

SERVICE

CLOSURE EXCEPTIONS – FLAG ITEMS

Flagged items as processed indicates that you have actioned the items that were preventing call closure.

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	TIA001	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 titaton	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	TT001 - 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

SELECT THE EXCEPTION ITEM TO FLAG

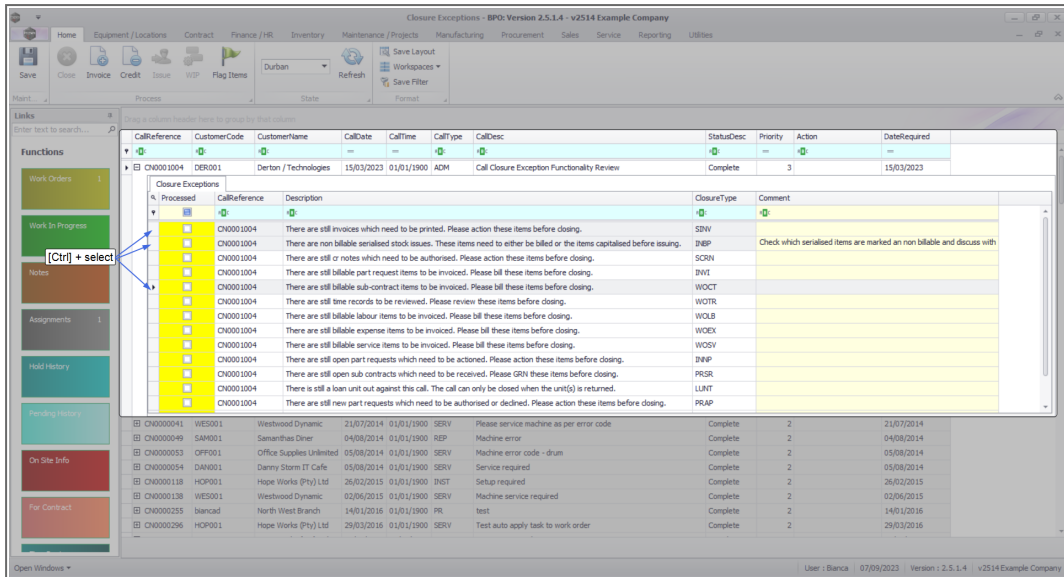
- Click in the **Check box** in front of the exception item you would like to flag as processed.
- You can continue to manually mark each item that needs to be flagged.

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

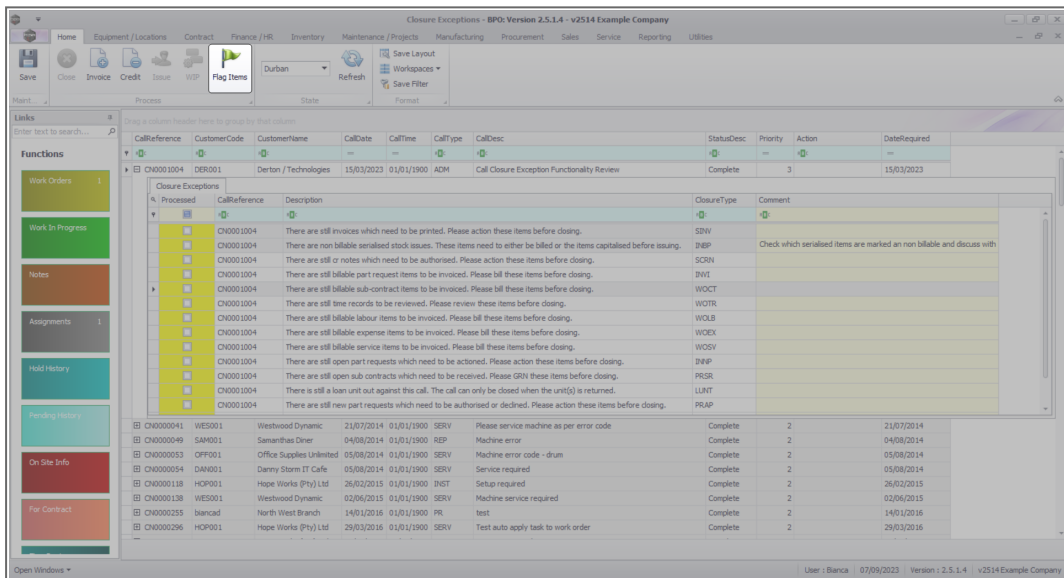
Processed	CallReference	Description	ClosureType	Comment
<input type="checkbox"/>	CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SNV	
<input checked="" type="checkbox"/>	CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP	Check which serialised items are marked as non billable and discuss with
<input type="checkbox"/>	CH0001004	There are still or notes which need to be authorised. Please action these items before closing.	SCRN	
<input type="checkbox"/>	CH0001004	There are still billable part request items to be invoiced. Please bill these items before closing.	INVT	
<input type="checkbox"/>	CH0001004	There are still billable sub-contract items to be invoiced. Please bill these items before closing.	WOCT	
<input type="checkbox"/>	CH0001004	There are still time records to be reviewed. Please review these items before closing.	WOIR	
<input type="checkbox"/>	CH0001004	There are still billable labour items to be invoiced. Please bill these items before closing.	WOLB	
<input type="checkbox"/>	CH0001004	There are still billable expense items to be invoiced. Please bill these items before closing.	WOEX	
<input type="checkbox"/>	CH0001004	There are still billable service items to be invoiced. Please bill these items before closing.	WOSV	
<input type="checkbox"/>	CH0001004	There are still open part requests which need to be actioned. Please action these items before closing.	INPV	
<input type="checkbox"/>	CH0001004	There are still open sub contracts which need to be received. Please GRN these items before closing.	PRSR	
<input type="checkbox"/>	CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT	
<input type="checkbox"/>	CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before closing.	PRAP	

FLAG MULTIPLE ITEMS

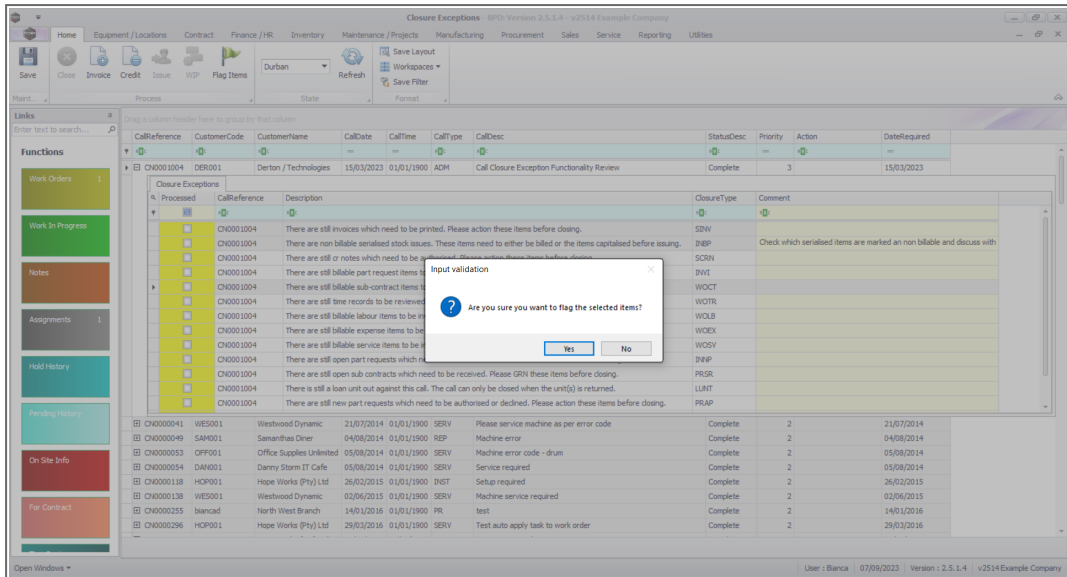
- You could also select multiple exception items, by holding down the **[Ctrl]** button and clicking each exception line you need to flag.



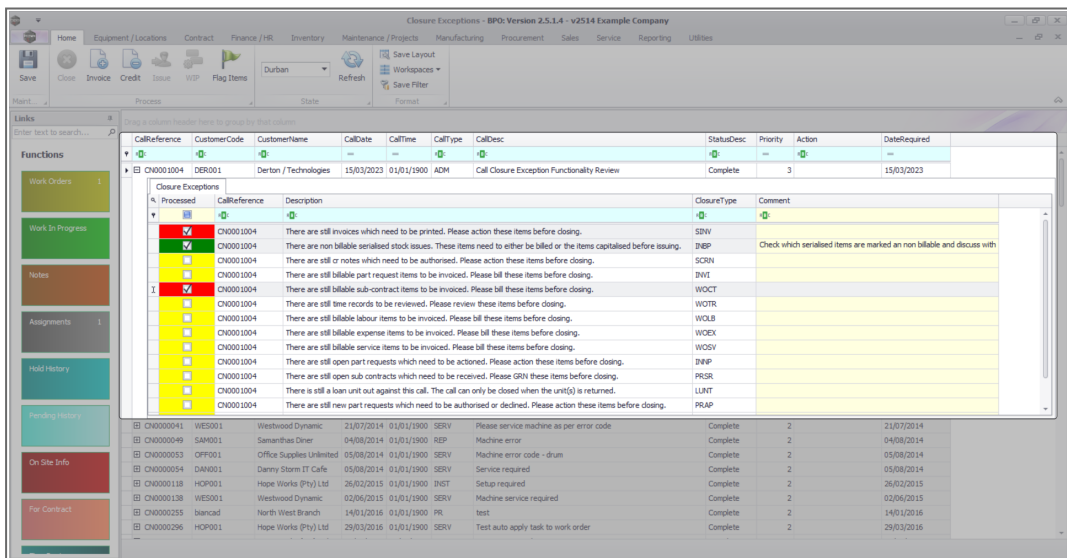
- Then click on the **Flag Items** button.



- A message box will come up, asking: **Are you sure you want to flag the selected items?**
- Select **Yes**.



- You will note in the example below that there could be 3 colours depending on the state of the exception, and indicates the following:
 - **Yellow** Unflagged Exception
 - **Red** Exception has been flagged, but does not have a comment. The comment is required.
 - **Green** Exception has been flagged and has a comment.



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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