

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

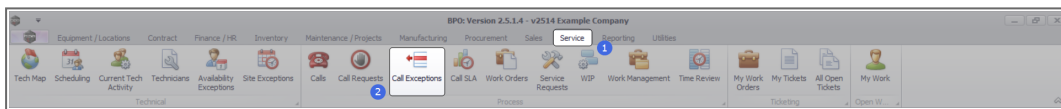
SERVICE

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.

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call SLA Hours Functionality Review	Complete	3		15/03/2023
CH0000981	HP0001	Hope Works (Pty) Ltd	11/12/2019	01/01/1900	ADM	test placing call on hold	Complete	3		11/12/2019
CH0000980	HP0001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	TON	Driver Connect - offline test	Complete	3		21/11/2019
CH0000979	HP0001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Third driver connect call	Complete	3		21/11/2019
CH0000978	HP0001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of toners required	Complete	3		21/11/2019
CH0000977	HP0001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete	3		21/11/2019
CH0000973	DAN002	Dancing Shoes	38/11/2019	01/01/1900	ADM	Test call email functionality	Complete	3		38/11/2019
CH0000941	RES001	Hyuns Electric	11/10/2019	01/01/1900	NCS	Test Service balances time logging	Complete	3		11/10/2019
CH0000832	HP0001	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
CH0000822	TEL005	Telelex	04/07/2019	01/01/1900	DR	test	Complete	2		11/07/2019
CH0000815	DAN002	Dancing Shoes	13/05/2019	01/01/1900	DNST	test another call for overflow error	Complete	3		13/05/2019
CH0000814	DAN002	Dancing Shoes	13/05/2019	01/01/1900	DNST	test call for overflow error	Complete	3		13/05/2019
CH0000812	HP0001	Hope Works (Pty) Ltd	03/05/2019	01/01/1900	IT	Test call for warranties	Complete	3		03/05/2019
CH0000793	HP0001	Hope Works (Pty) Ltd	11/09/2018	01/01/1900	TON	Toner replacement requirement	Complete	3		11/09/2018
CH0000781	HP0001	Hope Works (Pty) Ltd	25/07/2018	01/01/1900	REP	Copier not switching on	Complete	3		25/07/2018
CH0000772	HP0001	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
CH0000771	HP0001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DR	Test all billable items.	Complete	3		11/07/2018
CH0000770	HP0001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DNST	Auto Invoicing next Level	Complete	1		11/07/2018
CH0000766	HP0001	Hope Works (Pty) Ltd	10/07/2018	01/01/1900	DNST	Test call for auto invoicing	Complete	3		10/07/2018
CH0000765	DER001	Derton / Technologies	10/07/2018	01/01/1900	DNST	Auto call invoice test	Complete	3		10/07/2018
CH0000764	APP0001	Apple Juice Inc	10/07/2018	01/01/1900	DNST	New Call for testing invoicing from Auto Call Invoice.	Complete	3		10/07/2018
CH0000763	HP0001	Hope Works (Pty) Ltd	06/07/2018	01/01/1900	DNST	Test call for auto invoice processing	Complete	3		06/07/2018
CH0000762	APP0001	Apple Juice Inc	13/06/2018	01/01/1900	DNST	Test stock over issue - auto approve part requests off	Complete	3		13/06/2018
CH0000552	HP0001	Hope Works (Pty) Ltd	08/01/2018	01/01/1900	DR	Test swap outs for tech connect	Complete	3		08/01/2018
CH0000549	HP0001	Hope Works (Pty) Ltd	19/12/2017	01/01/1900	DNST	Test new swap out process on tech connect	Complete	3		19/12/2017
CH0000534	GB0001	Good Books	14/09/2017	01/01/1900	IT	Test call for the WebPortal back order report	Complete	2		14/09/2017

- 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	blanc6	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	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	TIAD01	Titam 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	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	SM	TT0001 - Daily - 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 ticketing	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	ARCYZ123	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
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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	blanc6	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	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	TIAD01	Titam 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	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	SM	TT0001 - Daily - 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 ticketing	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	ARCYZ123	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.

Add new Customer Credit Note - BPD: Version 2.5.1.4 - v2514 Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Workspaces

Maintain | Format

Customer Name: Derton / Technologies | Reference: | Billing address: PO Box 741, Forest Hills, Upper Highway Area, 1224

Contact Name: Maggie Smart | Status: N | Date & Time: 06/09/2023 15:59:46

Commercial: Default | Billing Customer: Derton / Technologies | Billing Contact: | Exchange Rate: 1

Salesman: Bianca Du Toit | Cr Note Currency: South African Rand | Tax Rate: 15.00

Return Items to Store:

Suppress/Print	Item Type	Item Code	Item Description	Cr Note Line Description	Batch/Serial No	Warehouse Name	Quantity	Unit Cost	Markup	Discount	Item Price	Base Ccy Price	Tax Rate	Department	Return To Store	Res
Select typ...																

Comment: | Sub Total: 0.00 | VAT: 0.00 | Grand Total: 0.00

User: Bianca | 06/09/2023 | Version: 2.5.1.4 | v2514 Example Company



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

