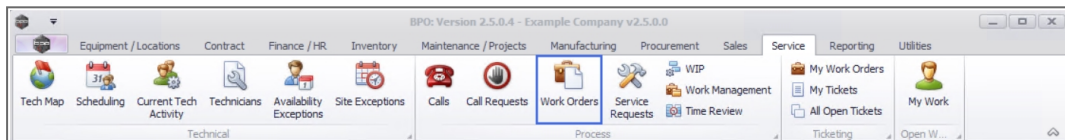


# SERVICE

## WORK ORDERS – EDIT WORK ORDER

Details may need to be **added** or **removed** from the work order after it has been created.

**Ribbon Access:** *Service > Work Orders*



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site**.
  - The example has **Durban** selected.
3. Select the **Status**.
  - Only work orders with an **Open**, **Deleted** or **Completed** status can be edited.

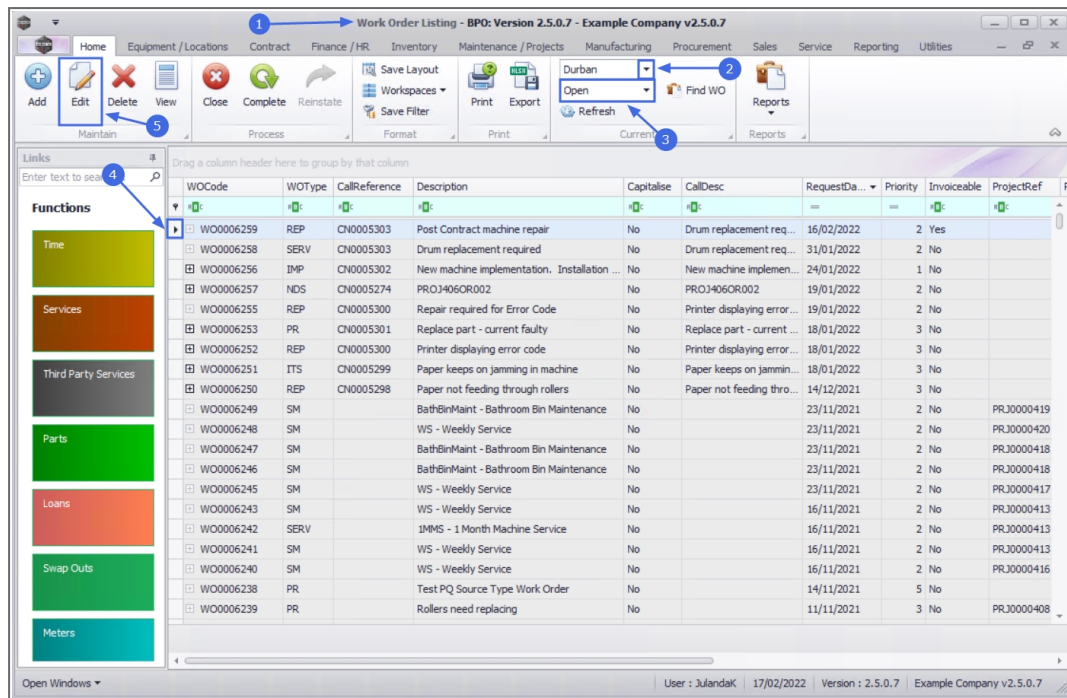


If you are not sure of the **site** or **status** of the work order you require, use the **Find WO** feature to search for it.

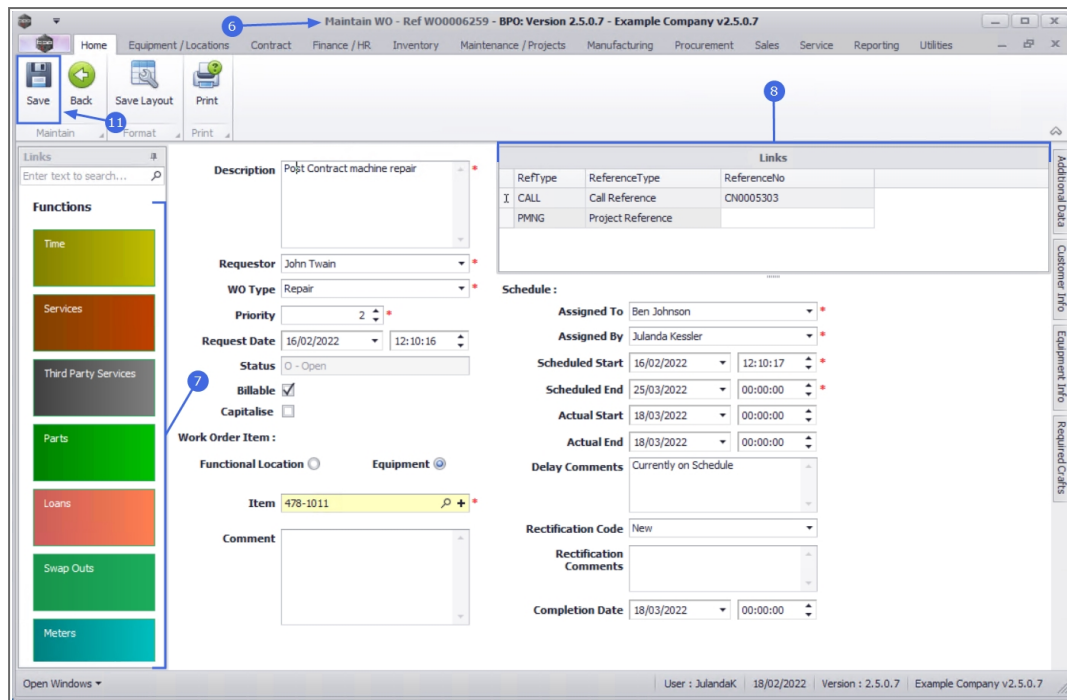
4. Click on the **row** of the work order you wish to edit.
5. Click on **Edit**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.



6. The **Maintain WO - Ref** [work order number] screen will be displayed.
7. Note that the **Functions** tiles are available from this screen to link and update the functions related to the work order.
8. Use the "Links Frame" on page 7 to link the work order to a **Call** or **Project**.



## ASSIGN REQUIRED CRAFT

The crafts required for the work that needs to be done on the work order can be *added* or *edited* on the Required Crafts tab.

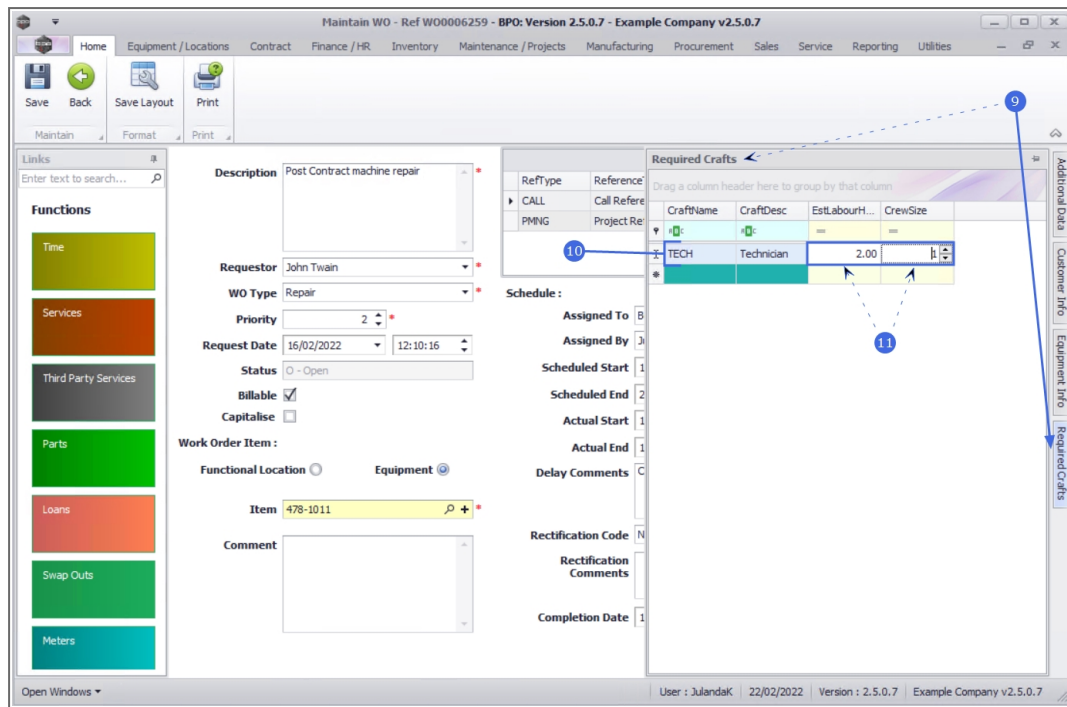
Crafts are skills or job title(s) **linked to employees**. Work Order schedule 'Required Crafts' details need to be configured on each work order.

9. Click on the **Required Crafts** tab to **expand** the **Required Crafts** docking panel.
10. The crafts required for this work order will display in the data grid.




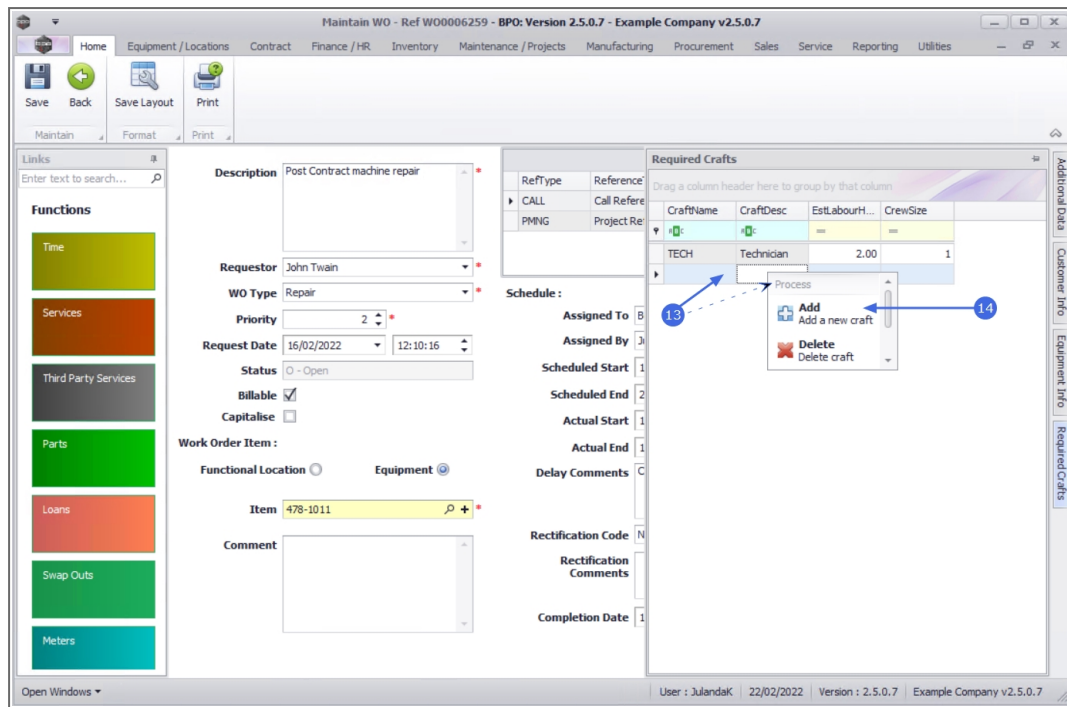
**Note** that the default craft assigned to a work order is based on the primary craft of the Assigned To person for that work order.

11. Click in the **field** of the existing craft to make the required changes.



## ADD A REQUIRED CRAFT

12. To add craft(s) required by the person responsible for carrying out the Work Order,
13.  **Right click** on the next available row in the **Required Crafts** data grid to display the **Process** menu.
14. Click on **Add** - Add a new craft.



**Maintain WO - Ref WO0006259 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7**

**Functions**

- Time
- Services
- Third Party Services
- Parts
- Loans
- Swap Outs
- Meters

**Description** Post Contract machine repair

**Requestor** John Twain

**WO Type** Repair

**Priority** 2

**Request Date** 16/02/2022 12:10:16

**Status** O - Open

**Billable** ☒

**Capitalise** ☐

**Work Order Item :**

**Functional Location** ☐ **Equipment** ☒

**Item** 478-1011

**Comment**

**Required Crafts**

CraftName	CraftDesc	EstLabourH...	CrewSize
TECH	Technician	2.00	1

**Process**

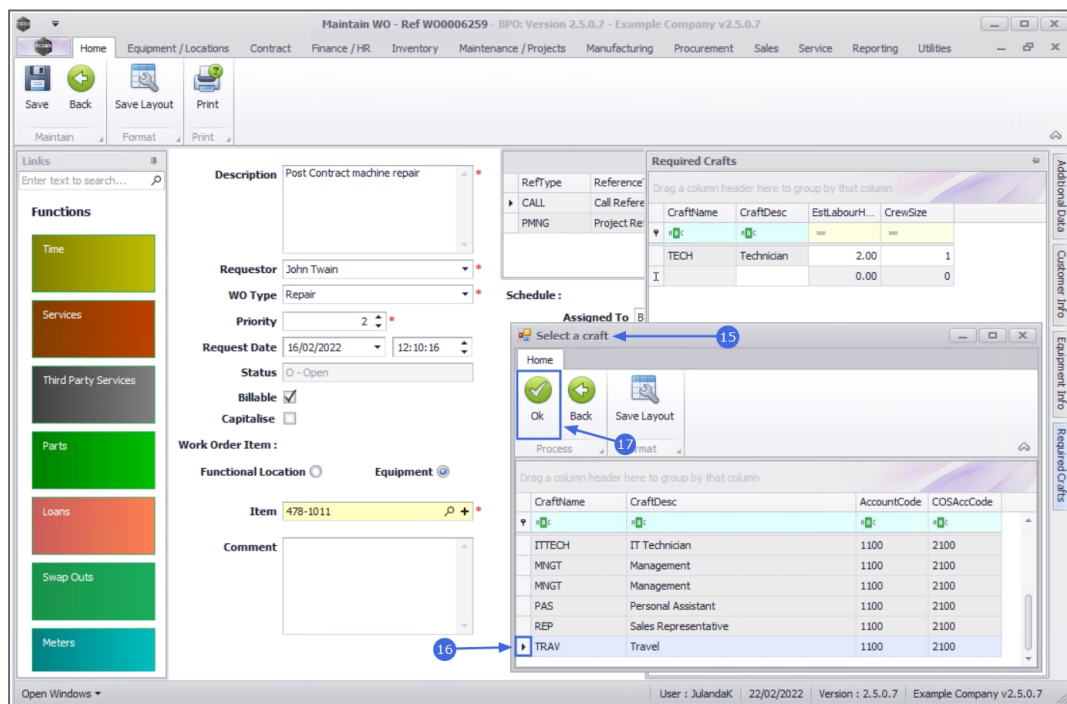
**Add** Add a new craft

**Delete** Delete craft

15. The **Select a craft** screen will display.

16. Click on the **row** of the **craft** you wish to **add** to the work order.

17. Click on **OK**.



**Maintain WO - Ref WO0006259 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7**

**Functions**

- Time
- Services
- Third Party Services
- Parts
- Loans
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**Capitalise** ☐

**Work Order Item :**

**Functional Location** ☐ **Equipment** ☒

**Item** 478-1011

**Comment**

**Required Crafts**

CraftName	CraftDesc	AccountCode	COSAccCode
ITECH	IT Technician	1100	2100
MNGT	Management	1100	2100
MNGT	Management	1100	2100
PAS	Personal Assistant	1100	2100
REP	Sales Representative	1100	2100
TRAV	Travel	1100	2100

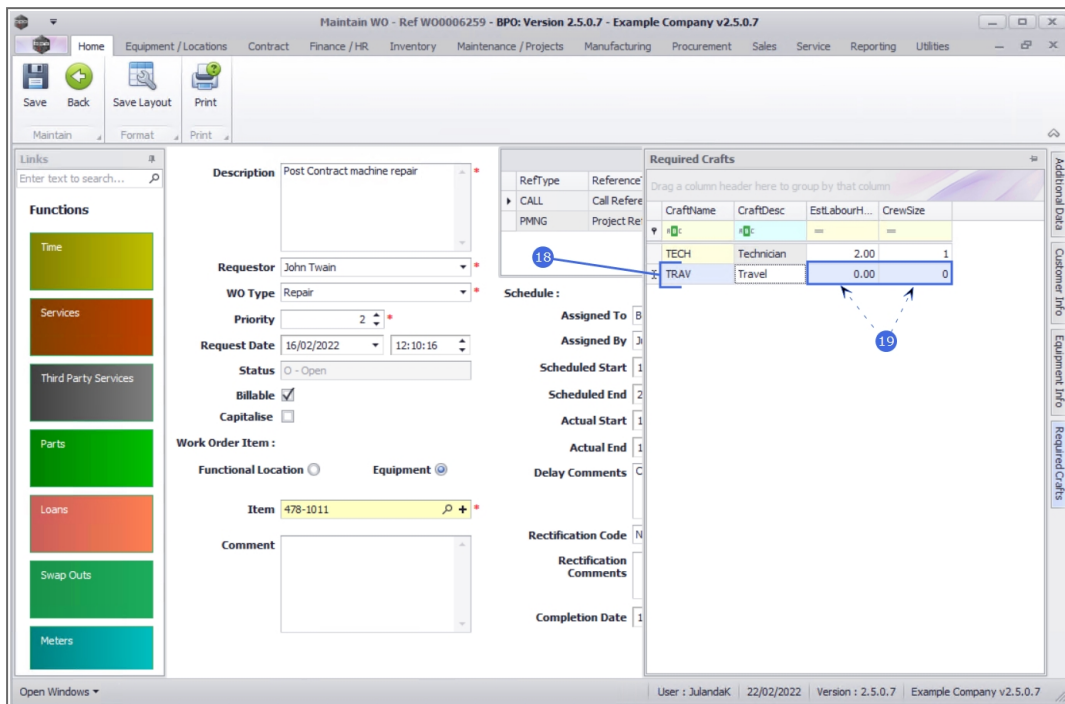
**Select a craft**

**Home** ☒ **Back** ☐ **Save Layout** ☐

**Process** ☐ **mat** ☐

**OK**  **Back**  **Save Layout**

18. The **Craft Name** column will populate with the selected craft.
19. Either **type in** or use the **directional arrows** to select the **Estimated Labour Hours** and **Crew Size** of the newly added craft.



## SCHEDULE

20. **Schedule:** Update and complete the required **Scheduled Start** and **End** Dates, the **Actual Start** and **End** Dates and **Delay Comments** as required.

## RECTIFICATION COMMENTS

Rectification comments are work resolution comments, created on successful completion of the work.

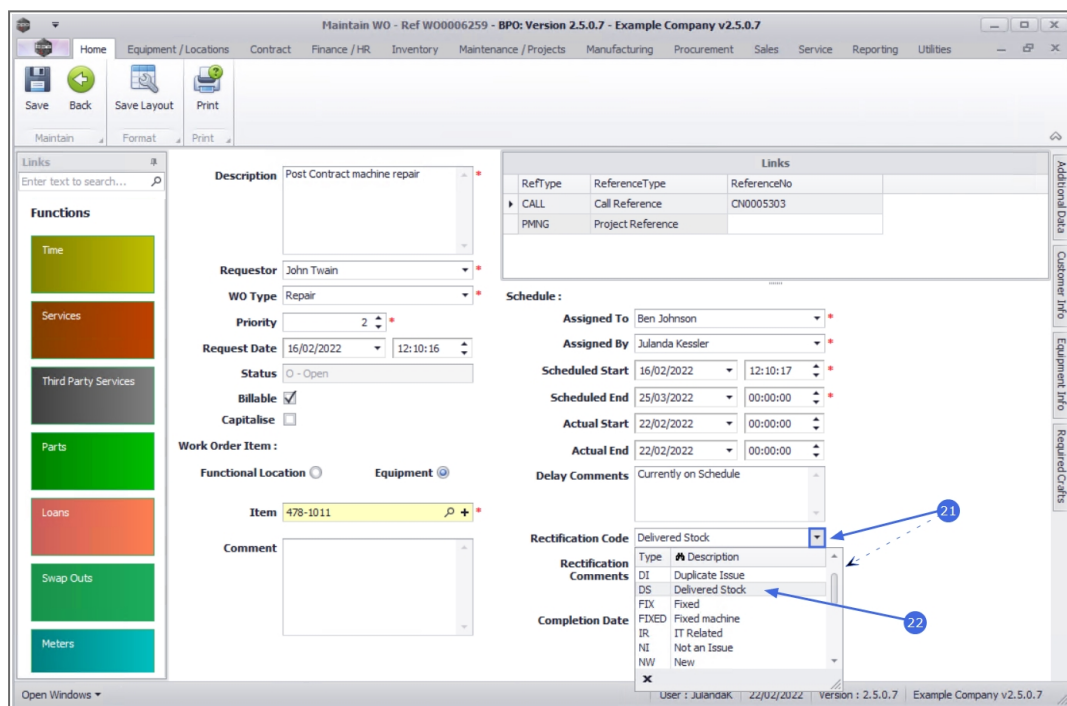
If the work order is linked to a call, this information will pull through to the call closure comments.

A work order must be completed, with rectification comments, before it can be closed.

You can add rectification comments to a work order in the following states:

- Open
- Deferred
- Completed

21. Click on the down **arrow** in the **Rectification Code** field to display the **Rectification Type** menu.
22. Select the **Rectification Type** relevant to the work order.



The screenshot shows the 'Maintain WO - Ref WO0006259 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7' window. The 'Rectification Code' dropdown menu is open, showing options: 'Delivered Stock', 'DI Duplicate Issue', 'DS Delivered Stock', 'FIX Fixed', 'FIXED Fixed machine', 'IR IT Related', 'NI Not an Issue', and 'NW New'. The 'Rectification Comments' text box is empty. The 'Completion Date' field is set to '22/02/2022'.

23. Type in the relevant **comment** in the **Rectification Comments** text box.
24. **Completion Date:** Type in or use the **arrow** to select the completion date for the work order using the calendar function.
25. When you have finished making the required changes, click on **Save**.



Maintain WO - Ref WO0006259 - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Description Post Contract machine repair

Requestor John Twain

WO Type Repair

Priority 2

Request Date 16/02/2022 12:10:16

Status Open

Billable ☒

Capitalise ☐

Work Order Item:

Functional Location ☐ Equipment ☒

Item 478-1011

Comment

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0005303
PMNG	Project Reference	

Schedule:

Assigned To Ben Johnson

Assigned By Julanda Kessler

Scheduled Start 16/02/2022 12:10:17

Scheduled End 25/03/2022 00:00:00

Actual Start 22/02/2022 00:00:00

Actual End 22/02/2022 00:00:00

Delay Comments Currently on Schedule

Rectification Code Delivered Stock

Rectification Comments Stock delivered as schedule

Completion Date 22/02/2022 00:00:00

Open Windows

User: JulandaK 22/02/2022 Version: 2.5.0.7 Example Company v2.5.0.7

MNU.072.026