

SERVICE

WORK MANAGEMENT - COMPLETE A WORK ORDER

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

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.

Click on the **Refresh** button Refresh to update the screen.



Work Management - Complete a Work Order

\$ · 1-		-	-> Work Ma	nagement - BPO: Version 2.5.0.8 - Exam	nple Comp	any v2.5.0.8					
Home Equipment / Locations Contra	ct Fina	nce	/HR Inven	tory Maintenance / Projects Manufa	cturing	Procurement Sa	les S	Service	Reporting Utilities	-	8 X
G Image: Complete Close Work Order 01/02/2022 Add Edit Complete Close Work Order 25/04/2022	• Re	fre	sh Assign S	Save Layout Workspaces Print	Call Print ort Del	Call Net Print S iveries WO H	ervice istory				
Process	Curr	ent		A Format		Print	4				\$
Find O Filter		F	WOCode	WODescription	SiteName	Technician	Status	WOTy	WOTypeDesc	CustomerCode	CalRefer
3		٩	8 C	* 🗖 c	a 🖬 c	a 🗖 c	* 0 ¢	× C c	a 🛛 c	8 C	8 0 0
			WO0006262	Additional equipment requested during ins	Durban	John Twain	0	IMP	Implementation	OFF001	
Sites	Stats		WO0006254	New machine implementation	Durban	Julanda Kessler	м	IMP	Implementation	APP0001	CN00053
- Durban	11/8		WO0006130	Site Inspection for Network Cable Installa	Durban	Belinda Sharman	0	INSP	Inspection	HOP001	
		۲	WO0006130	Site Inspection for Network Cable Installa	Durban	Jade Rivers	0	INSP	Inspection	HOP001	
Belinda Sharman	2/1		WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	м	INST	Installation	HOP001	
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	М	INST	Installation	HOP001	CN00052
🤦 John Twain	2/0		WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	М	INST	Installation	HOP001	CN00052
Theo Paterson	1/1		WO0006264	Tier - Commercial Tier Test	Durban	Arial Blythe	0	INST	Installation	HOP001	CN00052
	1/1		WO0006259	Post Contract machine repair	Durban	Julanda Kessler	0	REP	Machine Repairs	HOP001	CN00053
Joseph Timber	1/0		WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN00052
Jade Rivers	1/0		WO0006260	Loan unit required while main unit is being	Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CN00053
Jeff Rivers	1/0		WO0006260	Loan unit required while main unit is being	Durban	John Twain	0	REP	Machine Repairs	OFF001	CN00053
9 Arist Dhatha	1/0		WO0006260	Loan unit required while main unit is being	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN00053
Analoguie	1/0	L	WO0006136	PROJ406OR002	Durban	Julanda Kessler	М	NDS	New Deal Sale	BIG0001	CN00052
Julanda Kessler	1/6	L	WO0006257	PROJ406OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN00052
Pretoria	0/0	L	WO0006253	Replace part - current faulty	Durban	Julanda Kessler	М	PR	Parts Requirement	biancad	CN00053
Cape Town	0/0	L	WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CN00052
A Bloamfootain	0/0	F	WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CN00052
A Divention test	0,0	H	WO0006258	Drum replacement required	Durban	Joseph Timber	0	SERV	Service	HOP001	CN00053
A New Test Site	0/0										
Johannesburg	0/0										
I		4									÷
Open Windows 🕶						User : Julanda	K 26/0	04/2022	Version : 2.5.0.8 Exar	nple Company v2.	5.0.8

- 4. Click on the *row* of the work order you wish to *complete*.
- 5. Click on *Complete*.

			Work Ma	nagement - BPO: Version 2.5.0.8 - Exam	nple Comp	any v2.5.0.8					
Home Equipment / Locations Contra	ct Fin	ance	/HR Inver	tory Maintenance / Projects Manufa	acturing	Procurement Sa	les S	Service	Reporting Utilities	-	₽ ×
Add Edit Complete Close Work 01/02/2021	• •	Content of the second s	sh Assign S	Start Save Layout Workspaces Print	Call Print	Call Net Print S	ervice				
Order				 Rep 	ort Del	iveries WO H	istory				
Process	Cur	rent		A Format A		Print	4				~
Find O Filter			WOCode	WODescription	SiteName	Technician	Status	WOTy	WOTypeDesc	CustomerCode	CalRefe
		4	R C	* D :	a 🗖 c	8 0 0	* 0 ¢	× C c	a 🛛 c	8 🗖 C	8 0 0
		Π	WO0006262	Additional equipment requested during ins	Durban	John Twain	0	IMP	Implementation	OFF001	
Sites	Stats		WO0006254	New machine implementation	Durban	Julanda Kessler	м	IMP	Implementation	APP0001	CN00053
🕨 🛫 🔿 Durban	11/8	t	WO0006130	Site Inspection for Network Cable Installa	Durban	Belinda Sharman	0	INSP	Inspection	HOP001	
		Þ	WO0006130	Site Inspection for Network Cable Installa	Durban	Jade Rivers	0	INSP	Inspection	HOP001	
Beinda Sharman	2/1		WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	М	INST	Installation	HOP001	
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	М	INST	Installation	HOP001	CN00052
🤦 John Twain	2/0		WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	М	INST	Installation	HOP001	CN00052
Theo Peterson	1/1		WO0006264	Tier - Commercial Tier Test	Durban	Arial Blythe	0	INST	Installation	HOP001	CN00052
			WO0006259	Post Contract machine repair	Durban	Julanda Kessler	0	REP	Machine Repairs	HOP001	CN00053
Joseph Timber	1/0		WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN00052
3ade Rivers	1/0		WO0006260	Loan unit required while main unit is being	Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CN00053
Jeff Rivers	1/0		WO0006260	Loan unit required while main unit is being	Durban	John Twain	0	REP	Machine Repairs	OFF001	CN00053
7 Arial Blythe	1/0		WO0006260	Loan unit required while main unit is being	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN00053
	10		WO0006136	PROJ406OR002	Durban	Julanda Kessler	м	NDS	New Deal Sale	BIG0001	CN00052
Julanda Kessler	1/6		WO0006257	PRO3406OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN00052
Pretoria	0/0		WO0006253	Replace part - current faulty	Durban	Julanda Kessler	М	PR	Parts Requirement	biancad	CN00053
Cape Town	0/0		WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CN00052
Bloemfontein	0/0		WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CN00052
	010		WO0006258	Drum replacement required	Durban	Joseph Timber	0	SERV	Service	HOPUU1	CN00053
A New Test Site	0/0										
Johannesburg	0/0										
		4									+
Open Windows 🕶						User : Julanda	K 26/0	4/2022	Version : 2.5.0.8 Exar	mple Company v2.	5.0.8



- 6. When you receive the *Input Validation* message to confirm;
 - Are you sure you want to complete this work order, no.

[work order number]?

7. Click on Yes.

¥			Work	Manager	nent - BPO: Version 2.5.0.8	- Exam	ple Comp	any v2.5.0.	8						
Home Equipment / Locations Contra	ct	Financ	ce/HR Inv	entory	Maintenance / Projects	Manufac	turing	Procuremen	t Sales	5	Service	Reporting U	tilities	-	ъ х
1/02/2021	•	2	2 2	\checkmark	2		2		3 2						
Add Edit Complete Close Work 25/04/2022	-	Refr	resh Assign	Start	Save Layout Workspaces	Print	all Print	Call Net P	rint Serv	ice					
Order					•	Repo	rt Deli	veries V	VO Histo	ory					
Process a		Curren	nt		Format	4		Print		A					6
Find Filter			WOCode	WOD	escription		SiteName	Technician	S	tatus	WOTy	WOTypeDesc	Custor	nerCode	CallRe
			9 #Ec	8 0 0			н∎с	* 0 ¢		C	* 0 ¢	* 0 0	* 0 ¢		8 0 0
			WO000626	2 Addit	onal equipment requested duri	ng ins	Durban	John Twain	C		IMP	Implementation	OFF00	1	
Sites	Stats		WO000625	4 New I	nachine implementation		Durban	Julanda Kes	isler M		IMP	Implementation	APP00	01	CN000
- 🔿 Durban	11/8		WO000613	0 Site I	nspection for Network Cable In	stalla	Durban	Belinda Sha	rman C		INSP	Inspection	HOPOC	1	
	11/0		• WO000613	0 Site I	nspection for Network Cable In	stalla	Durban	Jade Rivers	. C		INSP	Inspection	HOPOC	1	
Belinda Sharman	2/1		WO000613	1 1818	1-1 - Check network requireme	ents	Durban	Belinda Sha	rman M		INST	Installation	HOPOC	1	
Karlien Jessica Young Dunnaway Svenson	1/0		WO000621	4 Tier -	Commercial Tier Test		Durban	Theo Peters	son M		INST	Installation	HOPOC	1	CN000
👤 John Twain	2/0	nput \	Validation <		6			\times	sler M		INST	Installation	HOPOC	1	CN000
Theo Peterson	1/1				1				C		INST	Installation	HOPOC	1	CN000
					1º				sler C		REP	Machine Repairs	HOPOC	1	CN000
Joseph Timber	1/0		Are you sure you want to complete this work order, no. WO0006130? pn O REP Machine Repairs							HOPOC	1	CN000			
Jade Rivers	1/0								ca Yo C		REP	Machine Repairs	OFF00	1	CN000
🙎 Jeff Rivers	1/0			-					C		REP	Machine Repairs	OFF00	1	CN000
9 Arial Blythe	1/			7—	<u> </u>	s	N	0	C		REP	Machine Repairs	OFF00	1	CN000
	*/4	11				_			sler M		NDS	New Deal Sale	BIG00	01	CN000
Julanda Kessler	1/6		WO000625	7 PROJ	406OR002		Durban	Belinda Sha	rman C		NDS	New Deal Sale	BIGOO	01	CN000
Tretoria Pretoria	0/0		WO000625	3 Repla	ce part - current faulty		Durban	Julanda Kes	isler M		PR	Parts Requiremen	nt bianca	d	CN000
Cape Town	0/0		WO000622	9 BathB	inMaint - Bathroom Bin Mainter	nance	Durban	Julanda Kes	isler M		SM	Scheduled Mainte	enance WES00)1	CN000
Bloemfontein	0/0		W0000623	4 BathE	inmaint - Bathroom Bin Mainter	nance	Durban	Julanda Kes	isier M		SM	Scheduled Mainte	enance WES00	1	CN000
	-/0	-1	WO000625	5 Drum	replacement required		Durban	Joseph Tim	Jer U		SERV	Service	HOPUL	1	CNUUU
A New Test Site	0/0	-1													
Johannesburg	0/0														
		- 11	4												

- 8. The *Rectification Comments* screen will display.
- 9. Click to type in a description for the work done. The comment needs to be at least **20** characters.
- 10. Click on *Save*.



+			Work M	anagen	ent - BPO: \	ersion 2.5.0		xample C	ompa	any v2.5	5.0.8								x
Home Equipment / Locations Contra	ct Finar	nce	/HR Inve	ntory	Maintenanc	e / Projects	Mar	nufacturing	, 1	Procuren	nent	Sales	Service	Reporting	Utiliti	ies	-	8	×
(2) (2) (3) (3) (3) (3) (3) (3) (3) (3) (3) (3	1 - 4	2	~ 2								Ŷ								
Add Edit Complete Close Work Order	2 🔻 Re	tre	sh Assign	Start	Save Layout	Workspace	ES P	Print Call Report	Print C Deliv	Call Net veries	Print WO	Service History							
Process a																			\Diamond
Find Filter			WOCode	WODe	scription			SiteN	lame	Technici	an	Status	WOTy	WOTypeDe	esc		CustomerCode	Call	Refe
		9	R C	8 0 0				яПс		R D C		8 🔲 C	8 🛛 C	R C			••••••••••••••••••••••••••••••••••••	809	
			WO0006262	Additio	inal equipmen	t requested d	luring ir	ns Durb	an	John Tw	ain	0	IMP	Implementa	ation		OFF001		
Sites	Stats		WO0006254	New n	achine implem	nentation		Durb	an	Julanda	Kessler	М	IMP	Implementa	ation	_	APP0001	CNC	00053
> - A Durban	11/8		WO0006130	Site In	spe 🖳 Rec	tification Co	omme	nts 🗲			-8				X		HOP001		
C Datada Charman	2/4	Þ	WO0006130	Site In	spe Home												HOP001		
Beinga sharman	2/1		WO0006131	1818-	1-1												HOP001		
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006214	Tier -	Con												HOP001	CNO	00052
🤦 John Twain	2/0		WO0006214	Tier -	Con Save	Back											HOP001	CNO	00052
Theo Peterson	1/1		WO0006264	Tier -	Con Proc	204	9								\$		HOP001	CNO	00052
			WO0006259	Post C	ont Site insp	ection comple	ted. V	Vork done.	1								HOP001	CNO	00053
Joseph Timber	1/0		WO0006250	Paper	not							-9					HOP001	CNO	00052
Jade Rivers	1/0		WO0006260	Loan u	nit												OFF001	CNO	00053
Jeff Rivers	1/0		WO0006260	Loan u	nit												OFF001	CNO	00053
G Arial Blutha	1/0		WO0006260	Loan u	nit												OFF001	CNO	00053
And by the	1/0		WO0006136	PROJ	060												BIG0001	CNO	00052
Julanda Kessler	1/6		WO0006257	PROJ	060												BIG0001	CNO	00052
Pretoria	0/0		WO0006253	Repla	ep												biancad	CNO	00053
Cape Town	0/0		WO0006229	BathB	sMa											e	WES001	CNO	00052
A Plasmfantsin	0/0		WO0006234	BathB	sMn											e	WES001	CNO	00052
bioennontern	0/0		WO0006258	Drum	epl												HOP001	CNO	
A New Test Site	0/0																		
Johannesburg	0/0																		
		4				Ð										_			+
Open Windows 🔻										Us	er : Julan	daK 26/	04/2022	Version : 2.	5.0.8	Exan	nple Company v2.	5.0.8	
																			111

- 11. When the *Work Order Complete* message display to confirm that;
 - The WO [work order number] has been completed successfully.
- 12. Click on *OK*.

Home Equipment / Locations Cont	ract I				ment - pro; version 2.5.0.6			any v2.5.0.8					
	urct 1	Finance	e/HR Inv	entory	Maintenance / Projects	Manufactu	ring	Procurement	Sales	Service	Reporting Utilities	-	8 ×
Add Efft Complete Close Work	21 -	Pafe		Start		Print Cal	Drint	Call Nat	Service				
Order	22 •	Keine	carr Maaigir	Start	Save Layout Workspaces	Report	Deli	iveries WO	History				
Process a	(Current	t		Format 4			Print					\diamond
Find Filter			WOCode	WOD	escription	Si	teName	Technician	Status	WOTy	WOTypeDesc	CustomerCode	CallRefe
			9 80C	8 C		1	c	* 0 ¢	۰ ۵ ۰	×0:	* E ¢	8 0 0	H O C
			WO0006263	2 Addit	ional equipment requested durin	ng ins Du	urban	John Twain	0	IMP	Implementation	OFF001	
Sites	Stats		WO000625	4 New	machine implementation	D	urban	Julanda Kessler	м	IMP	Implementation	APP0001	CN00053
- Durban	11/8		WO0006130) Site I	nspection for Network Cable Ins	stalla Du	urban	Belinda Sharman	0	INSP	Inspection	HOP001	
	14/0		WO000613) Site I	inspection for Network Cable Ins	stalla Du	urban	Jade Rivers	0	INSP	Inspection	HOP001	
Belinda Sharman	2/1	-10	WO000613	1 1818	-1-1 - Check network requirement	nts Du	urban	Belinda Sharman	M	INST	Installation	HOP001	
Karlien Jessica Young Dunnaway Svenso	n 1/0		WO0006214	4 Tier -	Commercial Tier Test	D	urban	Theo Peterson	м	INST	Installation	HOP001	CN00052
👤 John Twain	2/0		WO0006214	4 Tie V	Vork Order - Complete 🔫		1	1	×	INST	Installation	HOP001	CN00052
Theo Peterson	1/1	-11	WO0006264	4 Tie			10			INST	Installation	HOP001	CN00052
a neo receison	4/1	-11	WO0006259	9 Po		4º				REP	Machine Repairs	HOP001	CN00053
3 Joseph Timber	1/0		WO0006250) Pa	The WO WO000613	0 has bee	n comp	leted successfully	<i>.</i>	REP	Machine Repairs	HOP001	CN00052
Jade Rivers	1/0		WO0006260) Lo						REP	Machine Repairs	OFF001	CN00053
2 Jeff Rivers	1/0		WO0006260) Lo	-				_	REP	Machine Repairs	OFF001	CN0005
		-11	WO0006260	D Lo	12			-> ОК		REP	Machine Repairs	OFF001	CN00053
Anai Biythe	1/0	-11	WO0006138	5 PR						NDS	New Deal Sale	BIG0001	CN00052
Julanda Kessler	1/6		WO000625	7 PROJ	406OR002	D	urban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN00052
A Pretoria	0/0		WO0006253	3 Repla	ace part - current faulty	D	urban	Julanda Kessler	м	PR	Parts Requirement	biancad	CN00053
A Cape Town	0/0		WO000622	9 Bath	BinMaint - Bathroom Bin Maintena	ance Di	urban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN00052
A	0/0	-11	WO0006234	4 Bath	BinMaint - Bathroom Bin Maintena	ance Di	urban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN00052
Bloemfontein	0/0	- 11	WO0006258	3 Drum	replacement required	D	urban	Joseph Timber	0	SERV	Service	HOP001	CN00053
A New Test Site	0/0												
3 Johannesburg	0/0												
(m)													b.
Dage Windows -								Lines a 2 days	day and	04/2022	Versien - 3 E 0.0	ale Company	500



13. The *Stats* column on the *Work Management* screen has been updated.

Note that if the Technician's stats showed 1 *Open* and 0 *Completed*, then the work order will be removed from the data grid. If the Technician had multiple Open work orders, then the Completed work orders will be updated.

Home Equipment / Locations Contra	t Fina	ance /	HR Inver	ntory Maintenance / Projects	Manufact	turing	Procurement Sa	ales S	ervice	Reporting Utilities	-	8 >
D 📝 🚱 🔞 01/02/2023	•	3	2				»	2				
dd Edit Complete Close Work 25/04/202	+ R	Refresh	Assign S	Start Save Layout Workspaces	Print C	all Print	Call Net Print S	ervice				
Drocere		rent		Format	керо	rt Dei	Print WO F	listory				
10000 4	-13<				4		rink	4				
		Dra	g a column be	ader here to group by that column								1
Find O Filter			WOCode	WODescription		SiteName	Technician	Status	WOTy	WOTypeDesc	CustomerCode	Call
		9	* 🛛 C	8 0 0		R C	*DC	8 0 0	* 0 ¢	R C	* 0 ¢	a 🛛 c
	•	+	WO0006262	Additional equipment requested duri	ing ins I	Durban	John Twain	0	IMP	Implementation	OFF001	
Sites	Stats		WO0006254	New machine implementation	1	Durban	Julanda Kessler	М	IMP	Implementation	APP0001	CNO
- A Durban	0/1		WO0006130	Site Inspection for Network Cable In	istalla I	Durban	Belinda Sharman	м	INSP	Inspection	HOP001	
Paliada Charman	1/2		WO0006130	Site Inspection for Network Cable In	istalla I	Durban	Jade Rivers	М	INSP	Inspection	HOP001	
a beirida sharmari	1/2		WO0006131	1818-1-1 - Check network requireme	ents I	Durban	Belinda Sharman	М	INST	Installation	HOP001	
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006214	Tier - Commercial Tier Test	1	Durban	Theo Peterson	м	INST	Installation	HOP001	CNO
🔍 John Twain	2/0		WO0006214	Tier - Commercial Tier Test	1	Durban	Julanda Kessler	м	INST	Installation	HOP001	CNO
Theo Peterson	1/1		WO0006264	Tier - Commercial Tier Test	1	Durban	Arial Blythe	0	INST	Installation	HOP001	CNO
			WO0006259	Post Contract machine repair	1	Durban	Julanda Kessler	0	REP	Machine Repairs	HOP001	CN0
Joseph Timber	1/0	1	WO0006250	Paper not feeding through rollers	1	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CNO
Jeff Rivers	1/0		WO0006260	Loan unit required while main unit is	being I	Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CNO
👤 Arial Blythe	1/0		WO0006260	Loan unit required while main unit is	being I	Durban	John Twain	0	REP	Machine Repairs	OFF001	CNO
C Julanda Kanalar	116		WO0006260	Loan unit required while main unit is	being I	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CNO
Julariua Ressier	1/0		WO0006136	PROJ406OR002	1	Durban	Julanda Kessler	М	NDS	New Deal Sale	BIG0001	CNO
Pretoria Pretoria	0/0		WO0006257	PROJ406OR002	1	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CNO
Cape Town	0/0		WO0006253	Replace part - current faulty	1	Durban	Julanda Kessler	м	PR.	Parts Requirement	biancad	CNO
	0/0		WO0006229	BathBinMaint - Bathroom Bin Mainter	nance I	Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CNO
			WO0006234	BathBinMaint - Bathroom Bin Mainter	nance I	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CNO
A New Test Site	0/0		WO0006258	Drum replacement required	1	Durban	Joseph Timber	0	SERV	Service	HOP001	CNO
10hannesburg	0/0											
		1										
		4.0										

MNU.074.004