

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

SERVICE

CALLS – CLOSE A CALL

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

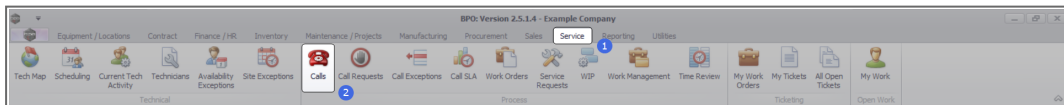
A call that has been closed, can only be viewed in the **All** status.

A Call can be [re-instated](#) after it has been closed.

If you need to process something on a work order linked to a closed call, e.g. raise a Credit Note, then the work order will need to be [re-instated](#). The work order can then be close again.

The system will notify you of any outstanding items, e.g. billable items not yet invoiced, for the call. You will have to act on the relevant messages before the call can be closed.

Ribbon Select **Service > Calls**



- The **Call Listing** screen will be displayed.

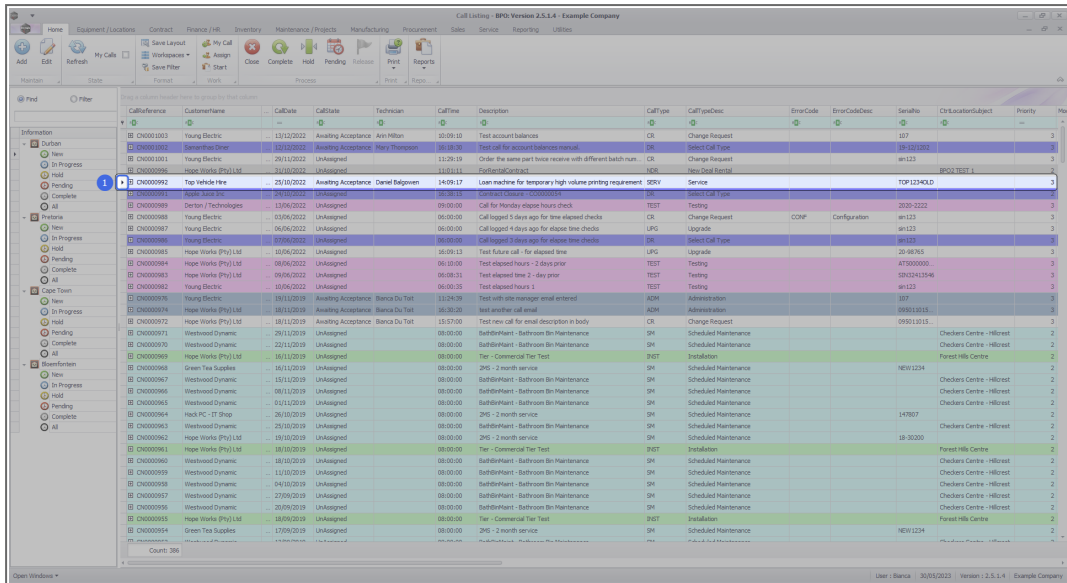
¹BPO2 v2.5.1.3 or higher

Calls - Close a Call

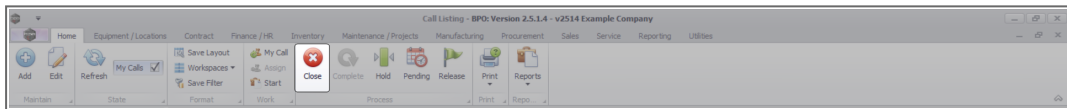
CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	09:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Sarawati Drive	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			19-12/202		3
EN0001001	Young Electric	29/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Battery/PC	IGR	New Deal Rental				BPOZ TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Beljouis	14:59:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP1234567		3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		06:58:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Denton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	03/06/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 3 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	03/06/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
EN0000984	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	06/06/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
EN0000982	Young Electric	18/06/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	16/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

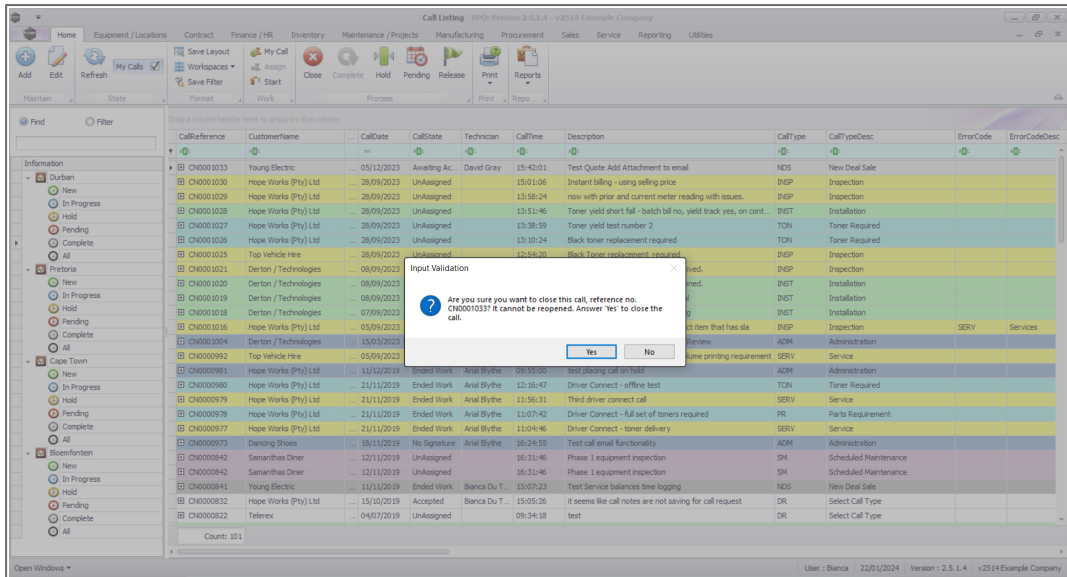
- Select the **Call** you wish to work with.



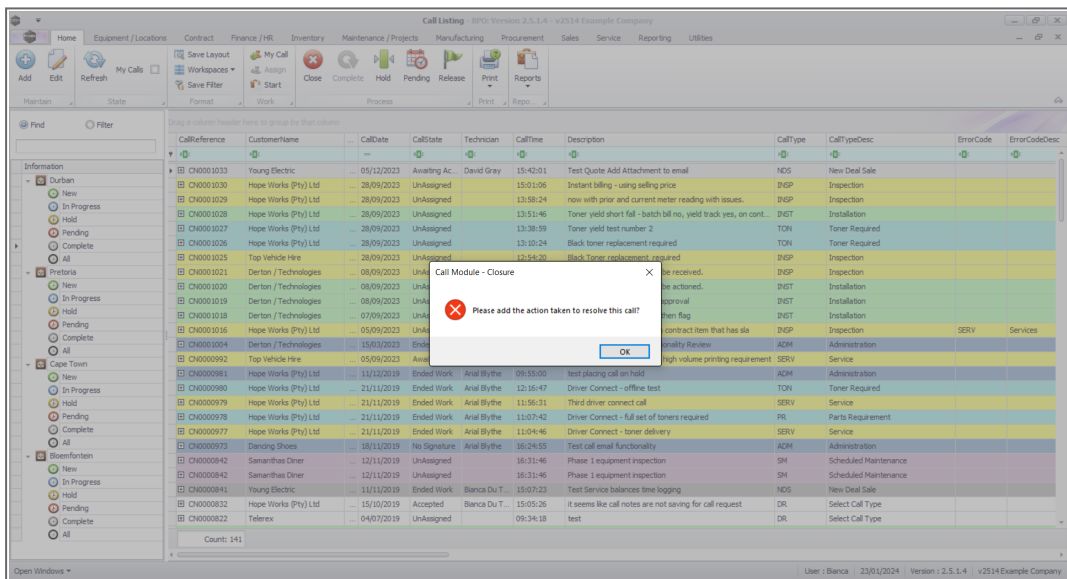
- Click on the **Close** button.



- When you receive the **Input Validation** message to confirm;
 - Are you sure you want to close this call, reference no. CN[ref. number]? It cannot be reopened. Answer 'Yes' to close the call.
- Click on **Yes**.

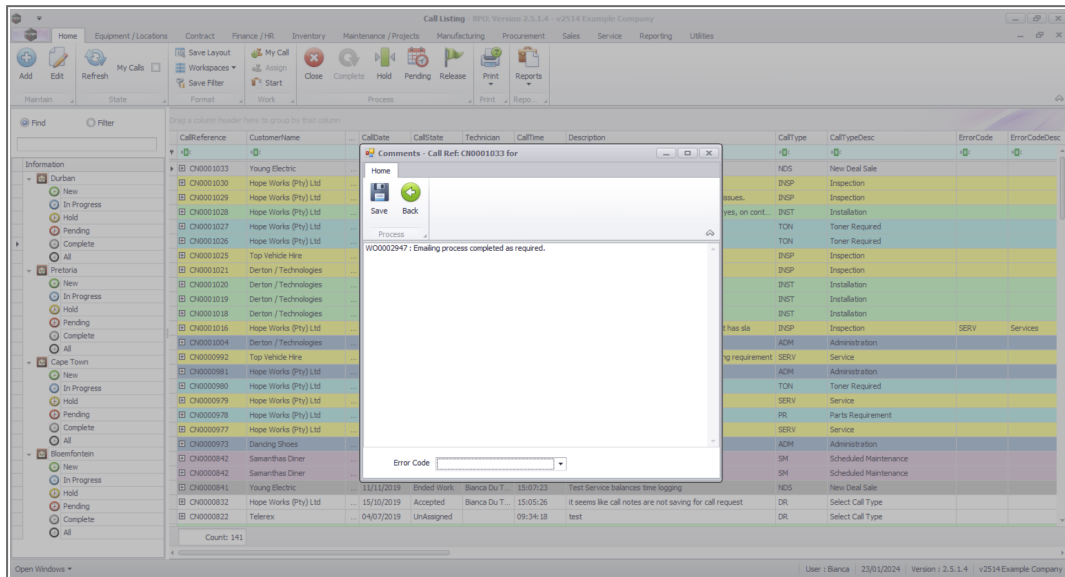


- When you receive the **Call Module - Closure** message to confirm;
 - Please add the action taken to resolve this call?
- Click on **OK**.

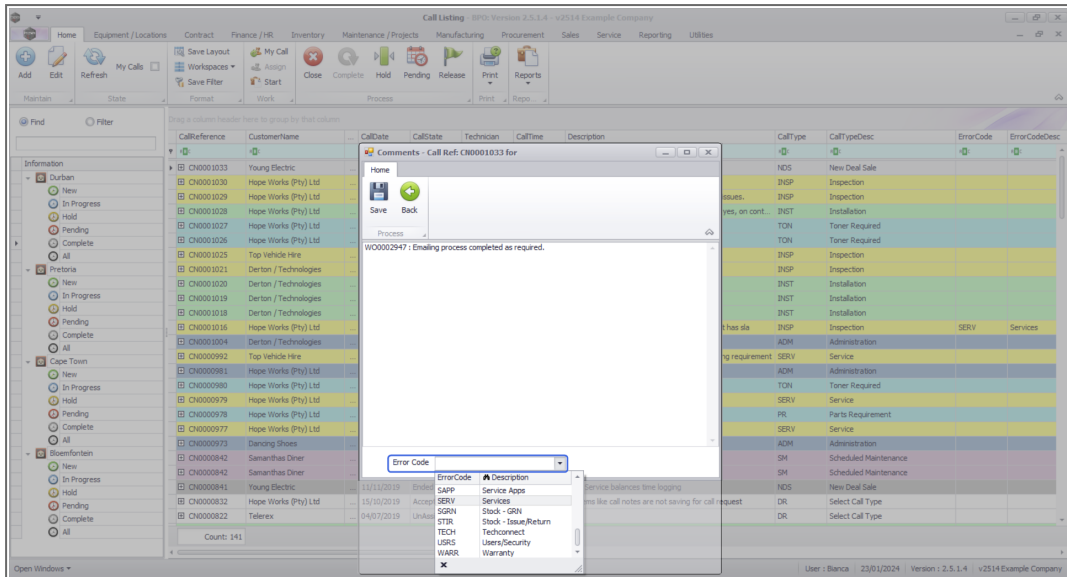


- The **Comments - Call Ref: []** for screen will pop up.
- Any **work orders** linked to this call will be listed in the **text box**.
- Type in the **call closure comments** next to the work order numbers.

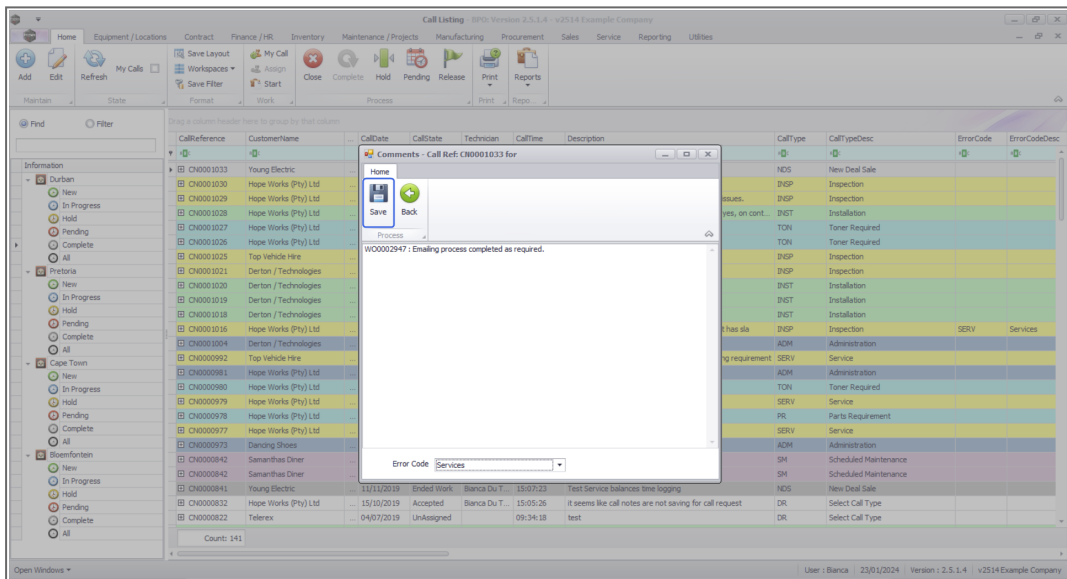
- **Note:** These comments will automatically pull through if you have updated the rectification comments on the work order.



- You have the option to select an **Error Code** at call closure.
- Click on the **drop-down arrow** in the **Error Code** field to display the **Error Code** menu.
 - **Note:** If the company configuration is set so that this is mandatory - then you will have to select an error code before saving.

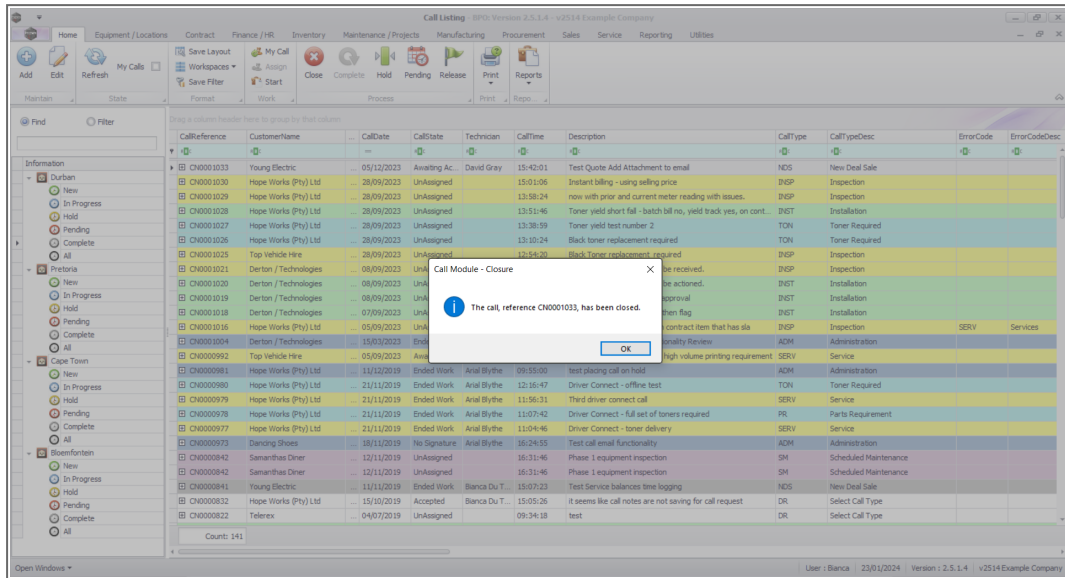


- When you have finished editing this Comments screen, click on **Save**.



- A **Call Module - Closure** message box will pop up, informing you that;
 - **The call, reference [], has been closed.**
- Click on **Ok**.

- **Note:** On close, the system will automatically **close** the linked **work order**.



- You can now view the closed call in the **Call Listing** by searching for the specific call number, which will open the call maintain screen. **Closed** calls have been removed from the Call Screen for performance enhancements.

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