

# SERVICE

## VIEW CALL CLOSURE EXCEPTION DETAILS

The **Call Closure Exceptions** screen is a new screen (in BPO2)<sup>1</sup> that displays the list of Close Call Exceptions returned by the (Auto Close Call Service)<sup>2</sup>, 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
  - Warranties

---

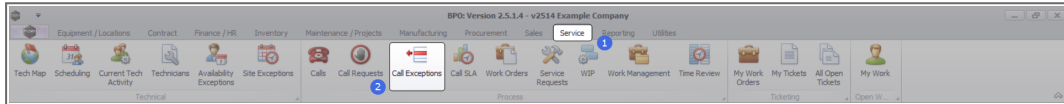
<sup>1</sup>BPO2 v2.5.1.3 or higher,

<sup>2</sup>v3.0.0.1

- 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.

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER200	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call SLA Hours Functionality Review	Complete	3		15/03/2023
CH0000981	HOP001	Hope Works (Pty) Ltd	11/12/2019	01/01/1900	ADM	test placing call on hold	Complete	3		11/12/2019
CH0000980	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	TON	Driver Connect - offline test	Complete	3		21/11/2019
CH0000979	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Third driver connect call	Complete	3		21/11/2019
CH0000978	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	PR	Driver Connect - full set of tones required	Complete	3		21/11/2019
CH0000977	HOP001	Hope Works (Pty) Ltd	21/11/2019	01/01/1900	SERV	Driver Connect - toner delivery	Complete	3		21/11/2019
CH0000973	DAN002	Dancing Shoes	18/11/2019	01/01/1900	ADM	Test call email functionality	Complete	3		18/11/2019
CH0000841	YES001	Young Electric	11/11/2019	01/01/1900	NDS	Test Service balances time logging	Complete	3		11/11/2019
CH0000832	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
CH0000822	TELO05	Telerex	04/07/2019	01/01/1900	DR	test	Complete	2		11/07/2019
CH0000815	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test another call for overflow error	Complete	3		13/05/2019
CH0000814	DAN002	Dancing Shoes	13/05/2019	01/01/1900	INST	test call for overflow error	Complete	3		13/05/2019
CH0000812	HOP001	Hope Works (Pty) Ltd	03/05/2019	01/01/1900	IT	Test call for warranties	Complete	3		03/05/2019
CH0000793	HOP001	Hope Works (Pty) Ltd	11/09/2018	01/01/1900	TON	Toner replacement requirement	Complete	3		11/09/2018
CH0000781	HOP001	Hope Works (Pty) Ltd	25/07/2018	01/01/1900	REP	Copier not switching on	Complete	3		25/07/2018
CH0000772	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
CH0000771	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	DR	Test all billable items.	Complete	3		11/07/2018
CH0000770	HOP001	Hope Works (Pty) Ltd	11/07/2018	01/01/1900	INST	Auto Invoicing Next Level	Complete	1		11/07/2018
CH0000766	HOP001	Hope Works (Pty) Ltd	10/07/2018	01/01/1900	INST	Test call for auto invoicing	Complete	3		10/07/2018
CH0000765	DER001	Derton / Technologies	10/07/2018	01/01/1900	INSP	Auto call invoice test	Complete	3		10/07/2018
CH0000764	APP001	Apple Juice Inc.	10/07/2018	01/01/1900	INSP	New Call for testing invoicing from Auto Call Invoice.	Complete	3		10/07/2018
CH0000763	HOP001	Hope Works (Pty) Ltd	06/07/2018	01/01/1900	INSP	Test call for auto invoice processing	Complete	3		06/07/2018
CH0000753	APP001	Apple Juice Inc.	13/06/2018	01/01/1900	INSP	Test stock over issue - auto approve part requests off	Complete	3		13/06/2018
CH0000552	HOP001	Hope Works (Pty) Ltd	08/01/2018	01/01/1900	DR	Test swap outs for tech connect	Complete	3		08/01/2018
CH0000549	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
CH0000534	GOB001	Good Books	14/08/2017	01/01/1900	IT	Test call for the WebPortal back order report	Complete	2		14/08/2017

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

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023
CH0000041	WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	2		21/07/2014
CH0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete	2		04/08/2014
CH0000053	OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete	2		05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	DNST	Setup required	Complete	2		26/02/2015
CH0000118	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	2		02/06/2015
CH0000255	blancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	2		14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete	2		29/03/2016
CH0000320	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000355	TIAG01	Titan Group	22/06/2016	01/01/1900	SERV	Loan Limit required	Complete	2		22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete	2		13/09/2016
CH0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete	2		13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete	2		26/09/2016
CH0000228	YESS01	Young Electric	18/11/2015	01/01/1900	REP	Check Contract Detail record in place after partial non stock return	Complete	2		18/11/2015
CH0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	DNST	My work - work order linked to a call. Installation at non client location	Complete	2		29/03/2017
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per WO	Complete	2	W00001262 : call closed	12/04/2017
CH0000447	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
CH0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code .....	Complete	2		17/05/2017
CH0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete	2		24/05/2017
CH0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete	2		08/06/2017
CH0000488	OFF001	Office Supplies Unlimited	06/06/2017	01/01/1900	DNST	Test creating a call with the required date field filled in.	Complete	2		06/06/2017
CH0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017
CH0000491	ABC072123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

## VIEW CLOSURE EXCEPTIONS

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

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023
CH0000041	WES001	Westwood Dynamic	21/07/2014	01/01/1900	SERV	Please service machine as per error code	Complete	2		21/07/2014
CH0000049	SAM001	Samanthas Diner	04/08/2014	01/01/1900	REP	Machine error	Complete	2		04/08/2014
CH0000053	OFF001	Office Supplies Unlimited	05/08/2014	01/01/1900	SERV	Machine error code - drum	Complete	2		05/08/2014
CH0000054	DAN001	Danny Storm IT Cafe	05/08/2014	01/01/1900	SERV	Service required	Complete	2		05/08/2014
CH0000118	HOP001	Hope Works (Pty) Ltd	26/02/2015	01/01/1900	DNST	Setup required	Complete	2		26/02/2015
CH0000118	WES001	Westwood Dynamic	02/06/2015	01/01/1900	SERV	Machine service required	Complete	2		02/06/2015
CH0000255	blancad	North West Branch	14/01/2016	01/01/1900	PR	test	Complete	2		14/01/2016
CH0000296	HOP001	Hope Works (Pty) Ltd	29/03/2016	01/01/1900	SERV	Test auto apply task to work order	Complete	2		29/03/2016
CH0000320	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000333	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000339	HOP001	Hope Works (Pty) Ltd	09/06/2016	01/01/1900	DNST	Tier - Commercial Tier Test	Complete	2		09/06/2016
CH0000355	TIAG01	Titan Group	22/06/2016	01/01/1900	SERV	Loan Limit required	Complete	2		22/06/2016
CH0000370	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Prior calls list for location	Complete	2		13/09/2016
CH0000372	HOP001	Hope Works (Pty) Ltd	13/09/2016	01/01/1900	REP	Scheduled Maintenance	Complete	2		13/09/2016
CH0000373	HOP001	Hope Works (Pty) Ltd	19/09/2016	01/01/1900	REP	12345	Complete	2		26/09/2016
CH0000228	YESS01	Young Electric	18/11/2015	01/01/1900	REP	Check Contract Detail record in place after partial non stock return	Complete	2		18/11/2015
CH0000425	HOP001	Hope Works (Pty) Ltd	29/03/2017	01/01/1900	DNST	My work - work order linked to a call. Installation at non client location	Complete	2		29/03/2017
CH0000437	HOP001	Hope Works (Pty) Ltd	12/04/2017	01/01/1900	SM	TT0001 - Daily - Call per WO	Complete	2	W00001262 : call closed	12/04/2017
CH0000447	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
CH0000458	HOP001	Hope Works (Pty) Ltd	17/05/2017	01/01/1900	PR	Error code .....	Complete	2		17/05/2017
CH0000472	HOP001	Hope Works (Pty) Ltd	24/05/2017	01/01/1900	SERV	Contract Service Test v2.1.0.5	Complete	2		24/05/2017
CH0000487	HOP001	Hope Works (Pty) Ltd	01/06/2017	01/01/1900	NDR	New Deal Rental	Complete	2		08/06/2017
CH0000488	OFF001	Office Supplies Unlimited	06/06/2017	01/01/1900	DNST	Test creating a call with the required date field filled in.	Complete	2		06/06/2017
CH0000490	HOP001	Hope Works (Pty) Ltd	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017
CH0000491	ABC072123	ABC Shoe Co	08/06/2017	01/01/1900	NDS	1234	Complete	2		15/06/2017

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

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023

Processed	CallReference	Description	ClosureType	Comment
<input type="checkbox"/>	CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SNW	
<input type="checkbox"/>	CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP	
<input type="checkbox"/>	CH0001004	There are still or notes which need to be authorised. Please action these items before closing.	SCRN	
<input type="checkbox"/>	CH0001004	There are still billable part request items to be invoiced. Please bill these items before closing.	INWT	
<input type="checkbox"/>	CH0001004	There are still billable sub-contract items to be invoiced. Please bill these items before closing.	WOCT	
<input type="checkbox"/>	CH0001004	There are still time records to be reviewed. Please review these items before closing.	WOTR	
<input type="checkbox"/>	CH0001004	There are still billable labour items to be invoiced. Please bill these items before closing.	WOLB	
<input type="checkbox"/>	CH0001004	There are still billable expense items to be invoiced. Please bill these items before closing.	WOCK	
<input type="checkbox"/>	CH0001004	There are still billable service items to be invoiced. Please bill these items before closing.	WOSV	
<input type="checkbox"/>	CH0001004	There are still open part requests which need to be actioned. Please action these items before closing.	INFP	
<input type="checkbox"/>	CH0001004	There are still open sub contracts which need to be received. Please GRN these items before closing.	PRSR	
<input type="checkbox"/>	CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT	
<input type="checkbox"/>	CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before closing.	PRAP	

## 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 [returned](#) 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 [reviewed](#).

### **ADD A COMMENT**

---

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

CallReference	CustomerCode	CustomerName	CallDate	CallTime	CallType	CallDesc	StatusDesc	Priority	Action	DateRequired
CH0001004	DER001	Derton / Technologies	15/03/2023	01/01/1900	ADM	Call Closure Exception Functionality Review	Complete	3		15/03/2023

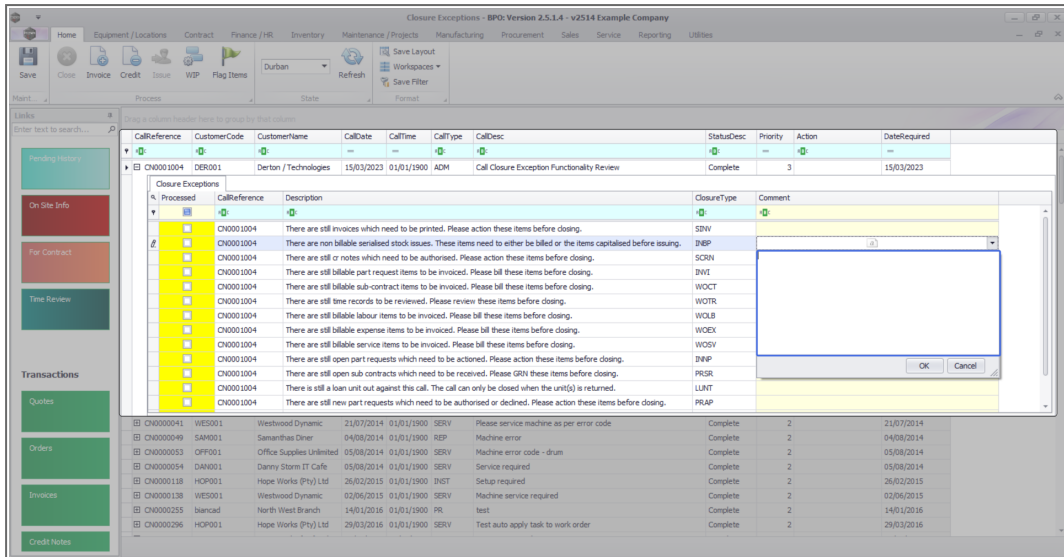
  

Processed	CallReference	Description	ClosureType	Comment
<input type="checkbox"/>	CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SNW	
<input type="checkbox"/>	CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP	
<input type="checkbox"/>	CH0001004	There are still or notes which need to be authorised. Please action these items before dosing.	SCRN	
<input type="checkbox"/>	CH0001004	There are still billable part request items to be invoiced. Please bill these items before dosing.	INVT	
<input type="checkbox"/>	CH0001004	There are still billable sub-contract items to be invoiced. Please bill these items before dosing.	WOCT	
<input type="checkbox"/>	CH0001004	There are still time records to be reviewed. Please review these items before dosing.	WOTR	
<input type="checkbox"/>	CH0001004	There are still billable labour items to be invoiced. Please bill these items before dosing.	WOLB	
<input type="checkbox"/>	CH0001004	There are still billable expense items to be invoiced. Please bill these items before dosing.	WOCK	
<input type="checkbox"/>	CH0001004	There are still billable service items to be invoiced. Please bill these items before dosing.	WOSV	
<input type="checkbox"/>	CH0001004	There are still open part requests which need to be actioned. Please action these items before dosing.	INPP	
<input type="checkbox"/>	CH0001004	There are still open sub contracts which need to be received. Please GRN these items before dosing.	PRSR	
<input type="checkbox"/>	CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT	
<input type="checkbox"/>	CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before dosing.	PRAP	

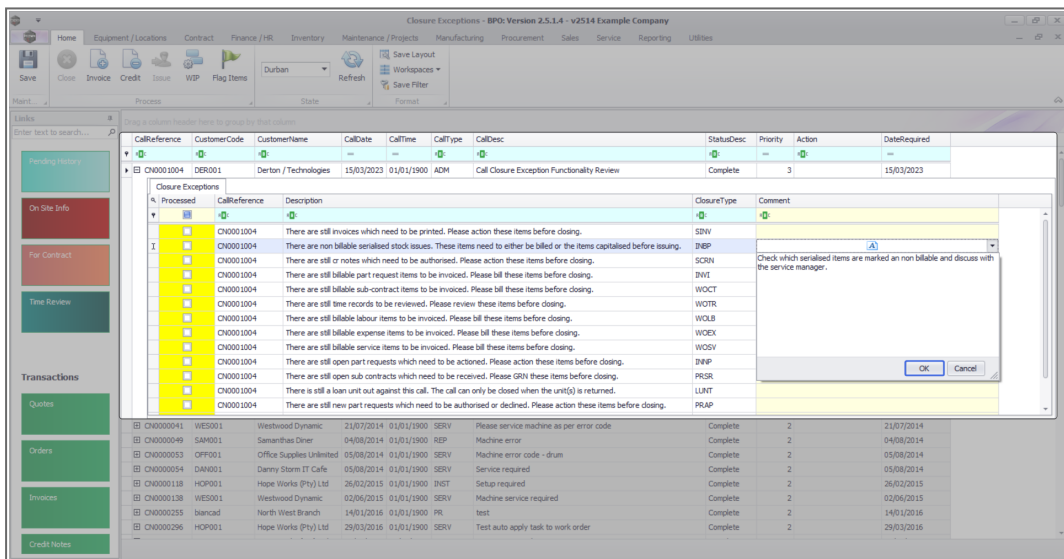
- A little notepad icon will appear in the centre of the field, and a drop down arrow will appear on the right hand side of the field.

Processed	CallReference	Description	ClosureType	Comment
<input type="checkbox"/>	CH0001004	There are still invoices which need to be printed. Please action these items before closing.	SNW	
<input type="checkbox"/>	CH0001004	There are non billable serialised stock issues. These items need to either be billed or the items capitalised before issuing.	INBP	
<input type="checkbox"/>	CH0001004	There are still or notes which need to be authorised. Please action these items before dosing.	SCRN	
<input type="checkbox"/>	CH0001004	There are still billable part request items to be invoiced. Please bill these items before dosing.	INVT	
<input type="checkbox"/>	CH0001004	There are still billable sub-contract items to be invoiced. Please bill these items before dosing.	WOCT	
<input type="checkbox"/>	CH0001004	There are still time records to be reviewed. Please review these items before dosing.	WOTR	
<input type="checkbox"/>	CH0001004	There are still billable labour items to be invoiced. Please bill these items before dosing.	WOLB	
<input type="checkbox"/>	CH0001004	There are still billable expense items to be invoiced. Please bill these items before dosing.	WOCK	
<input type="checkbox"/>	CH0001004	There are still billable service items to be invoiced. Please bill these items before dosing.	WOSV	
<input type="checkbox"/>	CH0001004	There are still open part requests which need to be actioned. Please action these items before dosing.	INPP	
<input type="checkbox"/>	CH0001004	There are still open sub contracts which need to be received. Please GRN these items before dosing.	PRSR	
<input type="checkbox"/>	CH0001004	There is still a loan unit out against this call. The call can only be closed when the unit(s) is returned.	LUNT	
<input type="checkbox"/>	CH0001004	There are still new part requests which need to be authorised or declined. Please action these items before dosing.	PRAP	

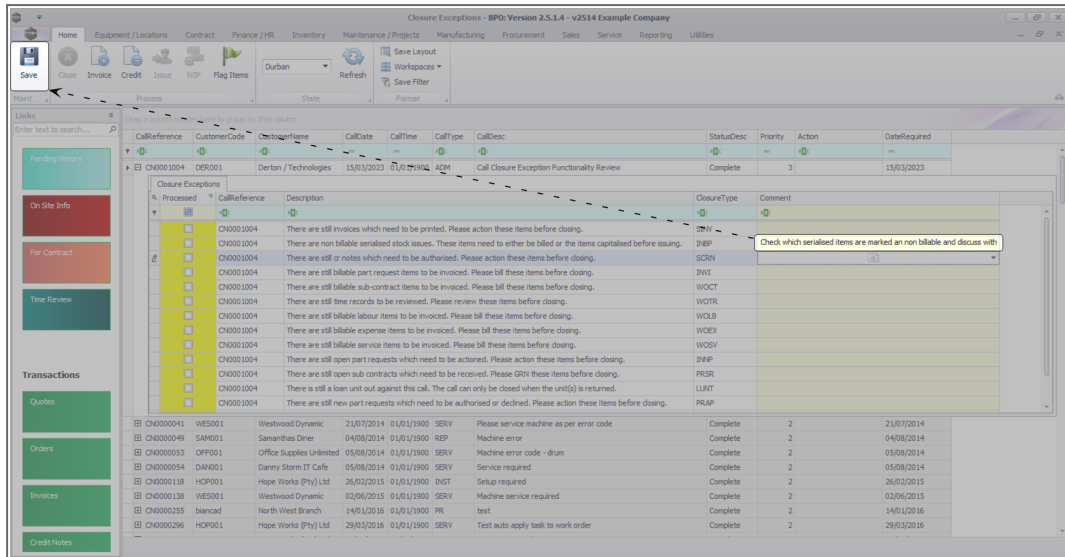
- Click in the field again, or on the arrow.
- The drop down Comments box will open.



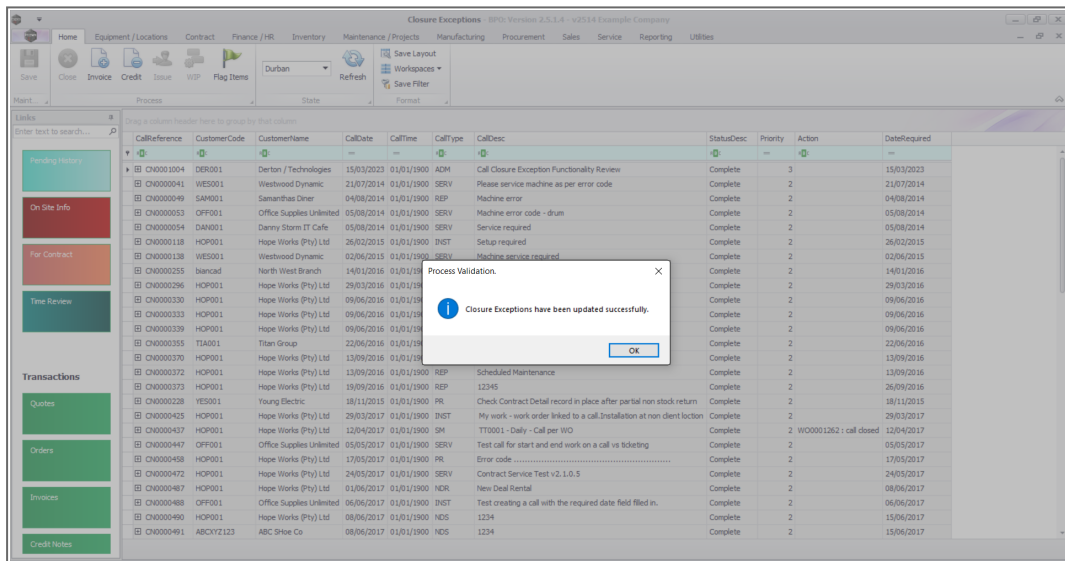
- Type in your comment.
- Click on **OK**.
- You can continue to add comments to other Exceptions on this and other calls on the list.



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



- 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](#)

- [Service - Closure Exceptions - Invoice Call](#)
- [Service - Closure Exceptions - Credit Call](#)
- [Service - Closure Exceptions - Issue Stock](#)
- [Service - Closure Exceptions - WIP](#)
- [Service - Closure Exceptions - Flag Items](#)

MNU.125.001

