

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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int ,		Process		State	4	Format	-							
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nter text to sear	rdh 🔎	CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired +		
Functions		▼ 40	1 <b>0</b> 4	(D)	-	-	(D)	(D)	* <b>0</b> *	-	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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er text to search P		CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired	
	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.

\$	Ψ						Add n	ew Custome	er Invoic	e - BPO	: Version 2.	.5.1.4 - v2	514 Examp	le Company						_	8 x
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			
۴		-	(D)	(0)	-O:		( <b>D</b> )	(D)	-		-	-	-	-	-	-	·0:	1 <b>0</b> :			
•		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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