

SERVICE

WORK ORDERS – REINSTATE A WORK ORDER

If you need to process or change something on a closed work order, then you will need to **reinstate the work order**, add or edit the details as required, and then close the work order again when done.

Some of the reasons for reinstating a work order are:

- To credit a cancelled order.
- To credit incorrect stock and re-invoice correct stock.
- To credit over supply.
- To credit and re-invoice correct selling price.

Only closed work orders can be reinstated.

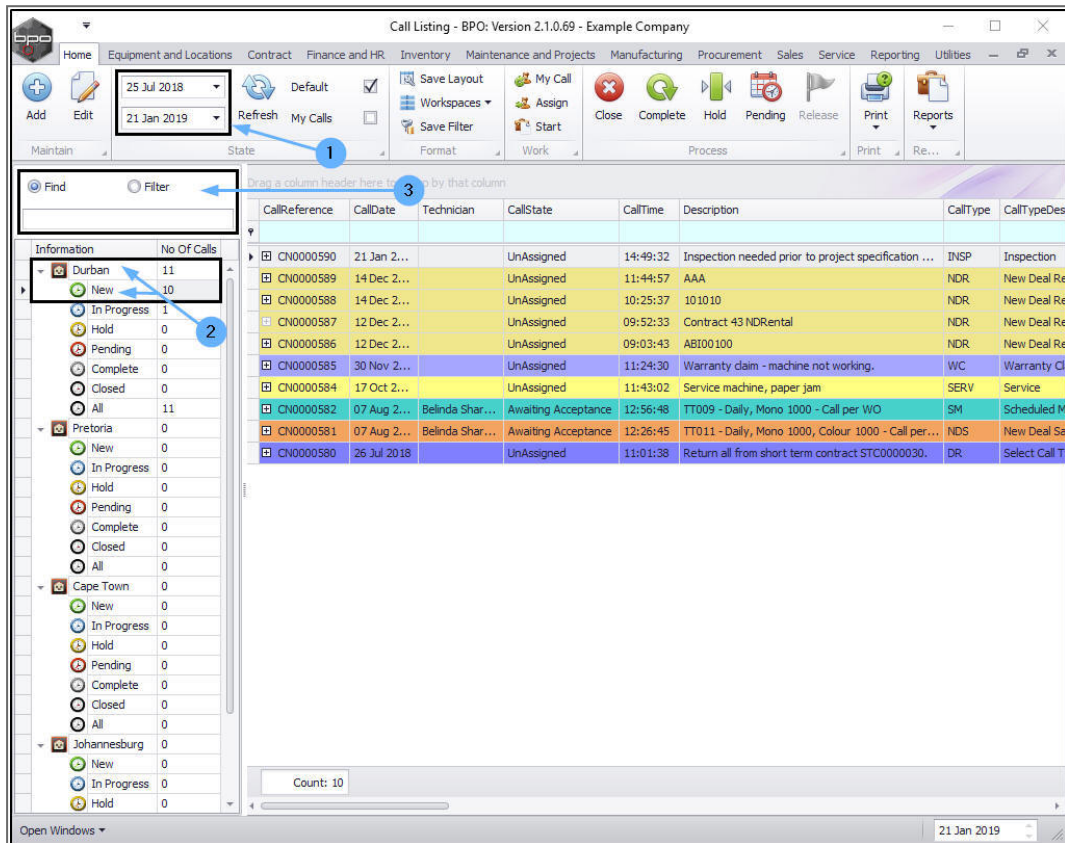
REINSTATE FROM A CALL

Ribbon Access: *Service > Calls*



The **Call Listing** screen will be displayed.

1. Ensure that the **date selection** fields are set to the correct range to include the call that you are searching for.
2. Ensure that you have selected the correct **site** and **status**.
3. You can then either scroll down the call list or use the **Find** or **Filter** option to search for the call.



- Click on the **expand** icon in the row of the selected call.

CallReference	CallDate	Technician	CallState	CallTime	Description	CallType	CallTypeDes
CN0000590	21 Jan 2...		UnAssigned	14:49:32	Inspection needed prior to project specification ...	INSP	Inspection
CN0000589	14 Dec 2...		UnAssigned	11:44:57	AAA	NDR	New Deal Re
CN0000588	14 Dec 2...		UnAssigned	10:25:37	101010	NDR	New Deal Re
CN0000587	12 Dec 2...		UnAssigned	09:52:33	Contract 43 NDRental	NDR	New Deal Re
CN0000586	12 Dec 2...		UnAssigned	09:03:43	AB100100	NDR	New Deal Re
CN0000585	30 Nov 2...		UnAssigned	11:24:30	Warranty claim - machine not working.	WC	Warranty Cl
CN0000584	17 Oct 2...		UnAssigned	11:43:02	Service machine, paper jam	SERV	Service
CN0000582	07 Aug 2...	Belinda Shar...	Awaiting Acceptance	12:56:48	TT009 - Daily, Mono 1000 - Call per WO	SM	Scheduled M
CN0000581	07 Aug 2...	Belinda Shar...	Awaiting Acceptance	12:26:45	TT011 - Daily, Mono 1000, Colour 1000 - Call per...	NDS	New Deal Sa
CN0000580	26 Jul 2018		UnAssigned	11:01:38	Return all from short term contract STC0000030.	DR	Select Cal T

1. The **Work Orders** frame will be expanded.
2. You will note that the **Status Description** for this work order is **Closed**.
3. **Right click** anywhere in the **row** of the work order.

Call Listing - BPO: Version 2.1.0.69 - Example Company

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

25 Jul 2018 | 21 Jan 2019 | Refresh | My Calls | Save Layout | Workspaces | Save Filter | My Call | Assign | Start | Close | Complete | Hold | Pending | Release | Print | Reports

Find | Filter

Information	No Of Calls
Durban	11
New	10
In Progress	1
Hold	0
Pending	0
Complete	0
Closed	0
All	11
Pretoria	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0
Cape Town	0
New	0
In Progress	0
Hold	0
Pending	0
Complete	0
Closed	0
All	0
Johannesburg	0
New	0
In Progress	0
Hold	0

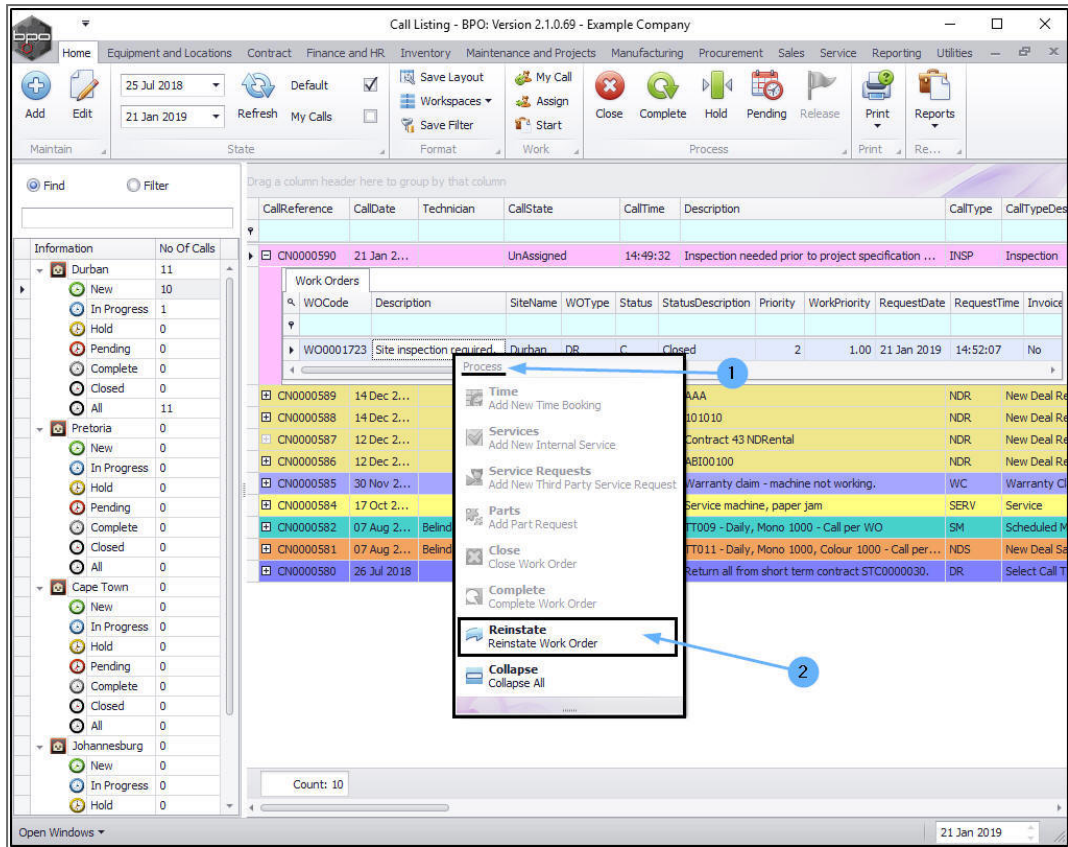
CallReference	CallDate	Technician	CallState	CallTime	Description	CallType	CallTypeDes
CN0000590	21 Jan 2...		UnAssigned	14:49:32	Inspection needed prior to project specification ...	INSP	Inspection

WOCCode	Description	SiteName	WOTType	Status	StatusDescription	Priority	WorkPriority	RequestDate	RequestTime	Invoice
WO0001723	Site inspection required.	Durban	DR	C	Closed	2	1.00	21 Jan 2019	14:52:07	No

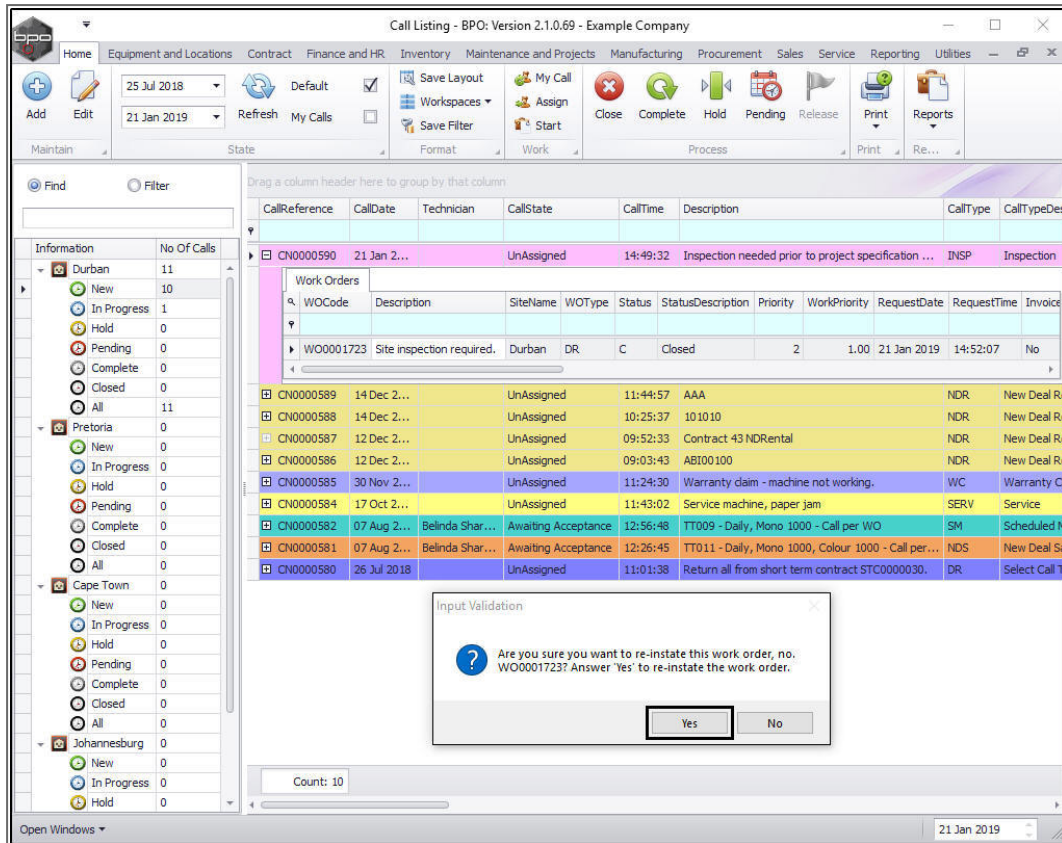
Count: 10

21 Jan 2019

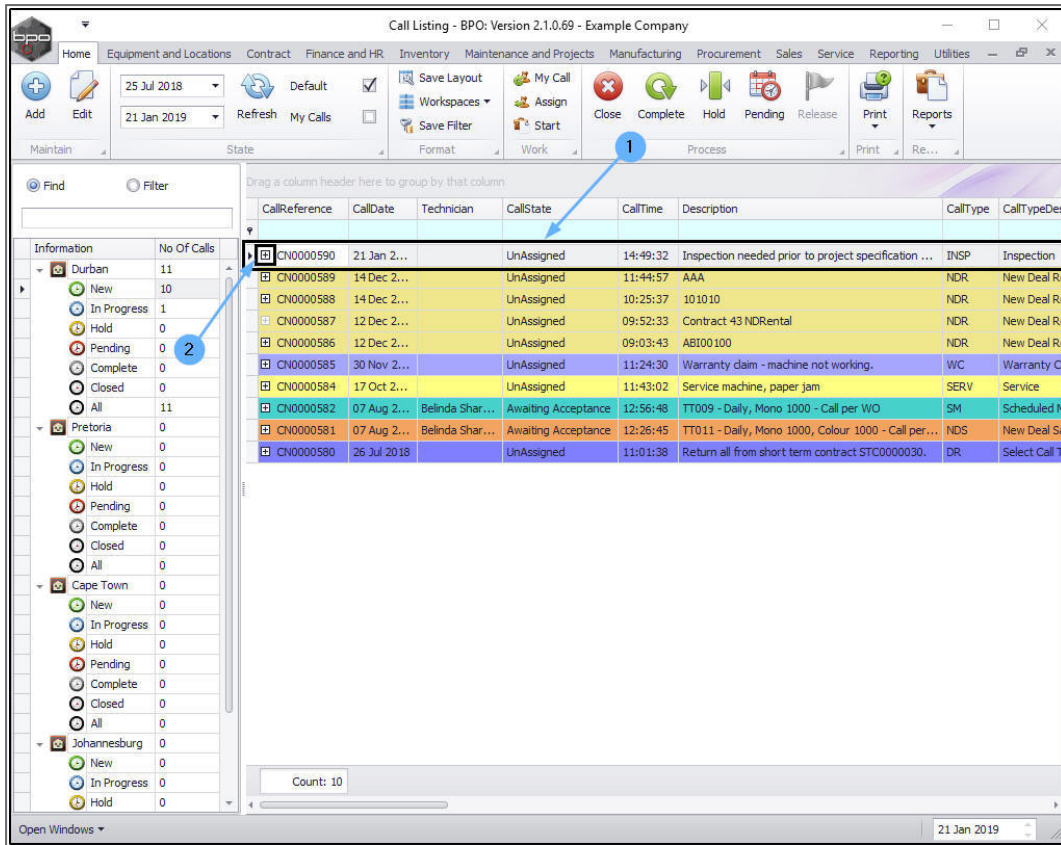
1. A **Process** menu will pop up.
2. Click on **Reinstate** - Reinstate Work Order.



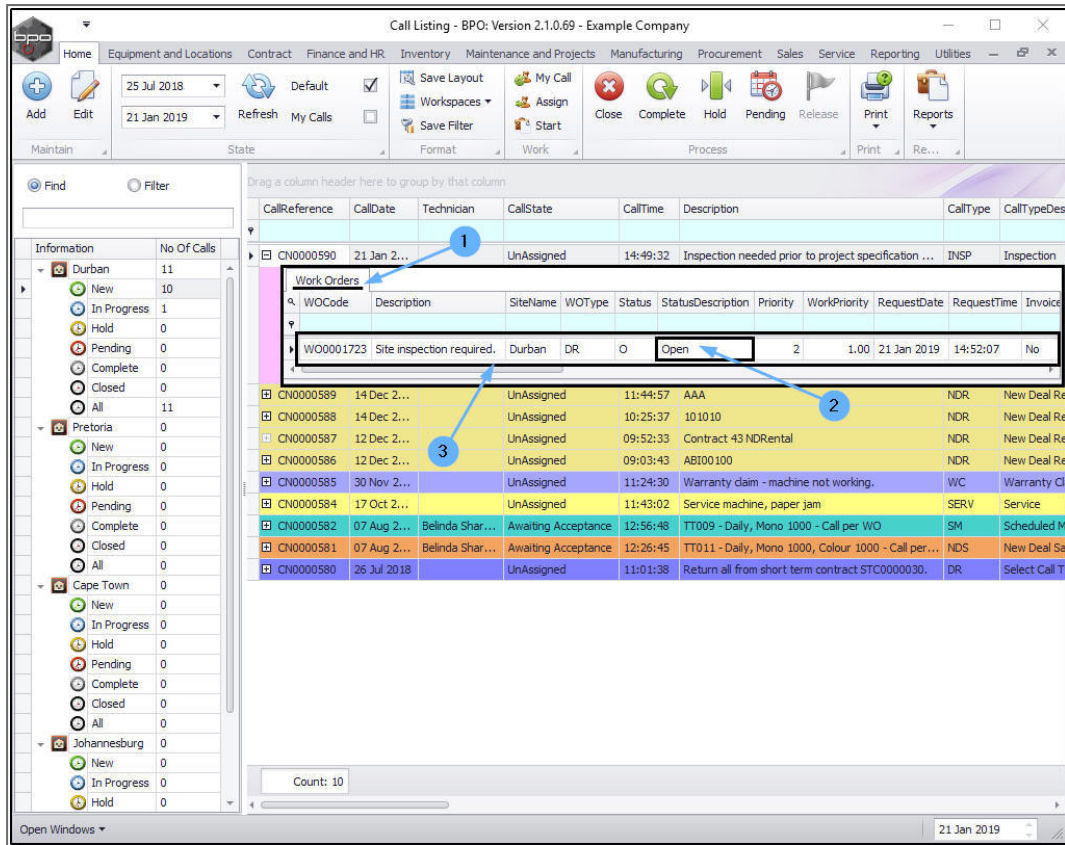
- An **Input Validation** message box will pop up asking;
 - **Are you sure you wants to reinstate this work order, no. []? Answer 'Yes' to re-instate the work order.**
- Click on **Yes**.



1. The expanded Work Orders frame will automatically **collapse**.
2. Click on the **expand** button again in the row of the call.

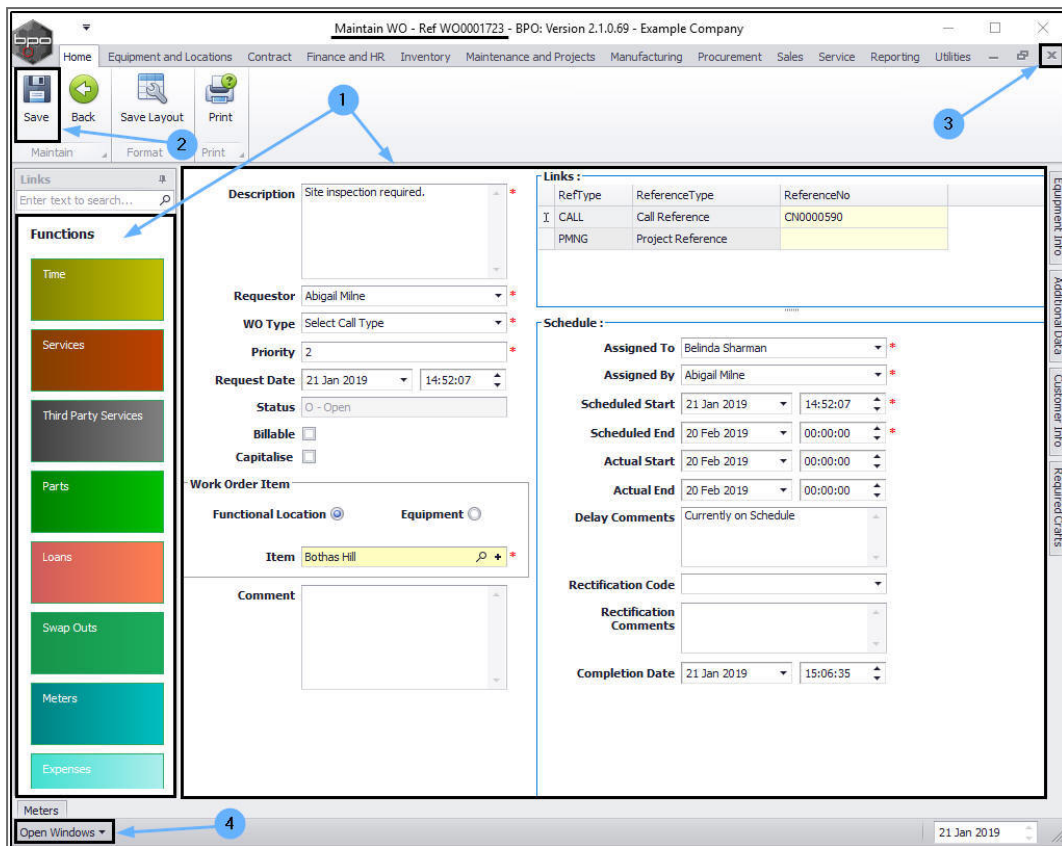


1. The **Work Orders** frame will expand.
2. You will note that the work order **Status Description** is now **Open**.
3. **Double click anywhere** in the **row** of the work order.



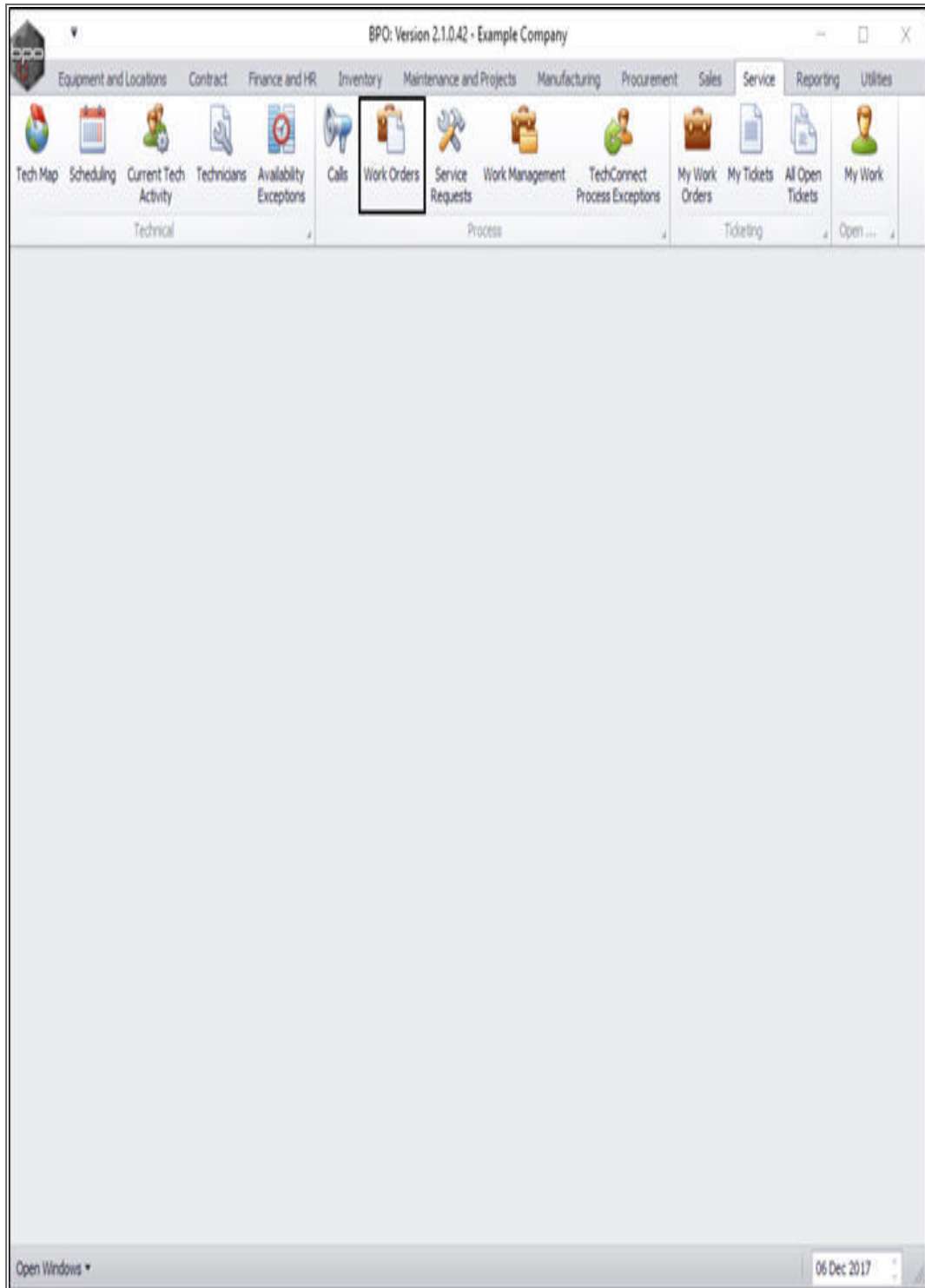
The **Maintain WO - Ref []** frame will be displayed.

1. **Add** or **Edit** any details as required in this screen or via the **Functions tiles**.
2. When you are done, click on **Save** if you have made changes.
3. Either **Close** the screen, or
4. Use the **Open Windows** menu to return to the **Call Listing** screen.



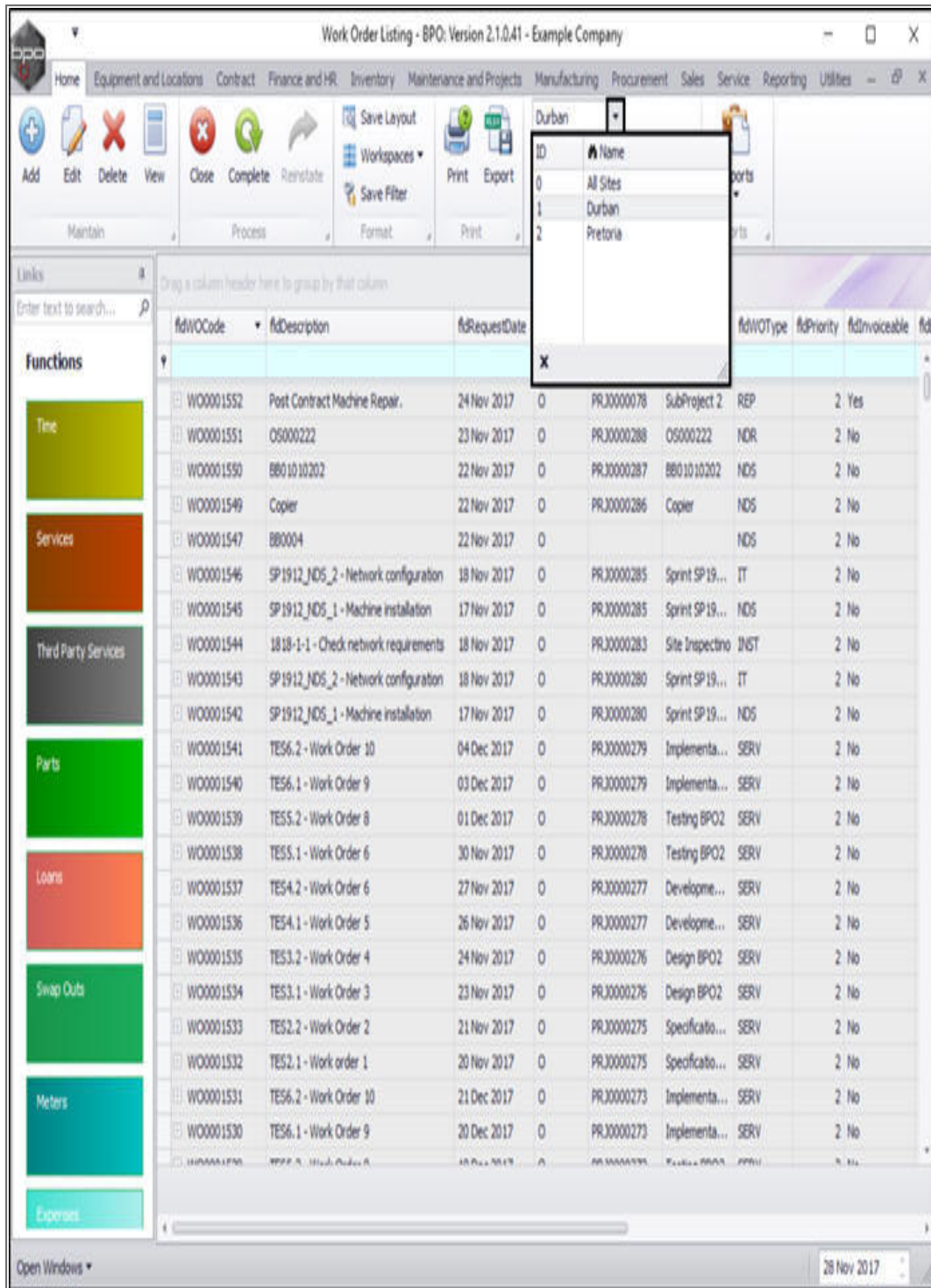
REINSTATE FROM A WORK ORDER

Ribbon Access: *Service > Work Orders*



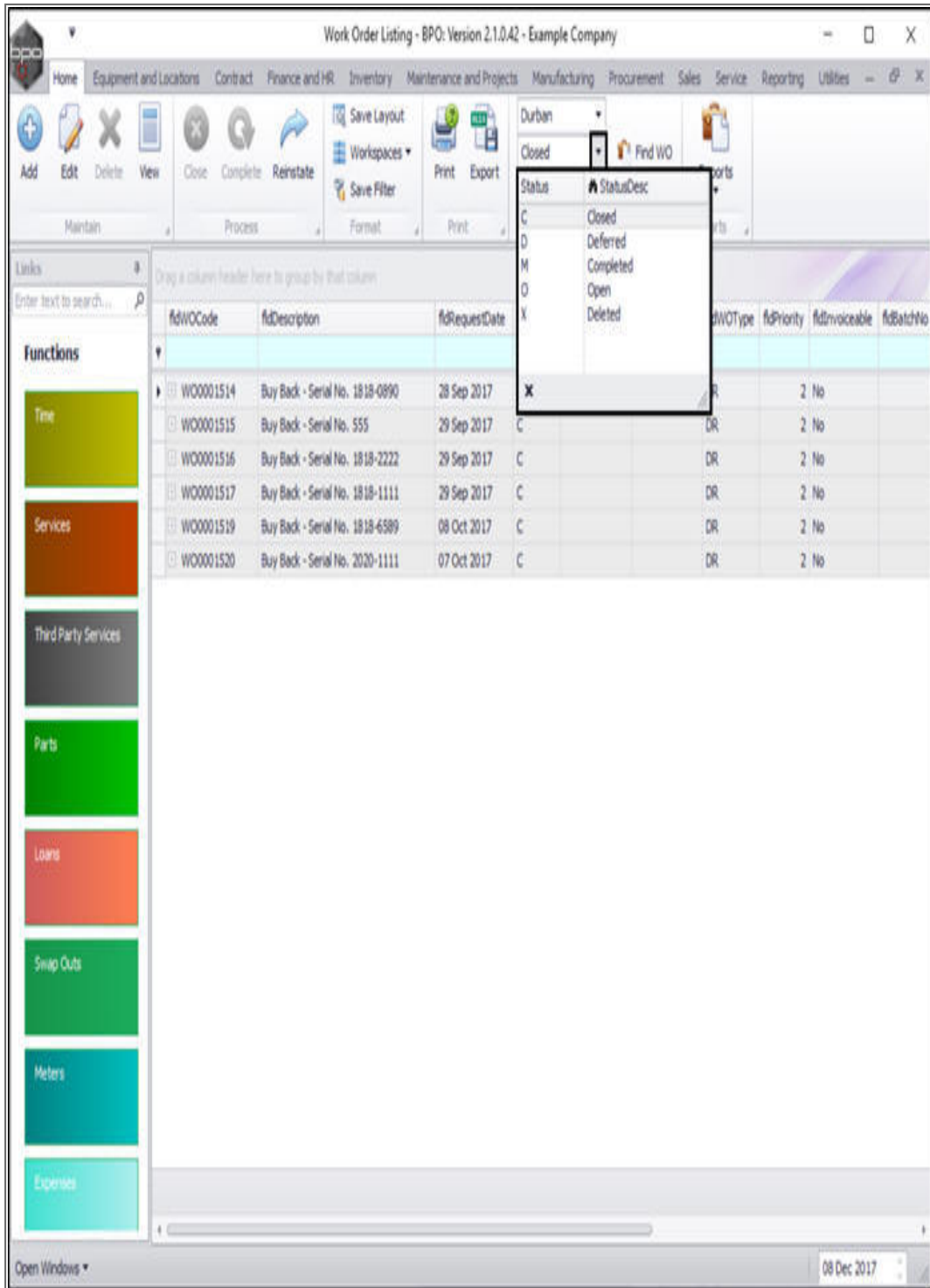
The **Work Order Listing** screen will be displayed.

- Select the **site**.
 - In this image **Durban** has been selected.



- Select the ***status***.
 - The status must be set to ***Closed***.

Note: Only closed work orders can be reinstated.



- Click on the **row selector** in front of the **work order** that you wish to **re-instate**.

- Click on **Reinstate**.

The screenshot shows the 'Work Order Listing - BPO: Version 2.1.0.42 - Example Company' application window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar below the menu contains various icons, with the 'Reinstate' icon (a blue arrow pointing right) highlighted with a black box. Other toolbar icons include Add, Edit, Delete, View, Close, Complete, Save Layout, Workspaces, Save Filter, Print, Export, Refresh, Find WO, and Reports.

On the left side, there is a 'Functions' sidebar with categories: Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The 'Services' category is currently selected.

The main area displays a table of work orders with the following columns: fdWOCode, fdDescription, fdRequestDate, fdStatus, fdStatusDescription, fdWOType, fdInvoiceable, fdSerialNo, and fdAssetRegNo. The table contains six rows of data, all with a status of 'Closed'.

fdWOCode	fdDescription	fdRequestDate	fdStatus	fdStatusDescription	fdWOType	fdInvoiceable	fdSerialNo	fdAssetRegNo
WO0001514	Buy Back - Serial No. 1818-0890	28 Sep 2017	C	Closed	DR	No	1818-0890	AREG000249
WO0001515	Buy Back - Serial No. 555	29 Sep 2017	C	Closed	DR	No	555	AREG000263
WO0001516	Buy Back - Serial No. 1818-2222	29 Sep 2017	C	Closed	DR	No	1818-2222	AREG000224
WO0001517	Buy Back - Serial No. 1818-1111	29 Sep 2017	C	Closed	DR	No	1818-1111	AREG000223
WO0001519	Buy Back - Serial No. 1818-6589	08 Oct 2017	C	Closed	DR	No	1818-6589	AREG000252
WO0001520	Buy Back - Serial No. 2020-1111	07 Oct 2017	C	Closed	DR	No	2020-1111	AREG000225

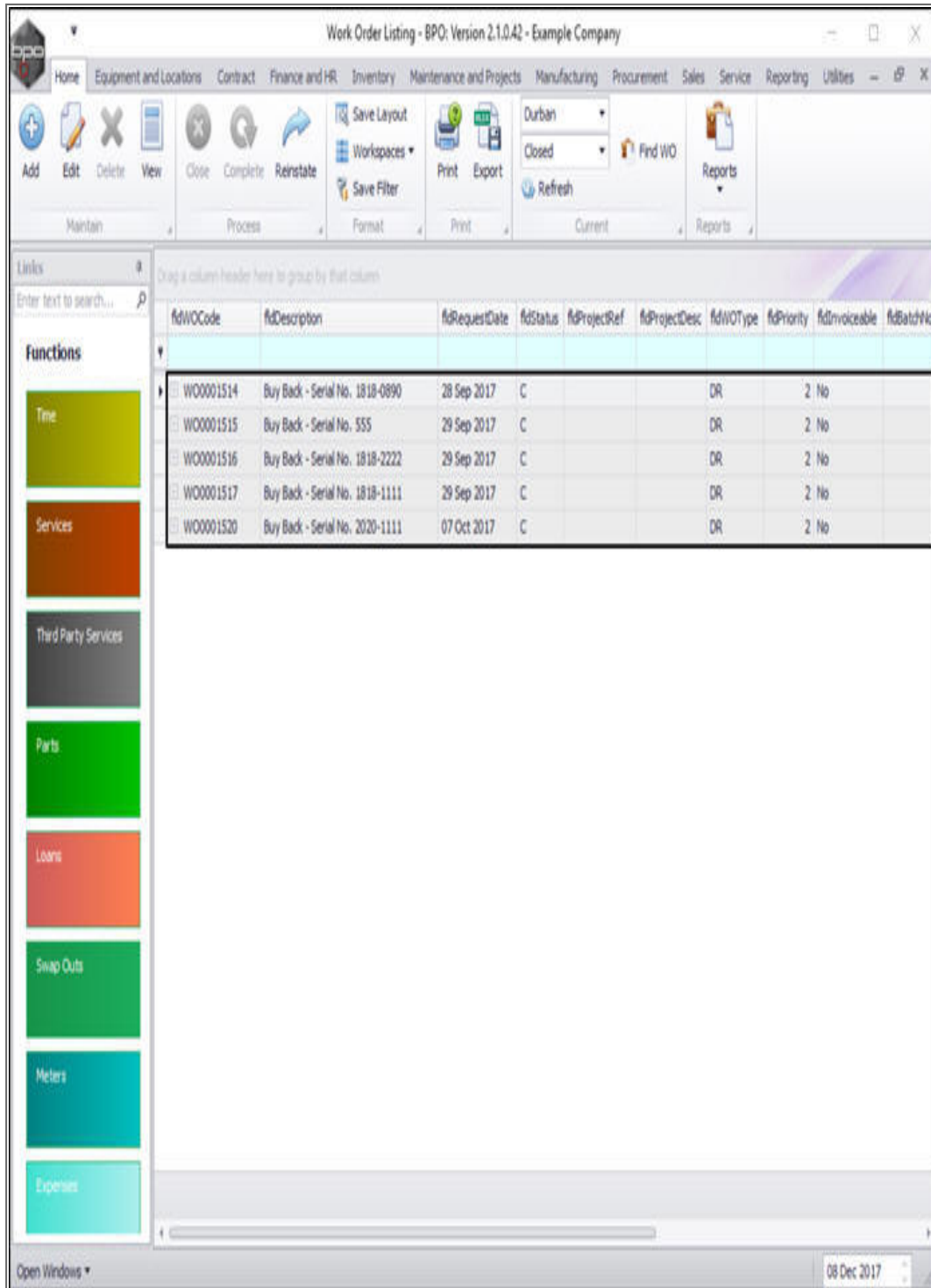
The status bar at the bottom right shows the date '08 Dec 2017'.

- An ***Input Validation*** message box will pop up asking;
 - ***Are you sure you want to re-instate this work order, no. []? Answer 'Yes' to reinstate the work order.***
- Click on **Yes**.

The screenshot shows the 'Work Order Listing - BPO: Version 2.1.0.42 - 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, Reinstate, Save Layout, Workspaces, Save Filter, Print, Export, Refresh, Find WO, and Reports. A sidebar on the left contains 'Functions' such as Time, Services, Third Party Services, Parts, Loans, Swap Outs, Meters, and Expenses. The main area displays a table of work orders with columns for fdWOCode, fdDescription, fdRequestDate, fdStatus, fdStatusDescription, fdWOType, fdInvoiceable, fdSerialNo, and fdAssetRegNo. A confirmation dialog box titled 'Input Validation' is overlaid on the table, asking: 'Are you sure you want to re-instate this work order, no. WO0001519? Answer 'Yes' to re-instate the work order.' with 'Yes' and 'No' buttons.

fdWOCode	fdDescription	fdRequestDate	fdStatus	fdStatusDescription	fdWOType	fdInvoiceable	fdSerialNo	fdAssetRegNo
WO0001514	Buy Back - Serial No. 1818-0890	28 Sep 2017	C	Closed	DR	No	1818-0890	AREG000249
WO0001515	Buy Back - Serial No. 555	29 Sep 2017	C	Closed	DR	No	555	AREG000263
WO0001516	Buy Back - Serial No. 1818-2222	29 Sep 2017	C	Closed	DR	No	1818-2222	AREG000224
WO0001517	Buy Back - Serial No. 1818-1111	29 Sep 2017	C	Closed	DR	No	1818-1111	AREG000223
WO0001519	Buy Back - Serial No. 1818-6589	08 Oct 2017	C	Closed	DR	No	1818-6589	AREG000252
WO0001520	Buy Back - Serial No. 2020-1111	07 Oct 2017	C	Closed	DR	No	2020-1111	AREG000225

- The selected work order will now be **removed** from the **Work Order Listing** screen where the status is set to **Closed**.



- The selected work order has now been moved to the **Work Order Listing** screen where the status is set to **Open**.

Work Order Listing - BPO: Version 2.1.0.42 - 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 Reinstate Save Layout Workspaces Print Export Save Filter Refresh Find WO Reports

Links: Enter text to search... Drag a column header here to group by that column

fdWOCCode	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectDesc	fdWOType	fdPriority	fdInvoiceable	fdBatchNo
WO0001539	TESS.2 - Work Order 8	01 Dec 2017	0	PRJ0000278	Testing BPO2	SERV	2	No	
WO0001538	TESS.1 - Work Order 6	30 Nov 2017	0	PRJ0000278	Testing BPO2	SERV	2	No	
WO0001537	TES4.2 - Work Order 6	27 Nov 2017	0	PRJ0000277	Developme...	SERV	2	No	
WO0001536	TES4.1 - Work Order 5	26 Nov 2017	0	PRJ0000277	Developme...	SERV	2	No	
WO0001535	TES3.2 - Work Order 4	24 Nov 2017	0	PRJ0000276	Design BPO2	SERV	2	No	
WO0001534	TES3.1 - Work Order 3	23 Nov 2017	0	PRJ0000276	Design BPO2	SERV	2	No	
WO0001533	TES2.2 - Work Order 2	21 Nov 2017	0	PRJ0000275	Specificatio...	SERV	2	No	
WO0001532	TES2.1 - Work order 1	20 Nov 2017	0	PRJ0000275	Specificatio...	SERV	2	No	
WO0001531	TES6.2 - Work Order 10	21 Dec 2017	0	PRJ0000273	Implementa...	SERV	2	No	
WO0001530	TES6.1 - Work Order 9	20 Dec 2017	0	PRJ0000273	Implementa...	SERV	2	No	
WO0001529	TES5.2 - Work Order 8	18 Dec 2017	0	PRJ0000272	Testing BPO2	SERV	2	No	
WO0001528	TES5.1 - Work Order 6	17 Dec 2017	0	PRJ0000272	Testing BPO2	SERV	2	No	
WO0001527	TES4.2 - Work Order 6	14 Dec 2017	0	PRJ0000271	Developme...	SERV	2	No	
WO0001526	TES4.1 - Work Order 5	13 Dec 2017	0	PRJ0000271	Developme...	SERV	2	No	
WO0001525	TES3.2 - Work Order 4	11 Dec 2017	0	PRJ0000270	Design BPO2	SERV	2	No	
WO0001524	TES3.1 - Work Order 3	10 Dec 2017	0	PRJ0000270	Design BPO2	SERV	2	No	
WO0001523	TES2.2 - Work Order 2	08 Dec 2017	0	PRJ0000269	Specificatio...	SERV	2	No	
WO0001522	TES2.1 - Work order 1	07 Dec 2017	0	PRJ0000269	Specificatio...	SERV	2	No	
WO0001521	Maintenance Service 3 monthly	06 Nov 2017	0			SERV	2	No	
WO0001519	Buy Back - Serial No. 1818-6589	08 Oct 2017	0			DR	2	No	
WO0001518	New Client Installation	06 Oct 2017	0			INST	2	No	
WO0001513	Issued and invoiced stock	30 Jun 2017	0			DR	2	No	
WO0001512	Quick Part Return where stock was is...	30 Jun 2017	0			DR	2	No	
WO0001511	Loan with Alternative Parts	30 Jun 2017	0			DR	2	No	

Open Windows ▾ 08 Dec 2017

MNU.072.036

