

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

# SERVICE

## **CLOSURE EXCEPTIONS - FLAG ITEMS**

Flagged items as processed indicates that you have actioned the items that were preventing call closure.

### **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.

Ψ							Closu	e Exceptio	ons - BPO: Version 2.5.1.4 - v2514 Example Company					_ 8
-	Home	Equipm	ent / Locations	Contract Finan	ce / HR Inventory	Maintenance	/ Projects	Manufact	ring Procurement Sales Service Reporting U	Julities				_ 6
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uncoon	15			/	-			-	-			-		
Work On	rders	1			Derton / Technologies Hope Works (Ptv) Ltd		01/01/1900		Call SLA Hours Functionality Review test placing call on hold	Complete			15/03/2023 11/12/2019	
			E CN0000981		Hope Works (Pty) Ltd Hope Works (Pty) Ltd		01/01/1900		test placing call on hold Driver Connect - offline test	Complete			21/12/2019	
			E CN0000980		Hope Works (Pty) Ltd Hope Works (Pty) Ltd		01/01/1900		Third driver connect call	Complete			21/11/2019	
and the	Progress		E CN0000979		Hope Works (Pty) Ltd Hope Works (Pty) Ltd		01/01/1900		Driver Connect call	Complete			21/11/2019	
WORK IN	Progress		E CN0000978		Hope Works (Pty) Ltd				Driver Connect - tone delivery	Complete			21/11/2019	
			E CN0000977		Dancing Shoes		01/01/1900		Test call email functionality	Complete	-		18/11/2019	
			E CN0000973		Young Electric		01/01/1900		Test Service balances time logging	Complete			10/11/2019	
Notes			E CN0000841		Hope Works (Pty) Ltd		01/01/1900		it seems like call notes are not saving for call request	Complete			15/10/2019	
			E CN0000832		Telerex		01/01/1900		test	Complete			11/07/2019	
_			E CN0000822		Dancing Shoes		01/01/1900		test test another call for overflow error	Complete			13/05/2019	
Assignme	ients	1	E CN0000815		Dancing Shoes		01/01/1900		test call for overflow error	Complete			13/05/2019	
			E CN0000812		Hope Works (Pty) Ltd		01/01/1900		Test call for warranties	Complete			03/05/2019	
			E CN0000812		Hope Works (Pty) Ltd		01/01/1900		Toner replacement requirement	Complete			11/09/2018	
Hold Hist			E CN0000793		Hope Works (Pty) Ltd		01/01/1900		Copier not switching on	Complete			25/07/2018	
			E CN0000772		Hope Works (Pty) Ltd		01/01/1900		Client equipment not functioning - to send out a loan unit	Complete			12/07/2018	
			E CN0000771		Hope Works (Pty) Ltd		01/01/1900		Test al bilable items.	Complete			11/07/2018	
Pending	History		E CN0000770		Hope Works (Pty) Ltd		01/01/1900		Auto Invoicing Next Level	Complete			11/07/2018	
			E CN0000766		Hope Works (Pty) Ltd		01/01/1900		Test call for auto invoicing	Complete			10/07/2018	
			E CN0000765		Derton / Technologies		01/01/1900		Auto call invoice test	Complete			10/07/2018	
On Site I			E CN0000764		Apple Juice Inc		01/01/1900		New Call for testing invoicing from Auto Call Invoice.	Complete			10/07/2018	
On Site I	Into		E CN0000763		Hope Works (Pty) Ltd		01/01/1900		Test call for auto invoice processing	Complete			06/07/2018	
			E CN0000753		Apple Juice Inc		01/01/1900		Test stock over issue - auto approve part requests off	Complete			13/06/2018	
			E CN0000552		Hope Works (Pty) Ltd		01/01/1900		Test swap outs for tech connect	Complete			08/01/2018	
For Cont			E CN0000549		Hope Works (Pty) Ltd		01/01/1900		Test new swap out process on tech connect	Complete			19/12/2017	
			E CN0000534		Good Books		01/01/1900		Test call for the WebPortal back order report	Complete			14/09/2017	

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

								ons - BPO: Version 2.5.1.4 - v2514 Example Company					- 8
Home		t / Locations	Contract Financ	e / HR Inventory				ring Procurement Sales Service Reporting Utilit					- 5
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ave Close	Invoice Cr	redit Issue	WIP Flag Items	Durban 🔻	Refresh	Workspace	s*						
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inks	4												
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		* *D:	×0:	-O:	-	-	(D)	·0:	-0:	-	1 <b>0</b> 4	-	
_		■ CN0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
		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	
			OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete		2	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	
		⊞ CN0000138	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
Time Review			biancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete		2	14/01/2016	
		⊞ CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
		⊞ CN0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
			HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	INST	Tier - Commercial Tier Test	Complete		2	09/06/2016	
Transactions		⊞ CN0000355	TIA001	Titan Group	22/06/2016	01/01/1900	SERV	Loan Unit required	Complete		2	22/06/2016	
manaactiona			HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete		2	13/09/2016	
Ouotes		⊞ 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	
		⊞ 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	
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		2	29/03/2017	
Citica s		⊞ 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	
			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	
	_	⊞ CN0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR.	Error code	Complete		2	17/05/2017	
Invoices			HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete		2	24/05/2017	
		⊞ CN0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete		2	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		2	06/06/2017	
Credit Notes		⊞ CN0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete		2	15/06/2017	
			ABCXYZ123	ABC SHoe Co	08/06/2017	01/01/1900	NDS	1234	Complete		2	15/06/2017	

### **SELECT THE EXCEPTION ITEM TO FLAG**

- Click in the **Check box** in front of the exception item you would like to flag as processed.
- You can continue to manually mark each item that needs to be flagged.

ve Close Invoice	Credit Issue Process	WIP	Flag Items	Durban 👻	Refresh	<ul> <li>Save Layo</li> <li>Workspace</li> <li>Save Filter</li> <li>Format</li> </ul>	is *						
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inctions	* 10:	·0:		-O:	-	-	·0:	·D:	×0:	-	<ul> <li>0</li> </ul>	-	
Work Orders 1	→ E CN00010			Derton / Technologies	15/03/2023	3 01/01/1900	ADM	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
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Work In Progress	Y I		-	( <b>D</b> )					-O:	1 <b>0</b> 0			
nork annoy cas			CN000100					action these items before closing.	SINV	Chardense	take a set alternal tike a	as are marked an non billable and discuss with	
	I		CN000100					ns need to either be billed or the items capitalised before issuing.	INBP	Check w	ion serialised item	is are marked an non billable and discuss with	
			CN000100 CN000100					ase action these items before closing. Please bill these items before closing.	SCRN				
Notes			CN000100					Please bill these items before closing. Please bill these items before closing.	WOCT				
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Assignments 1			CN000100					ase bill these items before closing.	WOEX				
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fold History			CN000100	4 There are still of	en sub contr	racts which ne	ed to be reo	eived. Please GRN these items before closing.	PRSR				
			CN000100	4 There is still a lo	an unit out a	gainst this call.	The call car	only be closed when the unit(s) is returned.	LUNT				
			CN000100	4 There are still n	w part requ	ests which nee	d to be auth	orised or declined. Please action these items before dosing.	PRAP				
	E CN00000	41 WESC	001	Westwood Dynamic	21/07/2014	4 01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2014	
	E CN00000	49 SAMO	001	Samanthas Diner	04/08/2014	4 01/01/1900	REP	Machine error	Complete		2	04/08/2014	
- C - L C		53 OFFO	01	Office Supplies Unlimited	05/08/2014	4 01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014	
On Site Info	⊞ CN00000	54 DANG	001	Danny Storm IT Cafe	05/08/2014	4 01/01/1900	SERV	Service required	Complete		2	05/08/2014	
		18 HOPO	001	Hope Works (Pty) Ltd	26/02/201	5 01/01/1900	INST	Setup required	Complete		2	26/02/2015	
		38 WESO	001	Westwood Dynamic	02/06/201	5 01/01/1900	SERV	Machine service required	Complete		2	02/06/2015	
		55 blanc	ad	North West Branch	14/01/2016	5 01/01/1900	PR	test	Complete		2	14/01/2016	
	⊞ CN00002	96 HOPC	001	Hope Works (Pty) Ltd	29/03/2016	5 01/01/1900	SERV	Test auto apply task to work order	Complete		2	29/03/2016	



### **FLAG MULTIPLE ITEMS**

• You could also select multiple exception items, by holding down the **[Ctrl]** button and clicking each exception line you need to flag.

Home Equipm	ent / Locat	ions O	ontract Finan	ce / HR Inventory		e / Projects		uring Procurement Sales Service Reporting	Utilities				- 8
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Nork Orders 1	•	0001004		Derton / Technologies	15/03/2023	3 01/01/1900	ADM	Call Closure Exception Functionality Review	Complete			15/03/2023	
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Vork In Progress				<ul> <li>(D)</li> </ul>					1 <b>0</b> :	1 <b>0</b> 0			
nork in Progress								action these items before closing.	SINV				
								ms need to either be billed or the items capitalised before issuing.	INBP	Check wh	ich serialised item	s are marked an non billable and discuss with	
[Ctrl] + select	K							ease action these items before dosing.	SCRN				
Notes								Please bill these items before closing.	INVI				
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Assignments 1								ase bill these items before closing.	WOEX				
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								n only be closed when the unit(s) is returned.	LUNT				
			CN000100	04 There are still n	w part requ	ests which nee	d to be aut	norised or declined. Please action these items before dosing.	PRAP				
	E CN	0000041	WES001	Westwood Dynamic	21/07/2014	4 01/01/1900	SERV	Please service machine as per error code	Complete		1	21/07/2014	
		00000-49	SAM001	Samanthas Diner	04/08/2014	4 01/01/1900	REP	Machine error	Complete			04/08/2014	
On Site Info		0000053	OFF001	Office Supplies Unlimited	05/08/2014	4 01/01/1900	SERV	Machine error code - drum	Complete			05/08/2014	
		0000054	DAN001	Danny Storm IT Cafe	05/08/2014	4 01/01/1900	SERV	Service required	Complete			05/08/2014	
		0000118		Hope Works (Pty) Ltd	26/02/201	5 01/01/1900	INST	Setup required	Complete			26/02/2015	
and and and		0000138		Westwood Dynamic		5 01/01/1900		Machine service required	Complete			02/06/2015	
		0000255		North West Branch		5 01/01/1900		test	Complete			14/01/2016	
	E CN	0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	5 01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016	

• Then click on the **Flag Items** button.

ave Close Invoice	Credit Issue W Process	P Flag Items	Durban 👻	Refresh Refresh	aces 🕶						
ks # er text to search A											
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	► CN0001004	DER001	Derton / Technologies	15/03/2023 01/01/1	MDA 006	Call Closure Exception Functionality Review	Complete		3	15/03/2023	
	Closure Exc	ceptions									
	9. Processes	d CallRefere	nce Description				ClosureType	Comment			
	9 🗎	* <b>0</b> ¢	1 <b>0</b> 0				* <b>0</b> :	1 <b>0</b> 0			
Work In Progress		CN000100	14 There are still in	voices which need to be	printed. Pleas	e action these items before closing.	SINV				
		CN000100	14 There are non b	llable serialised stock is	ues. These ite	ms need to either be billed or the items capitalised before issuing.	INBP	Check wh	nich serialised item	s are marked an non billable and discuss with	h
		CN000100	14 There are still or	notes which need to be	authorised. Pl	ease action these items before closing.	SCRN				
Notes		CN000100	14 There are still bi	lable part request items	to be invoiced	. Please bill these items before dosing.	INVI				
	•		14 There are still bi	lable sub-contract item	to be invoiced	I. Please bill these items before closing.	WOCT				
		CN000100	14 There are still tir	ne records to be review	ed. Please revi	ew these items before dosing.	WOTR				
Assignments 1		CN000100	14 There are still bi	lable labour items to be	invoiced. Pleas	se bill these items before dosing.	WOLB				
			14 There are still bi	lable expense items to I	pe invoiced. Ple	ease bill these items before dosing.	WOEX				
			14 There are still bi	lable service items to be	invoiced. Plea	se bill these items before dosing.	WOSV				
Hold History		CN000100	14 There are still op	en part requests which	need to be ac	tioned. Please action these items before closing.	INNP				
			14 There are still op	en sub contracts which	need to be rea	ceived. Please GRN these items before closing.	PRSR				
			14 There is still a lo	an unit out against this	call. The call ca	n only be closed when the unit(s) is returned.	LUNT				
		CN000100	14 There are still ne	w 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	00 SERV	Please service machine as per error code	Complete			21/07/2014	
	E CN0000049	SAM001	Samanthas Diner	04/08/2014 01/01/1	00 REP	Machine error	Complete			04/08/2014	
		OFF001	Office Supplies Unlimited	05/08/2014 01/01/1	00 SERV	Machine error code - drum	Complete		2	05/08/2014	
On Site Info	E CN0000054	DAN001	Danny Storm IT Cafe	05/08/2014 01/01/1	00 SERV	Service required	Complete		2	05/08/2014	
		HOP001	Hope Works (Pty) Ltd	26/02/2015 01/01/1	00 INST	Setup required	Complete		2	26/02/2015	
	E CN0000138	WES001	Westwood Dynamic	02/06/2015 01/01/1	000 SERV	Machine service required	Complete		2	02/06/2015	
		biancad	North West Branch	14/01/2016 01/01/1	900 PR	test	Complete		2	14/01/2016	
	E CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016 01/01/1	900 SERV	Test auto apply task to work order	Complete		2	29/03/2016	



- A message box will come up, asking: Are you sure you want to flag the selected items?
- Select Yes.

ve Close Invoice		Items State	Refresh	Save Layo  Workspace  Save Filter  Format	s <b>*</b>						
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	· 🗉 -0	(D)					10:	* <b>0</b> ¢			
Vork In Progress	0	0001004 There are still	nvoices which	need to be pri	nted, Pleas	e action these items before dosing.	SINV				
		0001004 There are non	bilable serialis	ed stock issue	. These ite	ms need to either be billed or the items capitalised before issuing.	INEP	Check wh	ich serialised item	s are marked an non billable and disc.	iss with
	0	0001004 There are still	or notes which			a sea action these items before clasing	SCRN				
otes		0001004 There are still	oillable part rec	quest items to	Input valie	dation ×	INVI				
	> 🔳 O	0001004 There are still	silable sub-con	ntract items to			WOCT				
	0	0001004 There are still	time records to	be reviewed	2	Are you sure you want to flag the selected items?	WOTR				
ssignments 1		0001004 There are still			•		WOLB				
		0001004 There are still					WOEX				
		0001004 There are still				Yes No	WOSV				
old History		0001004 There are still					INNP				
						eived. Please GRN these items before closing.	PRSR				
						n only be closed when the unit(s) is returned.	LUNT				
		0001004 There are still	new part reque	ests which nee	d to be aut	horised or dedined. Please action these items before dosing.	PRAP				
		Westwood Dynamic		01/01/1900		Please service machine as per error code	Complete	2		21/07/2014	
	E CN0000049 SAM001	Samanthas Diner		+ 01/01/1900		Machine error	Complete	2		04/08/2014	
n Site Info		Office Supplies Unlimite				Machine error code - drum	Complete	2		05/08/2014	
	E CN0000054 DAN001	Danny Storm IT Cafe		+ 01/01/1900		Service required	Complete	2		05/08/2014	
	⊞ CN0000118 HOP001	Hope Works (Pty) Ltd		5 01/01/1900		Setup required	Complete	2		26/02/2015	
or Contract		Westwood Dynamic		5 01/01/1900		Machine service required	Complete			02/06/2015	
		North West Branch		5 01/01/1900 5 01/01/1900		test Test auto apply task to work order	Complete	2		14/01/2016 29/03/2016	
		Hope Works (Pty) Ltd	23/03/2016		SCAL	rest auto appry task to more of der	Complete	4		25/05/2016	

- You will note in the example below that there could be 3 colours depending on the state of the exception, and indicates the following:
  - Yellow Unflagged Exception
  - **Red** Exception has been flagged, but does not have a comment. The comment is required.
  - **Green** Exception has been flagged and has a comment.



#### Service - Closure Exceptions - Flag Items

Ψ					Closure	e Exceptio	ens - BPO: Version 2.5.1.4 - v2514 Example Company					- 8
Home Equipm	ent / Locations C	ontract Financ	ce / HR Inventory	Maintenance / I	Projects	Manufact.	ring Procurement Sales Service Reporting	Utilities				_ 8
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er text to search P	CalReference	CustomerCode	CustomerName	CalDate 0	CallTime	CalType	CalDesc	StatusDesc	Priority	Action	DateRequired	
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	Closure E	xceptions										
	9 Process	ed CalRefere	ence Description					ClosureType	Commen	t		
	T 関	1 IC	<ul> <li>O:</li> </ul>					* <b>0</b> :	* <b>0</b> <			<u> </u>
Work In Progress		CN000100	04 There are still in	voices which nee	ed to be print	ted. Please	action these items before dosing.	SINV				
		CN000100	04 There are non bi	lable serialised	stock issues.	These iten	is need to either be billed or the items capitalised before issuing	INBP	Check w	hich serialised iten	ns are marked an non billable a	ind discuss with
		CN000100	04 There are still or	notes which ner	ed to be auti	norised. Ple	ase action these items before closing.	SCRN				
Notes		CN000100	04 There are still bil	lable part reque	est items to b	e invoiced.	Please bill these items before closing.	INVI				
	I	CN000100	04 There are still bil	lable sub-contra	act items to b	e invoiced.	Please bill these items before closing.	WOCT				
		CN000100	04 There are still tin	ne records to be	e reviewed. P	fease revie	w these items before dosing.	WOTR				
Assignments 1			04 There are still bil	lable labour item	ns to be invoi	ced. Please	bill these items before dosing.	WOLB				
			04 There are still bil	lable expense it	tems to be im	voiced. Plea	ase bill these items before dosing.	WOEX				
			04 There are still bil	lable service iter	ems to be invo	iced. Pleas	e bill these items before closing.	WOSV				
Hold History							oned. Please action these items before dosing.	INNP				
							rived. Please GRN these items before closing.	PRSR				U
							only be closed when the unit(s) is returned.	LUNT				
		CN000100	04 There are still ne	w part requests	s which need	to be auth	orised or declined. Please action these items before dosing.	PRAP				-
		WES001	Westwood Dynamic	21/07/2014 0	01/01/1900	SERV	Please service machine as per error code	Complete		2	21/07/2014	
	E CN0000049	SAM001	Samanthas Diner	04/08/2014 0	01/01/1900	REP	Machine error	Complete		2	04/08/2014	
On Site Info		OFF001	Office Supplies Unlimited	05/08/2014 0	01/01/1900	SERV	Machine error code - drum	Complete		2	05/08/2014	
	⊞ CN0000054			05/08/2014 0			Service required	Complete		2	05/08/2014	
				26/02/2015 0			Setup required	Complete		2	26/02/2015	
For Contract				02/06/2015 0			Machine service required	Complete		2	02/06/2015	
	E CN0000255		North West Branch	14/01/2016 0			test	Complete		2	14/01/2016	
	E CN0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016 0	01/01/1900	SERV	Test auto apply task to work order	Complete			29/03/2016	

#### **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

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