

We are currently updating our site; thank you for your patience.

SERVICE

INTRODUCTION TO CALL CLOSURE EXCEPTIONS

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 List

- 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:

¹BPO2 v2.5.1.3 or higher, ²v3.0.0.1



- Part requests
- Travel
- Warranties
- Sub-contracts
- Services
- Work expense
- Labour

THE CALL CLOSURE EXCEPTIONS LISTING SCREEN

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.

Ψ							Closu	e Exceptio	ons - BPO: Version 2.5.1.4 - v2514 Example Company					_ 8
۵ ا	Home	Equipm	ent / Locations	Contract Finar	nce / HR Inventory	Maintenance	/ Projects	Manufact	ring Procurement Sales Service Reporting I	Utilities				_ 8
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nt			Process		4 State		Format							
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er text !	to search	P	CalReference	CustomerCode	CustomerName	CalDate	CalTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired +	
unctic	ons		7 10:	(D)	×D:	=	=	0:		10:	=	<d:< td=""><td>=</td><td></td></d:<>	=	
			/ ⊞ CN0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900		Call SLA Hours Functionality Review	Complete		3	15/03/2023	
		1	E CN0000981		Hope Works (Pty) Ltd		01/01/1900		test placing call on hold	Complete		3	11/12/2019	
			E CN0000980		Hope Works (Pty) Ltd		01/01/1900		Driver Connect - offine test	Complete		3	21/11/2019	
			E CN0000979	HOP001	Hope Works (Ptv) Ltd		01/01/1900		Third driver connect call	Complete		3	21/11/2019	
Work I	In Progress		E CN0000978	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of toners required	Complete		3	21/11/2019	
			E CN0000977	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete		3	21/11/2019	
			E CN0000973	DAN002	Dancing Shoes	18/11/2019	01/01/1900	ADM	Test call email functionality	Complete		3	18/11/2019	
lotes			E CN0000841	YES001	Young Electric	11/11/2019	01/01/1900	NDS	Test Service balances time logging	Complete		3	11/11/2019	
			E CN0000832	HOP001	Hope Works (Pty) Ltd	15/10/2019	01/01/1900	DR	it seems like call notes are not saving for call request	Complete		3	15/10/2019	
			E CN0000822	TEL005	Telerex	04/07/2019	01/01/1900	DR	test	Complete		2	11/07/2019	
	nments		E CN0000815	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test another call for overflow error	Complete		3	13/05/2019	
sagn	mena		⊞ CN0000814	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test call for overflow error	Complete		3	13/05/2019	
			E CN0000812	HOP001	Hope Works (Pty) Ltd	03/05/2019	01/01/1900	п	Test call for warranties	Complete		3	03/05/2019	
			⊞ CN0000793	HOP001	Hope Works (Pty) Ltd	11/09/2018	01/01/1900	TON	Toner replacement requirement	Complete		3	11/09/2018	
fold H	listory			HOP001	Hope Works (Pty) Ltd	25/07/2018	01/01/1900	REP	Copier not switching on	Complete		3	25/07/2018	
			⊞ CN0000772	HOP001	Hope Works (Pty) Ltd	12/07/2018	01/01/1900	REP	Client equipment not functioning - to send out a loan unit	Complete		3	12/07/2018	
				HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DR	Test all billable items.	Complete		3	11/07/2018	
			⊞ CN0000770	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	INST	Auto Invoicing Next Level	Complete		1	11/07/2018	
			E CN0000766		Hope Works (Pty) Ltd		01/01/1900		Test call for auto invoicing	Complete			10/07/2018	
			E CN0000765		Derton / Technologies		01/01/1900		Auto call invoice test	Complete			10/07/2018	
In Site	te Info		E CN0000764	APP0001	Apple Juice Inc	10/07/2018	01/01/1900	INST	New Call for testing invoicing from Auto Call Invoice.	Complete		3	10/07/2018	
			E CN0000763		Hope Works (Pty) Ltd		01/01/1900		Test call for auto invoice processing	Complete			06/07/2018	
					Apple Juice Inc		01/01/1900		Test stock over issue - auto approve part requests off	Complete			13/06/2018	
or Co	ontract		⊞ CN0000552		Hope Works (Pty) Ltd		01/01/1900		Test swap outs for tech connect	Complete			08/01/2018	
					Hope Works (Pty) Ltd		01/01/1900		Test new swap out process on tech connect	Complete			19/12/2017	
			⊞ CN0000534	GDB0001	Good Books	14/09/2017	01/01/1900	Π	Test call for the WebPortal back order report	Complete	1	2	14/09/2017	



QUICK CALL ACCESS

• You can double click on a call to view the Call Details.

For a detailed handling of this topic refer to Service - Closure Exceptions - View Call Details

RIBBON ACTION BUTTONS

MAINTAIN ACTION BUTTON

 From the Closure Exception Screen you can Save Comments or note whether the Processed for each Closure Exception item.
 Refer to <u>Add a Comment</u> or Calls - Edit a Call

Ψ						Closu	re Exceptio	ns - BPO: Version 2.5.1.4 - v2514 Example Company					- 2
Home Equip	ment / Locations	Contra	act Financ	e / HR Inventory	Maintenance	/ Projects	Manufactu	ring Procurement Sales Service Reporting	Utilities				
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		@ _	- F	Durban 🔻	GA I	Workspace	s *						
e Close Invoice	Credit Issue	WIP	Flag Items		Refresh	Save Filter							
	Drag a column		ere to group by										
	CalReferen		stomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
Save	۲ iD:	-0-		10: 	-	-	·0:	1 0 :	1 0 1	-	1 0 4	-	
Jave	► CN0001	004 DEF	R001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
1	Close	re Except	tions										
aint	9. Pro	cessed	CalRefere						ClosureType	Commen	t		
	۲		×04	 C 						*D:			
Vork In Progress	I	\checkmark	CN000100	4 There are still in	voices which r	eed to be prim	nted. Please	action these items before dosing.	SINV	Items In	voiced		
			CN000100	4 There are non b	vilable serialise	d stock issues	. These item	is need to either be billed or the items capitalised before issuing.	INBP				
			CN000100	4 There are still o	r notes which r	need to be au	thorised. Ple	ase action these items before closing.	SCRN				
lotes			CN000100	4 There are still b	ilable part req	uest items to	be invoiced.	Please bill these items before closing.	INVI				
			CN000100	4 There are still b	ilable sub-con	tract items to	be invoiced.	Please bill these items before closing.	WOCT				
			CN000100	4 There are still to	me records to	be reviewed.	Please revie	w these items before dosing.	WOTR				
ssignments 1			CN000100					bill these items before closing.	WOLB				
			CN000100					ise bill these items before closing.	WOEX				
			CN000100					e bill these items before dosing.	WOSV				
lold History			CN000100					aned. Please action these items before closing.	INNP				
			CN000100	4 There are still o	pen sub contra	ects which nee	ed to be rece	ived. Please GRN these items before closing.	PRSR				
			CN000100					only be closed when the unit(s) is returned.	LUNT				
			CN000100	4 There are still n	ew part reque	sts which nee	d to be auth	orised or declined. Please action these items before dosing.	PRAP				
	E CN0000	041 WE	S001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2014	
	⊞ CN0000	049 SAI	M001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete		2	04/08/2014	
n Site Info		053 OFF	F001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014	
in site into-	⊞ CN0000	054 DAI	N001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete		2	05/08/2014	
		118 HO	P001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete		2	26/02/2015	
	⊞ CN0000	138 WE	S001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
		255 biar	ncad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2016	
	⊞ CN0000	296 HO	P001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2016	

PROCESS ACTION BUTTONS

- Close a call when there are no further outstanding items on the call.
- <u>Invoice</u> all billable items on the call underlying work orders.



- <u>Credit</u> invoices raised against the call or underlying work orders.
- Issue stock against open part requests.
- View Work In Progress Items linked the call underlying work orders.
- Flag Items for closure processing.

Ψ			Closure Ex	cceptions - BPO: Version 2.5.1.4 - v2514 Example Company	/			- 2
Home Equip	ment / Locations Contract Fina	ance / HR Inventory	Maintenance / Projects Ma	anufacturing Procurement Sales Service Reportin	g Utilities			_ 2
	Credit Issue WIP Flag Item	6 Durban 💌	Refresh					
t		2 2						
			205	×		Priority Action	DateRequired	
unctions	lose Invoice C	redit Issue	WIP Flag	Items	10:	- 40:		
Work Orders			in ing	sure Exception Functionality Review	Complete	3	15/03/2023	
Nork Orbers								
		Process			ClosureType	Comment		
				4	8 0 0	4 0 4		
Work In Progress	I CN0001			. Please action these items before closing.	SINV	Items Invoiced		
	CN0001		lable serialised stock issues. The	ese items need to either be billed or the items capitalised before iss	uing, INBP			
	CN0001			sed. Please action these items before closing.	SCRN			
Notes	CN0001			voiced. Please bill these items before dosing.	INVI			
	CN0001			woiced. Please bill these items before closing.	WOCT			
	CN0001			se review these items before dosing.	WOTR			
Assignments 1	CN0001			 Please bill these items before closing. 	WOLB			
	CN0001			ed. Please bill these items before dosing.	WOEX			
	CN0001			d. Please bill these items before dosing.	WOSV			
Hold History	CN0001			be actioned. Please action these items before dosing.	INNP			
	CN0001			be received. Please GRN these items before closing.	PRSR			
	CN0003			call can only be closed when the unit(s) is returned.	LUNT			
	CN0001	.004 There are still ne	w part requests which need to b	be authorised or declined. Please action these items before dosing.	PRAP			
	CN0000041 WES001	Westwood Dynamic	21/07/2014 01/01/1900 SER	RV Please service machine as per error code	Complete	2	21/07/2014	
	E CN0000049 SAM001	Samanthas Diner	04/08/2014 01/01/1900 REP	P Machine error	Complete	2	04/08/2014	
On Site Info		Office Supplies Unlimited	05/08/2014 01/01/1900 SER	RV Machine error code - drum	Complete	2	05/08/2014	
orrorat anno		Danny Storm IT Cafe	05/08/2014 01/01/1900 SER	RV Service required	Complete	2	05/08/2014	
		Hope Works (Pty) Ltd	26/02/2015 01/01/1900 INS	5T Setup required	Complete	2	26/02/2015	
		Westwood Dynamic	02/06/2015 01/01/1900 SER	RV Machine service required	Complete	2	02/06/2015	
	E CN0000255 biancad	North West Branch	14/01/2016 01/01/1900 PR	test	Complete	2	14/01/2016	
For Contract				RV Test auto apply task to work order	Complete		29/03/2016	

STATE ACTION BUTTONS

- The Closure Exceptions listing can be **Refreshed**.
- Calls can be filtered by **Site**.



Service - Introduction to Call Closure Exceptions

) v				Closure E	cceptions - BPC	: Version 2.5.1.4 - v2514 Example Company					- 2 3
Home Equip	ment / Locations C	ontract Financ	e / HR Inventory	Maintenance / Projects Ma	anufacturing	Procurement Sales Service Reporting Utili	bes				_ @ :
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runcuons	► E CN0001004		Dettor		Refresh	Exception Functionality Review	Complete				
	E CN0000041		Westy			ce machine as per error code	Complete	2		21/07/2014	
	E CN0000049		Samar			or	Complete	2		04/08/2014	
	E CN0000053		Office	State		⊿ or code - drum	Complete			05/08/2014	
Work In Progress	E CN0000054	DAN001	Danny Storm IT Cafe	05/08/2014 01/01/1900 SE		required	Complete	2		05/08/2014	
	E CN0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015 01/01/1900 INS			Complete	2		26/02/2015	
	E CN0000138	WES001	Westwood Dynamic	02/06/2015 01/01/1900 SE	RV Machine	service required	Complete			02/06/2015	
Notes	E CN0000255	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 SE	RV Test au	to apply task to work order	Complete	2		29/03/2016	
	E CN0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016 01/01/1900 INS	ST Tier - O	ommercial Tier Test	Complete	2		09/06/2016	
Assignments 1		HOP001	Hope Works (Pty) Ltd	09/06/2016 01/01/1900 INS	ST Tier - O	ommercial Tier Test	Complete	2		09/06/2016	
	⊞ CN0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016 01/01/1900 INS	ST Tier - C	ommercial Tier Test	Complete	2		09/06/2016	
		TIA001	Titan Group	22/06/2016 01/01/1900 SE	RV Loan Ur	it required	Complete	2		22/06/2016	
	⊞ CN0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016 01/01/1900 RE	P Prior ca	Is list for location	Complete	2		13/09/2016	
		HOP001	Hope Works (Pty) Ltd	13/09/2016 01/01/1900 RE	P Schedul	ed Maintenance	Complete	2		13/09/2016	
	⊞ CN0000373	HOP001	Hope Works (Pty) Ltd	19/09/2016 01/01/1900 RE	P 12345		Complete	2		26/09/2016	
		YES001	Young Electric	18/11/2015 01/01/1900 PR	Check C	iontract Detail record in place after partial non stock return	Complete	2		18/11/2015	
	⊞ CN0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017 01/01/1900 INS	ST My wor	k - work order linked to a call.Installation at non client loction	Complete	2		29/03/2017	
		HOP001	Hope Works (Pty) Ltd	12/04/2017 01/01/1900 SM	TT000	- Daily - Call per WO	Complete	2	WO0001262 : call closed	12/04/2017	
	⊞ CN0000447	OFF001	Office Supplies Unlimited	05/05/2017 01/01/1900 SE	RV Test cal	for start and end work on a call vs ticketing	Complete	2		05/05/2017	
On Site Info		HOP001	Hope Works (Pty) Ltd	17/05/2017 01/01/1900 PR	Error co	de	Complete	2		17/05/2017	
	E CN0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017 01/01/1900 SE	RV Contrac	t Service Test v2.1.0.5	Complete	2		24/05/2017	
	E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017 01/01/1900 ND	R New De	al Rental	Complete	2		08/06/2017	
For Contract	E CN0000488	OFF001	Office Supplies Unlimited	06/06/2017 01/01/1900 INS	ST Test cre	ating a call with the required date field filled in.	Complete	2		06/06/2017	
	E CN0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017 01/01/1900 ND	S 1234		Complete	2		15/06/2017	
		ABCXYZ123	ABC SHoe Co	08/06/2017 01/01/1900 ND	S 1234		Complete	2		15/06/2017	

FORMAT BUTTONS

- **Save Layout** Saves any changes made to the data grid, such as changing column width.
- Workspaces Saves layout preferences.
- Save Filter Saves any applied filters set on the data grid.

Ŧ					Closu	re Exceptio	ns - BPO: Version 2	5.1.4 - v2514 Example Company					- 2
Home Equipme	nt / Locations Co	ontract Financ	ce / HR Inventory	Maintenance		Manufactu	ring Procurement	t Sales Service Reporting Utilit	ies				- 8
ave Close Invoice	Credit Issue W	IP Flag Items	Durban 👻	Cefresh a	Save Layo Workspac Save Filte	s •							
les a					2	Save l	.ayout						
ter text to search P	CalReference	CustomerCode	CustomerName	CallDate		Mandan .			StatusDesc	Priority	Action	DateRequired	
unctions	9 ID:	1 0 :	(D)		-	WORKS	paces +		10:		10 C		
	▶ ⊞ CN0001004	DER001	Derton / Technologies		0	C		n Functionality Review	Complete				
	E CN0000041	WES001	Westwood Dynamic	21/07/2014	1	Saver	liter	ne as per error code	Complete			21/07/2014	
	E CN0000049	SAM001	Samanthas Diner	04/08/2014					Complete			04/08/2014	
	E CN0000053	OFF001	Office Supplies Unlimited	05/08/2014		Forma	at 🔺	drum	Complete			05/08/2014	
Work In Progress		DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required		Complete			05/08/2014	
	E CN0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required		Complete			26/02/2015	
		WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service req	uired	Complete	2		02/06/2015	
Notes		biancad	North West Branch	14/01/2016	01/01/1900	PR	test		Complete	:		14/01/2016	
100003		HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task	k to work order	Complete	2		29/03/2016	
	E CN0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tie	er Test	Complete	:		09/06/2016	
		HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tie	er Test	Complete	1		09/06/2016	
Assignments 1	E CN0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tie	er Test	Complete	:		09/06/2016	
		TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required		Complete	2		22/06/2016	
	⊞ CN0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for loca	ation	Complete			13/09/2016	
Hold History	E CN0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintena	nce	Complete	-		13/09/2016	
		HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345		Complete	3		26/09/2016	
		YES001	Young Electric	18/11/2015	01/01/1900	PR	Check Contract Det	all record in place after partial non stock return	Complete	-		18/11/2015	
	⊞ CN0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	INST	My work - work ord	er linked to a call.Installation at non client loction	Complete	3		29/03/2017	
		HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Ca	ll per WO	Complete		2 WO0001262 : call dosed	12/04/2017	
		OFF001	Office Supplies Unlimited	05/05/2017	01/01/1900	SERV	Test call for start an	d end work on a call vs ticketing	Complete	2		05/05/2017	
On Site Info		HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code		Complete			17/05/2017	
		HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Te	st 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	
For Contract		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	
	⊞ CN0000-490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234		Complete	:		15/06/2017	
		ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234		Complete	1		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

BPO.MNU.125