

# SERVICE

## CALLS - CLOSE A CALL

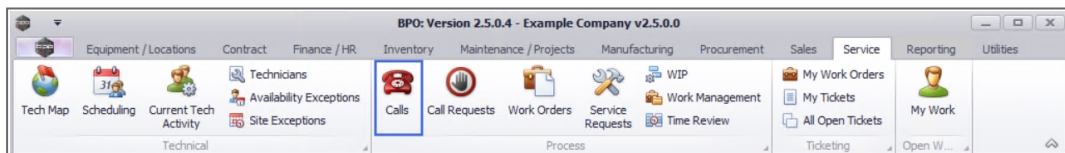
A call that has been closed, can only be viewed in the **All** status.

A Call cannot be re-opened once it has been closed.

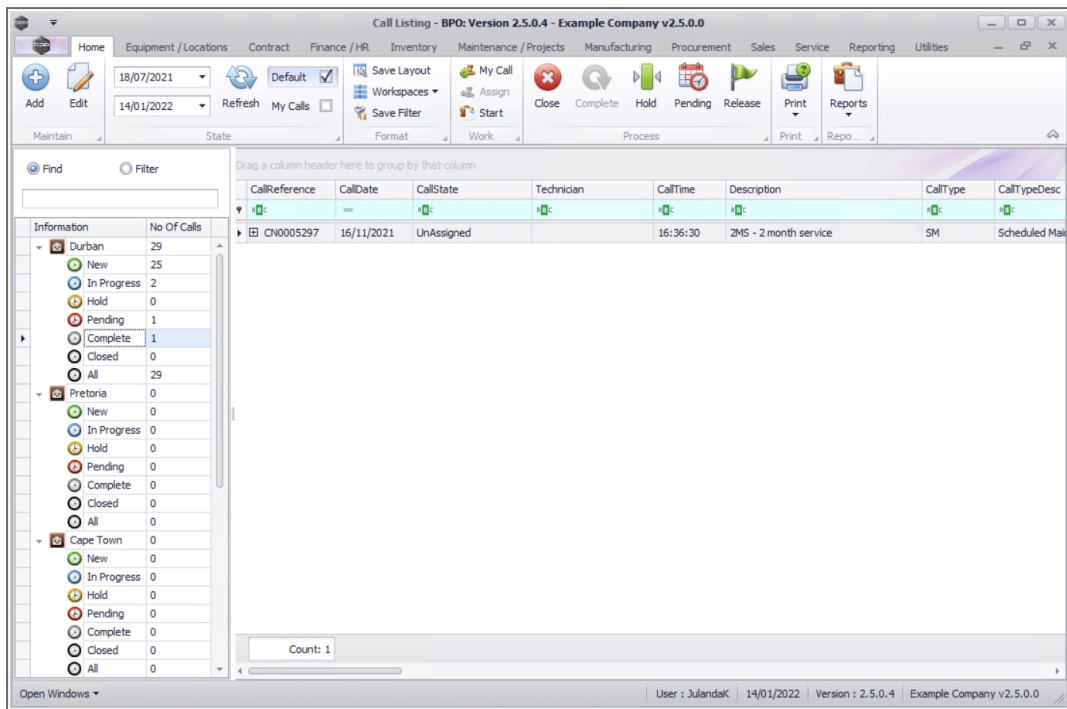
If you need to process something on a work order linked to a closed call, e.g. raise a Credit Note, then the work order will need to be re-instated. The work order can then be close again.

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.

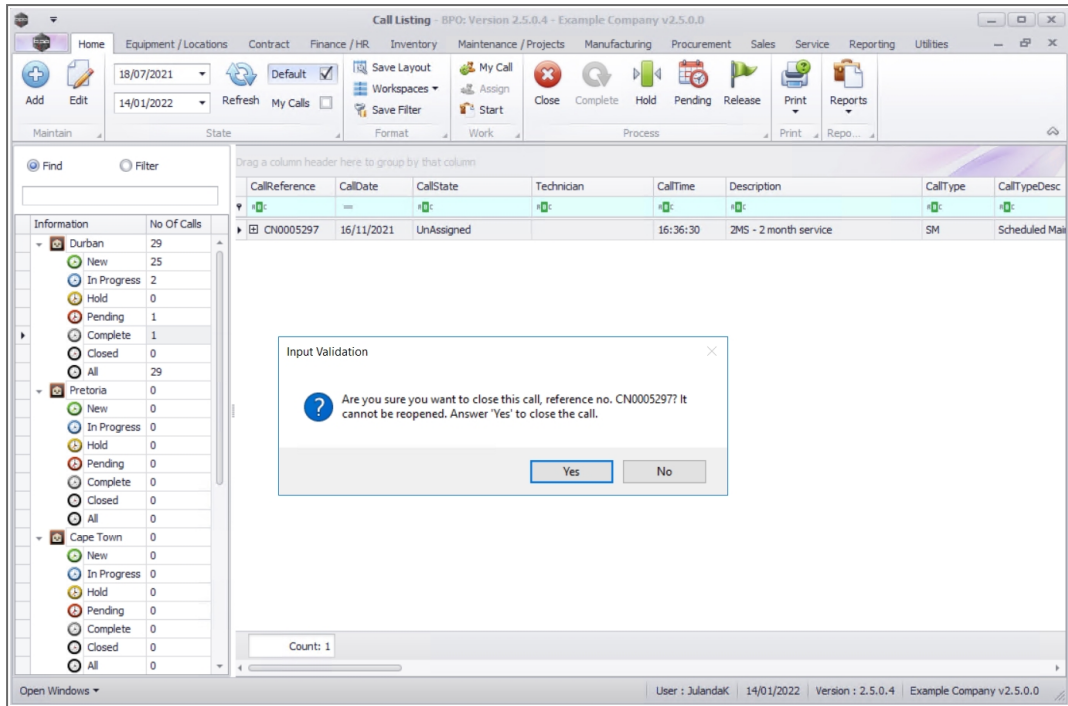
**Ribbon Access:** *Service > Calls*



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**.



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**.



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

The screenshot shows a software application window titled "Call Listing - BPO: Version 2.1.0.43 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with various icons for actions like Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area displays a table of call records with columns: CallRefere..., CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and Serial. A left-hand pane shows a filter tree for "Information" and "No Of Calls" with categories like Durban (64), New (36), In Progress (7), Hold (3), Pending (2), Complete (12), All (64), Pretoria (0), New (0), In Progress (0), Hold (0), Pending (0), Complete (0), and All (0). A dialog box titled "Call Module - Closure" is overlaid on the bottom right, featuring a red 'X' icon and the text "Please add the action taken to resolve this call?" with an "OK" button.

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	Complete	Accepted	Jade Rivers	14-96
CH0000501	29 Jun 2017	16:14:01	Loan unit - Alternate Issue	INVT	Installation	Complete	UnAssigned		1020
CH0000494	19 Jun 2017	10:30:02	Service Request	NDS	New Deal Sale	Complete	UnAssigned		
CH0000491	08 Jun 2017	14:54:02	1234	NDS	New Deal Sale	Complete	No Signature		
CH0000487	01 Jun 2017	15:09:57	New Deal Rental	NDR	New Deal Rental	Complete	No Signature		
CH0000484	31 May 2017	16:42:01	C class quick part returns	DR	Select Call Type	Complete	UnAssigned		20-85
CH0000482	31 May 2017	16:01:19	Quick Part Return 2 v2.1...	PR	Parts Requirem...	Complete	Accepted	Susan D...	20-85
CH0000477	25 May 2017	11:17:44	Calls - Quotes testing v2...	SERV	Service	Complete	No Signature		20-85
CH0000469	24 May 2017	12:20:29	Third Party Service v2.1...	SERV	Service	Complete	Accepted	Mark Mu...	20-85
CH0000463	22 May 2017	15:51:18	Return Requests - Loan ...	REP	Repair	Complete	Started Work	Mark Mu...	20-85
CH0000462	22 May 2017	15:01:28	Call - Quick part return	PR	Parts Requirem...	Complete	Accepted	Mark Mu...	20-85
CH0000450	17 May 2017	10:10:47	Test v2.1.0.3.....	PR	Parts Requirem...	Complete	UnAssigned		2020

- 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.

Call Listing - BPO: Version 2.1.0.43 - Example Company

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

22 Apr 2017 22 Dec 2017 Refresh My Calls

Save Layout Workspaces Save Filter My Call Assign Start Close Complete Hold Pending Release Print Reports

Find Filter

Drag a column header here to group by that column

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	Complete	Accepted	Jade Rivers	14-96
CH0000501	29 Jun 2017								1020
CH0000494	19 Jun 2017								
CH0000491	08 Jun 2017								
CH0000487	01 Jun 2017								
CH0000484	31 May 2017								20-85
CH0000482	31 May 2017							Susan D...	20-85
CH0000477	25 May 2017								20-85
CH0000469	24 May 2017							Mark Mu...	20-85
CH0000463	22 May 2017							Mark Mu...	20-85
CH0000462	22 May 2017							Mark Mu...	20-85
CH0000450	17 May 2017								2020

Comments - Call Ref: CH0000505 for

Home

Save Back

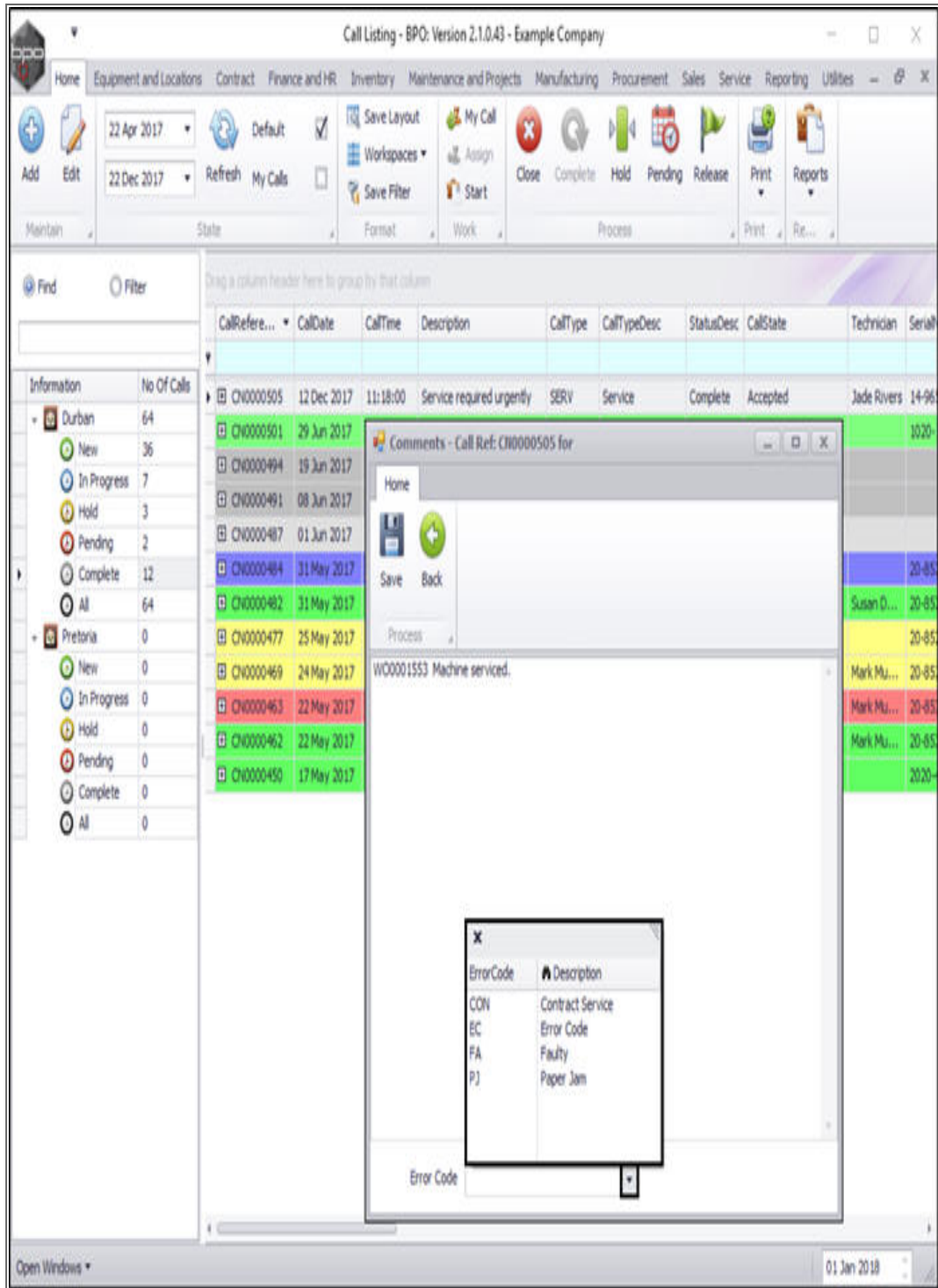
Process

W00001553 :

Error Code

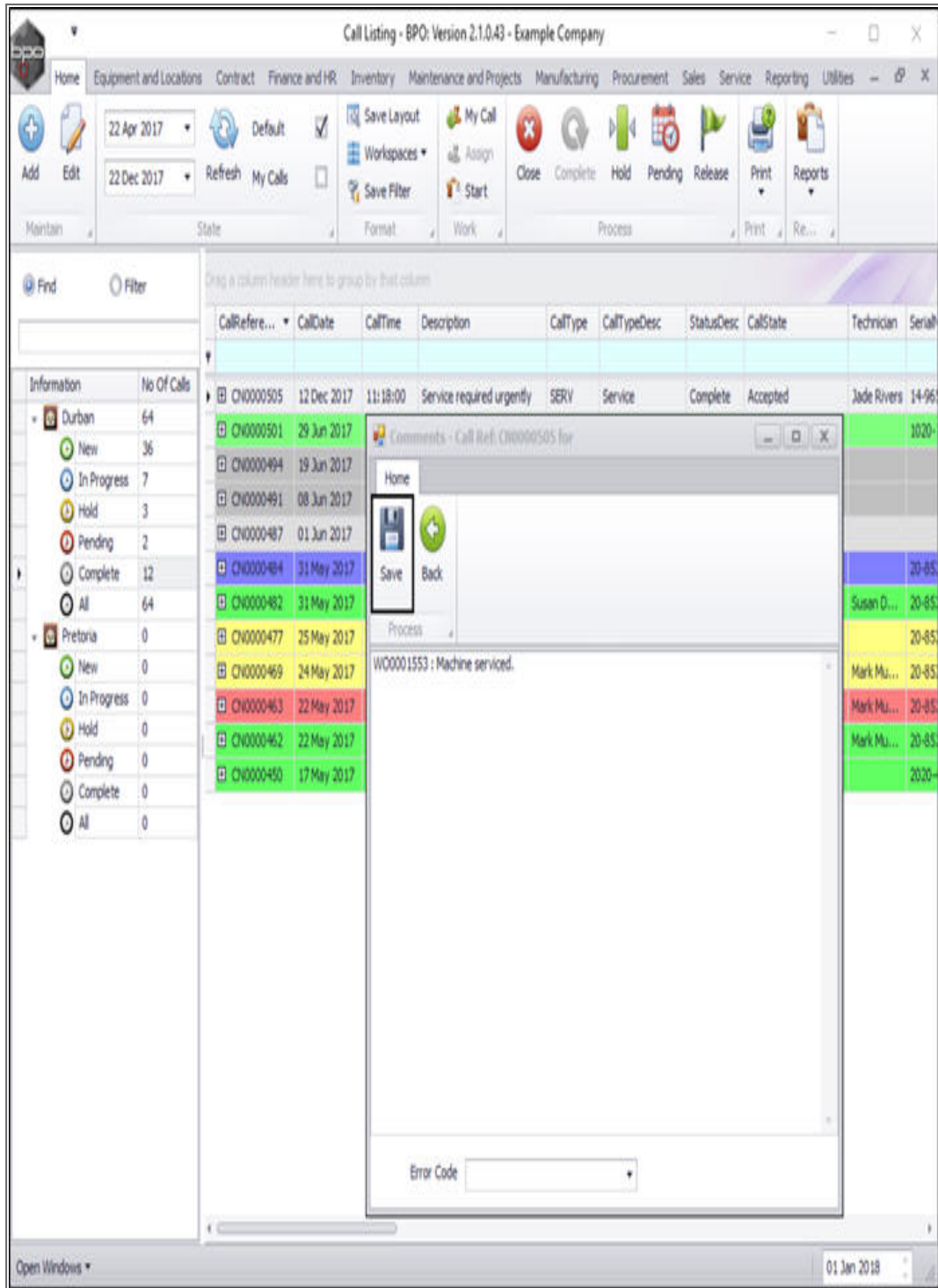
Open Windows 01 Jan 2018

- 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 have to select an error code before saving.



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





- 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*.

The screenshot shows the 'Call Listing' application interface. The main window displays a table of call records with columns: CallRefere..., CallDate, CallTime, Description, CallType, CallTypeDesc, StatusDesc, CallState, Technician, and Serial. A dialog box titled 'Call Module - Closure' is open, showing a message: 'The call, reference CH0000505, has been closed.' with an 'OK' button.

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	Serial
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	Complete	Accepted	Jade Rivers	14-96
CH0000501	29 Jun 2017	16:14:01	Loan unit - Alternate Issue	INVT	Installation	Complete	UnAssigned		1020
CH0000494	19 Jun 2017	10:30:02	Service Request	NDS	New Deal Sale	Complete	UnAssigned		
CH0000491	08 Jun 2017	14:54:02	1234	NDS	New Deal Sale	Complete	No Signature		
CH0000487	01 Jun 2017	15:09:57	New Deal Rental	NDR	New Deal Rental	Complete	No Signature		
CH0000484	31 May 2017	16:42:01	C class quick part returns	DR	Select Call Type	Complete	UnAssigned		20-85
CH0000482	31 May 2017	16:01:19	Quick Part Return 2 v2.1...	PR	Parts Require...	Complete	Accepted	Susan D...	20-85
CH0000477	25 May 2017	11:17:44	Calls - Quotes testing v2...	SERV	Service	Complete	No Signature		20-85
CH0000469	24 May 2017	12:20:29	Third Party Service v2.1...	SERV	Service	Complete	Accepted	Mark Mu...	20-85
CH0000463	22 May 2017	15:51:18	Return Requests - Loan ...	REP	Repair	Complete	Started Work	Mark Mu...	20-85
CH0000462	22 May 2017	15:01:28	Call - Quick part return	PR	Parts Require...	Complete	Accepted	Mark Mu...	20-85
CH0000450	17 May 2017	10:10:47	Test v2.1.0.3.....	PR	Parts Require...	Complete	UnAssigned		2020

- 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**.

The screenshot displays the 'Call Listing' window in the BPO software. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with various icons for actions such as Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area features a search and filter section on the left, a table of call records, and a summary table for different locations and statuses.

CallRefere...	CallDate	CallTime	Description	CallType	CallTypeDesc	StatusDesc	CallState	Technician	SerialNo
CH0000509	15 Dec 2017	10:27:25	Machine no receiving fax ...	IT	IT Requirement	Hold	UnAssigned		
CH0000508	12 Dec 2017	13:18:00	Paper not feeding throug...	REP	Repair	Closed	UnAssigned		2020
CH0000507	12 Dec 2017	13:17:05	Paper not feeding throug...	REP	Repair	New	UnAssigned		2020
CH0000506	12 Dec 2017	12:17:21	Paper Jam machine has s...	REP	Repair	New	UnAssigned		12-9
CH0000505	12 Dec 2017	11:18:00	Service required urgently	SERV	Service	Closed	Accepted	Jade Rivers	14-9
CH0000504	22 Nov 2017	12:46:33	HW001111	NDR	New Deal Rental	New	UnAssigned		
CH0000503	22 Nov 2017	10:41:25	New Deal Sale Installation	NDS	New Deal Sale	In Progress	Accepted	Jade Rivers	1818
CH0000502	06 Oct 2017	10:18:07	New Client Installaton	INST	Installation	Hold	UnAssigned		1020
CH0000501	29 Jun 2017	16:14:01	Loan unit - Alternate Issue	INST	Installation	Complete	UnAssigned		1020
CH0000500	21 Jun 2017	12:06:28	NDS - Test Credit and ret...	NDS	New Deal Sale	New	UnAssigned		
CH0000499	21 Jun 2017	10:01:09	1234	NDS	New Deal Sale	New	Awaiting Acceptance	Ben John...	
CH0000498	20 Jun 2017	12:08:13	Test call for swap out - in...	PR	Parts Requirem...	New	UnAssigned		2020
CH0000497	20 Jun 2017	08:27:27	Test edit call linked to ass...	TEST	Testing	New	Awaiting Acceptance	Joel James	14-9
CH0000496	19 Jun 2017	12:14:44	TT002 - Weekly - Call per ...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	
CH0000495	19 Jun 2017	12:03:24	TT071 - 2 Weekly - Call p...	SM	Scheduled Man...	New	Awaiting Acceptance	Belinda S...	an12
CH0000494	19 Jun 2017	10:30:02	Service Request	NDS	New Deal Sale	Complete	UnAssigned		
CH0000493	15 Jun 2017	12:28:25	Test ofNote Totals for Pri...	NDS	New Deal Sale	New	UnAssigned		
CH0000492	15 Jun 2017	12:06:26	Paper jamming in printer	DR	Select Call Type	In Progress	Accepted	Mark Mu...	20-8
CH0000491	08 Jun 2017	14:54:02	1234	NDS	New Deal Sale	Complete	No Signature		
CH0000490	08 Jun 2017	14:50:42	1234	NDS	New Deal Sale	Pending	No Signature		
CH0000489	07 Jun 2017	12:45:24	test	NDS	New Deal Sale	New	UnAssigned		
CH0000488	06 Jun 2017	10:20:09	Test creating a call with t...	INST	Installation	New	UnAssigned		
CH0000487	01 Jun 2017	15:09:57	New Deal Rental	NDR	New Deal Rental	Complete	No Signature		
CH0000486	01 Jun 2017	15:06:59	Call - Orders	NDR	New Deal Rental	New	UnAssigned		

Summary Table:

Information	No Of Calls
Durban	64
New	36
In Progress	7
Hold	3
Pending	2
Complete	11
All	64
Pretoria	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
All	0

- **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.

The screenshot displays the 'Call Listing' application interface. The main window title is 'Call Listing - BPO: Version 2.1.0.43 - Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Refresh, My Calls, Save Layout, Workspaces, Save Filter, My Call, Assign, Start, Close, Complete, Hold, Pending, Release, Print, and Reports. The main area contains a table with the following columns: Description, CreateUserName, CloseUserName, SLAHours, ElapsedHours, SLAZone, DeptCode, and DeptName. The table is filtered to show calls from Durban. A row is highlighted in red, and the 'CloseUserName' cell for that row is selected with a black border, showing the name 'AbigaM'. A left-hand navigation pane shows a tree view of call statuses and locations. The status 'All' is selected under Durban, showing 64 calls. The status 'All' is also selected under Pretoria, showing 0 calls. The date '01 Jan 2018' is displayed in the bottom right corner.

Description	CreateUserName	CloseUserName	SLAHours	ElapsedHours	SLAZone	DeptCode	DeptName
	AbigaM		0	0.00	0		
	AbigaM	AbigaM	8	0.00	0	Tech	Technical
	AbigaM		8	131.22	0	Tech	Technical
	AbigaM		0	132.22	0	Tech	Technical
	AbigaM	AbigaM	8	0.00	0		
	AbigaM		0	259.23	0	Tech	Technical
	AbigaM		0	0.00	0		
	AbigaM		8	0.00	0	Tech	Technical
	JudithM		8	0.00	0	Tech	Technical
	BiancaD		0	1260.90	0	Sales	Sales Department
	BiancaD		0	1262.98	0		
	BiancaD		0	1269.87	0	Sales	Sales Department
	BiancaD		8	1273.55	0		
	BiancaD		8	1278.77	0	Tech	Technical
ils Centre	BiancaD		2	1278.95	0	Sales	Sales Department
	JudithM		0	0.00	0	Tech	Technical
	BiancaD		0	1297.03	0	Tech	Technical
	JudithM		0	0.00	0	Tech	Technical
	BiancaD		0	0.00	0		
	BiancaD		0	0.00	0	Tech	Technical
	BiancaD		0	1351.25	0	Tech	Technical
	BiancaD		0	1362.67	0		
	JudithM		0	0.00	0	Tech	Technical
	JudithM		0	1385.40	0	Tech	Technical



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