

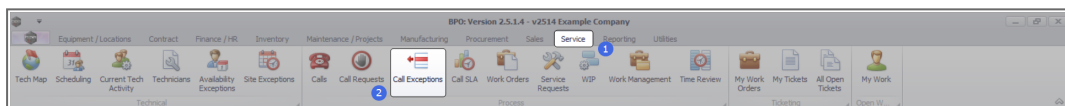
SERVICE

CLOSURE EXCEPTIONS – FLAG ITEMS

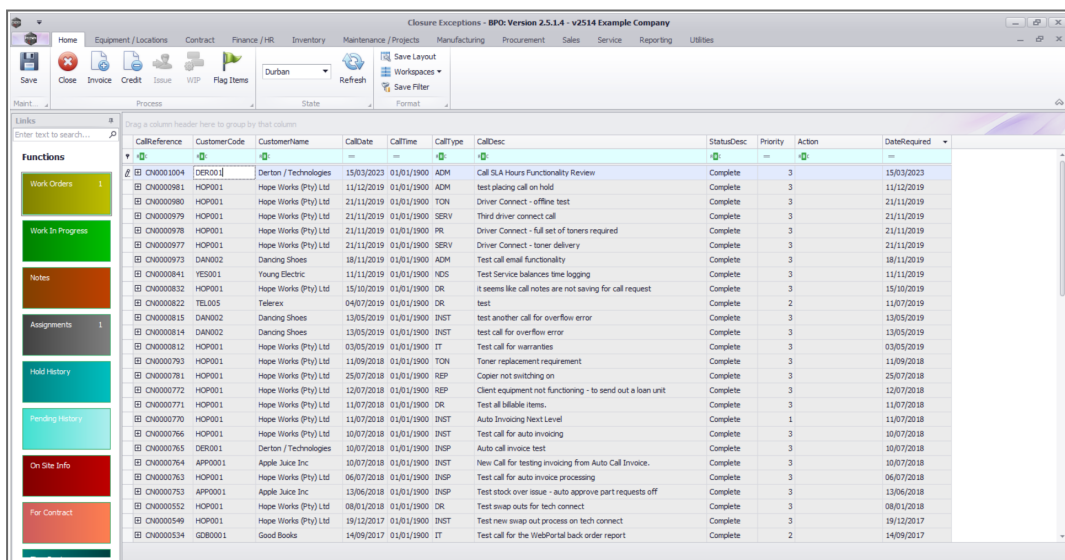
Flagged items as processed indicates that you have actioned the items that were preventing call closure.

SELECT THE CALL

Ribbon Select **Service** > **Call Exceptions**

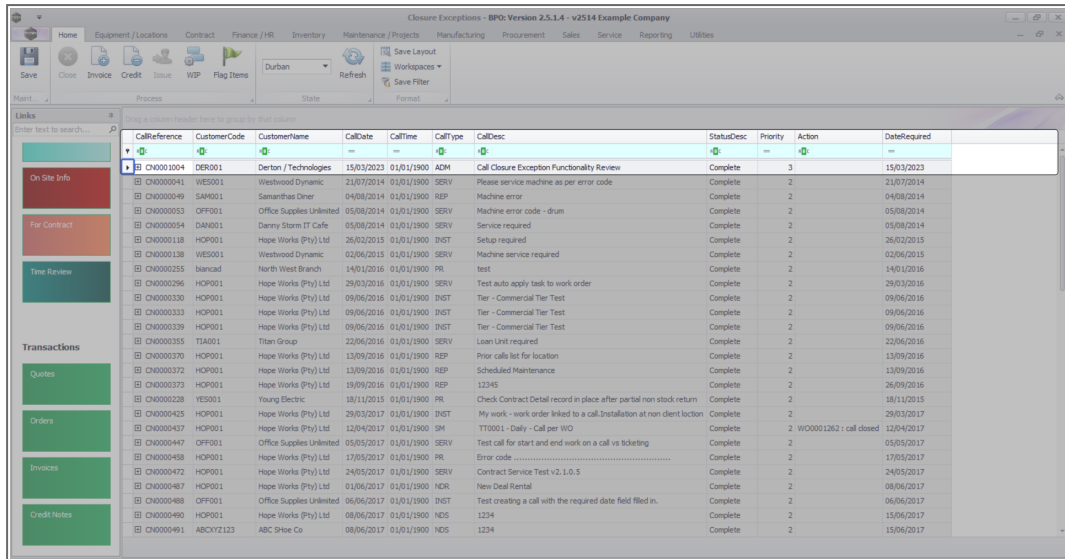


- The **Closure Exceptions Listing** screen will be displayed, listing all Completed calls with completed work orders that have closure exceptions.



CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER0001	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
CH0000941	YES001	Young Electric	11/11/2019	01/01/1900	NCS	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 out 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	GB0001	Good Books	14/09/2017	01/01/1900	IT	Test call for the WebPortal back order report	Complete	2		14/09/2017

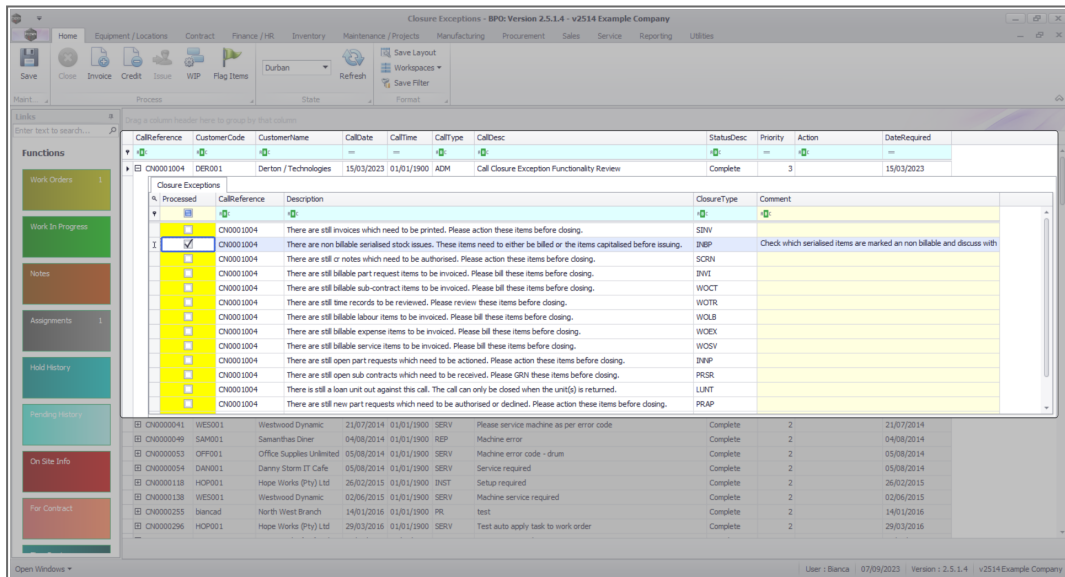
- Click on the row selector in front of the call.



CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023
CH0000041	WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	2		21/07/2014
CH0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete	2		04/08/2014
CH0000053	OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete	2		05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete	2		26/02/2015
CH0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	2		02/06/2015
CH0000255	blancd	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	2		14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete	2		29/03/2016
CH0000320	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000323	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000355	TTA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete	2		22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete	2		13/09/2016
CH0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete	2		13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete	2		26/09/2016
CH0000228	YES001	Young Electric	18/11/2015	01/01/1900	PR	Check Contract Detail record in place after partial non stock return	Complete	2		18/11/2015
CH0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	INST	My work - work order linked to a call. Installation at non client location	Complete	2		29/03/2017
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per WO	Complete	2		12/04/2017
CH0000447	OFF001	Office Supplies Unlimited	05/05/2017	01/01/1900	SERV	Test call for start and end work on a call vs ticketing	Complete	2		05/05/2017
CH0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete	2		17/05/2017
CH0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete	2		24/05/2017
CH0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete	2		08/06/2017
CH0000488	OFF001	Office Supplies Unlimited	06/06/2017	01/01/1900	INST	Test creating a call with the required date field filled in.	Complete	2		06/06/2017
CH0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017
CH0000491	ABCYT2123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

SELECT THE EXCEPTION ITEM TO FLAG

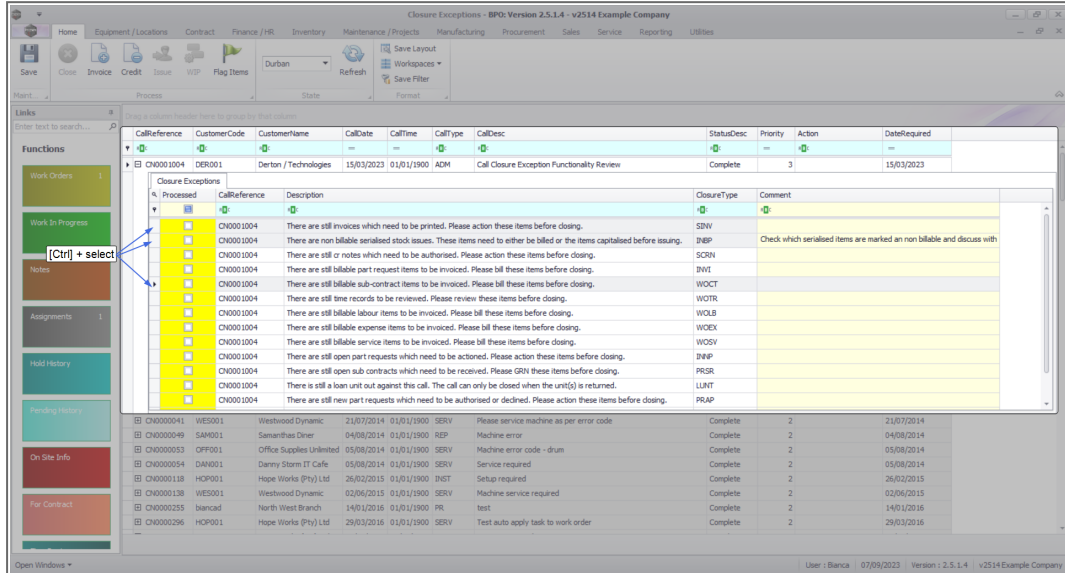
- Click in the **Check box** in front of the exception item you would like to flag as processed.
- You can continue to manually mark each item that needs to be flagged.



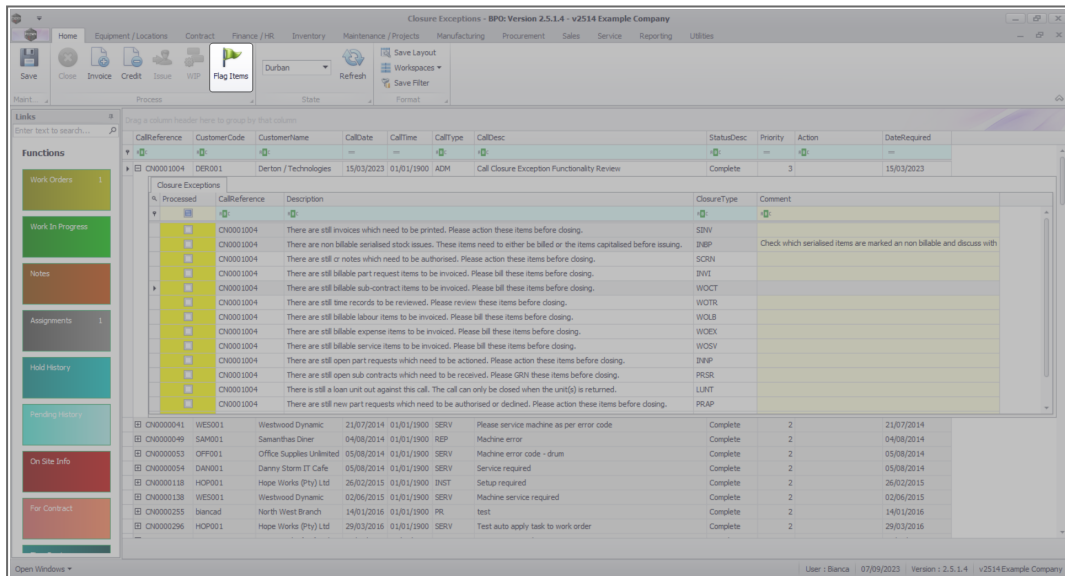
CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023
CH0001004						There are still invoices which need to be printed. Please action these items before closing.	SNV			
CH0001004						There are non billable serialised stock issues. These items need to be either billed or the items capitalised before issuing.	INBP		Check which serialised items are marked as non billable and discuss with	
CH0001004						There are still or notes which need to be authorised. Please action these items before closing.	SONR			
CH0001004						There are still billable part request items to be invoiced. Please bill these items before closing.	INVT			
CH0001004						There are still billable sub-contract items to be invoiced. Please bill these items before closing.	WOCT			
CH0001004						There are still time records to be reviewed. Please review these items before closing.	WOIR			
CH0001004						There are still billable labour items to be invoiced. Please bill these items before closing.	WOLB			
CH0001004						There are still billable expense items to be invoiced. Please bill these items before closing.	WOEX			
CH0001004						There are still billable service items to be invoiced. Please bill these items before closing.	WOSV			
CH0001004						There are still open part requests which need to be actioned. Please action these items before closing.	INVP			
CH0001004						There are still open sub contracts which need to be received. Please GRN these items before closing.	PRSR			
CH0001004						There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT			
CH0001004						There are still new part requests which need to be authorised or declined. Please action these items before closing.	PRAP			

FLAG MULTIPLE ITEMS

- You could also select multiple exception items, by holding down the **[Ctrl]** button and clicking each exception line you need to flag.



- Then click on the **Flag Items** button.



- Closure Exceptions - BPO: Workweek 2.5.1.4 - v2514 Example Company**

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

Save | Close | Invoice | Credit | Issue | WIP | Flag Items | Durban | Refresh | Save Layout | Workspaces | Save Filter

Start | Process | State | Format

Links
Enter text to search...

Functions

 - Work Orders
 - Work In Progress
 - Notes
 - Assignments
 - Hold History
 - Pending History
 - On Site Info
 - Far Contract

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01:01:00	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023

Closure Exceptions

Processed

CallReference	Description	ClosureType	Comment
CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SDNV	
CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	BNBP	Check which serialised items are marked as non billable and discuss with
CH0001004	There are still o/ notes which need to be actioned.	SCBN	
CH0001004	There are still make part request items to be actioned.	BNPT	
CH0001004	There are still billable sub-contract items to be actioned.	WOCCT	
CH0001004	There are still time records to be reviewed.	WOTR	
CH0001004	There are still billable labour items to be actioned.	WOLB	
CH0001004	There are still billable expense items to be actioned.	WOEX	
CH0001004	There are still billable service items to be actioned.	WOSV	
CH0001004	There are still open part requests which need to be actioned.	BNPT	
CH0001004	There are still open sub contracts which need to be received. Please GRN these items before closing.	PRSR	
CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LLNT	
CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before closing.	PRAP	

Input validation

Are you sure you want to flag the selected items?

Yes No

CH0000041	WES001	Westwood Dynamic	21/07/2014	01:01:00	SRV	Please service machine as per error code	Complete	2	21/07/2014
CH0000049	SAM001	Samantiras Diner	04/08/2014	01:01:00	REP	Machine error	Complete	2	04/08/2014
CH0000053	OPF001	Office Supplies Unlimited	05/08/2014	01:01:00	SRV	Machine error code - drum	Complete	2	05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01:01:00	SRV	Service required	Complete	2	05/08/2014
CH0000018	HPH001	Hope Works (Pty) Ltd	26/02/2015	01:01:00	BNPT	Setup required	Complete	2	26/02/2015
CH0000018	WES001	Westwood Dynamic	02/06/2015	01:01:00	SRV	Machine service required	Complete	2	02/06/2015
CH0000225	BNW001	North West Branch	14/01/2016	01:01:00	PRL	test	Complete	2	14/01/2016
CH0000296	HPH001	Hope Works (Pty) Ltd	29/03/2016	01:01:00	SRV	Test auto apply task to work order	Complete	2	29/03/2016

Open Windows

User : Bianca 07/09/2023 Version : 2.5.1.4 - v2514 Example Company

- You will note in the example below that there could be 3 colours depending on the state of the exception, and indicates the following:
 - **Yellow** Unflagged Exception
 - **Red** Exception has been flagged, but does not have a comment. The comment is required.
 - **Green** Exception has been flagged and has a comment.

CO3 Technologies - BPO: Version 2.5.1.4 - v2514 Example Company

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

Save Close Invoice Credit Issue WIP Flag Items Durban Refresh Workspaces Save Filter

Links: Enter text to search...

Functions: Work Orders 1, Work In Progress, Notes, Assignments 1, Hold History, Pending History, On Site Info, For Contract

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/2000	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023

Closure Exceptions

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.	SDW	
<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	Check which serialised items are marked as non billable and discuss with
<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 received. 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	

CH0000041	WES001	Westwood Dynamic	21/07/2014	01/01/2000	SERV	Please service machine as per error code	Complete	2		21/07/2014
CH0000049	SAM001	Samarthas Diner	04/08/2014	01/01/2000	REP	Machine error	Complete	2		04/08/2014
CH0000053	OPF001	Office Supplies Unlimited	05/08/2014	01/01/2000	SERV	Machine error code - drum	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/2000	SERV	Service required	Complete	2		05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/2000	INST	Setup required	Complete	2		26/02/2015
CH0000138	WES001	Westwood Dynamic	02/06/2015	01/01/2000	SERV	Machine service required	Complete	2		02/06/2015
CH0000255	biancad	North West Branch	14/01/2016	01/01/2000	PR	test	Complete	2		14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/2000	SERV	Test auto apply task to work order	Complete	2		29/03/2016

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](#)

MNU.125.007

