

SERVICE

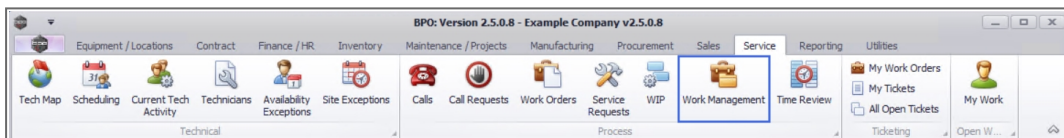
WORK MANAGEMENT – CLOSE A WORK ORDER

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



Remember a Work Order must be **Complete**, with **Rectification Comments**, before it can be **Closed**.

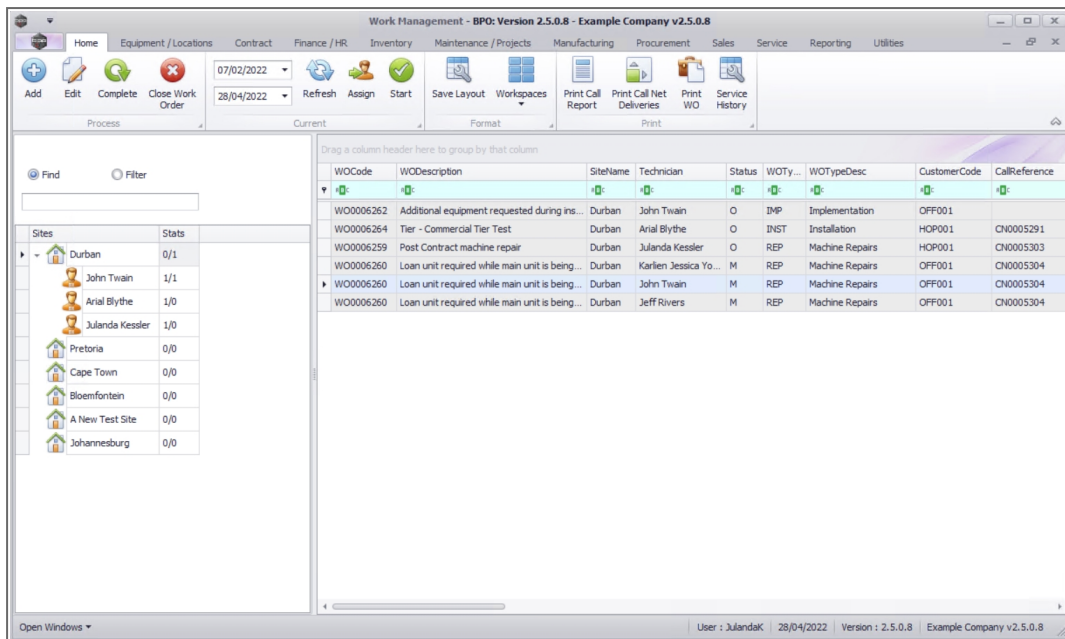
Ribbon Access: *Service > Work Management*



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 to update the screen.



CLOSE THE WORK ORDER

- Click on the **row selector** in front of the (Completed) **Work Order** that you wish to **close**.
 - **Note:** In this image; you can see in the **Status** column that the selected Work Order is set to status **M - Completed**. (A Work Order can only be closed after it has been Completed).

The screenshot shows the 'Work Management' interface with a table of work orders. An 'Input Validation' dialog box is open, displaying the question: "Are you sure you want to close this work order, no. WO0006260?". The dialog has 'Yes' and 'No' buttons.

WOCCode	WOCDescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallReference
WO0006262	Additional equipment requested during ins...	Durban	John Twain	O	IMP	Implementation	OFF001	
WO0006264	Tier - Commercial Tier Test	Durban	Anal Blythe	O	INST	Installation	HOP001	CH0005291
WO0006259	Post Contract machine repair	Durban	Julanda Kessler	O	REP	Machine Repairs	HOP001	CH0005303
WO0006260	Loan unit required while main unit is being...	Durban	Karlien Jessica Yo...	M	REP	Machine Repairs	OFF001	CH0005304
WO0006260	Loan unit required while main unit is being...	Durban	John Twain	M	REP	Machine Repairs	OFF001	CH0005304
WO0006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	M	REP	Machine Repairs	OFF001	CH0005304

The screenshot shows the same 'Work Management' interface. The 'Input Validation' dialog box is no longer present. The work order table is visible, and the row for WO0006260 (John Twain) is highlighted in blue.

WOCCode	WOCDescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallReference
WO0006262	Additional equipment requested during ins...	Durban	John Twain	O	IMP	Implementation	OFF001	
WO0006264	Tier - Commercial Tier Test	Durban	Anal Blythe	O	INST	Installation	HOP001	CH0005291
WO0006259	Post Contract machine repair	Durban	Julanda Kessler	O	REP	Machine Repairs	HOP001	CH0005303
WO0006260	Loan unit required while main unit is being...	Durban	Karlien Jessica Yo...	M	REP	Machine Repairs	OFF001	CH0005304
WO0006260	Loan unit required while main unit is being...	Durban	John Twain	M	REP	Machine Repairs	OFF001	CH0005304
WO0006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	M	REP	Machine Repairs	OFF001	CH0005304

It is also worth noting in this image;

1. The technician assigned to this Work Order is Belinda Sharman.
2. In the stats column of the Sites frame you can see the figures **11/1** next to the name Belinda Sharman. This means she has **11** Open and **1** Completed Work Order (we will see this change later in this manual).

The screenshot shows the 'Work Management - BPO: Version 2.1.0.62 - Example Company' application. The main window displays a list of work orders with columns for WCode, WDescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. A sidebar on the left shows a 'Sites' list with a 'Stats' column. The 'Durban' site is expanded, showing a list of technicians and their statistics. The 'Belinda Sharman' entry in the stats list shows '11/1'. A red circle '2' is placed over this '11/1' value, and a red circle '1' is placed over the 'Belinda Sharman' name in the main work order list. A red arrow points from the '11/1' in the stats list to the 'Belinda Sharman' name in the work order list.

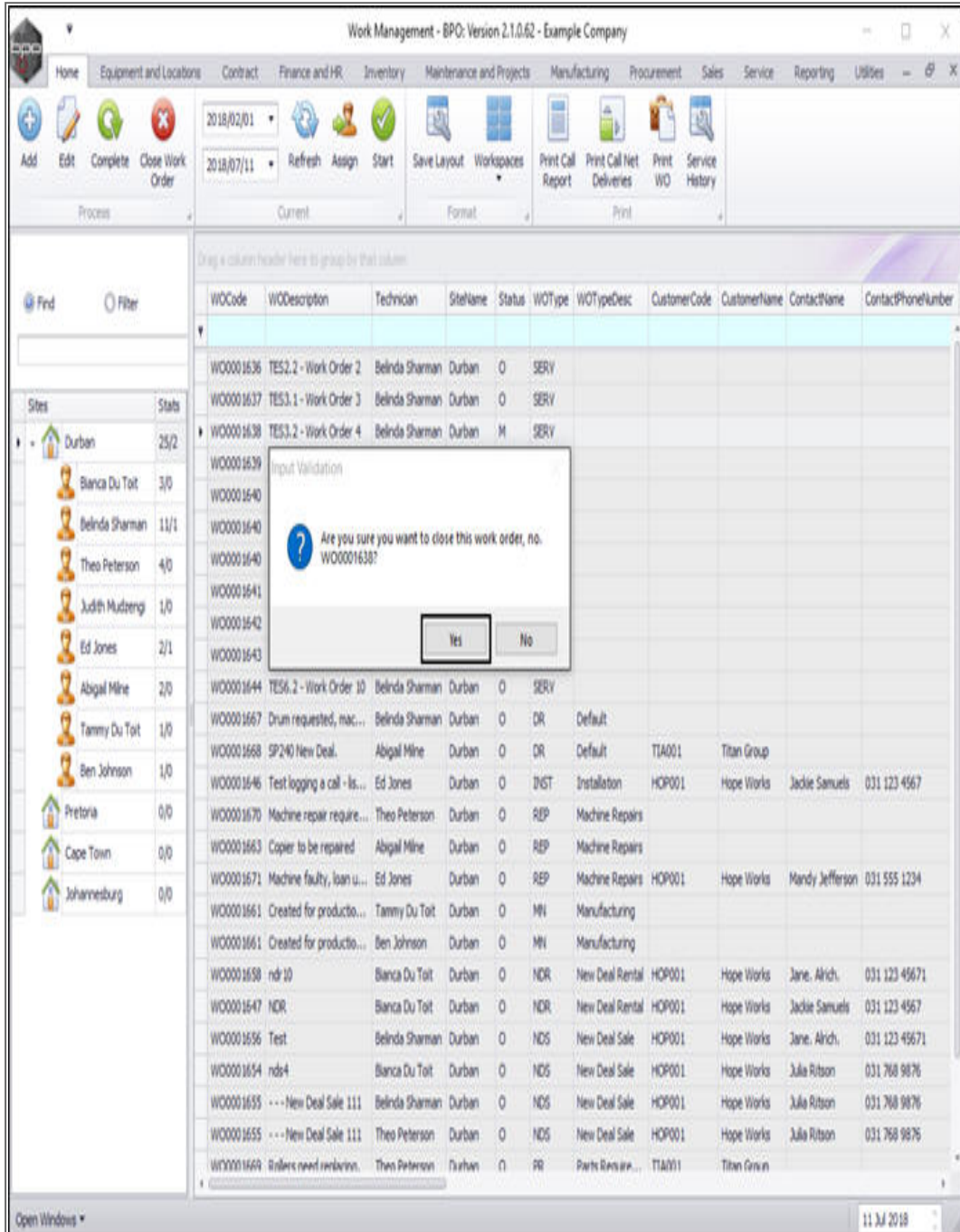
WCode	WDescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
W00001636	TES2.2 - Work Order 2	Belinda Sharman	Durban	O	SERV					
W00001637	TES3.1 - Work Order 3	Belinda Sharman	Durban	O	SERV					
W00001638	TES3.2 - Work Order 4	Belinda Sharman	Durban	M	SERV					
W00001639	TES4.1 - Work Order 5	Belinda Sharman	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Belinda Sharman	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Theo Peterson	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Judith Mudzengi	Durban	O	SERV					
W00001641	TES5.1 - Work Order 6	Belinda Sharman	Durban	O	SERV					
W00001642	TES5.2 - Work Order 8	Belinda Sharman	Durban	O	SERV					
W00001643	TES6.1 - Work Order 9	Belinda Sharman	Durban	O	SERV					
W00001644	TES6.2 - Work Order 10	Belinda Sharman	Durban	O	SERV					
W00001667	Drum requested, mac...	Belinda Sharman	Durban	O	DR	Default				
W00001668	SP240 New Deal.	Abigal Mine	Durban	O	DR	Default	TIA001	Titan Group		
W00001646	Test logging a call - ls...	Ed Jones	Durban	O	INST	Installation	HOP001	Hope Works	Jackie Samuels	031 123 4567
W00001670	Machine repair require...	Theo Peterson	Durban	O	REP	Machine Repairs				
W00001663	Copier to be repaired	Abigal Mine	Durban	O	REP	Machine Repairs				
W00001671	Machine faulty, loan u...	Ed Jones	Durban	O	REP	Machine Repairs	HOP001	Hope Works	Mandy Jefferson	031 555 1234
W00001661	Created for productio...	Tammy Du Toit	Durban	O	MN	Manufacturing				
W00001661	Created for productio...	Ben Johnson	Durban	O	MN	Manufacturing				
W00001658	ndr-10	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HOP001	Hope Works	Jane. Alrich.	031 123 45671
W00001647	NDR	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HOP001	Hope Works	Jackie Samuels	031 123 4567
W00001656	Test	Belinda Sharman	Durban	O	NDS	New Deal Sale	HOP001	Hope Works	Jane. Alrich.	031 123 45671
W00001654	ndr4	Bianca Du Toit	Durban	O	NDS	New Deal Sale	HOP001	Hope Works	Jula Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Belinda Sharman	Durban	O	NDS	New Deal Sale	HOP001	Hope Works	Jula Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Theo Peterson	Durban	O	NDS	New Deal Sale	HOP001	Hope Works	Jula Ritson	031 768 9876
W00001669	Rollers need recondition.	Theo Peterson	Durban	O	RR	Parts Requir...	TIA001	Titan Group		

- When you are sure (*according to the previous steps*) that you have selected a '**Completed**' work order to be closed, click on **Close Work Order**.

The screenshot shows the 'Work Management - BPO: Version 2.1.0.62 - Example Company' application. The top toolbar contains several icons, with the 'Close Work Order' icon (a red square with a white 'X') highlighted by a red box. Below the toolbar is a navigation pane on the left with a 'Sites' list. The main area displays a table of work orders with columns: WCode, WDescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. The 'Status' column for the selected row (W00001638) shows 'M', indicating it is completed.

WCode	WDescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
W00001636	TES2.2 - Work Order 2	Belinda Sharman	Durban	O	SERV					
W00001637	TES3.1 - Work Order 3	Belinda Sharman	Durban	O	SERV					
W00001638	TES3.2 - Work Order 4	Belinda Sharman	Durban	M	SERV					
W00001639	TES4.1 - Work Order 5	Belinda Sharman	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Belinda Sharman	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Theo Peterson	Durban	O	SERV					
W00001640	TES4.2 - Work Order 6	Judith Mutzengi	Durban	O	SERV					
W00001641	TESS.1 - Work Order 6	Belinda Sharman	Durban	O	SERV					
W00001642	TESS.2 - Work Order 8	Belinda Sharman	Durban	O	SERV					
W00001643	TES6.1 - Work Order 9	Belinda Sharman	Durban	O	SERV					
W00001644	TES6.2 - Work Order 10	Belinda Sharman	Durban	O	SERV					
W00001667	Drum requested, mac...	Belinda Sharman	Durban	O	DR	Default				
W00001668	SP240 New Deal.	Abigail Milne	Durban	O	DR	Default	TJA001	Titan Group		
W00001646	Test logging a call - Is...	Ed Jones	Durban	O	INST	Installation	HCP001	Hope Works	Jackie Samuels	031 123 4567
W00001670	Machine repair require...	Theo Peterson	Durban	O	REP	Machine Repairs				
W00001663	Copier to be repaired	Abigail Milne	Durban	O	REP	Machine Repairs				
W00001671	Machine faulty, loan u...	Ed Jones	Durban	O	REP	Machine Repairs	HCP001	Hope Works	Mandy Jefferson	031 555 1234
W00001661	Created for productio...	Tammy Du Toit	Durban	O	MN	Manufacturing				
W00001661	Created for productio...	Ben Johnson	Durban	O	MN	Manufacturing				
W00001658	ndr10	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jane. Alrich.	031 123 45671
W00001647	NDR	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jackie Samuels	031 123 4567
W00001656	Test	Belinda Sharman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Jane. Alrich.	031 123 45671
W00001654	ndr4	Bianca Du Toit	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Belinda Sharman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Theo Peterson	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001669	Rollers need reassemb...	Theo Peterson	Durban	O	RR	Parts Reassemb...	TJA001	Titan Group		

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



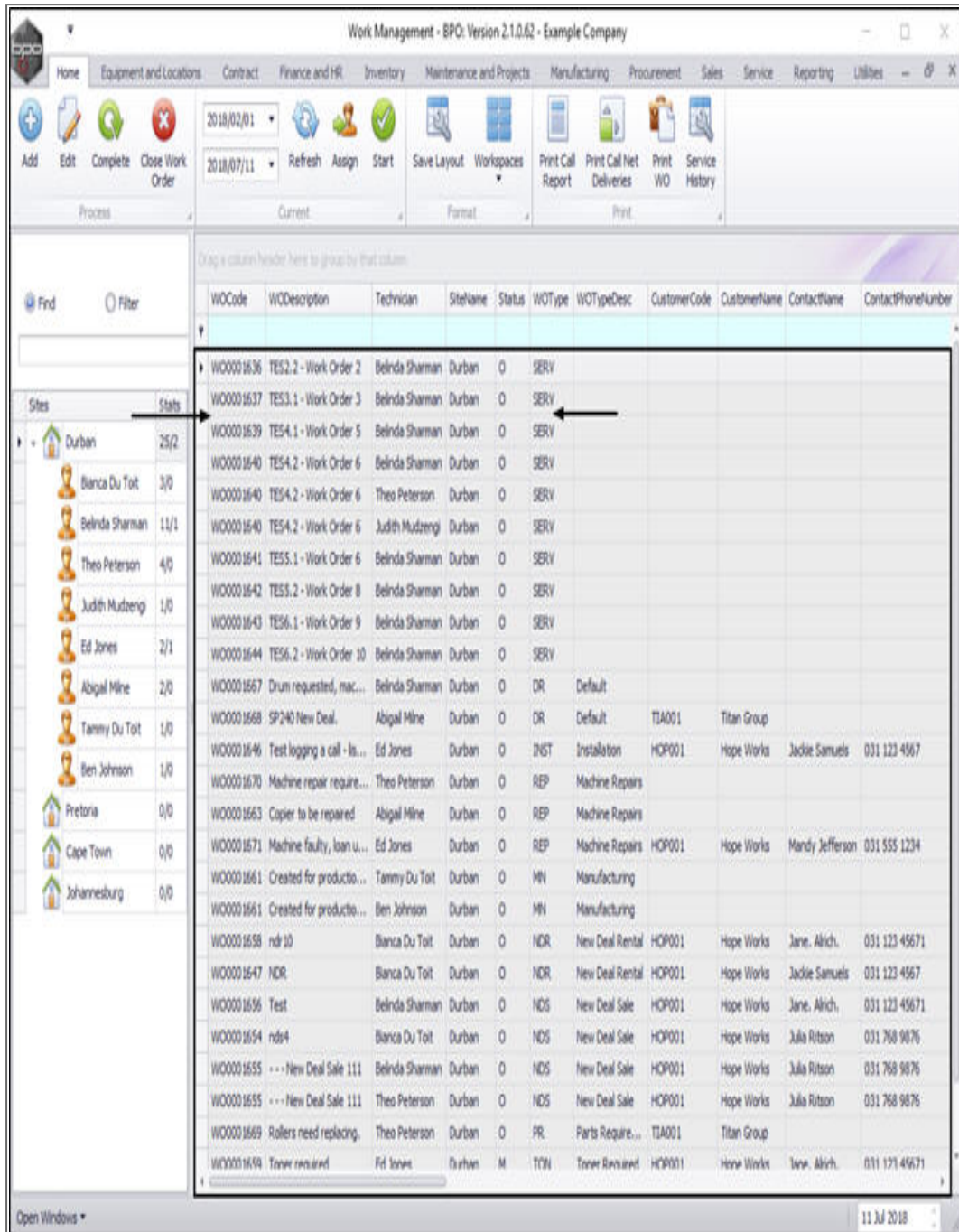
- A **Processing** message box will pop up informing you that;
 - **The work order, no. [] has been closed.**
- Click on **OK**.

The screenshot shows the 'Work Management - BPO: Version 2.1.0.62 - Example Company' interface. A 'Processing' dialog box is displayed in the foreground, containing the message: 'The work order, no. W00001638, has been closed.' with an 'OK' button.

The background table lists work orders with the following columns: WCode, WCodeDescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. The table contains 25 rows of data, including work orders for various technicians like Belinda Sherman, Theo Peterson, and Abigail Milne across different sites such as Durban, Pretoria, Cape Town, and Johannesburg.

WCode	WCodeDescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
W00001636	TES2.2 - Work Order 2	Belinda Sherman	Durban	O	SERV					
W00001637	TES3.1 - Work Order 3	Belinda Sherman	Durban	O	SERV					
W00001638	TES3.2 - Work Order 4	Belinda Sherman	Durban	M	SERV					
W00001639	TES4.1 - Work Order 5									
W00001640	TES4.2 - Work Order 6									
W00001640	TES4.2 - Work Order 6									
W00001640	TES4.2 - Work Order 6									
W00001641	TES5.1 - Work Order 6									
W00001642	TES5.2 - Work Order 8									
W00001643	TES6.1 - Work Order 9									
W00001644	TES6.2 - Work Order 10	Belinda Sherman	Durban	O	SERV					
W00001667	Drum requested, mac...	Belinda Sherman	Durban	O	DR	Default				
W00001668	SP240 New Deal,	Abigail Milne	Durban	O	DR	Default	TIA001	Titan Group		
W00001646	Test logging a call - Is...	Ed Jones	Durban	O	INST	Installation	HCP001	Hope Works	Jackie Samuels	031 123 4567
W00001670	Machine repair require...	Theo Peterson	Durban	O	REP	Machine Repairs				
W00001663	Copier to be repaired	Abigail Milne	Durban	O	REP	Machine Repairs				
W00001671	Machine faulty, loan u...	Ed Jones	Durban	O	REP	Machine Repairs	HCP001	Hope Works	Mandy Jefferson	031 555 1234
W00001661	Created for productio...	Tammy Du Toit	Durban	O	MN	Manufacturing				
W00001661	Created for productio...	Ben Johnson	Durban	O	MN	Manufacturing				
W00001658	ndr 10	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jane. Alrich	031 123 45671
W00001647	NDR	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jackie Samuels	031 123 4567
W00001656	Test	Belinda Sherman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Jane. Alrich	031 123 45671
W00001654	nda4	Bianca Du Toit	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Belinda Sherman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Theo Peterson	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
W00001669	Rollers need resharpen...	Theo Peterson	Durban	O	PR	Park Repair...	TIA001	Titan Group		

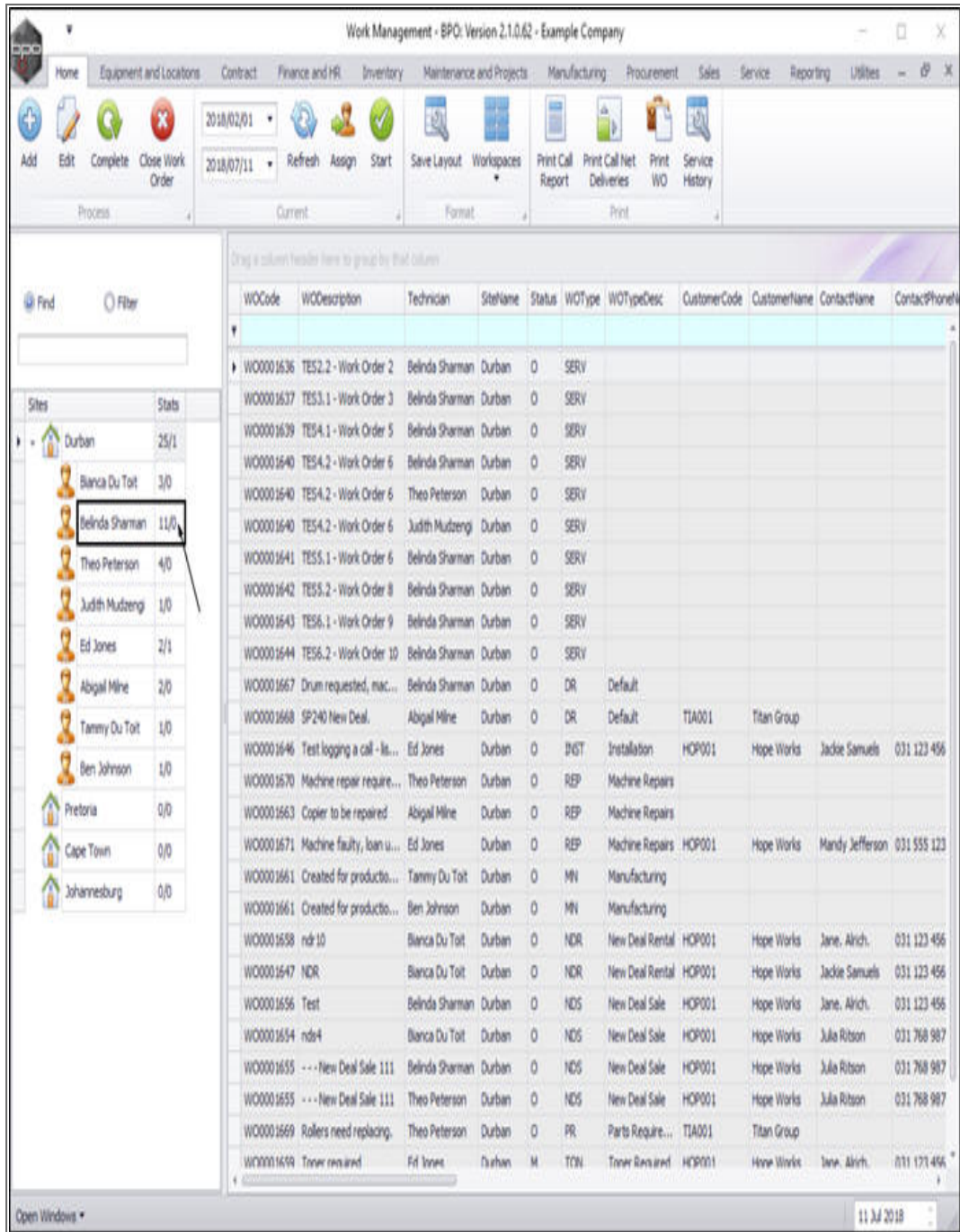
- The closed work order has now been **removed** from the **Work Management** screen.



- In the **Stats** column of the **Sites** frame, you can see that the numbers for Belinda Sharman have now changed to **11/0** which means

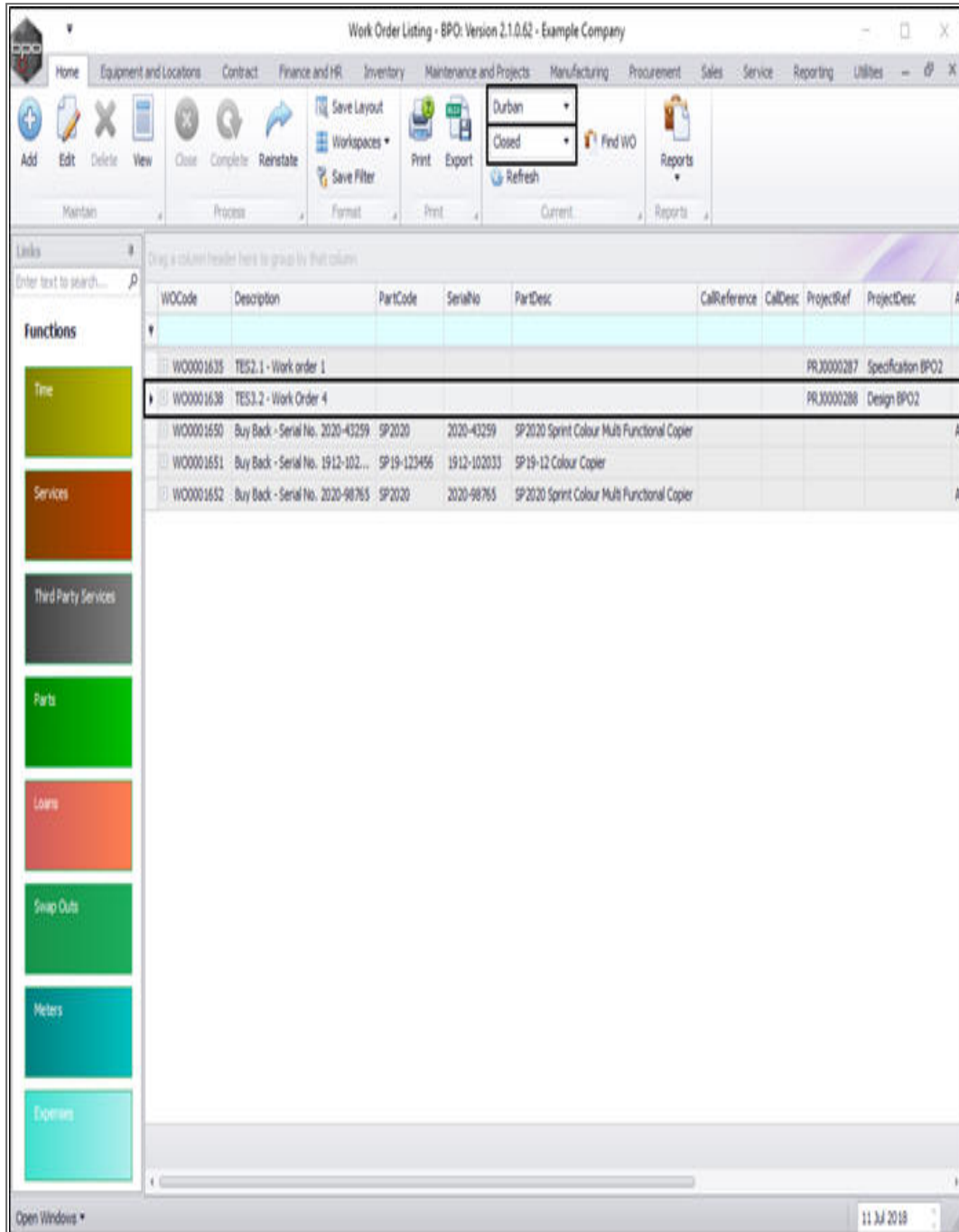
she still has **11** Open but **0** Completed work orders, as the completed Work Order has been **closed** and **removed** from this screen.

- **Note:** You may need to **Refresh** the screen to see the Stats column changes.



- You can find the closed Work Order in the **Work Order Listing** screen where the correct **site** is selected and the **status** is set to **Closed**.

- [**Ribbon Access:** Service > Work Orders > Work Orders Listing screen]
- If the closed Work order is not immediately apparent in this screen, you can use the [Find WO function](#).





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