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

SERVICE

VIEW CALL CLOSURE EXCEPTION DETAILS

The **Call Closure Exceptions** screen is a new screen (in BPO2)[1] that displays the list of Close Call Exceptions returned by the (Auto Close Call Service)[2], with the corrective action. You can easily access the call, as well as the call related functions and transaction tiles. These exceptions can then be processed on BPO, and once flagged as processed, the call can then either be closed manually or left to be auto closed by the Close Call Service.

The Call Closure Exceptions List

- New part requests requires approval (where approval is required).
- Open part requests need to be actioned.
- Open sub contracts need to be received.
- Invoices need to be printed.
- Credit notes need to be authorised.
- Loan unit out against the call.
- Non billable serialized stock issues.
- Meters attached with no readings captured (where meter reading required is yes)
- Open warranty claims have not been processed.
- Unreviewed hours (where TimeReview flag is Yes)
- Items to Invoice:
    - Part requests
    - Travel

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[1]BPO2 v2.5.1.3 or higher,
[2]v3.0.0.1

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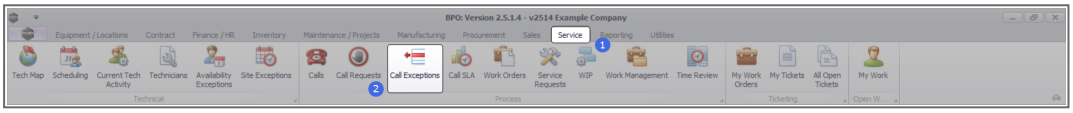
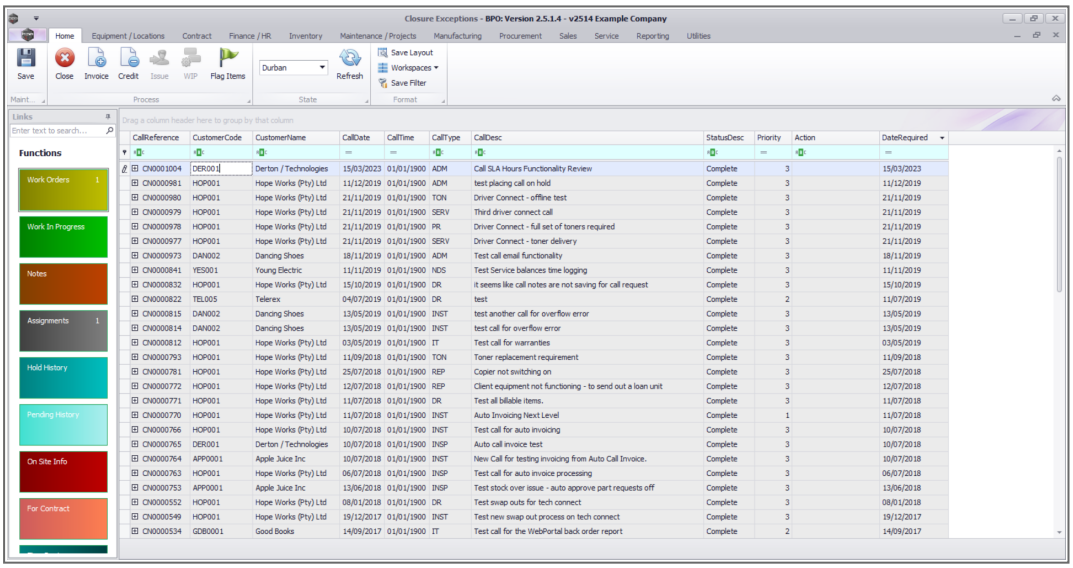
- Warranties
- Sub-contracts
- Services
- Work expense
- Labour

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.



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

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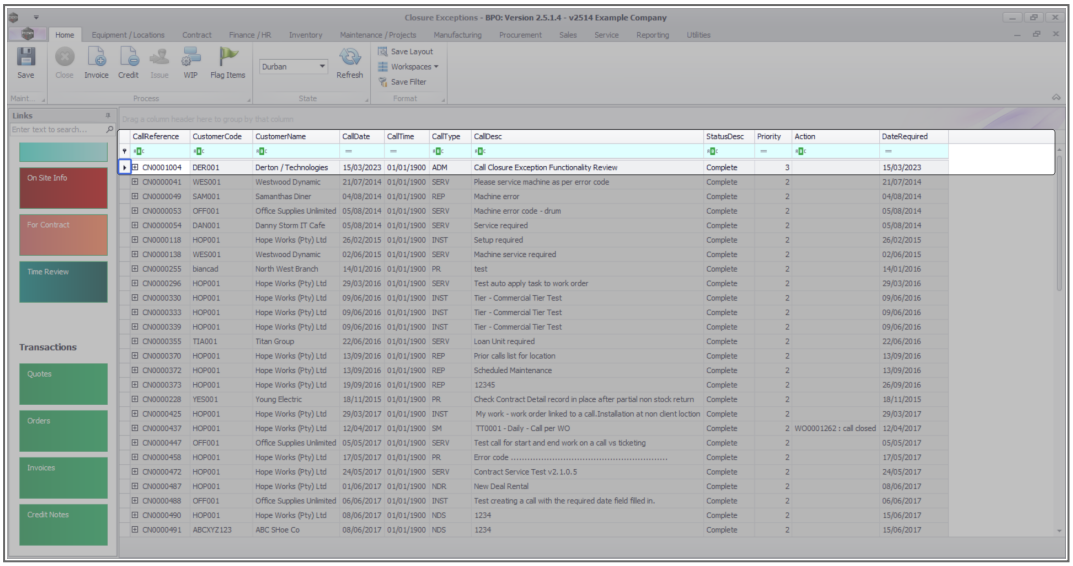
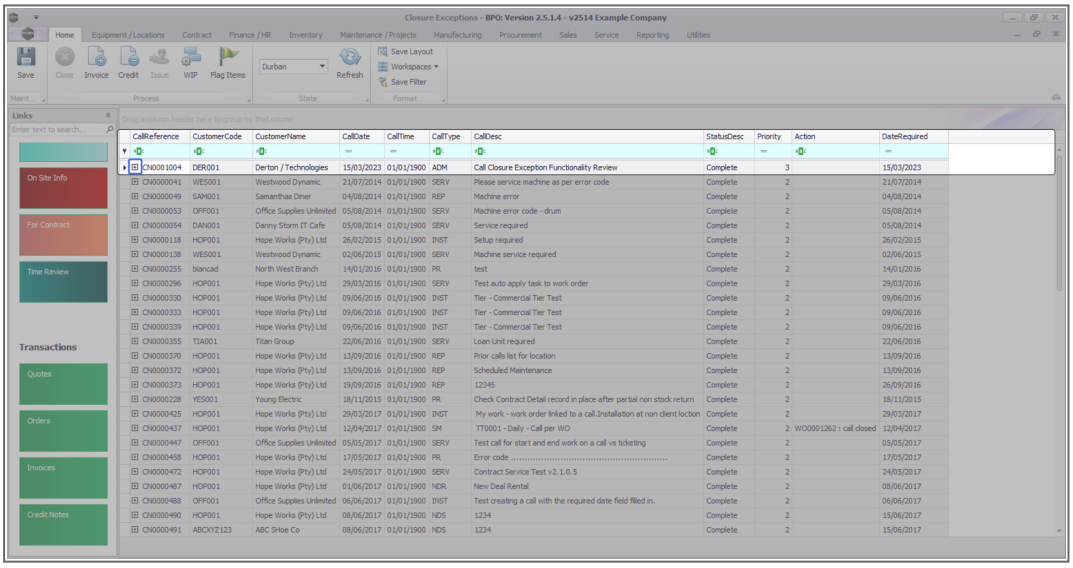


VIEW CLOSURE EXCEPTIONS

- Click on the little (+) to expand the **Closure Exceptions** sub grid.



- The Closure Exceptions sub grid will open, displaying the list of exceptions.

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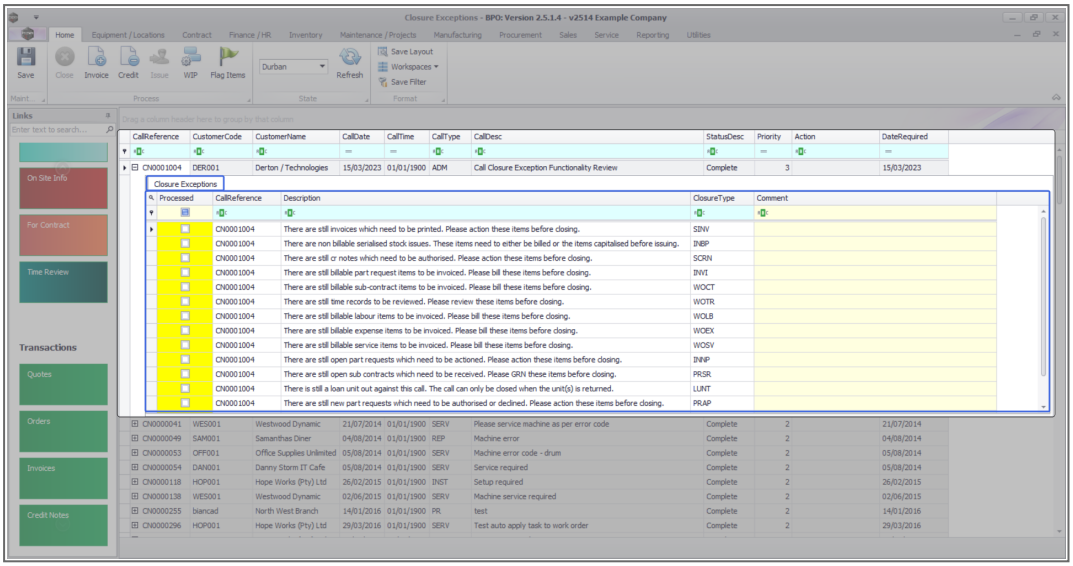

QUICK ACCESS EXCEPTION ITEM ACTIONS

- Double click on any of the exception lines to open the relevant screen required for corrective action:
    - **Credit notes need to be authorised**
        - Exception Description: There are still cr notes which need to be authorised. Please action these items before closing.
        - Opens the Sales Credit Note screen so that the credit note can be authorised.
    - **Invoices need to be printed**
        - Exception Description: There are still invoices which need to be printed. Please action these items before closing.
        - Opens the Sales Invoice screen so that the invoice can be printed.
    - **Items to Invoice**

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- Exception Descriptions:
    - There are still billable part request items to be invoiced. Please bill these items before closing.
    - There are still billable sub-contract items to be invoiced. Please bill these items before closing.
    - There are still billable labour items to be invoiced. Please bill these items before closing.
    - There are still billable expense items to be invoiced. Please bill these items before closing.
    - There are still billable service items to be invoiced. Please bill these items before closing.
    - There are still billable warranty items to be invoiced. Please bill these items before closing.
- Opens the Sales Invoice screen so that the item(s) can be invoiced.

- **Loan unit out against the call**
    - Exception Description: There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.
    - Opens the Loan Requests screen so that the loan unit(s) can be returned to the asset warehouse.

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- **Meters attached with no readings captured**
    - Exception Description: No meter reading has been captured on the call or an underlying work order. Add a reading to proceed.
    - Opens the Work Order Meter Reading screen so that the meter readings can be captured.
- **New part requests requires approval**
    - Exception Description: There are still new part requests which need to be authorised or declined. Please action these items before closing.
    - Opens the Part Request Approval screen so that the part requests can be checked and approved.
- **Non billable serialized stock issues**
    - Exception Description: There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.
    - Opens the Part Request screen so that the part request can be set to Billable.
- **Open part requests need to be actioned**
    - Exception Description: There are still open part requests which need to be actioned. Please action these items before closing.
    - Opens the Part Request screen so that the parts can be issued.
- **Open sub contracts need to be received**

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        - Exception Description: There are still open sub contracts which need to be received. Please GRN these items before closing.
        - Opens the Purchase Order screen so that a Non Stock GRN can be created.
    - **Open warranty claims have not been processed**
        - Exception Description: There are still billable warranty items to be invoiced. Please bill these items before closing.
        - Opens the Warranty Claim screen to authorise the warranty claim.
    - **Unreviewed hours**
        - Exception Description: There are still time records to be reviewed. Please review these items before closing.
        - Opens the Time Review screen so that labour hours can be reviewed.

ADD A COMMENT

- Click in the **Comments** field for the Exception you would like to add a note to.

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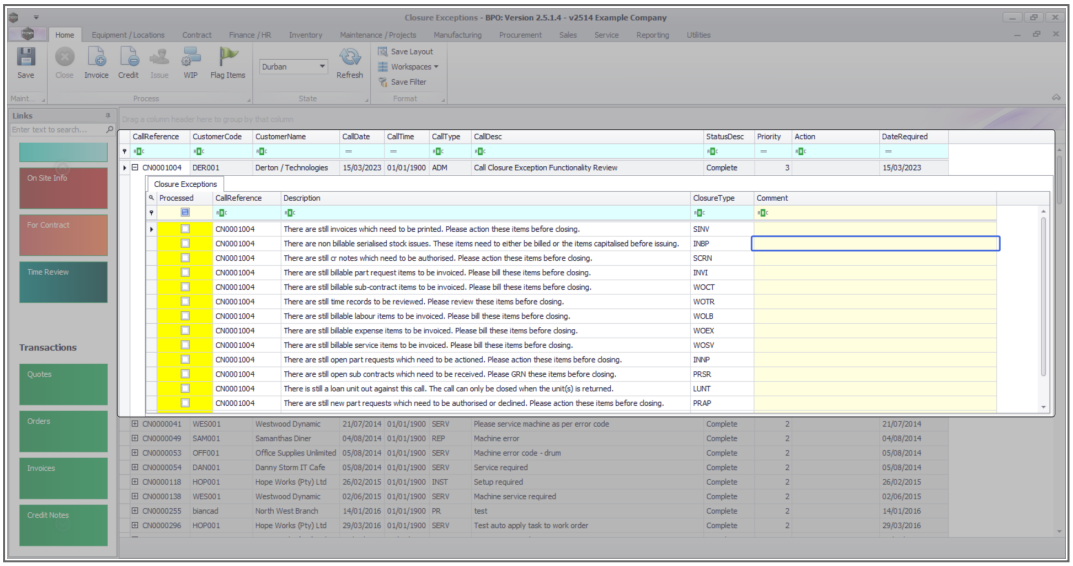
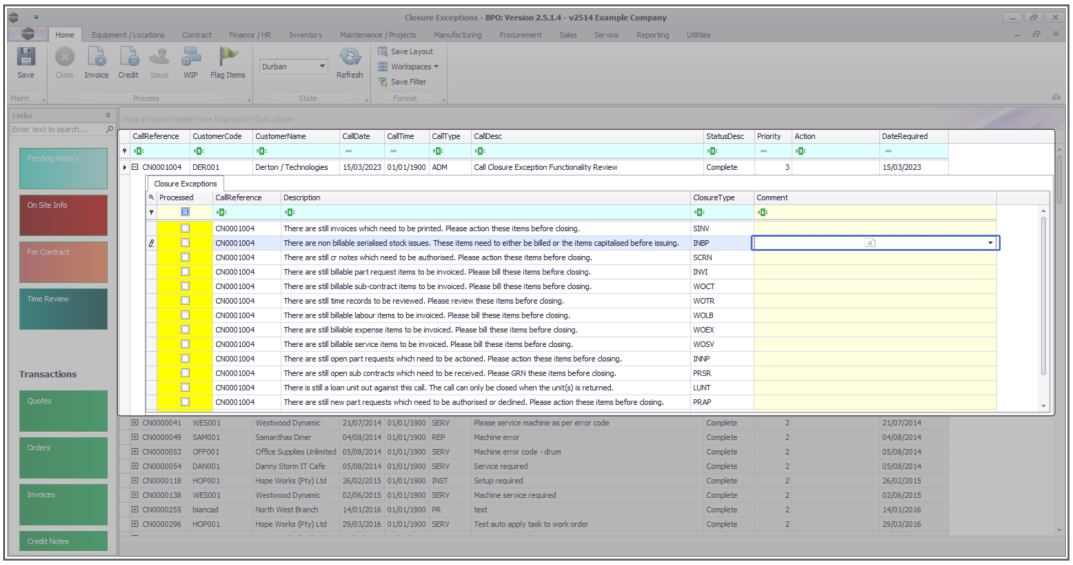


- A little notepad icon will appear in the centre of the field, and a drop down arrow will appear on the right hand side of the field.



- Click in the field again, or on the arrow.
- The drop down Comments box will open.

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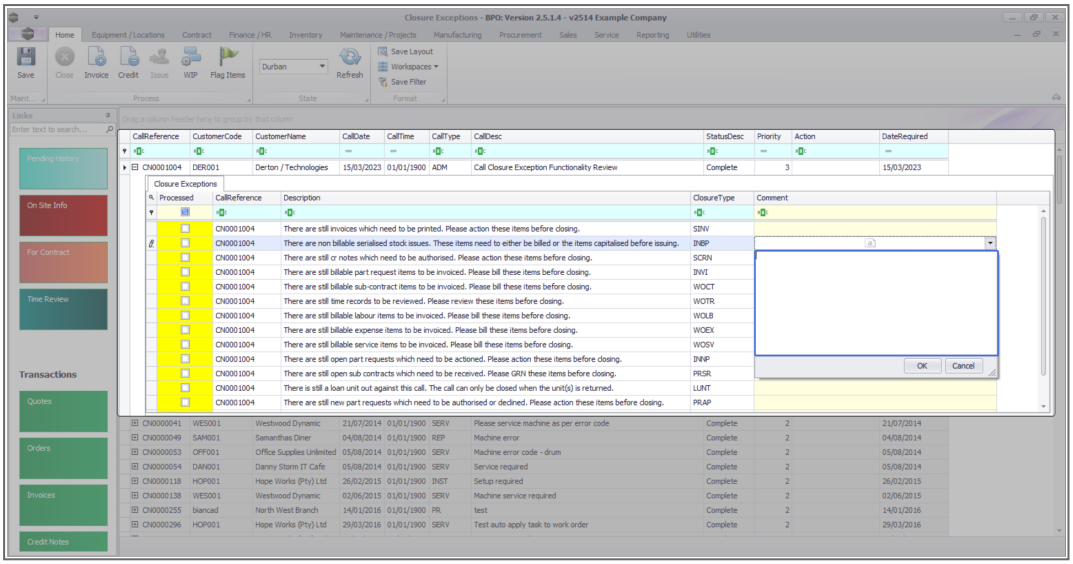
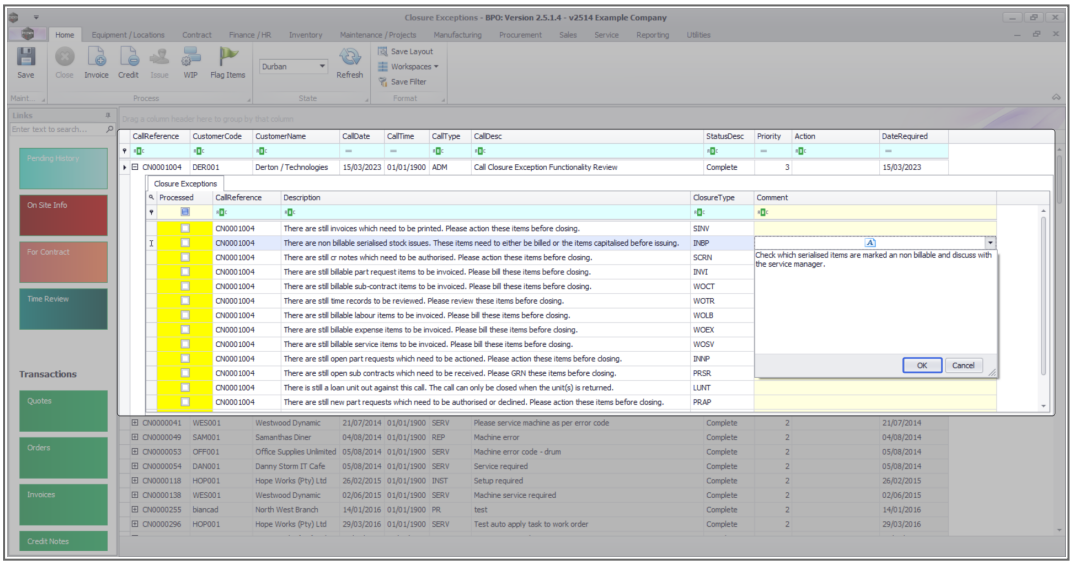


- Type in your comment.
- Click on **Ok**.
- You can continue to add comments to other Exceptions on this and other calls on the list.



- Once done, Click on **Save**.

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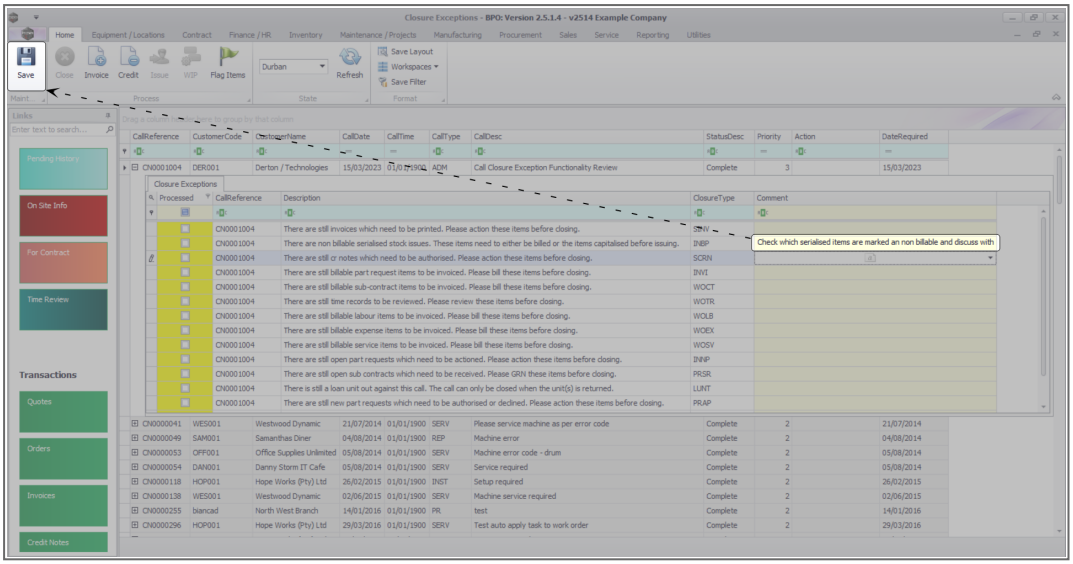
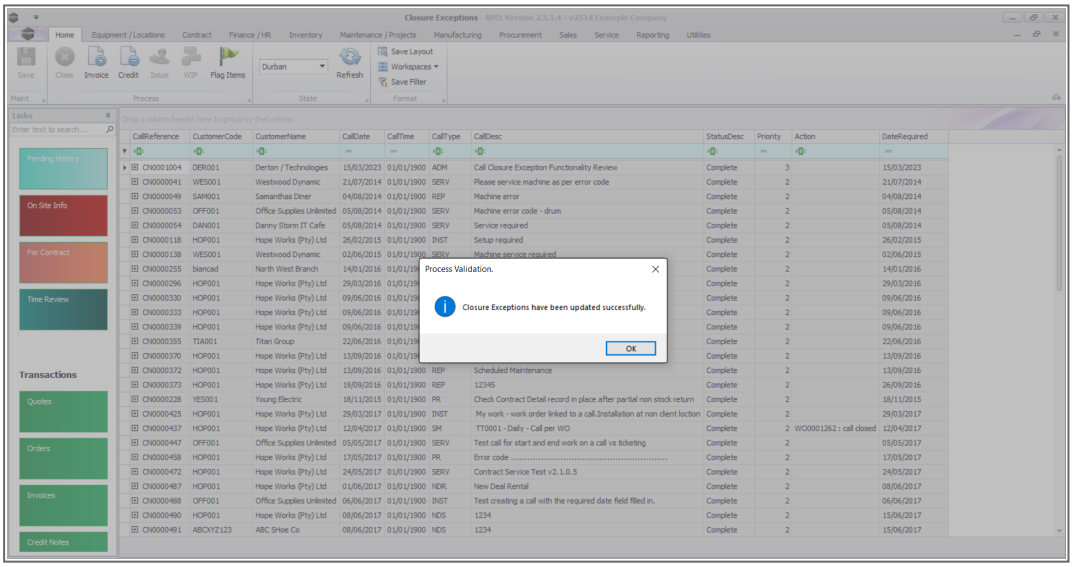


- All expanded Closure Exception sub grids will close and a message box will come up, saying: **Closure Exceptions have been updated successfully**.



Related Topics

- Service - Introduction to Call Closure Exceptions
- Service - View Call Closure Exception Details
- Service - Closure Exceptions - View Call Details

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- 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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