

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.

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	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
CH0000320	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	TIAG01	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 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	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 parbal 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
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01:01:1900	SH	TT0001 - Delay - 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 scheduling	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	ABCVZ123	ABC Shoe Co	08/06/2017	01:01:1900	NDS	1234	Complete	2		15/06/2017

CREDIT THE CALL

- Click on the **Credit** button.

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
CH0000128	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	2		02/06/2015
CH0000235	BanCo6	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 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	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	SH	T10001 - Daily - Call per W/O	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 scheduling	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	ABCYZ123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

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

Customer Name: Derton / Technologies
 Contact Name: Maggie Smart
 Commercial: Default
 Salesman: Bianca Du Toit
 Billing Customer: Derton / Technologies
 Cr Note Currency: South African Rand
 Tax Rate: 15.00

Reference: [Blank]
 Status: N
 Date & Time: 06/09/2023 15:59:46
 Billing Contact: [Blank]
 Exchange Rate: 1

Billing address: PO Box 741, Forest Hills, Upper Highway Area, 1234
 Shipping address: [Blank]

SuppressOnPrint	ItemCode	ItemDescription	CrNoteLineDescription	BatchSerialNo	WarehouseName	Quantity	UnitCost	Markup	Discount	ItemPrice	BaseCrPrice	TaxRate	Department	ReturnToStore	Rep
Select typ...															

Sub Total: 0.00
 VAT: 0.00
 Grand Total: 0.00

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](#)

MNU.125.004

