# Purpose

There are four steps to reopening a service call:

1. Disputes will come in from the customer, either via the Credit team or directly to the Service Team. The Service Team will investigate and decide if there is a need to reopen the call
2. In branch approval process is followed
3. The Service Team complete credit and will pick the service call up again as it will show in their cue called Credited, Not Re-Invoiced
4. The Service Team then needs to make the required changes and re-invoice the service call

This procedure will explain what needs to be done once the dispute has been investigated and the Service Team has found the service call needs to be reopened.

# Prerequisites

A service call needs to be invoiced and closed.

# Terminology

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| **Service Call** | A job that a technician must complete |
| **Segment** | A task within a service call |
| **Reopen** | Moves the segment/operation status from ‘Finished’ to ‘In process’ |
| **Back out an invoice** | Crediting the original customer invoice |
|  | Displays all invoice journals for the selected segment or operation |
|  | Runs the credit (backout) function for the selected invoice |
|  | View the segments of the service call |
|  | Reopens the segment or operation and updates the **Status** from ‘Finished’ to ‘In Process’ |
|  | Reopens the service call and updates the **Call status** from ‘Closed’ to ‘Reopened’ |

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

**What is covered in this guide**

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1. Before backing out service call

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| Before backing out of a service invoice check the following; |
| **Service Credit Process:** gives details on how to determine the type of Credit that is required for the Service Call issue, either Backout an Invoice or Manual Credit  <http://intra/files/service-credit-process---march-2016-pdf-naIyQB.pdf> |
| **Delegated Authority Policy** (GR119) to determine who will give the approval  <http://intra/content/policies-and-procedures/delegated-authority> |
| **Credit notes policy**(GR104) explains the policy on Credits  http://intra/files/gr104-credit-notes-policy-jan2011--doc-sx5JGZ.doc |
| **Manual credit QRG**  http://intra/files/qrg---manual-credit---march-2016-pdf-XtHRSE.pdf |

1. Reopen call

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| 1. Find the required service call – see **QRG\_Find a Service Call** for more information on how to find the required service call |
| 1. Select **Service call** 2. Select **Re-open call**   The **Call status** field will update to **‘Reopened’** |
| Call status showing ‘Reopened’: |

1. Back out invoice

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| Before backing out the invoice the service call needs to be reopened – see Step 2.  If a Warranty Segment is included on the Service Call don’t back out the Invoice, contact the Warranty Department, they will action.  Or create a Manual Credit against the call – see **QRG\_Manual Credit.** |
| If the following notification displays, it means you haven’t re-opened the service call before attempting to back out the invoice. |
| Remember that after the service call is reopened the status will be changed. Ensure you have selected the correct service call before moving to Step 4. |
| 1. Highlight the service call 2. Select **Related information > Invoice journals**   The **Invoice journals** window will display  SNAGHTMLa51c6bd |
| 1. Highlight the invoice that needs to be backed out 2. Select **Functions > Select for credit adjustment note**   The **Back-out reason code** window will display |
| 1. Select a back-out reason code 2. Select **OK**   A notification advising that the invoice proposal has been created will display |
| 1. Select **Close**   The **Invoice journals** window will display with the new credit line showing |
| 1. If the credit doesn’t show, press **F5** to refresh the window 2. Select **Close**   SNAGHTML14d6e04 |

1. Reopen a service segment (only adjustments): Standard service

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| 1. Find the required service call – see **QRG\_Find a Service Call** for more information or if previously invoiced, use the cue called ‘Credited, Not Re-Invoiced’ |
| 1. Highlight the service call 2. Select **Service call > Service segment**   SNAGHTML15152b8 |
| 1. Is the segment currently invoiced?  * **Yes:** Complete Task 3 and Task 4, then continue with Step 17 * **No:** Go to Step 17 |
| 1. Reopen segment to make adjustments:    1. Select segment    2. Select Reopen to make adjustments |
| 1. Choose one of the following options:  * **OK** To reopen immediately * **Cancel** To cancel out of reopening the service call * **Batch** To add the service call to a batch to reopen overnight   The segment will now be ‘In process’ and Parts, Labour and Misc. can be posted |
| 1. Adjust as required see – **SER\_5.1\_Complete a Service Call** for more information. |
| 1. Re-invoice the segment – see **SER\_5.1\_Complete a Service Call** for more information. |

1. Reopen service segment (adding parts, labour or misc.) – Standard service

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| 1. Find the required service call – see **QRG\_Find a Service Call** for more information or if previously invoiced, use the cue called Credited, Not Re-Invoiced. |
| 1. Highlight the service call 2. Select **Service call > Service segment**   SNAGHTML15152b8 |
| 1. Is the segment currently invoiced?  * **Yes:** Complete Task 3 and Task 4 and then go to Step 27 * **No:** Go to Step 27 |
| If the service segment has had the invoice backed out it will have a tick in the **Credited** checkbox and the **Invoice Indicator** field will be blank. |
| 1. Highlight the segment to be reopened 2. Select **Service segments > Reopen**   The **Status change** window will display  SNAGHTML15304b7 |
| 1. Choose one of the following options:  * **OK** To reopen immediately * **Cancel** To cancel out of reopening the service call * **Batch** To add the service call to a batch to reopen overnight   The segment will now be ‘In process’ and Parts, Labour and Misc. can be posted |
| 1. Add Parts, Labour and Misc. as required and then re-invoice the segment – see **SER\_5.1\_Complete a Service Call** for more information |

1. Reopen service segment - Warranty

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| 1. Find the required service call – see **QRG\_Find a Service Call** for more information. |
| 1. Highlight the service call 2. Select **Service call > Service segment**   SNAGHTML15152b8 |
| 1. Is the segment currently invoiced?  * **Yes:** Complete Task 3, then Contact the Warranty Team * **No:** Go to Step 34 |
| 1. Highlight the segment to be reopened 2. Select **Service segments > Reopen**   The **Status change** window will display  SNAGHTML1995114 |
| 1. Choose one of the following options:  * **OK** To reopen immediately * **Cancel** To cancel out of reopening the service call * **Batch** To add the service call to a batch to reopen overnight   The **Segment re-open reason code** window will display |
| 1. Select the relevant reason 2. Select **OK**   The selected reason code will populate the segment detail |
| 1. Open segment details fast tab 2. Open **Re-open reasons** tab clear before completing the segment   The segment will now be ‘In process’ and Parts, Labour and Misc. can be posted |
| 1. Add Parts, Labour and Misc. as required and then re-invoice the segment - see **SER\_5.3\_Invoice a Service Call** for more information |

# What next?

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| Make changes to the service call | SER\_5.1\_Complete a Service Call |
| Re-invoice the service call | SER\_5.1\_Complete a Service Call |