

SERVICE

CALLS - CLOSE A CALL

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

A Call <u>cannot</u> be re-opened once 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 <u>re-instated</u>. 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.

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Select the *Site* where the call has been logged.
 - The example has *Durban* selected.
- 3. Set the *Status* to either *New*, *In Progress* or *Complete*, depending on where the call you wish to close, is listed.
 - The example has *Complete* selected.
- 4. Click on the *row* of the *call* you wish to *close*.
- 5. Click on *Close*.



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- 6. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to close this call, reference no. CN [ref. number]? It cannot be reopened. Answer 'Yes' to close the call.
- 7. Click on Yes.



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- When you receive the *Call Module Closure* message to confirm;
 - Please add the action taken to resolve this call?
- Click on OK.



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					Please add the act	ion taken t	to resolve this call? OK				

- The *Comments Call Ref: [] for* screen will pop up.
- Any *work orders* linked to this call will be listed in the *text box*.



- Type in the *call closure comments* next to the work order numbers.
 - Note: These comments will automatically pull through if you have updated the rectification comments on the work order.



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- You have the option to select an *Error Code* at call closure.
- Click on the *drop down arrow* in the *Error Code* field to display the *Error Code menu*.
 - Note: If the company configuration is set so that this is mandatory then you will <u>have</u> to select an error code before saving.



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• When you have finished editing this Comments screen, click on *Save*.



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• A *Call Module - Closure* message box will pop up, informing you that;



• The call, reference [], has been closed.

- Click on *Ok*.
- Note: On close, the system will automatically *close* the linked *work order*.



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• You can now view the closed call in the *Call Listing* screen where the status is set to *All*.



• You will see that the *Status Description* has now been changed to *Closed*.

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	O Held	yess 7	-		CN0000506	12 Dec 2017	12:17:21	Paper Jam machine has s	REP	Repair	New	UnAssigned		12-9
	() Pendin	0 2		,	E CN0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	Closed	Accepted	Jade Rivers	14-9
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•	Pretoria	0			CN0000502	06 Oct 2017	10:18:07	New Clent Installation	INST	Installation	Hold	UnAssigned		1020
	O New	0			CN0000501	29 Jun 2017	16:14:01	Loan unit - Alternate Issue	DIST	Installation	Complete	UnAssigned		1020
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- *Scroll right* in the row until you can view the *Close User Name* column.
- Here you will be able to see who closed the call.

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