

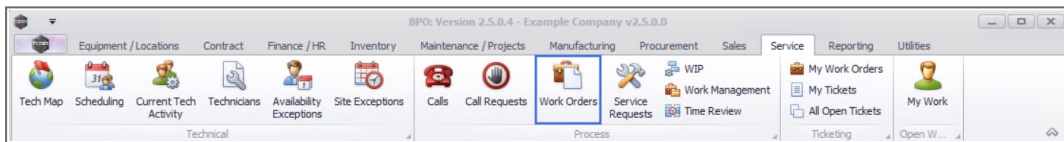
SERVICE

WORK ORDERS – CLOSE WORK ORDER

All work order transactions must be completed e.g. issuing parts, invoicing etc., before a work order can be closed. A work order must be completed before it can be closed.

Work Orders can be closed from a Call or from a **Work Order**.

Ribbon Access: *Service > Work Orders*



1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** where the work order was raised.
 - The example has **Durban** selected.
3. Change the **Status** to **Completed**.
4. Click on the **row** of the **work order** you wish to close.
5. Click on **Close**.

WCode	WOType	CallReference	Description	Capitalise	CallDesc	RequestDa...	Priority	Invoiceable	ProjectRef	ProjectDesc	Status
W00006261	IMP	CN0005305	B6004	No	B6004	04/04/2022	2	No			M
W00006254	IMP	CN0005302	New machine implementation	No	New machine implemen...	18/01/2022	1	No			M
W00006253	PR	CN0005301	Replace part - current faulty	No	Replace part - current ...	18/01/2022	3	No			M
W00006244	SM	CN0005297	ZMS - 2 month service	No	ZMS - 2 month service	16/11/2021	2	No			M
W00006234	SM	CN0005296	BathBinMaint - Bathroom Bin Maintenance	No	BathBinMaint - Bathroo...	05/11/2021	2	No			M
W00006229	SM	CN0005295	BathBinMaint - Bathroom Bin Maintenance	No	BathBinMaint - Bathroo...	29/10/2021	2	No			M
W00006214	INST	CN0005291	Tier - Commercial Tier Test	No	Tier - Commercial Tier ...	16/10/2021	2	No			M
W00006136	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	01/10/2021	2	No			M
W00006131	INST		1818-1-1 - Check network requirements	No		19/08/2021	2	No	PRJ0000411	Site Inspect...	M
W00005785	NDR		OSU 1001	No		24/03/2021	2	No	PRJ0000407	OSU1001	M
W00002350	TEST	CN0000840	Repair machine	No	Tested email	23/04/2020	3	No			M
W00002347	TR	CN0000849	testing	No	testing	22/04/2020	3	No			M
W00002340	TEST	CN0000845	This is a brand new call	No	This is a brand new call	20/04/2020	3	No			M
W00002339	TEST	CN0000844	This is a new call- testing email functionality	No	This is a new call- test...	20/04/2020	3	No			M
W00002332	TEST	CN0000840	Tested email	No	Tested email	16/04/2020	3	No			M
W00002329	TEST	CN0000837	Testing email functionality	No	Testing email function...	14/04/2020	3	No			M
W00002325	TEST	CN0000833	testing a loan unit	No	testing a loan unit	07/04/2020	3	No			M
W00002319	SERV	CN0000827	Driver connect testing - toner delivery	No	Driver connect testing ...	21/11/2019	3	No			M
W00002315	CR	CN0000823	Test call for Mail Service	No	Test call for Mail Service	16/07/2019	3	No			M
W00002314	IMP	CN0000822	test	No	test	04/07/2019	2	No			M

6. 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.**

7. Click on **Yes**.

Input Validation dialog box:

Are you sure you want to close this work order, no. W00006261?
Answer 'Yes' to close the work order.

Buttons: Yes, No

- A **Work Order Module - Closure** message box will pop up informing you that,
 - ***The work order, no. [], has been closed.***
- Click on **Ok**.

The screenshot displays the 'Work Order Listing - BPO: Version 2.1.0.41 - Example Company' application. The interface includes a top navigation bar with various menu items like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Add, Edit, Delete, View, Close, Complete, Reinstated, Save Layout, Workspaces, Print, Export, Save Filter, Refresh, Find WO, and Reports. A sidebar on the left contains 'Links' and 'Functions' sections with buttons for Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main area shows a table of work orders with columns for WOCODE, DESCRIPTION, REQUEST DATE, STATUS, PROJECT REF, PROJECT ID, WOTYPE, PRIORITY, and INVOICE. A modal dialog box titled 'Work Order Module - Closure' is open, displaying an information icon and the message: 'The work order, no. WO0001209, has been closed.' with an 'OK' button.

WOCODE	DESCRIPTION	REQUEST DATE	STATUS	PROJECT REF	PROJECT ID	WOTYPE	PRIORITY	INVOICE
WO0001224	Work Mgt - project - work order linked to asset - client	31 Mar 2017	M	PRJ0000213	Work Mgt ...	DR	2	No
WO0001222	Work Mgt - work order linked to a non client asset	31 Mar 2017	M			DR	2	No
WO0001221	Work order mgt - work order linked to a non client location	31 Mar 2017	M			DR	2	No
WO0001217	work order linked to location - resolved and reassigned	31 Mar 2017	M	PRJ0000211	work order ...	DR	2	No
WO0001216	work order linked to location - unresolved client	31 Mar 2017	M	PRJ0000211	work order ...	DR	2	No
WO0001215	work order linked to location - unresolved	31 Mar 2017	M	PRJ0000211	work order ...	DR	2	No
WO0001214	work order linked to location - resolved	31 Mar 2017	M	PRJ0000211	work order ...	DR	2	No
WO0001213	work order linked to asset unresolved and reassigned	31 Mar 2017	M	PRJ0000210	Project link...	DR	2	No
WO0001212	work order linked to asset - resolved and reassigned	31 Mar 2017	M	PRJ0000210	Project link...	DR	2	No
WO0001211	work order linked to asset - Unresolved client	31 Mar 2017	M	PRJ0000210	Project link...	DR	2	No
WO0001210	Work order linked to an asset - Unresolved	31 Mar 2017	M	PRJ0000210	Project link...	DR	2	No
WO0001209	Work order Linked to asset - resolved1	31 Mar 2017	M	PRJ0000210	Project link...	DR	2	No
		31 Jul 2014	M			SERV	2	No
		30 Mar 2017	M	PRJ0000209	Location - ...	DR	2	No
		30 Mar 2017	M	PRJ0000209	Location - ...	DR	2	No
		30 Mar 2017	M	PRJ0000209	Location - ...	DR	2	No
		30 Mar 2017	M	PRJ0000209	Location - ...	DR	2	No
		30 Mar 2017	M	PRJ0000208	All open tc...	DR	2	No
		30 Mar 2017	M	PRJ0000208	All open tc...	DR	2	No
WO0001200	Unresolved, completed and reassigned	30 Mar 2017	M	PRJ0000208	All open tc...	DR	2	No
WO0001199	Unresolved	30 Mar 2017	M	PRJ0000208	All open tc...	DR	2	No
WO0001198	Resolved and reassigned	30 Mar 2017	M	PRJ0000208	All open tc...	DR	2	No

- The closed work order can now be found in the **Work Order Listing** screen where the status is set to **Closed**.

Work Order Listing - BPO: Version 2.1.0.41 - Example Company

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

Add Edit Delete View Close Complete Reinstale Save Layout Workspaces Print Export Find WO

Maintain Process Format Print

Links: Enter text to search...

Functions: Time Services Third Party Services Parts Loans Swap Outs Meters Expenses

fdWOCODE	fdDescription	fdRequestDate	Status	fdWOType	fdPriority	fdInvoiceable	fdB...
WO0001312	Prints arent stapled	20 Apr 2017	X	REP	2	No	
WO0001304	retest my call process	20 Apr 2017	C	NOR	2	No	
WO0001299	TT0001 - Daily - Call per WO	13 Apr 2017	C	SM	2	No	
WO0001298	New Short Term Contract WO	13 Apr 2017	C	DR	2	No	
WO0001298	New Short Term Contract WO	13 Apr 2017	C	DR	2	No	
WO0001290	work order 1.....	13 Apr 2017	C	DR	2	No	PRJ0000070 test
WO0001289	Work order for completion, closure an...	13 Apr 2017	C	TEST	2	No	PRJ0000229 Test project...
WO0001262	TT0001 - Daily - Call per WO	12 Apr 2017	C	SM	2	No	
WO0001241	work order linked to client asset	04 Apr 2017	C	DR	2	No	PRJ0000066 Willows Cen...
WO0001240	work order linked to an asset	04 Apr 2017	C	DR	2	No	
WO0001239	work order linked to non client asset	04 Apr 2017	C	DR	2	No	
WO0001238	work order assigned to client asset	04 Apr 2017	C	DR	2	No	
WO0001237	work order assigned to non client locat...	04 Apr 2017	C	DR	2	No	
WO0001236	work order assigned to client location	04 Apr 2017	C	DR	2	No	
WO0001209	Work order Linked to asset - resolved1	31 Mar 2017	C	DR	2	No	PRJ0000210 Project linke...
WO0001193	Project not linked to customer	30 Mar 2017	C	DR	2	No	PRJ0000207 Project not l...

Open Windows 28 Nov 2017

MNU.072.006

