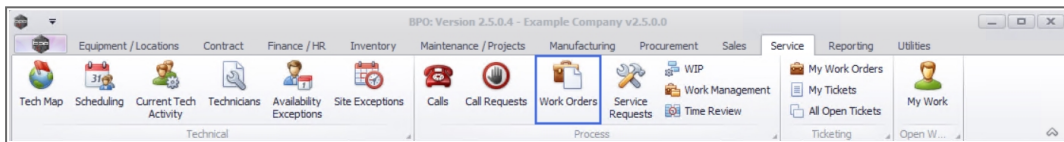# SERVICE

## WORK ORDERS – EDIT WORK ORDER

Details may need to be **added** or **removed** from the work order <u>after</u> 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.
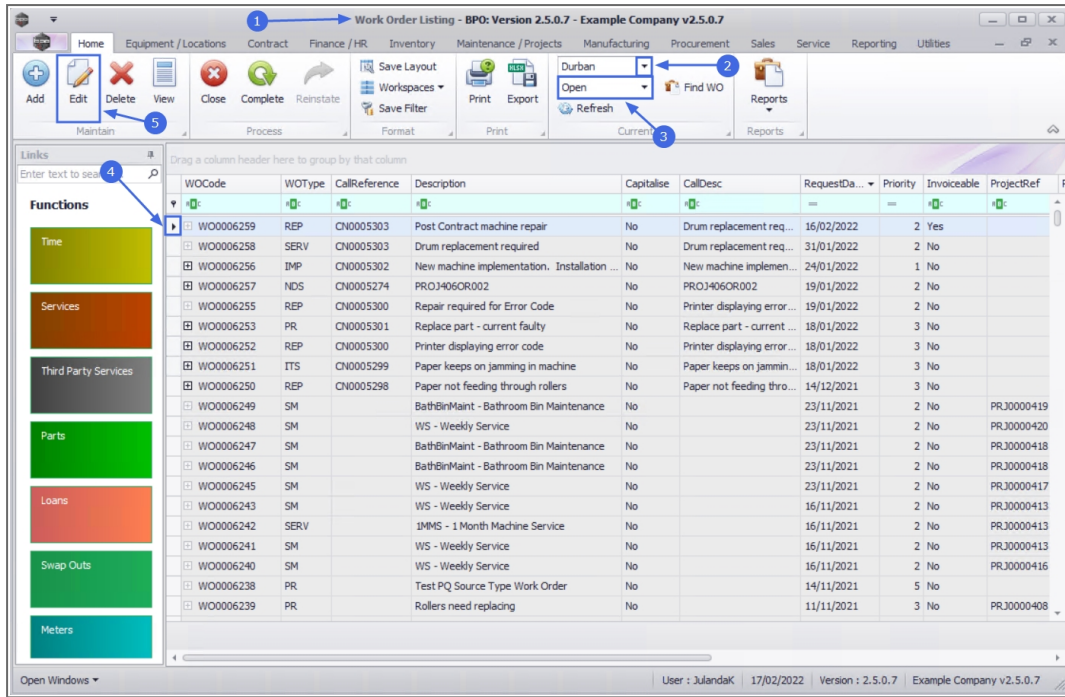
> 💡 If you are not sure of the *site* or *status* of the work order you require, use the <u>Find WO</u> feature to search for it.

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 to link the work order to a **Call** or **Project**.
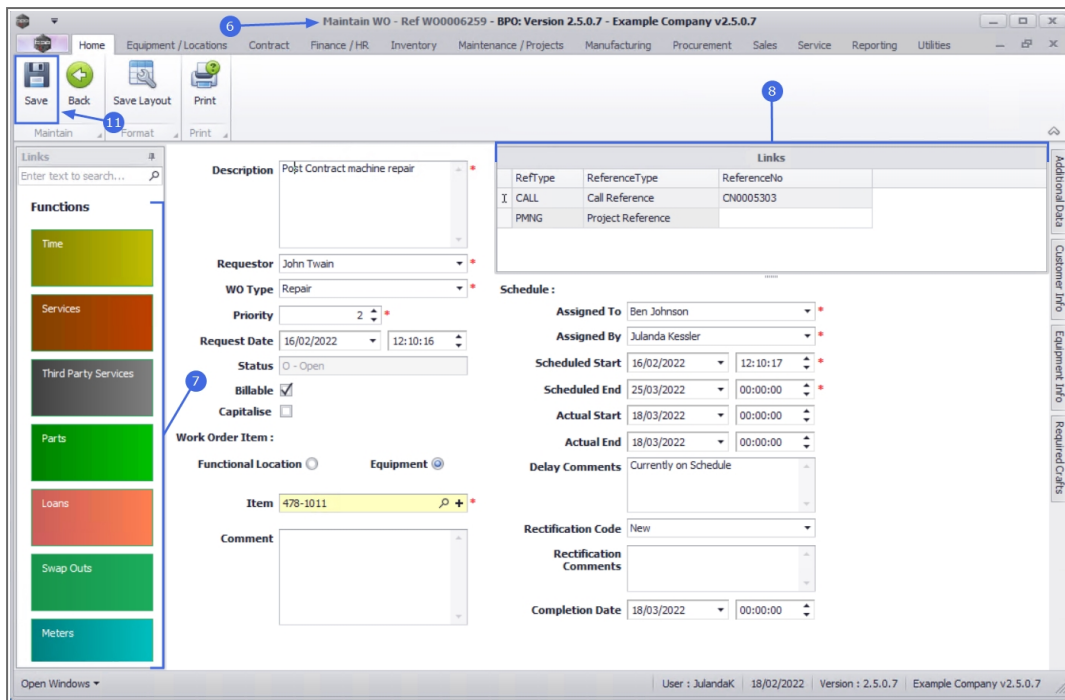
# ASSIGN REQUIRED CRAFT

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 to display in the data grid.

> Note that t he 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.
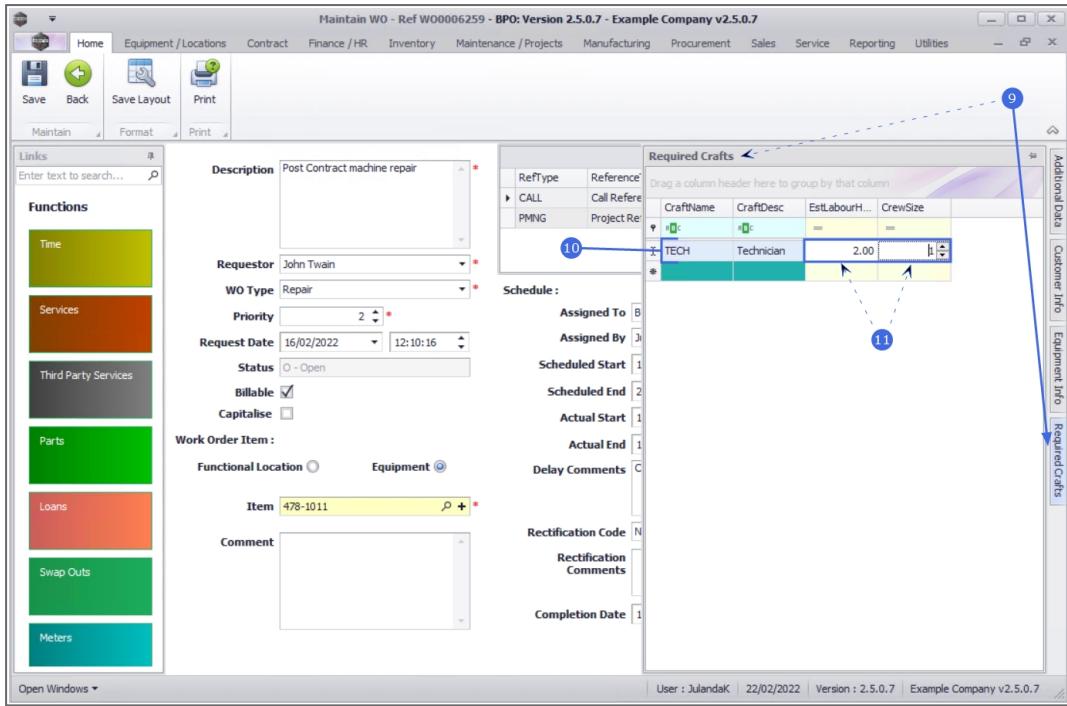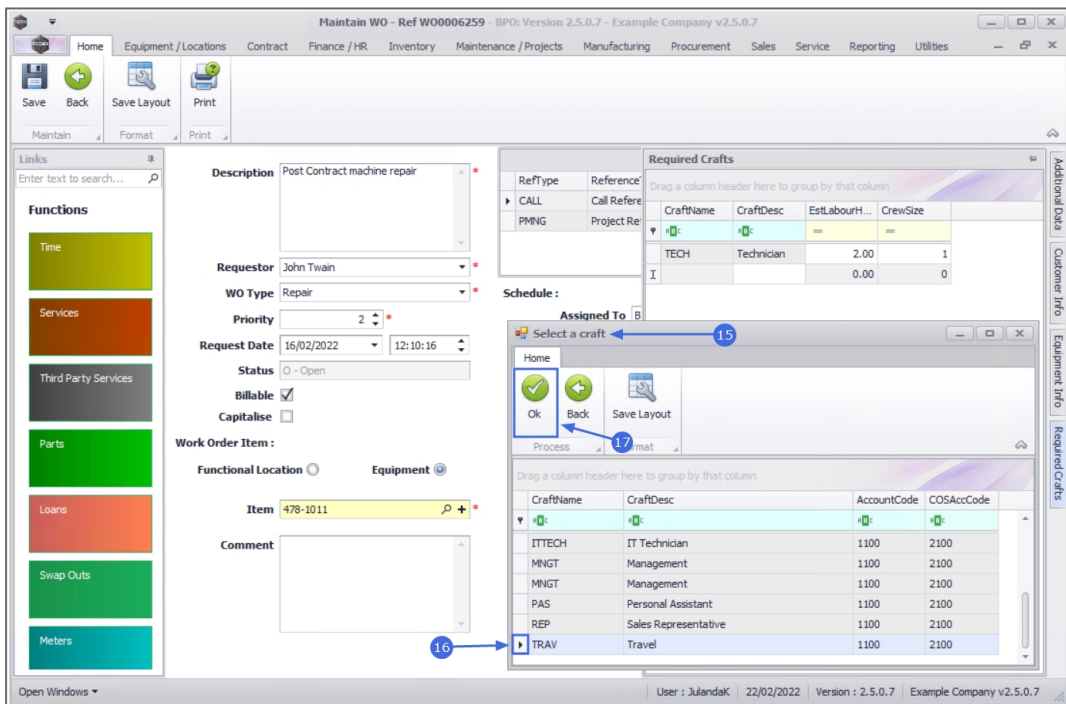
## ADD A REQUIRED CRAFT

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.

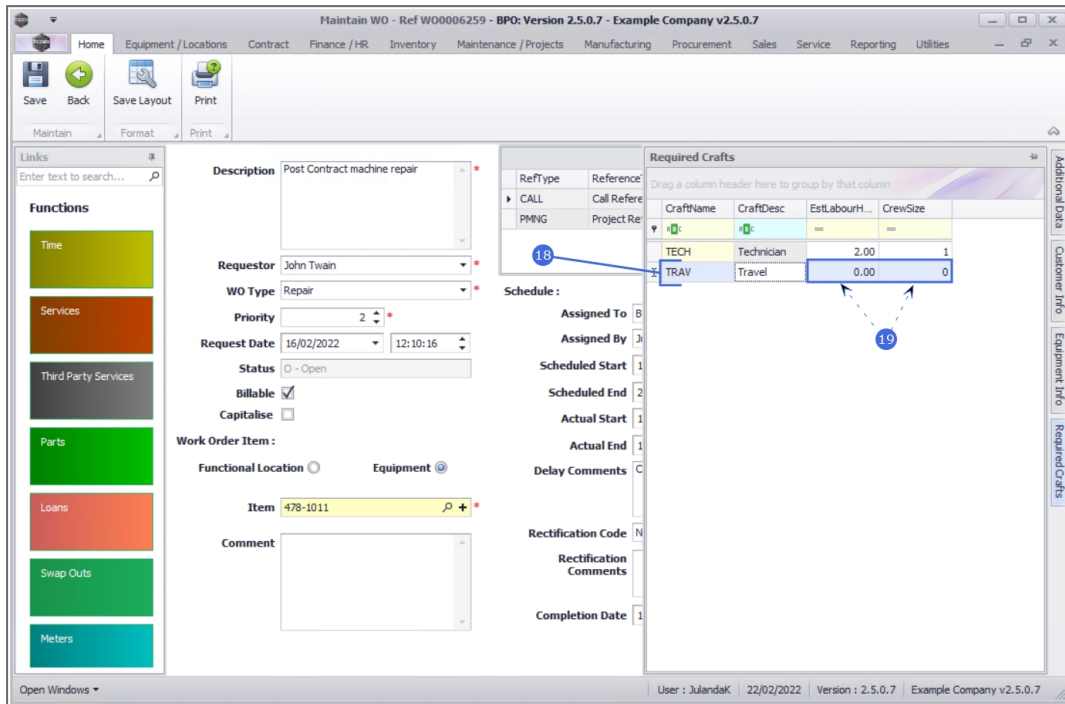14. Click on *Add* - Add a new craft.
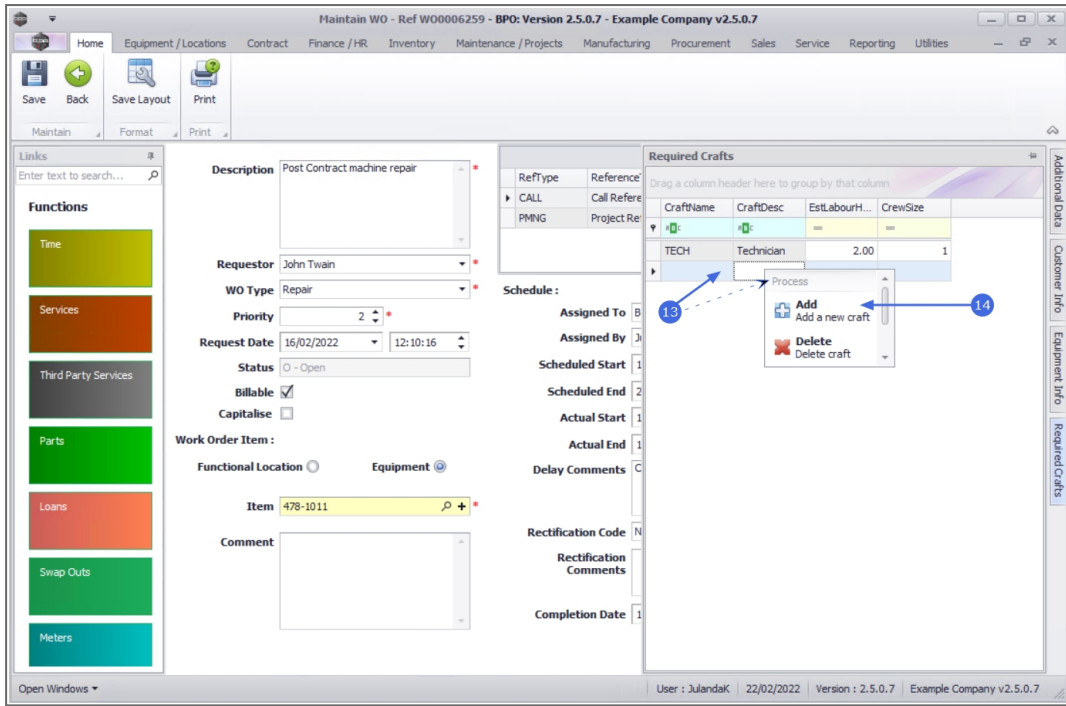
15. The **Select a craft** screen will display.
16. Click on the **row** of the **craft** you wish to **add** to the work order.
17. Click on **OK**.

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.
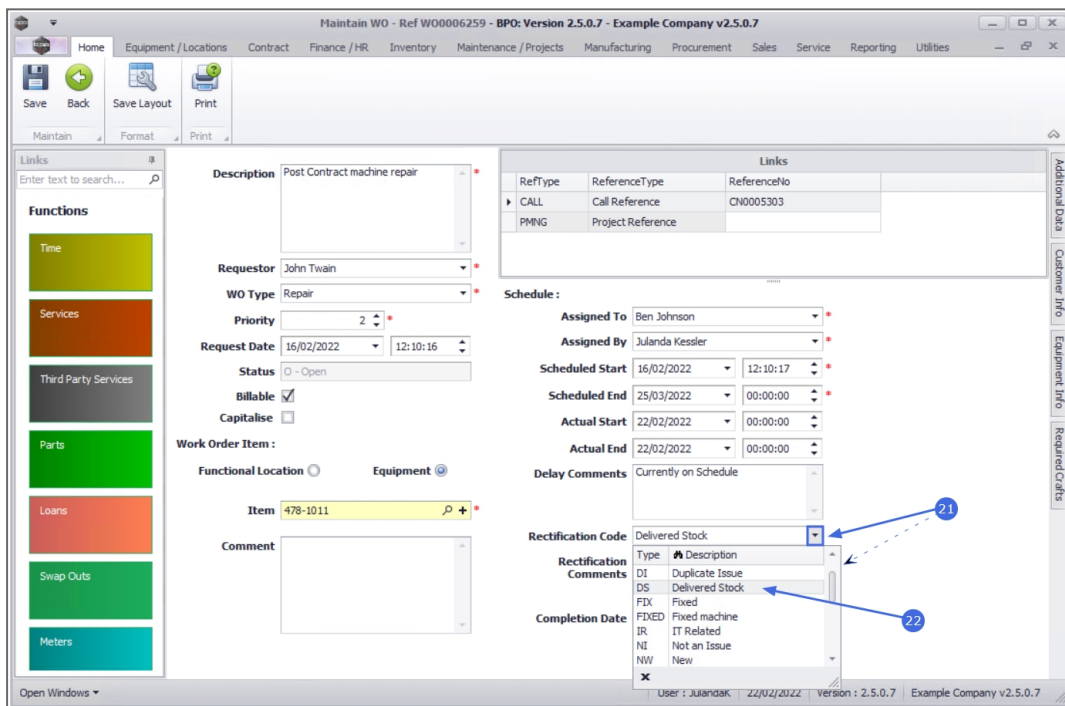


23. Type in the relevant *comment* in the *Rectification Comments* text box.

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*.

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