiting Ac.				NDS	New Deal Sale			
CH0000069	Denny Storm IT Cafe	71 23/09/2014	Awaiting Ac.				TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.				SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlens Jess.	11:04:32	Machine service required	SERV	Service			46
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlens Jess.	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlens Jess.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Magenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jam.	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam.	15:07:45	slate unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bellish Networking Inc	13/01/2015	Awaiting Ac.	Reneo Du T.	16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Caroline Su.	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Caroline Su.	08:45:05	New customer contact call	DR	Select Call Type			

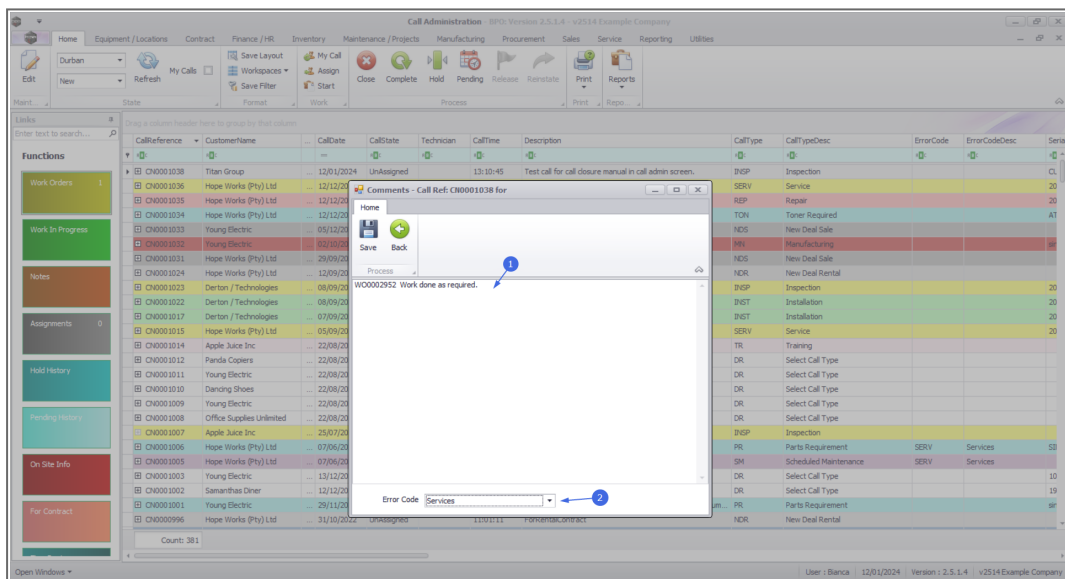
- A message box will come up, noting:
 - Please add the action taken to resolve this call.



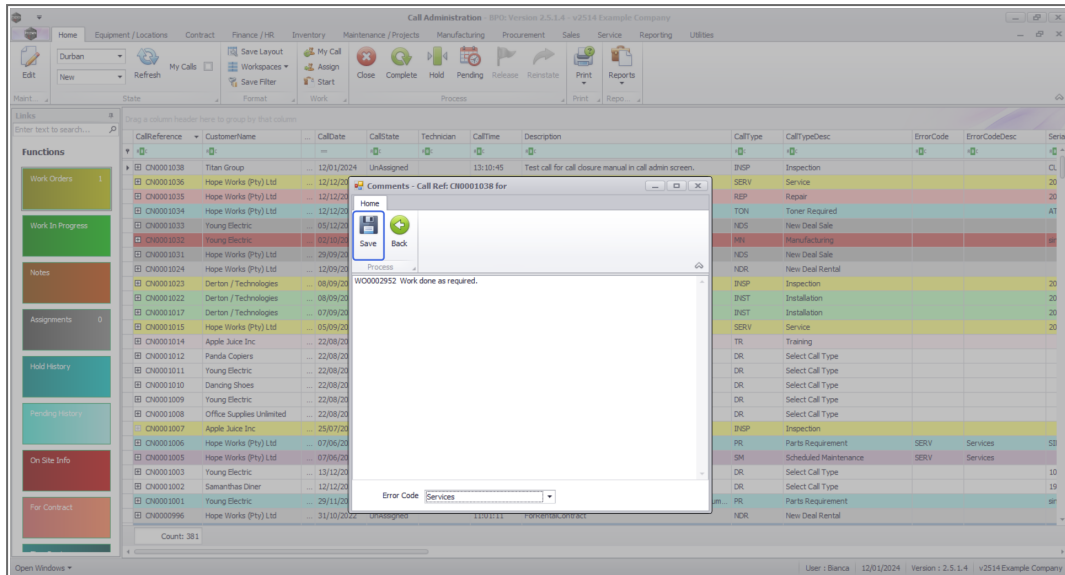
The screenshot shows the CO3 Call Administration software interface. The main window displays a list of calls. A dialog box titled 'Call Module - Closure' is open, asking: 'Please add the action taken to resolve this call?'. The dialog has an 'OK' button.

CallReference	CustomerName	CallDate	CallTime	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	Serial
CH0000040	Westwood Dynamic	40 21/07/2014	Awaiting Ac.	Belinda Sha.	13:26:10	Service machine 5/N: 1912-102036	SERV	Service			19
CH0000042	Samantha Diner	42 21/07/2014	Awaiting Ac.	Belinda Sha.	13:59:38	Machine repair needed	REP	Repair			19
CH0000044	Office Supplies Unlimited	44 28/07/2014	Awaiting Ac.	Belinda Sha.	11:34:37	1 black toner for collection	TON	Toner Required			19
CH0000047	Titan Group	47 31/07/2014	Awaiting Ac.	George Jam.	14:13:49	Service required	SERV	Service			19
CH0000051	Westwood Dynamic	51 05/08/2014	Awaiting Ac.	Belinda Sha.	13:00:23	Toner for delivery	TON	Toner Required			14
CH0000055	Titan Group	57 07/08/2014	Awaiting Ac.	Belinda Sha.	12:14:38	Toner required	TON	Toner Required			20
CH0000056	Young Electric	58 07/08/2014	Awaiting Ac.	Belinda Sha.	14:14:11	Contract Closure: CH0000057	DR	Select Call Type			
CH0000057	Westwood Dynamic	59 08/08/2014	Awaiting Ac.				TON	Toner Required			19
CH0000058	Samantha Diner	60 08/08/2014	Awaiting Ac.				NDS	New Deal Sale			
CH0000060	Westwood Dynamic	62 08/08/2014	Awaiting Ac.				NDR	New Deal Rental			
CH0000063	Young Electric	63 20/08/2014	Awaiting Ac.				SERV	Service			52
CH0000067	Denny Storm IT Cafe	69 23/09/2014	Awaiting Ac.				NDS	New Deal Sale			
CH0000069	Denny Storm IT Cafe	71 23/09/2014	Awaiting Ac.				TON	Toner Required			19
CH0000070	Derton / Technologies	72 23/09/2014	Awaiting Ac.				SERV	Service			19
CH0000072	Derton / Technologies	74 25/09/2014	Awaiting Ac.	Karlens Jess.	11:04:32	Machine service required	SERV	Service			46
CH0000073	Derton / Technologies	75 25/09/2014	Awaiting Ac.	Karlens Jess.	11:41:18	test	NDS	New Deal Sale			
CH0000075	Derton / Technologies	77 26/09/2014	Awaiting Ac.	Karlens Jess.	12:07:35	Service and toner required	SERV	Service			19
CH0000084	Titan Group	86 11/11/2014	Awaiting Ac.	George Jam.	16:17:59	Magenta toner required	TON	Toner Required			19
CH0000085	Panda Copiers	87 11/11/2014	Awaiting Ac.	George Jam.	16:21:59	CO789	NDS	New Deal Sale			
CH0000094	Westwood Dynamic	96 08/01/2015	Awaiting Ac.	George Jam.	15:07:45	slate unit for rental on current contract	NDR	New Deal Rental			
CH0000099	Bellish Networking Inc	13/01/2015	Awaiting Ac.	Reneo Du T.	16:40:32	test first work order	SERV	Service			
CH0000109	Titan Group	26/02/2015	Awaiting Ac.	Caroline Su.	09:52:00	Test machine	REP	Repair			19
CH0000125	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	09:37:02	test	REP	Repair			19
CH0000127	Derton / Technologies	06/03/2015	Awaiting Ac.	Caroline Su.	10:09:53	test	SERV	Service			19
CH0000135	Mary Contrary	27/05/2015	Awaiting Ac.	Caroline Su.	08:45:05	New customer contact call	DR	Select Call Type			

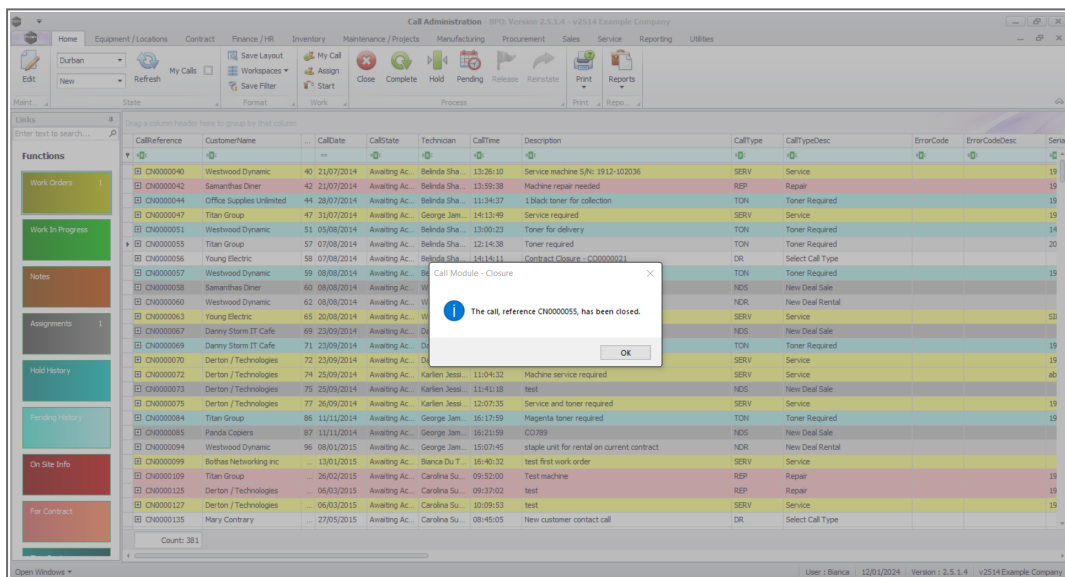
- The **Comments for Call Ref: [call ref no]** screen will come up
 - **Comment:** This comment is to note the work that was done to resolve the call. Comments may already appear here if logged via TechConnect or manually on the underlying work order. You could append details or add the rectification comment if not yet entered.
 - **Error Code:** The error code is may be mandatory depending on the company configuration: [Call Error Code Mandatory](#). The error codes are a list of codes that may display on the devices being services and set up on the system for selection. This code may have already been selected on call creation. This could be changed or selected at this point. Depending on your company's requirements, you may not need to select the error code.



- Click on the **Save** button.



- A message box will come up, noting:
 - The call, reference **[call ref no]**, has been closed.



- The call will be closed and removed from the Call Administration listing screen.



For a detailed handling of this topic refer to [Service - Introduction to Calls](#)

Related Topics

- [Service - Introduction to Call Administration](#)
- [Call Administration - Edit a Call](#)
- [Call Administration - My Calls](#)
- [Call Administration - Assign a Call](#)
- [Call Administration - Start or End Work](#)
- [Call Administration - Close a Call](#)
- [Call Administration - Complete a Call](#)
- [Call Administration - Hold a Call](#)
- [Call Administration - Pend a Call](#)
- [Call Administration - Release a Call](#)
- [Call Administration - Reinstate a Call](#)

MNU.124.005

