

SERVICE

VIEW CALL CLOSURE EXCEPTION DETAILS

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 are as follows:

- 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:
 - Part requests
 - Travel
 - Warranties

¹BPO2 v2.5.1.3 or higher.

²v3.0.0.1

- Sub-contracts
- Services
- Work expense
- Labour

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.



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

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derby / 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	DNST	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	blanad	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
CH0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000355	TIA001	Titam 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 let 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	DNST	My work - work order linked to a call. Installation at non client location	Complete	2		29/03/2017
CH0000447	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per W/O	Complete	2	W00001262 : call closed	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	DNST	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	ABCYZ123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

VIEW CLOSURE EXCEPTIONS

- Click on the little (+) to expand the **Closure Exceptions** sub grid.

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	blancad	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
CH0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000333	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	TIAD01	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	15/09/2016	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	T10001 - Daily - Call per WO	Complete	2	W00001262 : call closed	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 scheduling	Complete	2		05/05/2017
CH0000468	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
CH0000498	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	ABCV2123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

- The Closure Exceptions sub grid will open, displaying the list of exceptions.

CallReference	Description	ClosureType
CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SBW
CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP
CH0001004	There are still or notes which need to be authorised. Please action these items before closing.	SCRN
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.	WOTR
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.	WOCR
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.	INFP
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

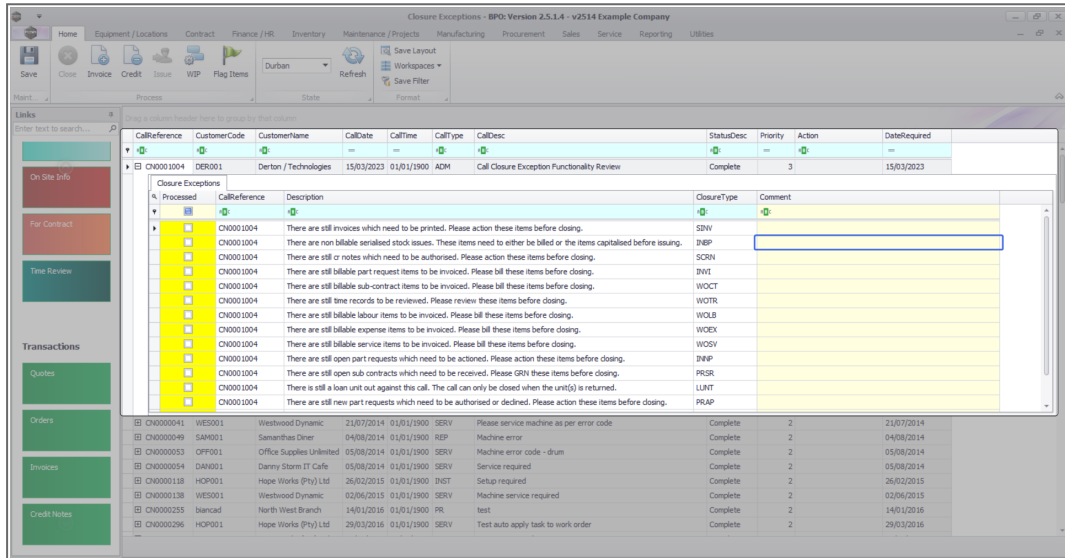
QUICK ACCESS EXCEPTION ITEM ACTIONS

- Double click on any of the exception lines to open the relevant screen required for corrective action.

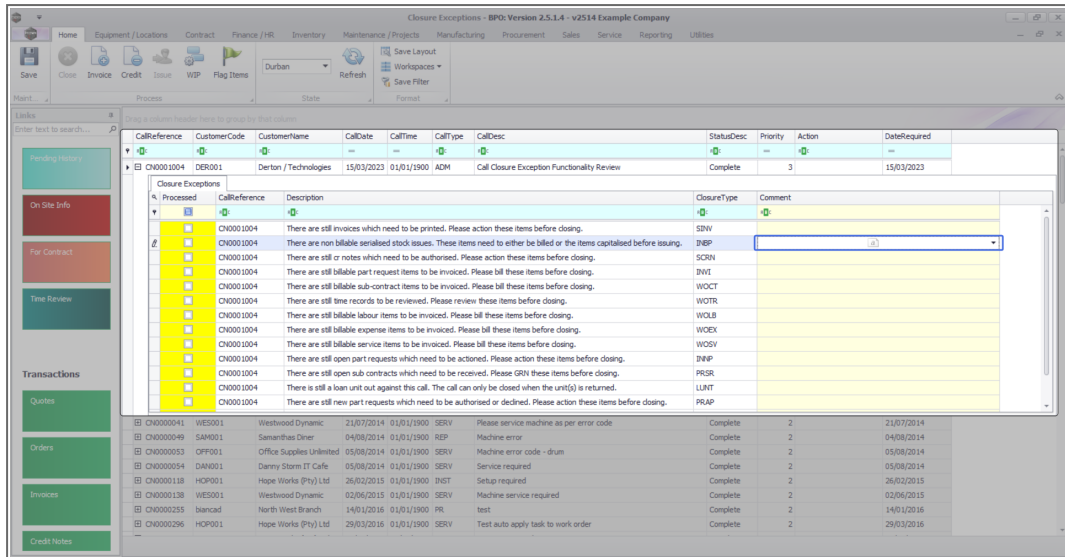
- For example, double clicking on an exception item where an outstanding part request exists - double clicking on that line will open the Part Request screen so that the stock can be issued.

ADD A COMMENT

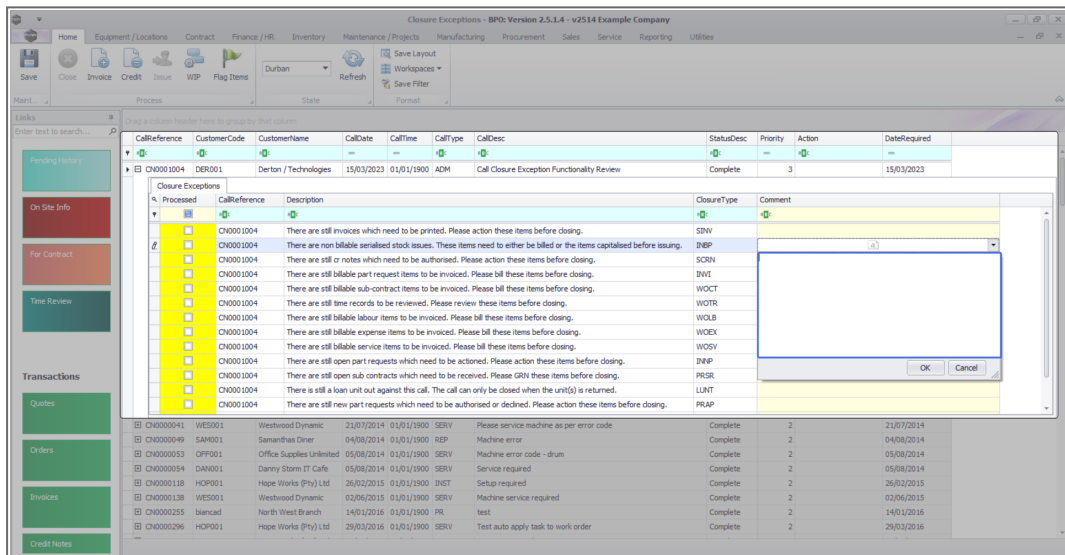
- Click in the **Comments** field for the Exception you would like to add a note to.



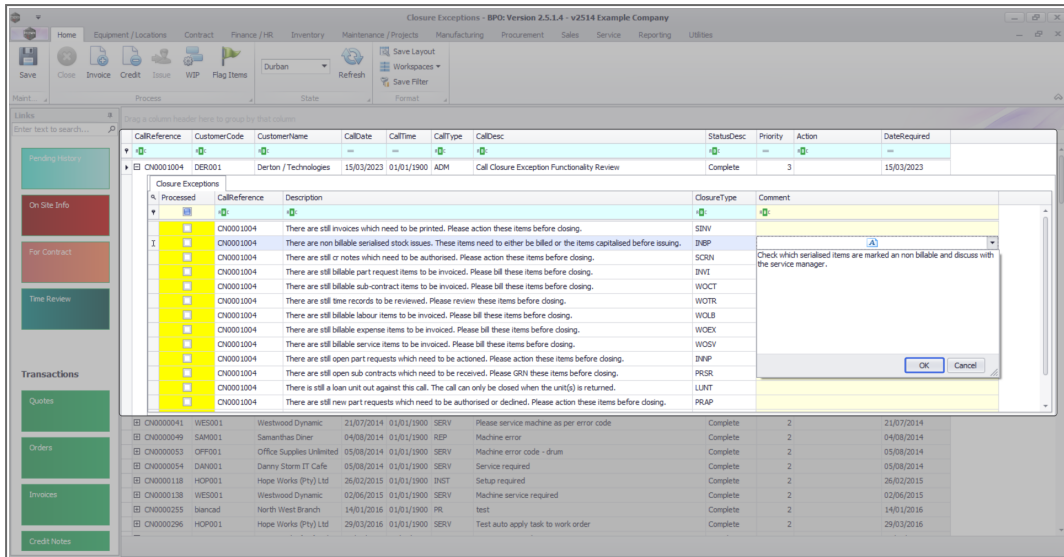
- A little notepad icon will appear in the centre of the field, and a drop down arrow will appear on the right hand side of the field.



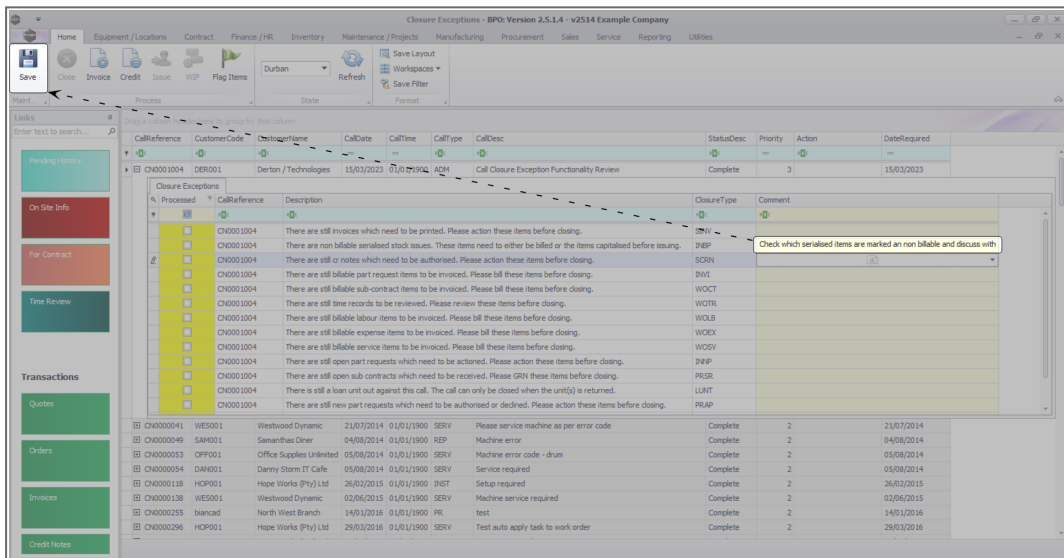
- Click in the field again, or on the arrow.
- The drop down Comments box will open.



- Type in your comment.
- Click on **OK**.
- You can continue to add comments to other Exceptions on this and other calls on the list.



- Once done, Click on **Save**.



- All expanded Closure Exception sub grids will close and a message box will come up, saying: **Closure Exceptions have been updated successfully.**

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CH0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	2		02/06/2015
CH0000255	biancod	North West Branch	14/01/2016	01/01/19			Complete	2		14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/19			Complete	2		29/03/2016
CH0000320	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19			Complete	2		09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19			Complete	2		09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19			Complete	2		09/06/2016
CH0000355	TIA001	Titan Group	22/06/2016	01/01/19			Complete	2		22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/19			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	15/09/2016	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	DNST	My work - work order linked to a call. Installation at non client location	Complete	2		29/03/2017
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CH0000447	OFF001	Office Supplies Unlimited	05/05/2017	01/01/1900	SERV	Test call for start and end work on a call vs scheduling	Complete	2		05/05/2017
CH0000468	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	DNST	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	ABCKY2123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

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](#)

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