

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

SERVICE

CALL CLOSURE EXCEPTIONS - HOLD HISTORY

The **Hold History** tile is a quick way to navigate to the list of hold events for the selected call.

A call can be placed on **Hold** manually in the call centre. If a call is placed on hold, no further processing can be performed until it has been released. The hold history is generate when the call is **Placed on Hold** and **Released from Hold**.

There can be many reasons to place a call on Hold, but these reasons are based on a delay from the client's side, for example:

- Awaiting client quote confirmation
- Awaiting client response
- Client unreachable
- Account in arrears

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

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



exceptions.

					ple Company	ons - BPO: Version 2.5.1.4 - v2514 Example Co	Exception	Closur							Ŧ
-					e Reporting Uti	ring Procurement Sales Service I	Manufactu	/ Projects	Maintenance	e / HR Inventory	ontract Financ	Locations C	iquipmen	Home E	•
								Save Layou					A I	~	
							•	Workspaces		Durban 🔻	- r		1 🕑	v	
								Save Filter	Refresh		/IP Flag Items	it Issue \	oice C	Close Inv	ave
								Format		State		Process			nt ,
															iks
													P	search	
	DateRequired +	Action	Priority	tatusDesc		CalDesc	CallType		CallDate	CustomerName	CustomerCode	CalReference	- 1		
	-	1 0 0	-	0:		(D):	0	-	-	×0:	0	• D ¢		ns	unctio
	15/03/2023		3	omplete		Call SLA Hours Functionality Review		01/01/1900		Derton / Technologies	DER001	E CN0001004	. k		Work (
	11/12/2019		3	omplete		test placing call on hold		01/01/1900		Hope Works (Pty) Ltd	HOP001	E CN0000981	*		
	21/11/2019		3	omplete		Driver Connect - offline test		01/01/1900		Hope Works (Pty) Ltd	HOP001	E CN0000980			
	21/11/2019		3	omplete		Third driver connect call	SERV	01/01/1900	21/11/2019	Hope Works (Pty) Ltd	HOP001	E CN0000979	= .		
	21/11/2019		3	omplete		Driver Connect - full set of toners required		01/01/1900		Hope Works (Pty) Ltd	HOP001	∃ CN0000978		Progress	Work I
	21/11/2019		3	omplete		Driver Connect - toner delivery	SERV	01/01/1900	21/11/2019	Hope Works (Pty) Ltd	HOP001	E CN0000977			
	18/11/2019		3	omplete		Test call email functionality	ADM	01/01/1900	18/11/2019	Dancing Shoes	DAN002		- 1		
	11/11/2019		3	omplete		Test Service balances time logging	NDS	01/01/1900	11/11/2019	Young Electric	YES001				
	15/10/2019		3	omplete	all request	it seems like call notes are not saving for call requ	DR	01/01/1900	15/10/2019	Hope Works (Pty) Ltd	HOP001				
	11/07/2019		2	omplete		test	DR	01/01/1900	04/07/2019	Telerex	TEL005	∃ CN0000822	- 1		
	13/05/2019		3	omplete		test another call for overflow error	INST	01/01/1900	13/05/2019	Dancing Shoes	DAN002	E CN0000815		nents	Assign
	13/05/2019		3	omplete		test call for overflow error	INST	01/01/1900	13/05/2019	Dancing Shoes	DAN002				
	03/05/2019		3	omplete		Test call for warranties	π	01/01/1900	03/05/2019	Hope Works (Pty) Ltd	HOP001	E CN0000812			
	11/09/2018		3	lomplete		Toner replacement requirement	TON	01/01/1900	11/09/2018	Hope Works (Pty) Ltd	HOP001	E CN0000793	= 1		
	25/07/2018		3	omplete		Copier not switching on	REP	01/01/1900	25/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000781		itory	
	12/07/2018		3	omplete	out a loan unit	Client equipment not functioning - to send out a lo	REP	01/01/1900	12/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000772			
	11/07/2018		3	omplete		Test all bilable items.	DR	01/01/1900	11/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000771	= 1		
	11/07/2018		1	lomplete		Auto Invoicing Next Level	INST	01/01/1900	11/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000770			
	10/07/2018		3	omplete		Test call for auto invoicing	INST	01/01/1900	10/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000766			
	10/07/2018		3	omplete		Auto call invoice test	INSP	01/01/1900	10/07/2018	Derton / Technologies	DER001	E CN0000765			
	10/07/2018		3	omplete	I Invoice.	New Call for testing invoicing from Auto Call Invoi	INST	01/01/1900	10/07/2018	Apple Juice Inc	APP0001	E CN0000764		Info	On Sit
	06/07/2018		3	omplete		Test call for auto invoice processing	INSP	01/01/1900	06/07/2018	Hope Works (Pty) Ltd	HOP001	E CN0000763			
	13/06/2018		3	omplete	equests off	Test stock over issue - auto approve part request	INSP	01/01/1900	13/06/2018	Apple Juice Inc	APP0001	E CN0000753			
	08/01/2018		3	omplete		Test swap outs for tech connect	DR	01/01/1900	08/01/2018	Hope Works (Pty) Ltd	HOP001	∃ CN0000552		brack	For Co
	19/12/2017		3	omplete	t	Test new swap out process on tech connect	INST	01/01/1900	19/12/2017	Hope Works (Pty) Ltd	HOP001	E CN0000549			
	14/09/2017		2	omplete	rt	Test call for the WebPortal back order report	п	01/01/1900	14/09/2017	Good Books	GDB0001	E CN0000534			

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

Ψ					Closu	e Exceptio	ons - BPO: Version 2.5.1.4 - v2514 Example Company					6
Home Equ	ipment / Locations C	ontract Financ	ce / HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utiliti	es				_ d
	323	2 🕨		42 5	🖏 Save Layo	ıt						
ave Close Invoid	e Credit Issue V	VIP Flag Items	Durban 🔻	Refresh	Workspace	s *						
save close privoid	te creat 1550c v	vir Hay toolio		(enesi) 9	🖁 Save Filter							
inks	Drag a column head											
	CalReference	CustomerCode	CustomerName	CalDate	CallTime	CalType	CalDesc	StatusDesc	Priority	Action	DateRequired	
	* (D)	(D)	-O:	-	-	-0-	0	-0-	-	(D)	-	
		DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete			15/03/2023	
On Site Info		WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	1	1	21/07/2014	
	E CN0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete			04/08/2014	
		OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete			05/08/2014	
For Contract	E CN0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete			05/08/2014	
		HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete			26/02/2015	
	⊞ CN0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete			02/06/2015	
Time Review		biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete			14/01/2016	
	⊞ CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016	
		HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
	⊞ CN0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
		HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete			09/06/2016	
Transactions	⊞ CN0000355	TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete			22/06/2016	
Tunsaccions		HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete			13/09/2016	
Ouotes	⊞ CN0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete			13/09/2016	
		HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete			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			18/11/2015	
Orders		HOP001	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		WO0001262 : call closed	12/04/2017	
		OFF001	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	
	⊞ CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete			17/05/2017	
Invoices		HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete			24/05/2017	
	⊞ CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete			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			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			15/06/2017	

CALL HOLD HISTORY

• Click on the Hold History tile.



Home	e Equipa	nent / Locations C	ontract Finan	ce / HR Inventory	Maintenance			ons - BPO: Version 2.5.1.4 - v2514 Example Company aring Procurement Sales Service Reporting Utilit	ies				- 8
Me Close	e Invoice		VIP Flag Items	Durban 👻	Refresh	Save Layou Workspace Save Filter							
		Process											
ks	4												
er text to sear	rch ,0	CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
unctions		Y 100	()	×0:	-	-	10:	1D:	×0:	-	4 0 4	-	
		▶ E CN0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
	: 1	E CN0001018	DER001	Derton / Technologies	07/09/2023	01/01/1900	INST	Call exception - correct and then flag	Complete		3	07/09/2023	
		E CN0001019	DER001	Derton / Technologies	08/09/2023	01/01/1900	INST	New part requests requires approval	Complete		3	08/09/2023	
		E CN0001020	DER001	Derton / Technologies	08/09/2023	01/01/1900	INST	Open part requests need to be actioned.	Complete		3	08/09/2023	
Work In Prog	yress	E CN0001021	DER001	Derton / Technologies	08/09/2023	01/01/1900	INSP	Open sub contracts need to be received.	Complete		3	08/09/2023	
		E CN0000041	WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2014	
		E CN0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete		2	04/08/2014	
Noter			OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014	
			DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete		2	05/08/2014	
	Notes		HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete		2	26/02/2015	
			WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
Assignments	: 1		biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2016	
			HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2016	
		E CN0000330	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
		E CN0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
		E CN0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
				Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete		2	22/06/2016	
Pe Ho	old Hist	tory		Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete		2	13/09/2016	
				Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete		2	13/09/2016	
				Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete		2	26/09/2016	
òr				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	
				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		2	29/03/2017	
		H 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	
For Contract			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	
		E CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete		2	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	

• The **Hold History** listing screen will open displaying the call hold events.

> -					Hold	d Events Listing for Ca	all ,Ref no : CN0001004	- BPO: Version 2.5.1.4	- v2514 Exampl	e Company				- 8
	Home	Equipment / Local	ions Contract	Finance / HR Inve	entory Mainten	ance / Projects Mar	ufacturing Procurem	ent Sales Servi	e Reporting	Utilities				- 8
0	2		2											
Back	Save La	yout Workspaces	Refresh											
ocessi ,		Format	_ Curr											
HoldDate	Ho	oldTime	HoldReasonCode	HoldReasonCodeDesc		HoldReason		EstReleaseDate	EstReleaseTime	ReleaseDate	ReleaseTime	EmployeeName		
-	-0	c.	0	(0)		(D)		-	1 0 0	-	(0)	1 0 :		
05/12/202	23 14	1:35:22	cqc	Awaiting Client quote cor	nfirmation	Awaiting client to	confirm quote	07/12/2023	14:35:22	05/12/2023	14:35:46	Bianca Du Toit		

For a detailed handling of this topic refer to Calls - Hold History

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.125.011