

# SERVICE

# **CLOSURE EXCEPTIONS - CREDIT A CALL**

If you need to credit a call, you can add the Credit Note directly from the Closure Exception Listing screen.

## **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.

<b>.</b> .						Closur	e Exceptio	ens - BPO: Version 2.5.1.4 - v2514 Example Company					_ & x
	Home Eq	uipment / Locations C	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utilit	ies				_ & ×
Save	Close Invol	ice Credt Issue	VIP Flag Items	Durban 👻	Refresh	Save Layou Workspace Save Filter	ıt s▼						
The last													
Enter te		Drag a column head											
		CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
		<u>▼ 40</u> 4	4 <b>0</b> 4	AQC.	-	-	1 <b>0</b> 0	1 <b>0</b> :	* <b>0</b> :	-	4 <b>D</b> ¢	-	â
		→	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	1	1	15/03/2023	
On			WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	-		21/07/2014	
		⊞ CN0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete			04/08/2014	
			OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	2		05/08/2014	
For			DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete			05/08/2014	
			HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete			26/02/2015	
		E CN0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	-		02/06/2015	
Tim			biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	2		14/01/2016	
		E CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
Tran	sactions		TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete			22/06/2016	
			HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete			13/09/2016	
Qu		E CN0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete			13/09/2016	
			HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete			26/09/2016	
		E CN0000228	YES001	Young Electric	18/11/2015	01/01/1900	PR	Check Contract Detail record in place after partial non stock return	Complete			18/11/2015	
Ore	iers		HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	INST	My work - work order linked to a call.Installation at non client loction	Complete	-		29/03/2017	
0.0010		E CN0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per WO	Complete		WO0001262 : call closed	12/04/2017	
			OFF001	Office Supplies Unlimited	05/05/2017	01/01/1900	SERV	Test call for start and end work on a call vs ticketing	Complete			05/05/2017	
			HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete			17/05/2017	
Invoices			HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete	-		24/05/2017	
		E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete			08/06/2017	
	_		OFF001	Office Supplies Unlimited	06/06/2017	01/01/1900	INST	Test creating a call with the required date field filled in.	Complete	3		06/06/2017	
Cre			HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete	1		15/06/2017	
		E CN0000491	ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	1		15/06/2017	

Help v2.5.0.14 - Pg 1 - Printed: 25/06/2024



## **CREDIT THE CALL**

• Click on the **Credit** button.

						Closu	e Exceptio	ens - BPO: Version 2.5.1.4 - v2514 Example Company					- 8 x
	Home Equip	ment / Locations (	Contract Financ	e/HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utilit	ies				_ & ×
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Save	Close Invoice	Credit Issue 1	WIP Flag Items		Refresh	Save Filter							
		Process											~
Linke													
Enter text													
		CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
		Υ 1□:	100	4 <b>0</b> :			<b>ا</b> ت:	1 <b>0</b> :	* <b>0</b> :		4 <b>0</b> 0		÷
		▶	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
On Sit	te Info		WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2014	
		⊞ CN0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete		2	04/08/2014	
			OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014	
For Co		E CN0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete		2	05/08/2014	
			HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete		2	26/02/2015	
		⊞ CN0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
Time F	Review		biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2016	
		⊞ CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
		⊞ CN0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
Transa	actions		TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete		2	22/06/2016	
	accorto		HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete		2	13/09/2016	
Quote		⊞ CN0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete		2	13/09/2016	
			HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete		2	26/09/2016	
		⊞ CN0000228	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	
Order	<i></i>		HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	INST	My work - work order linked to a call.Installation at non dient loction	Complete		2	29/03/2017	
Cruer		⊞ CN0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per WO	Complete		2 WO0001262 : call closed	12/04/2017	
			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	
		E CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete		2	17/05/2017	
Invoices		HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete		2	24/05/2017		
		E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete		2	08/06/2017	
		E CN0000488	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	
Credit		E CN0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete		2	15/06/2017	
			ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete		2	15/06/2017	Ψ

• The **Credit Note** Maintain screen will open, listing the customer information.

Add new Custor	r Credit Note - BPO: Version 2.5.1.4 - v2514 Example Comp	pany		- 8 ×								
Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Maintenan	facturing Procurement Sales Service Reporting	Utilities		_ & ×								
Save Back Delete Save Layout Workspaces Item												
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Customer Name Derton / Technologies 🔑 * Reference	Billing address											
Contact Name Maggie Smart 🔑 * Status N	PO Box 741 ,0 + Forest Hills											
Commercial Default • Date & Time 06/09/2023 • 15:59:46 +	Upper Highway Area											
Salesman Blanca Du Tolt *	Shipping address											
Billing Customer Derton / Technologies P Billing Contact P	ρ											
Cr Note Currency South African Rand Exchange Rate 1 🗘												
Tax Rate 15.00 - 15 🗇												
Return Items to Store	Addresses Related Ref											
SuppressOnPrint ItemType ItemCode ItemDescription CrNoteLineDescription	* BatchSerialNo WarehouseName Quantity Unit	tCost Markup Discount ItemPrice	BaseCcyPrice TaxRate Dep	artment ReturnToStore Rep								
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			Grand Total	0.00								
Open Windows *		User	: Bianca   06/09/2023   Version :	2.5.1.4 v2514 Example Company								

For a detailed handling of this topic refer to Calls - Add a Credit Note



#### **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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