SERVICE

CALL ADMINISTRATION – CLOSE A CALL

The Call Administration screen is part of the Extended Call Centre - Version Compatibility[1]

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

A Call can be <u>re-instated</u> 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 <u>re-instated</u>. 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.
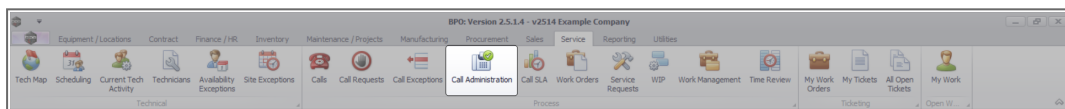
The Call Closure Exceptions List

- 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)
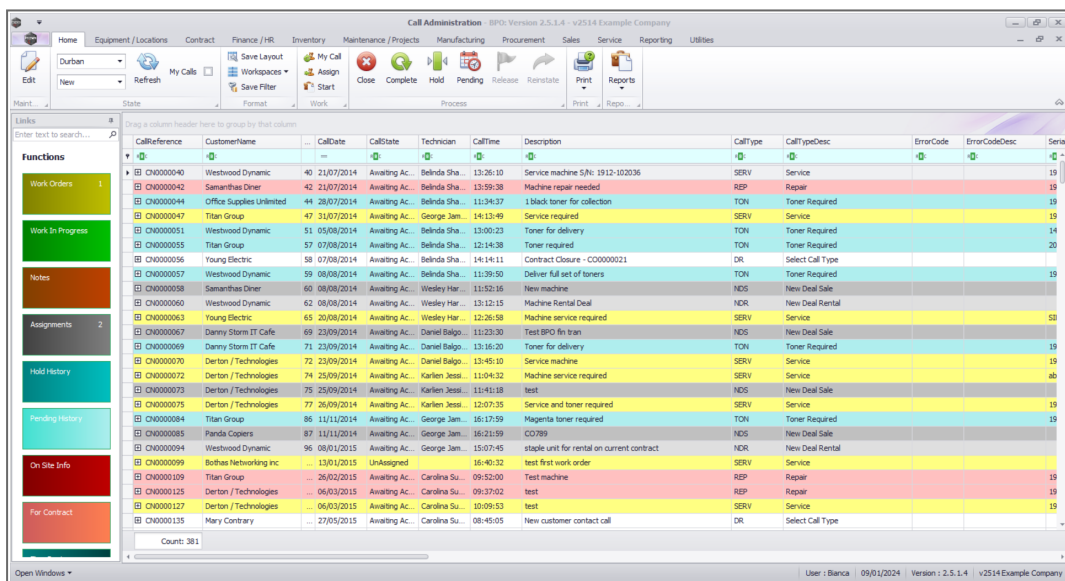
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[1]BPO2 v2.5.1.3 or higher.

- Items to Invoice:
  - Part requests
  - Travel
  - Warranties
  - Sub-contracts
  - Services
  - Work expense
  - Labour

THE CALL ADMINISTRATION SCREEN

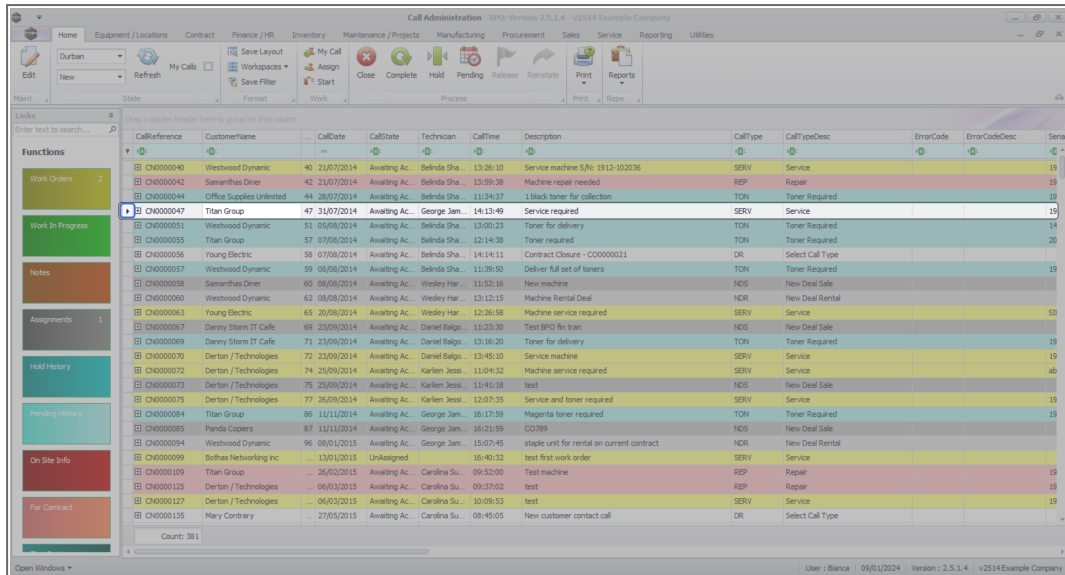*Ribbon* Select *Service > Call Administration*

- The *Call Administration* screen will be displayed.

- Click on the row selector of the call you would like to work with.

CLOSE CALL

- Click on the *Close* button.

- A message box will come up, asking:
  - **Are you sure you want to close this call, reference no. *[call ref no]*? It cannot be reopened. Answer 'Yes'**
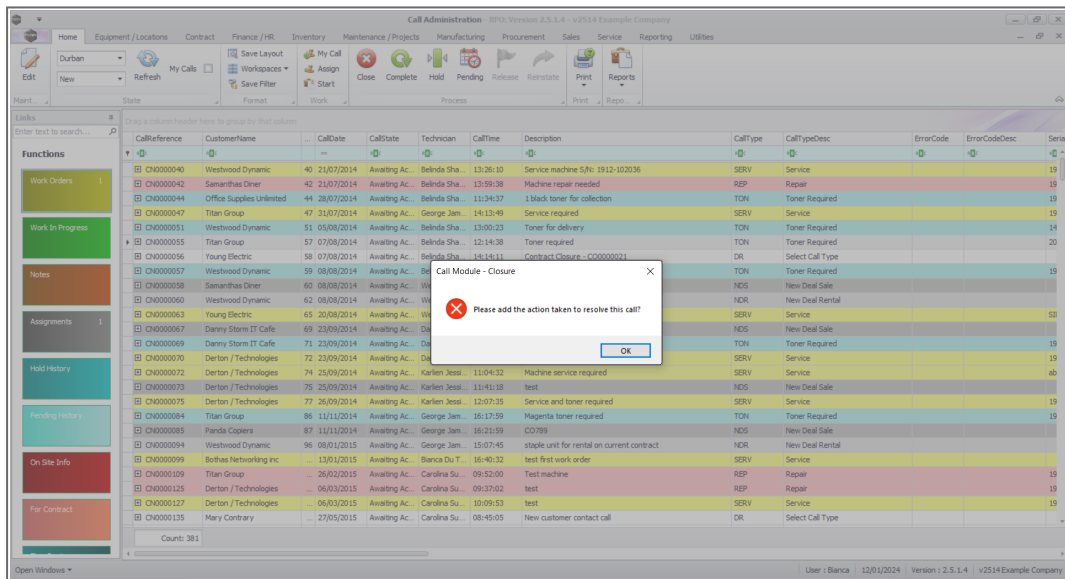
to close the call.

- Note that the call can be <u>reinstated</u>, if required.

- A message box will come up, noting:

  - **Please add the action taken to resolve this call.**

- The **Comments for Call Ref:** *[call ref no]* screen will come up
    - **Comment:** This comment is to note the work that was done to resolve the call. Comments may already appear here if logged via TechConnect or manually on the underlying work order. You could append details or add the rectification comment if not yet entered.
    - **Error Code:** The error code is may be mandatory depending on the company configuration: <u>Call Error Code Mandatory</u>. The error codes are a list of codes that may display on the devices being services and set up on the system for selection. This code may have already been selected on call creation. This could be changed or selected at this point. Depending on your company's requirements, you may not need to select the error code.
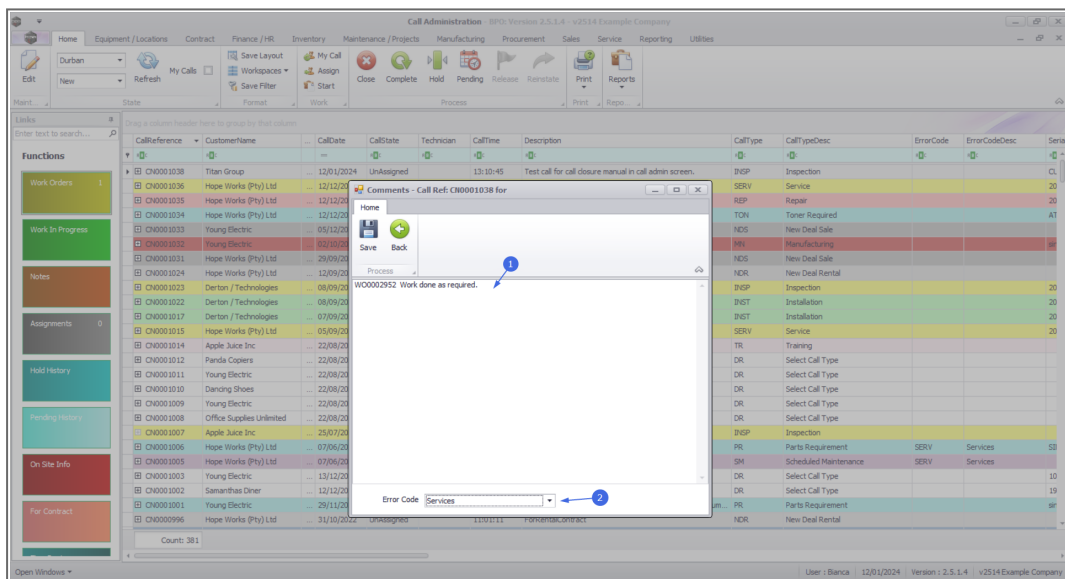
- Click on the **Save** button.
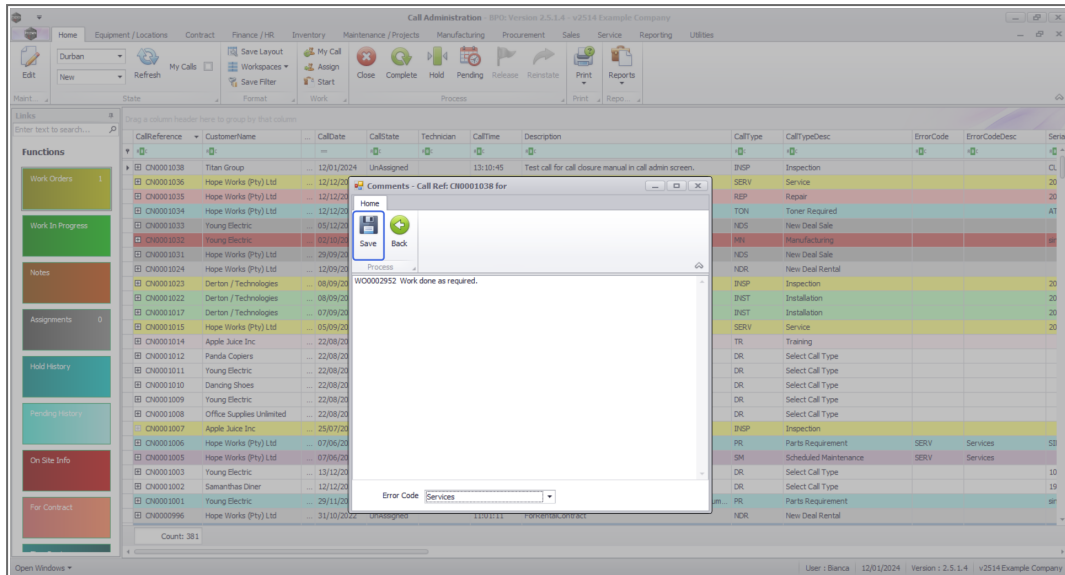
- A message box will come up, noting:
  - **The call, reference *[call ref no]*, has been closed.**
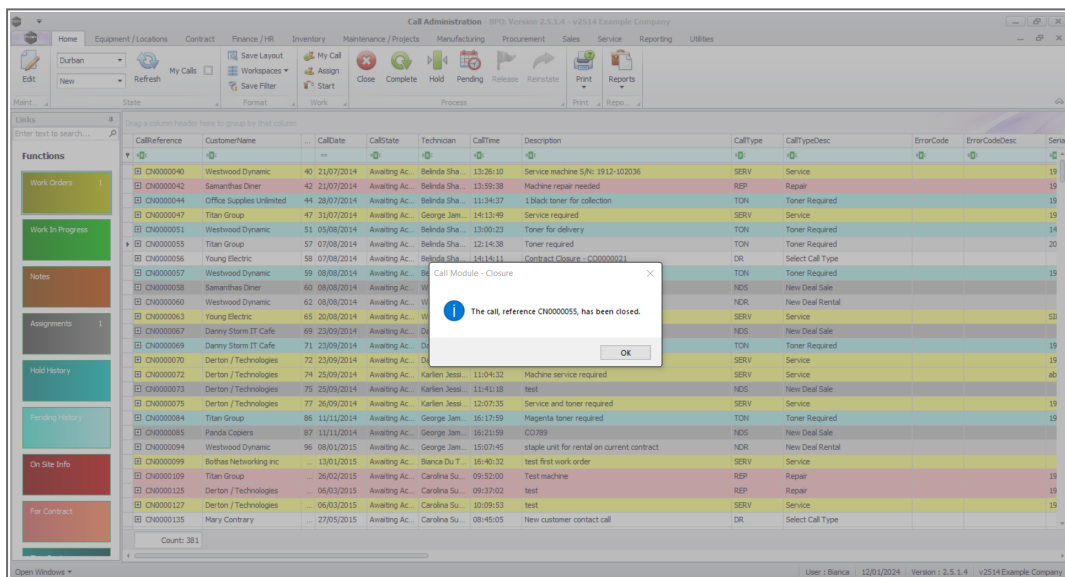
- The call will be closed and removed from the Call Administration listing screen.

For a detailed handling of this topic refer to Service - Introduction to Calls

Related Topics

- Service - Introduction to Call Administration
- Call Administration - Edit a Call
- Call Administration - My Calls
- Call Administration - Assign a Call
- Call Administration - Start or End Work
- Call Administration - Close a Call
- Call Administration - Complete a Call
- Call Administration - Hold a Call
- Call Administration - Pend a Call
- Call Administration - Release a Call
- Call Administration - Reinstate a Call

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