

SERVICE

WORK MANAGEMENT - CLOSE A WORK ORDER

You can **close** a Work Order from the **Work Management** screen.

Remember a Work Order must be **Complete'**, with **Rectification Comments**, before it can be **Closed**.

Ribbon Access: Service > Work Management



- 1. The *Work Management* screen will be displayed.
- 2. Select the *date range* that will contain the *work order* you wish to assign.
- 3. Select the *Site* where the work order was issued.
 - The example has *Durban* selected.





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CLOSE THE WORK ORDER

- Click on the *row selector* in front of the (Completed) *Work Order* that you wish to *close*.
 - Note: In this image; you can see in the Status column that the selected Work Order is set to status M - Completed. (A Work Order can only be closed <u>after</u> it has been Completed).



Work Management - Close a Work Order

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It is also worth noting in this image;



- 1. The technician assigned to this Work Order is Belinda Sharman.
- In the stats column of the Sites frame you can see the figures 11/1 next to the name Belinda Sharman. This means she has 11 Open and 1 Completed Work Order (we will see this change later in this manual).

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• When you are sure *(according to the previous steps)* that you have selected a **'Completed'** work order to be closed, click on *Close Work Order*.

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- An Input Validation message box will pop up asking;
 - Are you sure you want to close this work order, no.
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- Click on Yes.

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- A *Processing* message box will pop up informing you that;
 - The work order, no. [] has been closed.
- Click on OK.

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				W00001655	· New Deal Sale 111	Theo Peterson	Durban	0	NDS	New Deal Sale	HOP001	Hope Works	Julia Ritson	031 768 9876
				W00001669	Rolers need replacing.	Theo Peterson	Durban	0	PR	Parts Require	T1A001	Titan Group		
				W00001659	Toner required	Fid torms	Dirhen	M	TON	Toner Required	H0P001	Hone Works	lane. Alich.	031 123 45671

• In the *Stats* column of the *Sites* frame, you can see that the numbers for Belinda Sharman have now changed to **11/0** which means



she still has **11** <u>Open</u> but **0** <u>Completed</u> work orders, as the completed Work Order has been *closed* and *removed* from this screen.

 Note: You may need to *Refresh* the screen to see the Stats column changes.



Work Management - Close a Work Order

h 1		Work Manag	ement - BPO: Ve	rsion 2.1.0.6	2 - Exam	ple Com	pany				□ X
Mone Equipment and Locato	ons Contract Pin	ance and HR Driventory	Maintenance	and Projects	Mar	ufacturey	g Procurement	Sales 1	ervice Repor	ting Utilities	- 19 1
Add Edit Complete Order Work	2018/02/01 • 2018/07/11 •	🐼 🕹 🥝 Refresh Assign Start	Save Layout V	Vorkspaces	Print C Repo	al Print	Cal Net Print Iveries WO	Service History			
Process	0,	rimt : a	Fornat				Print	4			
G Fed O Film	WOCode	W00escription	Technician	SteNane	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhon
0.14											
	+ WO000163	6 TES2.2 - Work Order 2	Beinda Sharman	Durban	0	SERV					
Gies State	W0000163	7 TES3.1 - Work Order 3	Belinda Sharman	Durban	0	SERV					
A Dates 100	W0000163	9 TES4.1 - Work Order 5	Beinda Sharman	Durban	0	SERV					
· 10 0000 25/1	W0000164	0 TES4.2 - Work Order 6	Beinda Sharman	Ourban	0	SERV					
Bianca Du Toit 3/0	W0000164	0 TES4.2 - Work Order 6	Theo Peterson	Durban	0	SERV					
🐰 Belnda Sharman 🛛 11/0	W0000164	0 TE54.2 - Work Order 6	Judith Mudzengi	Durban	0	SERV					
1 Theo Peterson 4/0	W0000164	1 TESS.1 - Work Order 6	Belinda Sharman	Durban	0	SERV					
10	W0000164	2 TESS.2 - Work Order 8	Beinda Sharman	Durban	0	SERV					
W WALLANDON NA	W0000164	3 TES6.1 - Work Order 9	Beinda Sharman	Ourban	0	SERV					
Ed Jones 2/1	W0000164	4 TES6.2 - Work Order 10	Belinda Sharman	Durban	0	SERV					
🤱 Abigal Mine 🛛 2/0	WO000166	7 Drum requested, mac	Beinda Sharman	Durban	0	DR	Default				
Tammy Du Toit 1/0	W0000166	8 SP240 New Deal.	Abgal Mine	Durban	0	DR	Default	TIA001	Titan Group		
Ban Wassen 10	W0000164	6 Test logging a call - lis	Ed Jones	Durban	0	DGT	Installation	HOP001	Hope Works	Jackie Samuels	031 123 45
	WO000167	0 Machine repair require	Theo Peterson	Durban	0	RP	Machine Repairs				
Pretoria 0/0	W0000166	3 Copier to be repaired	Abigal Mine	Durban	0	REP	Machine Repairs				
Cape Town 0/0	W0000167	1 Machine faulty, loan u	Ed Jones	Durban	0	REP	Machine Repairs	H0P001	Hope Works	Mandy Jefferson	031 555 12
A Johannesburg 0,0	W0000166	1 Created for productio	Tanny Du Tolt	Durban	0	MN	Manufacturing				
	WO000166	1 Created for productio	Ben Johnson	Durban	0	MN	Manufacturing		19772 M (14.5	503 5055	
	WO000165	8 ndr10	Bianca Du Tolt	Durban	0	NOR	New Deal Rental	HCP001	Hope Works	Jane, Anch.	031 123 45
	W0000164	7 NOK	Balada Churrolt	Durban	0	NOR	New Deal Rental	HUP001	Hope Works	Jacke Samuels	031 123 45
	W0000165		Bassa Du Tut	Durban	0	100	New Deal Sale	HOPWI	Hope Works	Jane, Andi.	031 123 45
	W0000165	1 (12)1	Balada Charman	Durban	0	16.0	New Deal Sale	HOPMI	Hope Works	Alla filikana	031 768 98
	W0000165	S New Deal Sale 111	Theo Deterritor	Outon	0	NVC	New Deal Sale	HOPOLI	Hope Works	Ma Ribera	031 700 90
	W0000103	9 New Least and Lill	Theo Peterson	Durban	0	100	Parts Description	TIAOOI	Tites Crown	Alla Kogon	011 100 30
	WOOD165	9 Tones need repeating. 9 Tones required	Fill Innes	Durhan	м	TON	Toner Required	HOPIDI	Hove Winds	Iane, Alrich.	811 121 45
nan Ulindaus •	()									11342	018

 You can find the closed Work Order in the Work Order Listing screen where the correct site is selected and the status is set to Closed.



- [Ribbon Access: Service > Work Orders > Work Orders Listing screen]
- If the closed Work order is not immediately apparent in this screen, you can use the <u>Find WO function</u>.

A '	Work Order Listing -	8PO: Version 2.1.0.62 - Example Company		- 🗆 X
W Hone Equipment (d Locations Contract Pinance and HR Inventory Ma	ntenance and Projects Manufacturing Procurement	Sales Service Reporting	Utilites - d ^o X
Add Edit Delete Ver	Image: Completer Reinstate Image: Completer Reinstate <td< th=""><th>Durban • Closed • W Refresh • Pind WO Reports</th><th></th><th></th></td<>	Durban • Closed • W Refresh • Pind WO Reports		
Mantan	a Process a Format a Pro-	t 4 Current 4 Reports		
Linis #				11
true and to teach h	WOCode Description PartCode	SerialNo PartDesc	CalReference CalDesc ProjectRef	ProjectDesc As
Functions				
-	W00001635 TE52.1 - Work order 1		PR.3000028	7 Specification BPO2
115	W00001638 TES3.2 - Work Order 4		PR.3000028	8 Design 8P02
	W00001650 Buy Back - Senai No. 2020-43259 SP2020	2020-43259 SP2020 Sprint Colour Multi Functional Copier		A
Services	W00001631 Duy Back - Senal No. 1912-102 SP19-122900	1912-102033 SP 19-12 Colour Colour Multi Runchenal Center		42
Parts Loans				
Swap Outs Meters				
Dome				
Open Windows *				11 Jul 2018



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Help v2.5.1.4 - Pg 12 - Printed: 27/06/2024

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