

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

¹BPO2 v2.5.1.3 or higher, ²v3.0.0.1



- 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.

¢ ب					Closure	e Exceptio	ens - BPO: Version 2.5.1.4 - v2514 Example Company					_ @ x
Home Equip	nent / Locations C	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact	ring Procurement Sales Service Reporting	Utilities				_ & ×
Save Close Invoice	Credit Issue V	VIP Flag Items	Durban 💌	Refresh	Save Layou Workspaces Save Filter	t I v						
Maint 🦼	Process		State		Format							~
Links 4	Drag a column head											
Enter text to search	CalReference	CustomerCode	CustomerName	CalDate	CalTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired *	
Functions	Y 10:	× D <	 (D) 	=	-	(D):	0	10:	=	<d:< td=""><td>-</td><td>A</td></d:<>	-	A
	// ⊞ CN0001004	DEROOIL	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call SLA Hours Functionality Review	Complete		3	15/03/2023	0
Work Orders 1	E CN0000981	HOP001	Hope Works (Ptv) Ltd	11/12/2019	01/01/1900	ADM	test placing call on hold	Complete		3	11/12/2019	
	E CN0000980	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	TON	Driver Connect - offline test	Complete		3	21/11/2019	
	E CN0000979	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Third driver connect call	Complete		3	21/11/2019	
Work In Progress	E CN0000978	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of toners required	Complete		3	21/11/2019	
	E CN0000977	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete		3	21/11/2019	
		DAN002	Dancing Shoes	18/11/2019	01/01/1900	ADM	Test call email functionality	Complete		3	18/11/2019	
Notes	⊞ CN0000841	YES001	Young Electric	11/11/2019	01/01/1900	NDS	Test Service balances time logging	Complete		3	11/11/2019	
		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	15/10/2019	
	⊞ CN0000822	TEL005	Telerex	04/07/2019	01/01/1900	DR	test	Complete	1	2	11/07/2019	
Arrigoments 1		DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test another call for overflow error	Complete		3	13/05/2019	
Assignmenta A	⊞ 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	03/05/2019	
	⊞ 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	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	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 History	⊞ 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	
	⊞ CN0000765	DER001	Derton / Technologies	10/07/2018	01/01/1900	INSP	Auto call invoice test	Complete		3	10/07/2018	
On Site Info	E CN0000764	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	E CN0000552	HOP001	Hope Works (Pty) Ltd	08/01/2018	01/01/1900	DR	Test swap outs for tech connect	Complete		3	08/01/2018	
	E CN0000549	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	
	E CN0000534	GDB0001	Good Books	14/09/2017	01/01/1900	п	Test call for the WebPortal back order report	Complete		2	14/09/2017	Ψ

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



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Home Equi	oment / Locations C	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utilit	ies				- 8
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			Durban 🔻		Workspace	s v						
Save Close Invoice	e Credit Issue N	VIP Flag Items	F F	Refresh	Save Filter							
iter text to search	Drag a column head											
	CalReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
	Y 10:	1 0 0	4 0 0	-	-	 0 	1 0 :	1 0 0	-	4 0 4	-	
		DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3	3	15/03/2023	
		WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete			21/07/2014	
	⊞ 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	
		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	
		WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete			02/06/2015	
		biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete			14/01/2016	
		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	
	E 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	E CN0000355	TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete			22/06/2016	
manaactiona		HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete			13/09/2016	
	⊞ 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	
	E 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	
Ordere		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	
	E 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			05/05/2017	
	E CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR.	Error code	Complete			17/05/2017	
	E CN0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete			24/05/2017	
	E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete			08/06/2017	
	E CN0000488	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	
	E CN0000490	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	

VIEW CLOSURE EXCEPTIONS

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

÷ 🗢						Closur	e Exceptio	ns - BPO: Version 2.5.1.4 - v2514 Example Company					- 8 x
	Home Equip	ment / Locations C	Contract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact.	ring Procurement Sales Service Reporting Utilit	ies				_ & ×
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Links	4												
	t to search ۶	CalReference	CustomerCode	CustomerName	CallDate	CallTime	CalType	CalDesc	StatusDesc	Priority	Action	DateRequired	
		Y (0)	<ul> <li>ID</li> </ul>	-O:	-	-	( <b>D</b> )	10:	* <b>0</b> :	-	• 10	-	A
		▶ E CN000 1004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
On S	ite Info		WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete			21/07/2014	
		⊞ 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 0		⊞ 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	E CN0000255	biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete			14/01/2016	
		E 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	
Trans	actions	⊞ CN0000355	TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete			22/06/2016	
			HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete			13/09/2016	
Quot	tes	⊞ 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	
		E 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	
Orde	YS		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	
		E 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			05/05/2017	
		E CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code	Complete			17/05/2017	
unvo	Kes		HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete			24/05/2017	
		E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete			08/06/2017	
		E CN0000488	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	
Cred	it Notes	E CN0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete			15/06/2017	
		E CN0000491	ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete			15/06/2017	Ψ

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



ф т							Closu	re Excepti	ions - BPO: Version 2.5.1.4 - v2514 Example Company					- 2 ×
Home Equipm	ent / Loc	ations	Contra	ct Financ	e / HR. Inventory	Maintenance	e / Projects	Manufact	turing Procurement Sales Service Reporting I	Utilities				_ & ×
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	Call	Referen	ce Cus	tomerCode	CustomerName	CallDate	CallTime	CallType	CalDesc	StatusDesc	Priority	Action	DateRequired	
	T 100		* <b>D</b> ¢		100	-	-	·0:	0	100	-	* <b>0</b> :	-	n
On Site Info	• 🗉 (	CN00010	04 DER	:001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	1		15/03/2023	
		Closu	re Excepti	ons										
		9. Pro	cessed	CalReferen	nce Description					ClosureType	Comment			
		۴		1 <b>0</b> 0	1 <b>0</b> 0					10:	1 <b>0</b> :			â
For Contract		•		CN000100	4 There are still in	voices which	need to be pri	inted. Please	e action these items before closing.	SINV				
				CN000100	4 There are non	ollable serialis	ed stock issue	s. These iter	ms need to either be billed or the items capitalised before issuing.	INBP				
				CN000100	4 There are still of	r notes which	need to be au	thorised. Pl	lease action these items before dosing.	SCRN				
Time Review				CN000100	4 There are still b	ilable part rec	uest items to	be invoiced.	<ol> <li>Please bill these items before closing.</li> </ol>	INVI				
				CN000100	4 There are still b	ilable sub-con	tract items to	be invoiced	d. Please bill these items before closing.	WOCT				
				CN000100	4 There are still t	me records to	be reviewed.	Please revi	iew these items before dosing.	WOTR				
				CN000100	4 There are still b	illable labour i	tems to be inv	oiced. Pleas	se bill these items before closing.	WOLB				
				CN000100	4 There are still b	ilable expensi	e items to be i	nvoiced. Ple	ease bill these items before closing.	WOEX				
Transactions				CN000100	4 There are still b	ilable service	items to be in	voiced. Plea	ase bill these items before dosing.	WOSV				
				CN000100	4 There are still of	pen part requ	ests which ne	ed to be act	tioned. Please action these items before closing.	INNP				
Quotes				CN000100	4 There are still of	pen sub contr	acts which ne	ed to be rec	ceived. Please GRN these items before closing.	PRSR				U
				CN000100	4 There is still a l	oan unit out ag	painst this call.	. The call car	in only be closed when the unit(s) is returned.	LUNT				
				CN000100	4 There are still r	ew part reque	ests which nee	d to be aut	horised or declined. Please action these items before dosing.	PRAP				
Orders			41 WE	5001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	1	1	21/07/2014	
	⊞ (	CN00000	49 SAN	1001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete			04/08/2014	
	<b></b>	CN00000	53 OFF	001	Office Supplies Unlimiter	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	3		05/08/2014	
Invoices	⊞ (	000000	S4 DAM	001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete	3		05/08/2014	
	± (	CN00001	.18 HOP	9001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete	3		26/02/2015	
	⊞ (	CN00001	.38 WE	5001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	3		02/06/2015	
Credit Notes	± (	CN00002	55 biar	icad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	3		14/01/2016	
	⊞ (	CN00002	96 HOF	2001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete	3		29/03/2016	
	-													

# **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



- 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 <u>returned</u> to the asset warehouse.



- 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



- 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 <u>reviewed</u>.

## **ADD A COMMENT**

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



¥			Cle	sure Except	ions - BPO: Version 2.5.1.4 - v2514 Example Company					
Home Equi	pment / Locations Contract Fin	ance / HR Inventory	Maintenance / Projects	Manufac	turing Procurement Sales Service Reporting	Utilities				
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	CN0001004 DEROOT	Dentin / Technologies	15/05/2025 01/01/1	IOU ADM	Call Closure Exception Punctionality Review	Complete		3	15/05/2025	
	Closure Exceptions	Description				dia	C			
	A Processed Calicen	erence Description				ClosureType	Commen	t		
r Contract	Y 10 AUC	iu:				10:	100			
	• CN000:	1004 There are still in	voices which need to be	printed. Pleas	e action these items before closing.	SINV	_			
	CN0001	1004 There are non b	illable serialised stock is	ues. These ite	ms need to either be billed or the items capitalised before issuing.	INBP				
Day (ave		1004 There are still o	r notes which need to be	authonsed. P	ease action these items before dosing.	SCRN				
		1004 There are still b	liable part request items	to be invoiced	. Please bill these items before closing.	INVI				
	CN0003	1004 There are still b	liable sub-contract items	to be invoiced	. Please bill these items before closing.	WOCI				
	CN0007	1004 There are still b	lable labour items to be	iousised Diese	ew mese items before closing.	WOR				
	CN0003	1004 There are still b	lable avoance items to be	involced. Field	se bill there items before closing.	WOEX				
	CN0007	1004 There are still b	llable expense items to h	invoiced. PR	ease bill these items before closing.	WOEX				
insactions	CN0003	1004 There are still o	nable service items to b	need to be ac	toped place action there items before during	TNND				
voter		1004 There are still o	pen par requests which	need to be oc	aived. Please GDN there items before closing.	DD-CD				
		1004 There is still a lo	an unit out against this	al. The call ca	n only be closed when the unit(s) is returned	LUNT				
	CN000	1004 There are still n	ew part requests which	need to be aut	horised or declined. Please action these items before closing.	PRAP				
	E CN0000041 WES001	Westwood Dynamic	21/07/2014 01/01/1	100 SERV	Please service machine as per error code	Complete		2	21/07/2014	
	E CN0000049 SAM001	Samanthas Diner	04/08/2014 01/01/1	100 REP	Machine error	Complete		2	04/08/2014	
		Office Supplies Unlimited	05/08/2014 01/01/1	00 SERV	Machine error code - drum	Complete		2	05/08/2014	
	E CN0000054 DAN001	Danny Storm IT Cafe	05/08/2014 01/01/1	100 SERV	Service required	Complete		2	05/08/2014	
	CN0000118 HOP001	Hope Works (Pty) Ltd	26/02/2015 01/01/1	100 INST	Setup required	Complete		2	26/02/2015	
		Westwood Dynamic	02/06/2015 01/01/1	100 SERV	Machine service required	Complete		2	02/06/2015	
	CN0000255 biancad	North West Branch	14/01/2016 01/01/1	100 PR	test	Complete		2	14/01/2016	
	E CN0000296 HOP001	Hope Works (Pty) Ltd	29/03/2016 01/01/1	100 SERV	Test auto apply task to work order	Complete		2	29/03/2016	

• 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.

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Hon	ne Equipm	ient / Lo	cations	Contrac	t Finance	e/HR I	nventory	Maintenance	/ Projects	Manufact.	uring Procurement Sales Service Reporting	Utilities					- & ×
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_		•	r reference	- COSC	uner coue	-Ostomerry	anc		carrine	(B)	(Dr	and the second s	Phoney	all c	Datekequireu		
			- CN0001004	L DEDI	001	Derton / Te	choologies	15/03/2023	01/01/1900	ADM	Call Close re Exception Exerctionality Review	Complete		3	15/03/2023		0
		, u	Closure	Evrentia		bertarry re	uniooges.	10/00/1010	01011000	HL.	cal cource exception and analy remem	comprete		-	13/03/2023		
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					CN000100+	4 Tb	ere are stil in	oices which n	eed to be prin	nted, Please	e action these items before closing.	SINV					n
			8		CN0001004	4 Th	ere are non bi	lable serialise	d stock issues	. These iten	ms need to either be billed or the items capitalised before issuing.	INEP			a	-	
For Contract					CN0001004	4 Th	ere are stil or	notes which r	eed to be au	thorised. Ple	ease action these items before dosing.	SCRN	-				
					CN0001004	4 Th	ere are stil bil	lable part req	uest items to	be invoiced.	. Please bill these items before closing.	INVI					
	_				CN0001004	4 Th	ere are stil bi	lable sub-cont	ract items to	be invoiced.	Please bill these items before closing.	WOCT					
Time Review	v i i				CN0001004	4 Th	ere are still tin	ne records to i	be reviewed.	Please revie	ew these items before dosing.	WOTR					
					CN0001004	4 Th	ere are stil bil	lable labour its	ems to be invi	piced. Please	e bill these items before dosing.	WOLB					
					CN0001004	4 Th	ere are stil bil	lable expense	items to be in	voiced. Plea	ase bill these items before closing.	WOEX					
					CN0001004	4 Th	ere are stil bil	lable service if	tems to be inv	oiced. Pleas	se bill these items before closing.	WOSV					
					CN0001004	4 Th	ere are still op	en part reque	sts which nee	ed to be acti	ioned. Please action these items before dosing.	INNP					
Transaction	ns				CN0001004	4 Th	ere are still op	en sub contra	icts which nee	ed to be rece	eived. Please GRN these items before closing.	PRSR					U
			_		CN0001004	4 Th	ere is still a loa	an unit out ag	ainst this call.	The call can	n only be closed when the unit(s) is returned.	LUNT					
Quotes					CN0001004	4 Th	ere are still ne	w part reque	sts which nee	d to be auth	horised or declined. Please action these items before closing.	PRAP					-
		Œ	CN0000041	L WES	001	Westwood	Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete			21/07/2014		
		Ð	CN0000049	9 SAM	001	Samanthas	Diner	04/08/2014	01/01/1900	REP	Machine error	Complete		2	04/08/2014		
Orders		Ð	CN0000053	OFFI	001	Office Supp	lies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014		
		Ð	CN0000054	1 DAN	001	Danny Stor	m IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete		2	05/08/2014		
		Œ	CN0000118	B HOP	001	Hope Work	s (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete		2	26/02/2015		
Invoices		Œ	CN0000138	8 WES	201	Westwood	Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015		
			CN0000255	5 bian	ad	North West	Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2016		
			CN0000296	5 HOP	301	Hope Work	s (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016		-
Credit Notes	8																

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



ф т										Closu	re Exceptio	ons - BPO: Version 2.5.1.4 - v2514 Example Company							_ 8 ×
Home Eq	uipmer	nt / Loci	ations	Co	ntract	Finance	/HR	Inventory	Maintenance	/ Projects	Manufact	uring Procurement Sales Service Reporting	Utilities						_ @ >
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	- 1	Y 100			0		0:		-	-	(0:	(D:	10:	-	-0:	-			
		• 🗉 d	N0001	004	DER001		Derton /	Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2	023		
			Clos	ure Exc	eptions														
		. 1	9. Pro	cessed	Ca	Referen	ce	Description					ClosureType	Commen	t				
On Site Info			۳		-0			(D)					* <b>0</b> :	* <b>0</b> ¢					<u>*</u>
					CN	0001004		There are still in	voices which	need to be pri	nted. Please	e action these items before dosing.	SINV						
The Contrast			Ø.		CN	0001004		There are non bi	ilable serialis	ed stock issue	s. These iter	ms need to either be billed or the items capitalised before issuing.	INBP			a		-	
Por Contract					CN	0001004		There are still cr	notes which	need to be au	thorised. Ple	ease action these items before closing.	SCRN						ווו ו
					CN	0001004		There are still bil	lable part rec	uest items to	be invoiced.	. Please bill these items before closing.	INVI						
					CN	0001004		There are still bil	lable sub-con	tract items to	be involced.	Please bill these items before closing.	WOCT						
Time Review					CN	0001004		There are still tin	ne records to	be reviewed.	Please revie	ew these items before closing.	WOTR						
					CN	0001004		There are still bil	lable labour i	ems to be inv	oiced. Pleas	e bill these items before dosing.	WOLB						
					CN	0001004		There are still bil	lable expensi	items to be i	nvoiced. Ple	ase bill these items before closing.	WOEX	-					
					UN CN	0001004		There are still bill	lable service	tems to be in	voiced. Pleas	se bill these items before closing.	WUSY						
Transactions					CN CN	0001004		There are still op	en part requ	ests which ne	ed to be act	slund. Please GDN these items before closing.	DDCD	-			ОК	Cancel	
Transactions					CN	0001004		There is still a log	an unit out ac	ainst this call	. The call car	n only be closed when the unit(s) is returned.	LUNT						
Quotes					CN	0001004		There are still ne	w part reque	sts which nee	d to be auth	horised or declined. Please action these items before closing.	PRAP						
		± 0	N0000	041	WES001		Westwo	od Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2	014		
	- 1	± 0	N0000	049	SAM001		Samanti	nas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete		2	04/08/2	014		
Orders		⊞ 0	N0000	053	OFF001		Office S	upplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2	014		
		± 0	N0000	054	DAN001		Danny S	torm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete		2	05/08/2	014		
		⊞ 0	N0000	118	HOP001		Hope W	orks (Pty) Ltd	26/02/2015	01/01/1900	INST	Setup required	Complete		2	26/02/2	015		
Invoices		<b></b>	00000	138	WES001		Westwo	od Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2	015		
		<b></b>	N0000	255	biancad		North W	lest Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2	016		
		± 0	N0000	296	HOP001		Hope W	orks (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2	016		
Credit Notes																			

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

					Closur	re Exceptio	ons - BPO: Version 2.5.1.4 - v2514 Example Company						. 8 x
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And the United	• • • •	00	0	-	-	(D)	10:	* <b>0</b> :	-	(D)	-		*
Pending history	► E CN0001004 D	ER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023		
	Closure Exce	ptions											
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On Site Info	Y 🗎	4 <b>0</b> 4	(D)					1 <b>0</b> 1	* <b>D</b> :				<u>*</u>
		CN0001004	There are still in	voices which r	eed to be prin	nted. Please	action these items before dosing.	SINV					
	I 🗆	CN0001004	There are non b	ilable serialise	d stock issues	. These item	is need to either be billed or the items capitalised before issuing.	INBP		A		*	
For Contract		CN0001004	There are still or	notes which r	need to be aut	thorised. Ple	ase action these items before closing.	SCRN	Check whi the service	ch serialised items are mar a manager	ked an non billable and o	discuss with	
		CN0001004	There are still bi	llable part req	uest items to b	be invoiced.	Please bill these items before dosing.	INVI	and best the	c manager i			
		CN0001004	There are still bi	lable sub-con	tract items to l	be invoiced.	Please bill these items before closing.	WOCT					
Time Review		CN0001004	There are still to	me records to	be reviewed.	Please revie	w these items before closing.	WOTR					
		CN0001004	There are still bi	lable labour it	ems to be invo	piced. Please	e bill these items before closing.	WOLB					
		CN0001004	There are still bi	lable expense	items to be in	voiced. Plea	ase bill these items before closing.	WOEX					
		CN0001004	There are still bi	lable service i	tems to be inv	oiced. Pleas	e bill these items before dosing.	WOSV	_				
		CN0001004	There are still op	pen part requi	ests which nee	ed to be action	oned. Please action these items before closing.	INNP			ОК	Dancel	
Transactions		CN0001004	There are still of	pen sub contra	sets which nee	to be rece	eved. Please GRW these items before closing.	PRSK	_				Ŭ
Quotes		CN0001004	There are still ro	an unit out ag	ete which neer	the call can	origad or darlined. Please action there items hefore closion	PPAP					
<b>2</b>		010001001	more are sum	en pareneque	so momen	0.000000000	onica al accinica mease accomonicae nemo perore cloaing.		_				
			Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	2		21/07/2014		
Orders	E CN0000049 S		Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete	2		04/08/2014		
	E CN0000053 0	AFF001	Ornce Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	-		05/08/2014		
	E CN0000034 D		Hone Works (Ptu) Ltd	26/02/2015	01/01/1900	INCT	Set vice required	Complete	-		26/02/2015		
Invoices	E CN0000138 W		Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete			02/06/2015		
	E CN0000255 b	iancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	2		14/01/2016		
	E CN0000296 H	IOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016		
Credit Notes													*

• Once done, Click on Save.



	Closure Exceptions -	BPO: Version 2.5.1.4 - v2514 Example Company			- 8 x
Home Equipm	t / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing	Procurement Sales Service Reporting Utilitie	ES .		_ & ×
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	Closure Excentions	· .			
	9. Processed   CallReference Description	Close	sureType Commen		
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	CN0001004 There are still invoices which need to be printed. Please action	n these items before dosing. Str.	N		
	CN0001004 There are non billable serialised stock issues. These items new	ed to either be billed or the items capitalised before issuing. INB	P Check w	nich serialised items are marked an n	n bilable and discuss with
For Contract	CN0001004     There are still or notes which need to be authorised. Please a	action these items before dosing. SCF	2N		*
	CN0001004 There are still billable part request items to be invoiced. Please	e bill these items before dosing. INV	T		
	CN0001004 There are still billable sub-contract items to be invoiced. Please	se bill these items before dosing. WO	ст		
Time Review	CN0001004 There are still time records to be reviewed. Please review the	ese items before dosing. WO	ITR		
	CN0001004 There are still billable labour items to be invoiced. Please bill t	hese items before dosing. WO	ILB		
	CN0001004 There are still billable expense items to be invoiced. Please bi	Il these items before dosing. WO	EX		
	CN0001004 There are still billable service items to be invoiced. Please bill	these items before dosing. WO			
	CN0001004 There are still open part requests which need to be actioned	Please action these items before dosing. INN	P		
Transactions	CN0001004 Inere are still open sub contracts which need to be received	Please GRN these items before closing. PRS	SR		
Quotes	CN0001004 There is still now part sequents which pend to be authorized	d or declared. Discourse action there items before decines.	10		
(and	CHOOLIDOT THE E are sur new part requests which need to be automset	a of dealined. Please action onese items before dosing.	~		
	CN0000041 WES001 Westwood Dynamic 21/07/2014 01/01/1900 SERV Ple	ase service machine as per error code	Complete	2 21/07/2	014
Orders	EE CN0000049 SAM001 Samanthas Diner 04/08/2014 01/01/1900 REP Ma	chine error	Complete	2 04/08/2	014
0.003	CN0000053 OFF001 Office Supplies Unlimited 05/08/2014 01/01/1900 SERV Ma	chine error code - drum	Complete	2 05/08/2	014
	E CN0000054 DAN001 Danny Storm I Cafe 05/08/2014 01/01/1900 SERV Ser	vice required	Complete	2 05/08/2	014
Transferra	El CN0000118 HCH001 Hope works (Pty) Ltd 26/02/2015 01/01/1900 INST Set	up required	Complete	26/02/2	015
Divoles-	Ch0000125 westwood Dynamic 02/06/2015 01/01/1900 SERV Ma     Ch00000255 biancad North West Branch 14/01/2016 01/01/1900 SERV Ma	anne service required	Complete	02/06/2	015
	E CN0000225 USR001 Hone Works (Ptv) 1 H 29/03/2016 01/01/1900 PK US	t auto anniv task to work order	Complete	20/03/2	016
			·	23/03/2	*
Creat Notes					

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

÷ چ						Closur	re Excepti	ms - BPO: Version 2.5.1.4 - v2514 Example Company					- 8 x
	Home Equipr	ment / Locations C	ontract Financ	e / HR Inventory	Maintenance	/ Projects	Manufact	uring Procurement Sales Service Reporting Utilit	ties .				_ & ×
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Maint a													$\diamond$
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	search 🔎	CalReference	CustomerCode	CustomerName	CallDate	CalTime	CalType	CalDesc	StatusDesc	Priority	Action	DateRequired	
		Y 100	×D:	0			0	0	10:		10c		
		► EL CN0001004	DER001	Derton / Technologies		01/01/1900	ADM	Call Closure Exception Euroctionality Review	Complete		-		
		E CN0000041	WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete			21/07/2014	
	_	E CN0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete			04/08/2014	
On Site I	Info		OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete			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	
For Cont		⊞ CN0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
			biancad	North West Branch	14/01/2016	01/01/19	Process Val	idation. X	Complete		2	14/01/2016	
		⊞ CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/19			Complete		2	29/03/2016	
Time Rev	view		HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19			Complete		2	09/06/2016	
		⊞ CN0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19		losure Exceptions have been updated successfully.	Complete		2	09/06/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/19			Complete		2	09/06/2016	
		⊞ CN0000355	TIA001	Titan Group	22/06/2016	01/01/19		or	Complete		2	22/06/2016	
			HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/19			Complete		2	13/09/2016	
Transact	tions	⊞ CN0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	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	
Quotes		⊞ 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	
			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		2	29/03/2017	
		E 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	
Orders			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			17/05/2017	
			HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete			24/05/2017	
Invoices		E CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete			08/06/2017	
- ANGRES			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	
		EE CN0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete			15/06/2017	
Ou this			ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete			15/06/2017	*
Great No	ULCS												

#### **Related Topics**

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

Help v2024.5.0.7/1.0 - Pg 10 - Printed: 04/07/2024



- 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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Help v2024.5.0.7/1.0 - Pg 11 - Printed: 04/07/2024

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