

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

SERVICE

CLOSURE EXCEPTIONS - INVOICE CALL

If you Call Closure Exception is related to items that must be invoiced, you can invoice 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.

3 v						Closur	e Exceptio	ns - BPO: Version 2.5.1.4 - v2514 Example Company						8
Home	e Equipr	nent/Locations 0	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact	ring Procurement Sales Service Reporting I	Utilities				_	₽
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nter text to sear	rdh 🔎	CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired +		
Functions		▼ 40	1 0 4	(D)	-	-	(D)	(D)	* 0 *	-	ADC .	-		
		& ⊞ CN0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call SLA Hours Functionality Review	Complete	3	1	15/03/2023		
Work Orders 1	E CN0000981	HOP001	Hope Works (Pty) Ltd	11/12/2019	01/01/1900	ADM	test placing call on hold	Complete	3	1	11/12/2019			
		⊞ CN0000980	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	TON	Driver Connect - offline test	Complete	3	1	21/11/2019		
	⊞ CN0000979	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Third driver connect call	Complete	3		21/11/2019			
Work In Prog	gress	E CN0000978	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of toners required	Complete	3	1	21/11/2019		
		E CN0000977	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete	3	1	21/11/2019		
		E CN0000973	DAN002	Dancing Shoes	18/11/2019	01/01/1900	ADM	Test call email functionality	Complete	3	1	18/11/2019		
Notes		⊞ CN0000841	YES001	Young Electric	11/11/2019	01/01/1900	NDS	Test Service balances time logging	Complete	3	1	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	1	15/10/2019		
		⊞ CN0000822	TEL005	Telerex	04/07/2019	01/01/1900	DR	test	Complete		1	11/07/2019		
Assignments			DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test another call for overflow error	Complete	3	1	13/05/2019		
Assignments	· •	E CN0000814	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test call for overflow error	Complete	3		13/05/2019		
			HOP001	Hope Works (Pty) Ltd	03/05/2019	01/01/1900	π	Test call for warranties	Complete	3	1	03/05/2019		
		E CN0000793	HOP001	Hope Works (Pty) Ltd	11/09/2018	01/01/1900	TON	Toner replacement requirement	Complete	3		11/09/2018		
Hold History			HOP001	Hope Works (Pty) Ltd	25/07/2018	01/01/1900	REP	Copier not switching on	Complete	3	1	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	1	12/07/2018		
			HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DR	Test all bilable items.	Complete	3		11/07/2018		
Pending Histo	ory	E CN0000770	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	INST	Auto Invoicing Next Level	Complete	1		11/07/2018		
			HOP001	Hope Works (Pty) Ltd	10/07/2018	01/01/1900	INST	Test call for auto invoicing	Complete	3		10/07/2018		
		E CN0000765	DER001	Derton / Technologies	10/07/2018	01/01/1900	INSP	Auto call invoice test	Complete	3	1	10/07/2018		
On Site Info			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	HOP001	Hope Works (Pty) Ltd	06/07/2018	01/01/1900	INSP	Test call for auto invoice processing	Complete	3		06/07/2018		
			APP0001	Apple Juice Inc	13/06/2018	01/01/1900	INSP	Test stock over issue - auto approve part requests off	Complete	3		13/06/2018		
For Contract			HOP001	Hope Works (Pty) Ltd	08/01/2018	01/01/1900	DR	Test swap outs for tech connect	Complete	3	1	08/01/2018		
			HOP001	Hope Works (Pty) Ltd	19/12/2017	01/01/1900	INST	Test new swap out process on tech connect	Complete	3		19/12/2017		
		⊞ CN0000534	GDB0001	Good Books	14/09/2017	01/01/1900	Π	Test call for the WebPortal back order report	Complete		1	14/09/2017		

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

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Home Equ	ipment / Locations C	Contract Finan	ce / HR Inventory				ring Procurement Sales Service Reporting Utilit	es				
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e Close Invoid	e Credit Issue V	VIP Flag Items	Durban 🔻	Refresh	Workspace	s*						
				9	Save Filter							
s	a Drag a column head											
	CalReference	CustomerCode	CustomerName	CallDate	CalTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
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	▶ CN0001004		Derton / Technologies	15/03/2023	01/01/1900		Call Closure Exception Functionality Review	Complete		3	15/03/2023	
			Westwood Dynamic		01/01/1900		Please service machine as per error code	Complete		2	21/07/2014	
	E CN0000049		Samanthas Diner		01/01/1900		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	
	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 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	
ransactions	⊞ CN0000355	TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete		2	22/06/2016	
		HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete		2	13/09/2016	
	⊞ CN0000372	HOP001	Hope Works (Pty) Ltd		01/01/1900		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	
Orders			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	
	⊞ 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	
			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	
Terretore					01/01/1900		Error code	Complete			17/05/2017	
		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				01/01/1900		New Deal Rental	Complete		2	08/06/2017	
			Office Supplies Unlimited				Test creating a call with the required date field filled in.	Complete		2	06/06/2017	
	E CN0000490				01/01/1900		1234	Complete		2	15/06/2017	
		ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete		2	15/06/2017	

INVOICE THE CALL

• Click on the **Invoice** button.

w.					Closu	e Exceptio	ns - BPO: Version 2.5.1.4 - v2514 Example Company					- 8
Home Equipm	ent / Locations C	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utiliti	ies				- 8
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	9 #Dc					ID:	ID:				=	
	► E CN0001004				01/01/1900		Call Closure Exception Functionality Review	Complete	- 3			
On Site Info	EII CN0001004 EII CN0000041										21/07/2014	
					01/01/1900		Please service machine as per error code	Complete	-		04/08/2014	
	E CN0000049		Samanthas Diner		01/01/1900		Machine error	Complete				
			Office Supplies Unlimited				Machine error code - drum	Complete			05/08/2014	
	E CN0000054				01/01/1900		Service required	Complete	2		05/08/2014	
					01/01/1900		Setup required	Complete	2		26/02/2015	
	E CN0000138				01/01/1900		Machine service required	Complete	2		02/06/2015	
Time Review			North West Branch		01/01/1900		test	Complete	2		14/01/2016	
	E CN0000296				01/01/1900		Test auto apply task to work order	Complete	2		29/03/2016	
					01/01/1900		Tier - Commercial Tier Test	Complete	2		09/06/2016	
	E CN0000333				01/01/1900		Tier - Commercial Tier Test	Complete	2		09/06/2016	
					01/01/1900		Tier - Commercial Tier Test	Complete	2		09/06/2016	
ransactions	E CN0000355		Titan Group		01/01/1900		Loan Unit required	Complete	2		22/06/2016	
					01/01/1900		Prior calls list for location	Complete	2		13/09/2016	
Quotes	E CN0000372				01/01/1900		Scheduled Maintenance	Complete	2		13/09/2016	
	E CN0000373				01/01/1900		12345	Complete	2		26/09/2016	
	E CN0000228		Young Electric		01/01/1900		Check Contract Detail record in place after partial non stock return		2		18/11/2015	
Orders					01/01/1900		My work - work order linked to a call.Installation at non client loction	Complete	2		29/03/2017	
	⊞ 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	
	E CN0000447	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	
Involution	E CN0000458				01/01/1900		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	
		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 Notes	E CN0000-490	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	

• The Invoice maintain screen will open, listing the customer information and items that still need to be invoiced.



- Check that all items and values are correct and remember to add a reference.
- Save when done.

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1	Home	Equipment / Loc	ations Co	ontract Finan	ce / HR Inven	tory M	laintenance / Project	s Manufa	ecturing	Procu	urement	Sales	Service	Reporting Util	ties					-	₽×
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Sup	pressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDes	cription	WarehouseName *	BatchSerial	lo Qua	ntity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Department	Status			
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•		Parts	2020-147K	Black toner SP2.	Black toner SP	2020	Main Stock DBN			1.000	396.014	0.000	0.000	396.014	396.014	15.000	Sales Depar	A			
		Labour	ADMN	Administration	Administration					0.800	150.000	10.000	0.000	165.000	165.000	15.000	Sales Depar	. A			
		Labour	TECH	Technician	Technician					2.000	0.000	0.000	0.000	260.470	260.470	15.000	Sales Depar	. A			
		Sub Contracts	TEST	Test Service	Test Service					1.000	632.510	0.000	0.000	632.510	632.510	15.000	Sales Depar	. A			
		Warranty	12MSW	12 Month Suppli		lier War				1.000	0.000						Sales Depar				
		Internal Service		Call Out Fee	Call Out Fee					1.000	0.000	0.000	0.000				Sales Depar				
		Internal Service	PRI	Printing	Printing			_		1.000	0.000	0.000	0.000	350.000	350.000	15.000	Sales Depar	. A			
*		Select type																			
Com	ment					*													Sub Total		2,146.49
com	ment																		Sub Total VAT		2,146.49
																		Gra	and Total		2,468.46
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For a detailed handling of this topic refer to Calls - Invoice a Call

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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