

SERVICE

CALLS - WORK ORDERS

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the <u>Call Centre Mode</u> notes.

A work order, or job card is an order for work to be performed for a **Company** or a **Customer**. <u>All</u> transactions concerning this work, such as part issues, labour time, etc. are logged against the work order.

When work is required for a **Customer**, a **Call** is raised. The system will generate a work order in the background. Transactions are logged on the call, but stored against the work order. <u>More than one</u> work order can be linked to a call, for example, when different tasks needs to be performed to complete one call.

When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

- If the work is for Building Maintenance, or Training, then the work order must be linked to a **functional location**, which must be set up before hand.
- If the work required is for an **asset**, e.g. repair a machine in store to be sold refurbished, then the machine is linked to the **call**.

Work Orders displayed in the *Calls Work Order* listing, are a restricted list of work orders that are linked to the selected **Call**.

1BPO2 v2.5.1.3 or higher



Ribbon Select Service > Calls



• The *Call Listing* screen will be displayed.

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- The Calls are listed by *Site* and will display calls for the first Site listed.
- Click on the relevant *Site* for the calls you wish to view.



						Call t	Listing - BPO: Version 2.5.1.4 - Example Company							
Home Equipment / Loc	ations Contract	Finance / HR Inventor	y Maintenance	/ Projects Manufai	turing Procureme	nt Sales	Service Reporting Utilities							
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O New	E CN0001001 Y						Order the same part twice receive with different batch num	CR	Change Request			sin123		
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O Product	E CN0000992 T	top Vehicle Hire		Amaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP 12340LD		
Complete	E CN0000991 A	ipple Juice Inc	24/10/2022	UnAssigned		16:38:15	Contract Closure - C00000054	DR	Select Call Type					
O AL	E CN0000989 D						Call for Monday elapse hours check		Testing					
Pretoria	E CN0000988 Y	oung Bectric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987 Y	oung Bectric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upprade			sin123		
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Pending	E CN0000984 H	tope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000.		
Complete	E 010000983 H	toow Works (Ptv) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
O AI	E CN0000982 Y			UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape Town	E CN0000975 Y		19/11/2019	Assisting Acceptance	Blanca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
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• Select the *Call* you wish to work with.

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Complete	E CN0000991	Apple Juice Inc		022 UnAssigned				DR	Select Call Type						2
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- O Pretoria	E CN0000988	Young Bectric	03/06/3	022 UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123			3
O New	E CN0000987	Young Electric	06/06/2	022 UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin 123			3
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O Peodos	E CN0000985	Hope Works (Pty) Lt	id 10/06/3	022 UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765			3
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Q AI	E CN0000983	Hope Works (Pty) Lt	sd 09/06/3	022 UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546			3
v 👩 Cape Town	E CN0000982	Young Electric		022 UnAssigned		05:00:35	Test elapsed hours 1		Testing			sin 123			
New	E CN0000976			019 Awaiting Acceptan	ce Blanca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration						3
In Progress	E CN0000974	Hope Works (Pty) Lt	id 18/11/3	019 Amaiting Acceptan	ce Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095010015			3
() Hold	E CN0000972	Hope Works (Pty) Lt	18/11/3	019 Awaiting Acceptan	ce Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015			
Pending	E CN0000971	Westwood Dynamic	29/11/3	019 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	5M	Scheduled Maintenance				Checkers Centre - Hildrest		2
Complete	E CN0000970	Westwood Dynamic		019 UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest		2
- Di Harringtein	E CN0000969	Hope Works (Pty) Lt	d 16/11/3	019 UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre		2
O New	E CN0000968	Green Tea Supplies	16/11/3	019 UnAssigned		08:00:00	2MS - 2 month service	\$24	Scheduled Maintenance			NEW1234			2
() In Progress	E CN0000967	Westwood Dynamic		019 UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest		2
() Hold	E CN0000966	Westwood Dynamic	08/11/3	019 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest		2
Pending	E CN0000965	Westwood Dynamic		019 UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest		2
 Complete 	E CN0000964	Hack PC - IT Shop	26/10/3	019 UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807			2
O Al	E CN0000963	Westwood Dynamic	25/10/3	019 UnAssigned		03:00:00	BathSinNaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest		2
	E CN0000962	Hope Works (Pty) Lt	1d 19/10/3	019 UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200			
	E CN0000961	Hope Works (Pty) Lt	d 18/10/3	019 UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Porest Hills Centre		2
	E CN0000960	Westwood Dynamic	18/10/3	019 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hilcrest		2
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	E CN0000958	Westwood Dynamic	04/10/3	019 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest		2
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	E CN0000936	Westwood Dynamic	20/09/3	019 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest		2
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• Click on the *Edit* button.



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formation	FE CN0001003	Young Bectric		Awaiting Acceptance	Arin Milton	10:09:10	Test account balances	09	Channe Request			107		
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O AI	E CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
O New	E CN0000987	Young Bectric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	■ CN0000986	Young Electric	07/06/2022	UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin 123		
() Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20/98765		
O Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O comprese	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:03:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Con True	E CN0000982		10/06/2022			05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
Cape rown	CN0000976 CN0000976 CN0000976		19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Program	E CN0000974	Hope Works (Pty) Ltd		Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration					
O Hold	FE CN0000972	Hope Works (Ptv) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request					
O Bandion	E (100000071	Mashamad Demonia	70/11/2010	the Lowissian		08-00-00	RathWoldsteint Rathwares für Meinternenen		Palanda dari Majatananan				Charless Canton, Milmont	
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O AL	E CN0000970	Westwood Dynamic		Universigned		08:00:00	Bachormant - Bachoon bri mantenance	224	Scheduled Mantenance				Cheolers Centre - Hildresc	
tioemfontein	E 010000969	Hope Works (Pty) Ltd	16/11/2019	UnAssigned		08:00:00	Her - Commercial Her Test	0/61	Installation				Forest Hills Centre	
O New	EI CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	524	Scheduled Maintenance			NEW1234		
() In Progress	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
(i) Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
O Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
O AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	BathSinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	524	Scheduled Maintenance				Checkers Centre - Hillcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic		UnAssigned		08:00:00	SathBinNeint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
	FE CN0000957	Westwood Dynamic	27/09/2019	Untesimed		08-00-00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000955	Wastwood Dynamic	20,00,0019	Unterimed		08-00-00	BathdinMaint - Bathroom Bin Maintenance	94	Criteria derl Maintenanne				Checkers Centre - Hillcrest	
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	E 010000994	oreer rea supples	1//09/2019	UnAssigned		03:00:00	240 - 2 month service	019	ouredured Maintenance			NEW 1234		
	Count													

- The *Call maintenance : Call ref [call reference number]* screen will display.
- Click on the *Work Orders* tile.

ф т	5 Call maintenance : Call ref CH0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8																
Home	Equipment / Lo	ations Con	ntract Final	nce / HR	Inventory	Maintena	ance / Projects	Manufa	cturing	Procurement	Sales	Service	Reporting	Utilities		- 6	P ×
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Open Windows *										User	: JulandaK	07/04/202	2 Version : :	2.5.0.8 Exa	mple Company	v2.5.0	0.8
										200				210			- 11

• The *Work Orders for Call Ref* [call reference number] screen will display.



• Any work orders that have been issued against the call will display in the data grid.

ADD WORK ORDER

• Click on Add.

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



- " The Work Order Maintenance screen will be displayed. " on page 2
- Complete the Work Order details for the call.
- In the *Links* frame note that the *Call Reference* has automatically been linked to the call reference you have selected.



Calls - Work Orders

Home Equipment	t / Locations Cont	Maintain WO - Ref WO	0006261 - BPO: Version 2.5. Naintenance / Projects Man	0.8 - Example Comp ufacturing Procur	pany v2.5.0.8 rement Sale	s Service	Reporting Util	ities — é	x x
Save Back Save Layout	Print								~
Functions	Description	B6004 - Additional hardware is required for installation	RefType Referen I CALL Cal Ref PMNG CALL	ceType I erence C	ReferenceNo CN0005305	inks rence	•	CN0005305	Equipment Info
Services	Requestor WO Type Priority	Julanda Kessler	Schedule : Assigned To	Belinda Sharman		*	12		Additional Data
Third Party Services	Request Date Status Billable Capitalise	04/04/2022	Assigned By Scheduled Start Scheduled End	Julanda Kessler 04/04/2022 • 05/04/2022 •	00:00:00	• • • •			Customer Info
Parts	Work Order Item : Functional Loca	ation @ Equipment	Actual End Delay Comments	04/05/2022 Currently on Schedu	12:00:00	•			Required Crafts
Swap Outs	Comment	Hillcrest 2 + * Company is closing early on Friday for Stock Take	Rectification Code Rectification Comments	New		•			
Meters		v	Completion Date	04/05/2022 -	12:00:00	\$			
Open Windows 🕶					User : Julanda	o7/04/2022	2 Version : 2.5.0.8	Example Company v2.5.0	0.8

CUSTOMER INFO TAB

- Click on the *Customer Info* tab to expand the *Customer Info* docking panel.
- From here you can view additional information for the *customer* linked to this work order as well as the Customer Notes, if any has been created.



ф. т.	Work Order Maintena	nce - BPO: Version	2.5.0.8 - Example Com	1pany v2.5.0.8			_ D X
Home Equipment / Locations C	Contract Finance / HR Inventory Mai	intenance / Projects	Manufacturing Pr	ocurement Sale	s Service Repor	ting Utilities	_ & ×
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Enter text to search P Description	a quotation for new licences	RefType	ReferenceType	ReferenceNo			, upm
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Request Da	te 07/04/2022 👻 14:10:52 🛟	Assig	ned By Julanda Kessler		Hold Reason	1	Q
Third Party Services Stat	us O - Open	Scheduled	d Start 07/04/2022	▼ 14:10:52	_		
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					Notes	NoteDate NoteTime	e Full'
Loans	m Kingston				▼ #□:	- * O C	100
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Meters					4		- ·
Meters					r.		
Open Windows 🕶				User : Julanda	aK 07/04/2022 Vers	on : 2.5.0.8 Example Com	pany v2.5.0.8

REQUIRED CRAFTS TAB

- Click on the *Required Crafts* tab to expand the Required Crafts docking panel.
- Crafts that have already been identified for the work order will be listed.
- Right click on the next active row in the Craft Name field to add any additional craft(s) needed for carrying out this Work Order.



	Work Order Maintenar	nce - BPO: Versio	n 2.5.0.8 -	Example Com	pany	v2.5.0.8	es Se	rvice	Reporting	Utilities	-	
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Third Party Services Status	O - Open	Schedule	d Start	07/04/2022	*	14:10:52	‡ •					
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Open Windows *						User : Julan	daK 07	04/2	022 Version :	2.5.0.8 Exa	mple Company v	v2.5.0.8

ADDITIONAL DATA TAB

- Click on the *Additional Data* tab to expand the *Additional Data* docking panel.
- You can view and rename the *Custom* fields *1 10*, that can be utilised for additional information required for this Work Order that is not covered on the Work Order screen. Rename the field labels to suit your company requirements.



*	Work Order Maintena	ance - BPO: Versio	n 2.5.0.8 - Example Con	npany v2.5.0.8		X
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Services Prior	ity 2 **	Assi	gned To		Custom 5	Field 5
Request Da	te 07/04/2022 T 14:10:52	Assi	gned By Julanda Kessler		Custom 6	Field 6
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EQUIPMENT INFO TAB

- Click on the *Equipment Info* tab to expand the *Equipment Info* docking panel.
- When addressing the [+] icon in the Item field, this panel can be viewed for additional information about the selected *equipment item*, including any warranties and/or equipment notes if applicable.



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METERS TAB

- Click on the Meters tab to expand the *Meters* docking panel.
- You will be able to view the meter history information for the Item referencing on the Work Order, if applicable.

For a detailed handling of this topic refer to Work Orders - Add a Work Order

SAVE WORK ORDER

• When you have finished adding details to the screen, click on *Save*.



¢ . ۳		Work Order Mainten	ance - BPO: Versio	on 2.5.0.8 - I	Example Comp	any v2.5.0.1	3			x
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Open Windows *						User : Ju	iandaK 07/04/2022	version : 2.5.0.8	example Company v2.5.0	J.8 //,

- You will return to the *Work Orders for Call Ref* screen where you can view the linked work order
- *Close* the screen to return to the *Call maintenance* screen.

\$ =					Work Order	rs for Call	Ref CN0005305 -	BPO: Version	2.5.0.8 - Ex	ample Company v	2.5.0.8				_ D X
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EDIT WORK ORDER

- From the *Work Orders for Call Ref [call reference number]* screen,
- Click on the *row* of the work order you wish to edit.
- Click on *Edit*.



- "The Maintain WO Ref [work order number] screen will be displayed. " on page 2
- You can make the changes to the *Work Order information* screen, *Required Crafts* tab or *Additional Data* tab as required.

For a detailed handling of this topic refer to Work Orders - Add a Work Order

• When you have made the necessary changes, click on *Save*.



Home Equipment / Locations Cont	Maintain WO - Ref WOO	006	261 - BPO: Ve enance / Projec	ts Man	0.8 - Example Co	ompa	ment Sale	s Servic	e Reporting Utili	ties _ B	x
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Open Windows -							User : Julanda	K 07/04/	2022 Version : 2,5,0,8	Example Company v2.5.0	.8

DELETE WORK ORDER

- From the *Work Orders for Call Ref [call reference number]* screen,
- Click on the *row* of the work order you wish to remove.
- Click on *Delete*.

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

- When you receive the *Input Validation* message to confirm;
 - Are you sure you want to delete this work order, no. [work order number]? Answer 'Yes' to delete the work order.
- Click on Yes.



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- The work order has been removed from the *Work Orders for Call Ref* screen.
- Click on the *Close* button to return to the Call maintenance screen.

ф т	Work Orders for Call Ref CN0005305 - BPO: Version 2.	5.0.8 - Example Company v2.5.0.8	B	_ _ X
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Help v2.5.1.4 - Pg 14 - Printed: 27/06/2024



VIEW WORK ORDER

- From the Work Orders for Call Ref [call ref number] screen,
- Click on the *row* of the work order you wish to view.
- Click on *View*.



• The *View Work Order - [work order number]* screen will be displayed.

Note that only the *Back* button is available on this screen as this screen is view only.

- From here you can view the Work Order details, Customer Info, the Required Crafts, Additional Data or the Equipment Info for the work order.
- Click on *Back* to return to the Work Order, or
 - Click on Print to Print the Work Order.



Calls - Work Orders

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CLOSE WORK ORDER

All work order transactions must be completed, for instance issuing parts, invoicing etc., before a work order can be closed. The system will prevent you from closing the work order if a transaction still needs to be processed on the work order.

You must have successfully <u>completed</u> the work order, before it can be closed.

- From the *Work Orders for Call Ref [call ref number]* screen will be displayed.
- Click on the *row* of the work order that needs to be closed.

Note that you will only be able to close a work order that has been completed.

• Click on *Close*.





- When you receive the *Input Validation* message to confirm;
 - Are you sure you want to close this work order, no. [work order number]? Answer 'Yes' to close the work order.
- Click on Yes.

For a detailed handling of this topic refer to Work Orders - Close Work Order

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Scroll to view the *Status* for the Work Order in the Status column.

The Status has changed to *C* - *Closed*.

COMPLETE WORK ORDER

Work orders linked to a project should be completed when the work required has been done.



- The *Work Orders for Call Ref [call reference number]* screen will be displayed.
- Click on the *row* of the Work Order you wish to complete.
- Click on *Complete*.

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

- When you receive the *Input Validation* to confirm;
 - Are you sure you want to complete this work order, no. [work order number]?Answer 'Yes' to complete the work order.
- Click on Yes.

For a detailed handling of this topic refer to Work Orders - Complete a Work Order

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REINSTATE WORK ORDER



- From the *Work Orders for Project Ref [project ref number]* screen will be displayed.
- Click on the *row* of the closed work order that needs to be reinstated.

Note the status for the work order as *C* - *Closed*.

• Click on *Reinstate*.

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

- When you receive the *Input Validation* message to confirm;
 - Are you sure you want to re-instate this work order, no. [work order number]? Answer 'Yes' to re-instate the work order.
- Click on Yes.



PRINT WORK ORDER

- From the Work Orders for Call Ref [call reference] screen,
- Click on the *row* of the work order you wish to print the work order report for.
- Click on *Print*.
- When you receive the *Report Generation* message to confirm,
 - Do you want to print the WO report for [work order number]?
- Click on Yes.

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- The Work Order will display in the Reports *Preview* screen.
- From here you can make cosmetic changes to the Work Order, as well as *Save*, *Zoom*, *Add a Watermark*, *Export* or *Email*.
- *Close* the Report Preview screen when done.



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Page 1 of 1			100	× O O
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FUNCTION TILES



The Times tile will direct you to the *Time booking for Work Order* screen where you can *Add*, *Edit* and *Delete* Labour Time for a Work Order linked to a Project. Refer to Work Orders - Time Booking



The Services tile will direct you to the *Internal services for WO Code* screen where you can *Add*, *Edit* and *Remove* an Internal Service from the Work Order. Refer to Work Orders - Internal Services



The Third Party Services tile will direct you to the *Service Request for WO Code* screen where you can *Add*, *Edit*, *Delete*, issue a *Requisition* and do *Billing* for the Work Order. Refer to Work Orders - Third Party Service Request



Parts

The Parts tile will direct you to the Service Request for WO Code screen where you can, Add, Edit, Remove an Internal Service to a Work Order, as well as view Requisitions, Issues and Transfers, maintain Notes, Change the Warehouse, Remap a Part or Create a Part on the Work Order. Refer to Work Orders - Part Requests The Loans tile will direct you to the Loan Requests for WO Code screen where you can Add, Edit, Delete and view Returns on a loan request linked to the Work Order. Refer to Work Orders - Loans The Swap Outs tile will direct you to the Swap Outs for

Swap Outs



Order. Refer to Work Orders - Swap Outs The Meters tile will direct you to the *Meters for WO Code* screen where you can view the list of meter readings

WO Code screen where you can Add swap outs on a Work



against the work order. Refer to Work Orders - Meters The Equipment tile will direct you to the *Expense Claims*

for WO Code screen where you can *Add*, *Edit* and *Delete* and expense claim from the Work Order. Refer to Work Orders - Expenses



The Travel tile will direct you to the *Travel Claims for WO Code* screen where you can *Add*, *Edit* and *Delete* a travel claim from the Work Order. Refer to Work Orders - Travel



Work Order screen where you can *Add*, *Edit*, *Delete* and *View* a digital documents linked to a work order. Refer to Work Orders - Documents

The Documents tile will direct you to the Documents for

The functions tile will direct you to the Issued Warranties

Warranties Issued

for WO Code screen where you can, *Add*, *Edit* and *Delete* a warranty linked to a work order. Work Orders - Warranties Issued



The functions tile will direct you to the *Instructions for* Instructions WO Code screen where you can Add, Edit, Delete and *Complete* an instruction for a Work Order. Refer to Work **Orders - Task Instructions** The functions tile will direct you to the *Images for WO Code* screen where you can view and *Print* the images linked to the Work Order. Refer to Work Orders - Images The functions tile will direct you to the Work in Progress Work in Progress for WO Code screen where you can Return, Invoice WO and Invoice Call(s) linked to the Work Order. Refer to Work Orders - Work in Progress (WIP) The functions tile will direct you to the Maintenance Methlaintenance odology for location screen where you can Add, Edit and **Delete** a maintenance methodology from a Work Order. Refer to Work Orders - Maintenance The functions tile will direct you to the *Time Not Billed for* Time Review Work Order Code screen where you can Invoice WO, Invoice Project, Flag Reviewed and set SLA Time linked to the Work Order. Refer to Work Orders - Time Review

PROCESSING TILES



The Quotes functions tile will direct you to the *Sales Quotes for Work Order* screen where you can *Add*, *Edit*, *Delete*, *View*, *Accept*, *Reject*, *Covert* and *Clone a Quote* linked to a Work Order. Refer to Work Orders - Sales Quotes

Orders

The Orders functions tile will direct you to the *Sales* Orders for Work Order screen where you can Add, Edit, Delete, View, Create Invoice, Create New Deal, Add



Items to WO, *New Deal Project*, *Print Sales Order* and *Print a Proforma Invoice*. Work Orders - Orders



The Invoices functions tile will direct you to the *Sales Invoices for Work Order* screen where you can *Add*, *Edit*, add a *Comment and Reference*, *Print* and *Send Invoices to Print Queue*. Refer to Work Orders - Invoices The Credit Notes functions tile will direct you to the *Sales Credit Notes for Work Order* screen where you can *Add*, *Edit, Delete, View, Release for Approval, Remove from Approval, Approve Cr Note* and *Send Cr Notes to Print Queue*. Refer to Work Orders - Credit Notes

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