

We are currently updating our site; thank you for your patience.

## SERVICE

### CALLS – WORK ORDERS

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

A **work order**, or job card is an order for work to be performed for a **Company** or a **Customer**. All transactions concerning this work, such as part issues, labour time, etc. are logged against the work order.

When work is required for a **Customer**, a **Call** is raised. The system will generate a work order in the background. Transactions are logged on the call, but stored against the work order. More than one work order can be linked to a call, for example, when different tasks needs to be performed to complete one call.

When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

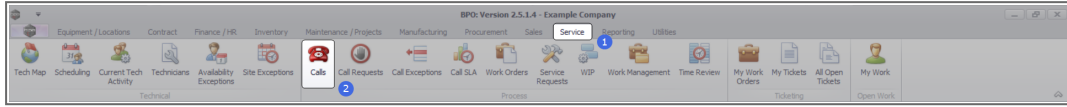
- If the work is for Building Maintenance, or Training, then the work order must be linked to a **functional location**, which must be set up before hand.
- If the work required is for an **asset**, e.g. repair a machine in store to be sold refurbished, then the machine is linked to the **call**.

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<sup>1</sup>BPO2 v2.5.1.3 or higher

Work Orders displayed in the **Calls Work Order** listing, are a restricted list of work orders that are linked to the selected **Call**.

## Ribbon Select **Service > Calls**



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

CallReference	CustomName	CallDate	CallTime	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorDesc	SerialNo	CtrLocationSubject	Priority
BN CN0001033	Young Electric	13/12/2022	Awaiting Acceptance	Ann Milan	10:09:10	Test account balances	CR	Change Request			107		3
BN CN0001034	Specialist Services	14/12/2022	Awaiting Acceptance	Rey Thompson	06:48:00	Test call for account balance manual	SM	Scheduled Maintenance			98151002		3
BN CN0001051	Young Electric	20/11/2022	Unassigned		11:30:19	Order the same part twice receive with different batch num	CR	Change Request			98123		3
BN CN0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:01:11	ForRentContract	NDR	New Deal Rental				BPO2 TEST 1	2
BN CN0000992	Top Vehicle Hire	21/10/2022	Awaiting Acceptance	Daniel Edgewen	14:06:17	Loan machine for temporary high volume printing requirement	SERV	Service				TOP123HOLD	2
BN CN0000985	Hope Works (Pty) Ltd	20/10/2022	Unassigned		08:28:18	Contract Change 100000000	SM	Sched Call Type					3
BN CN0000989	Derton /Techniques	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CN0000988	Young Electric	13/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	98123		3
BN CN0000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			98123		3
BN CN0000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 3 days ago for elapse time checks	SM	Sched Call Type			98123		3
BN CN0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-88765		3
BN CN0000984	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			47500000		3
BN CN0000983	Hope Works (Pty) Ltd	04/04/2022	Unassigned		06:05:31	Test elapsed time 2 - day prior	TEST	Testing			5202412346		3
BN CN0000982	Young Electric	10/04/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			98123		3
BN CN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		3
BN CN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	16:20:29	Test another call email	ADM	Administration			99913915		3
BN CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:37:00	Test new call for email description in body	CR	Change Request			99913915		3
BN CN0000971	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000969	Hope Works (Pty) Ltd	18/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000968	Green Tea Supplies	18/11/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CN0000967	Westwood Dynamic	18/11/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000964	HOCS PC IT Shop	20/10/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			147807		2
BN CN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubBtMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hllcrest	2
BN CN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	SM - 2 month service	SM	Scheduled Maintenance			NEW1234		2

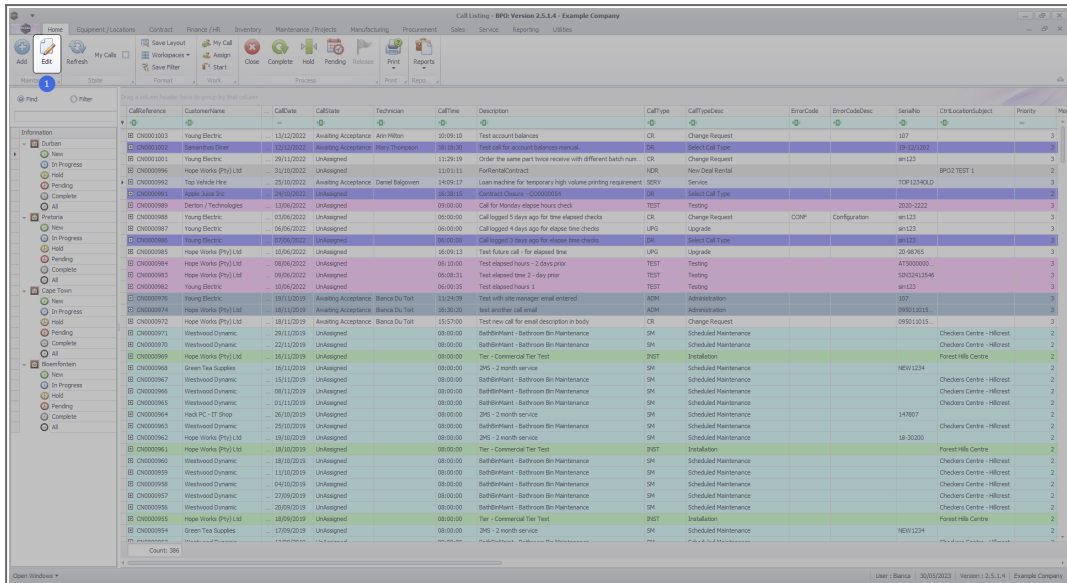
- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH000103	Young Electric	13/12/2022	20:39:10	Test account balance	CR	Change Request			107		3
BN CH000102	Sherwood Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH000101	Young Electric	26/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000099	Hope Works (Pty) Ltd	24/10/2022	14:59:17	User machine for temporary high volume printing requirement	SRV	New Deal Rental			an123	BP02 TEST 1	3
BN CH000098	Young Electric	13/12/2022	06:38:20	Test account balance	CR	Change Request			107		3
BN CH000097	Young Electric	06/06/2022	06:00:00	Call logged 4 days ago for elasee time checks	LPG	Upgrade		CONF Configuration	an123		3
BN CH000096	Young Electric	07/06/2022	06:00:00	Call logged 3 days ago for elasee time checks	DR	Select Call Type			an123		3
BN CH000095	Hope Works (Pty) Ltd	18/06/2022	06:00:00	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000094	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BN CH000093	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN231413946		3
BN CH000092	Young Electric	18/06/2022	06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000091	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000090	Hope Works (Pty) Ltd	18/11/2019	06:30:26	Test another call email	ADM	Administration			095019151		3
BN CH000089	Young Electric	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BN CH000088	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000087	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000086	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000085	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000084	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000083	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000082	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000081	HOCS PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000080	Westwood Dynamic	21/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000079	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000078	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000077	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000076	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000075	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000074	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000073	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000072	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000071	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

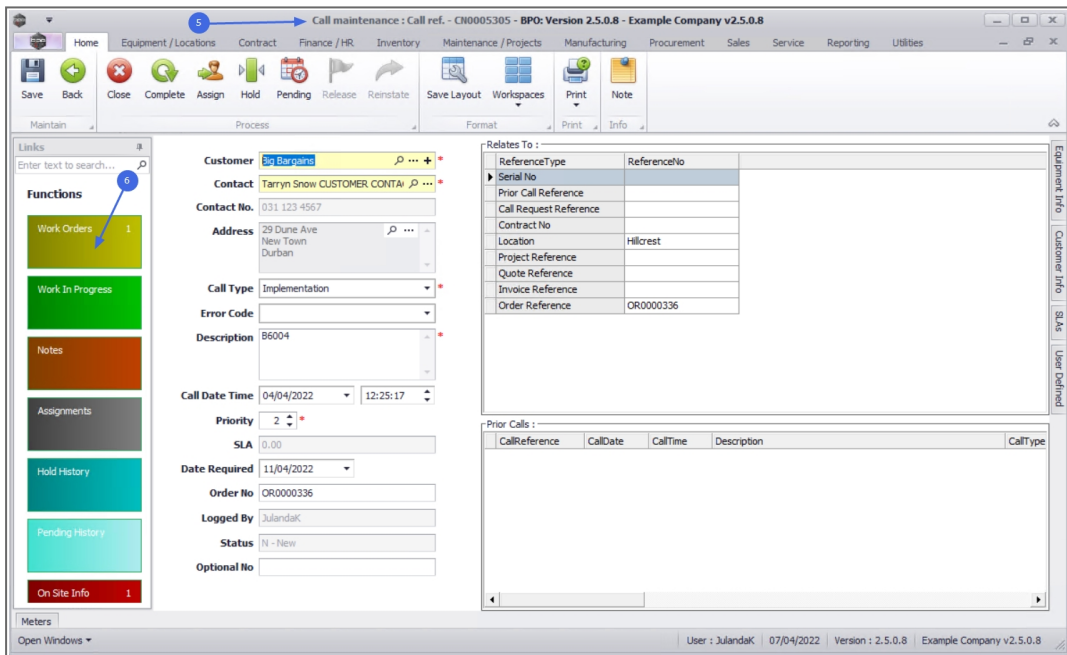
• Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH000103	Young Electric	13/12/2022	20:39:10	Test account balance	CR	Change Request			107		3
BN CH000102	Sherwood Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH000101	Young Electric	26/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000099	Hope Works (Pty) Ltd	24/10/2022	14:59:17	User machine for temporary high volume printing requirement	SRV	New Deal Rental			an123	BP02 TEST 1	3
BN CH000098	Young Electric	13/12/2022	06:38:20	Test account balance	CR	Change Request			107		3
BN CH000097	Young Electric	06/06/2022	06:00:00	Call logged 4 days ago for elasee time checks	LPG	Upgrade		CONF Configuration	an123		3
BN CH000096	Young Electric	07/06/2022	06:00:00	Call logged 3 days ago for elasee time checks	DR	Select Call Type			an123		3
BN CH000095	Hope Works (Pty) Ltd	18/06/2022	06:00:00	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000094	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BN CH000093	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN231413946		3
BN CH000092	Young Electric	18/06/2022	06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000091	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000090	Hope Works (Pty) Ltd	18/11/2019	06:30:26	Test another call email	ADM	Administration			095019151		3
BN CH000089	Young Electric	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BN CH000088	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000087	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000086	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000085	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000084	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000083	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000082	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000081	HOCS PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000080	Westwood Dynamic	21/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000079	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000078	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000077	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000076	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000075	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000074	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000073	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000072	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
BN CH000071	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

• Click on the **Edit** button.



- The **Call maintenance : Call ref - [call reference number]** screen will display.
- Click on the **Work Orders** tile.



- The **Work Orders for Call Ref [call reference number]** screen will display.

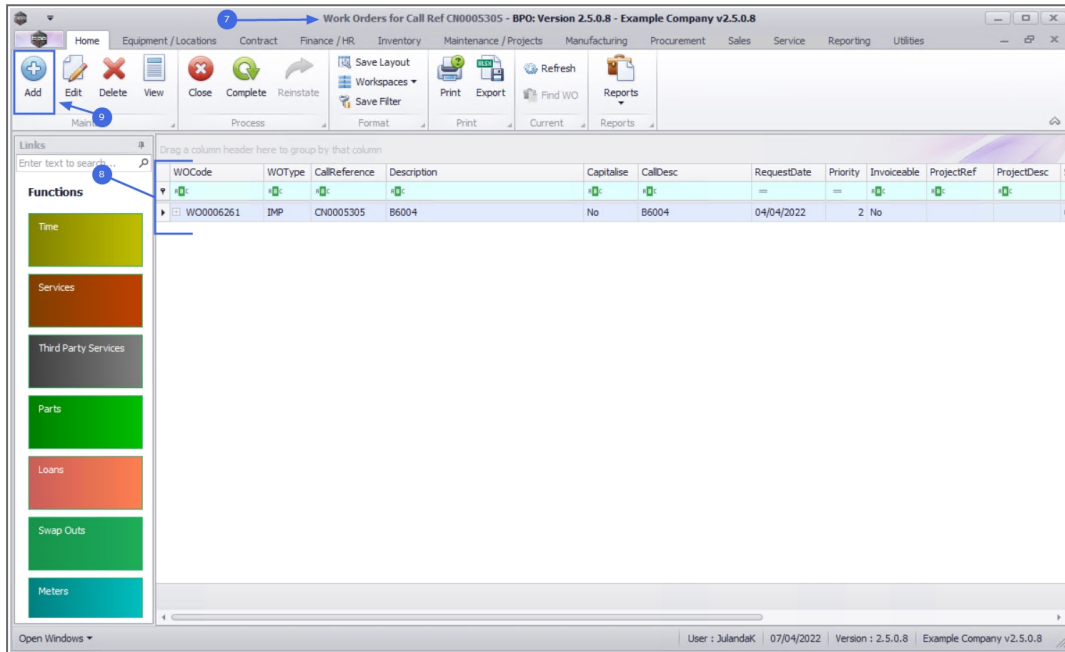
- Any work orders that have been issued against the call will display in the data grid.

## ADD WORK ORDER

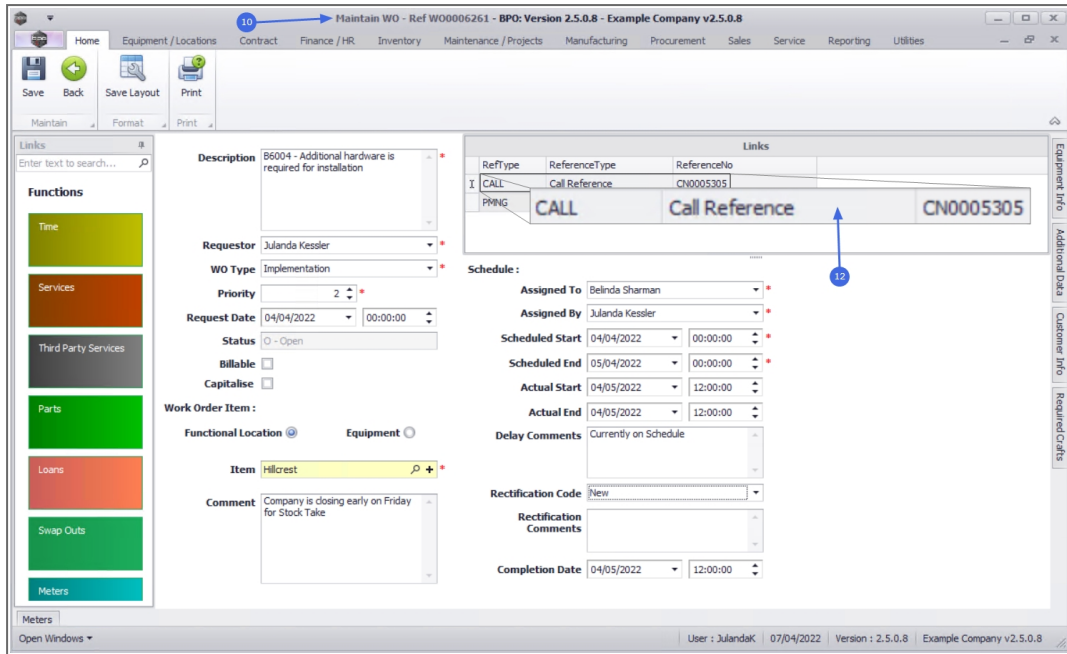
- Click on **Add**.



Short cut key: Right click to display the **All groups** menu list. Click on **Add**.

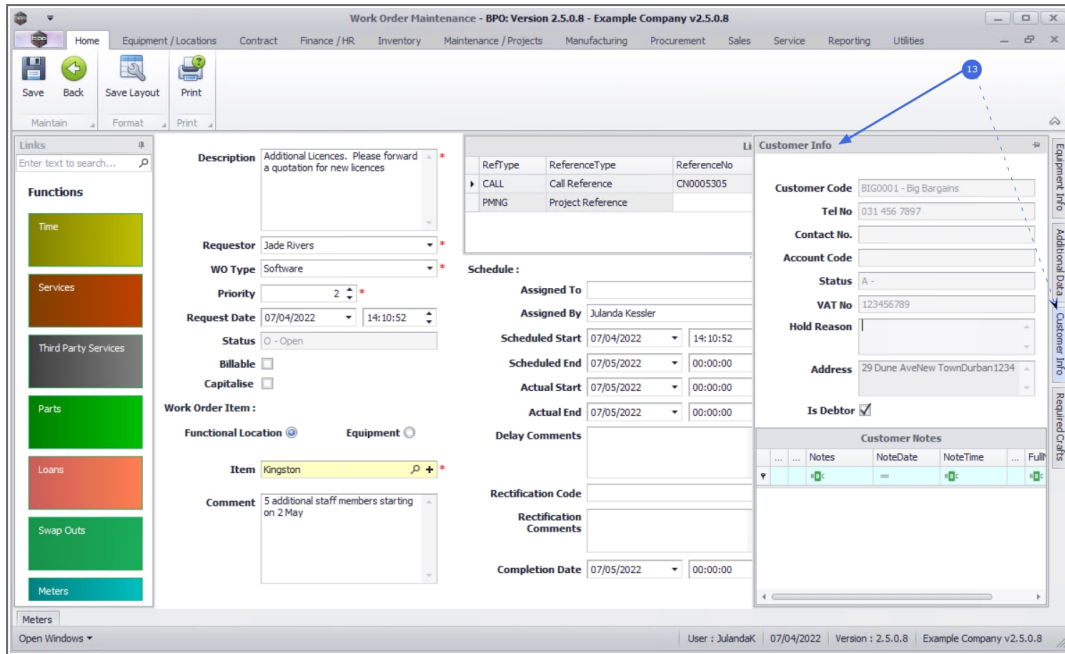


- " The Work Order Maintenance screen will be displayed. " on page 2
- Complete the Work Order details for the call.
- In the **Links** frame note that the **Call Reference** has automatically been linked to the call reference you have selected.




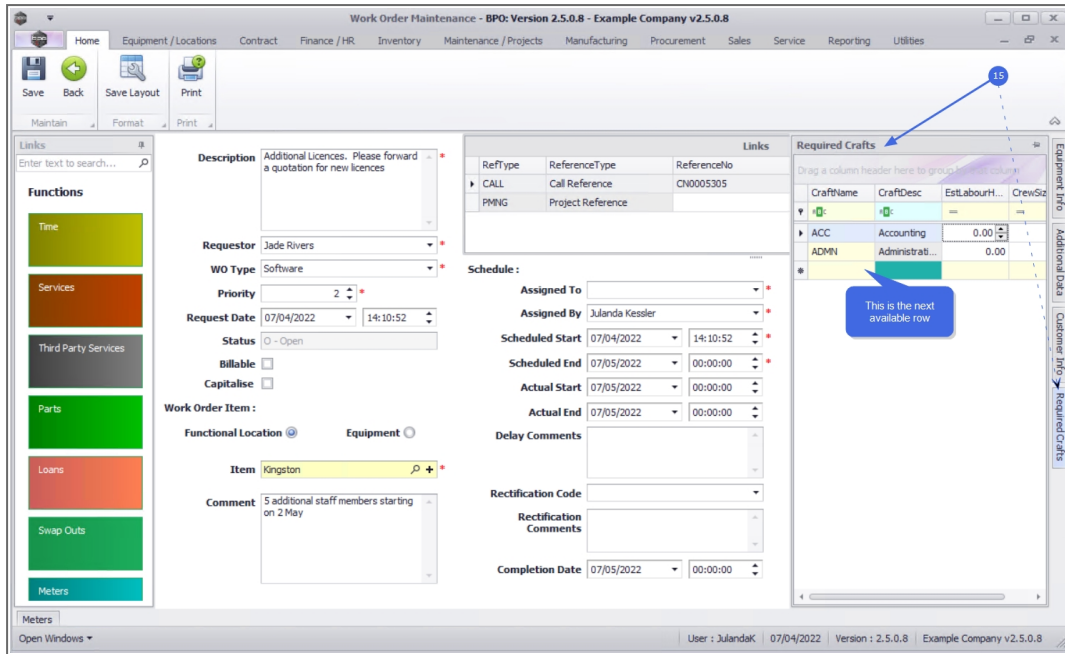
## CUSTOMER INFO TAB

- Click on the **Customer Info** tab to expand the **Customer Info** docking panel.
- From here you can view additional information for the **customer** linked to this work order as well as the Customer Notes, if any has been created.



## REQUIRED CRAFTS TAB

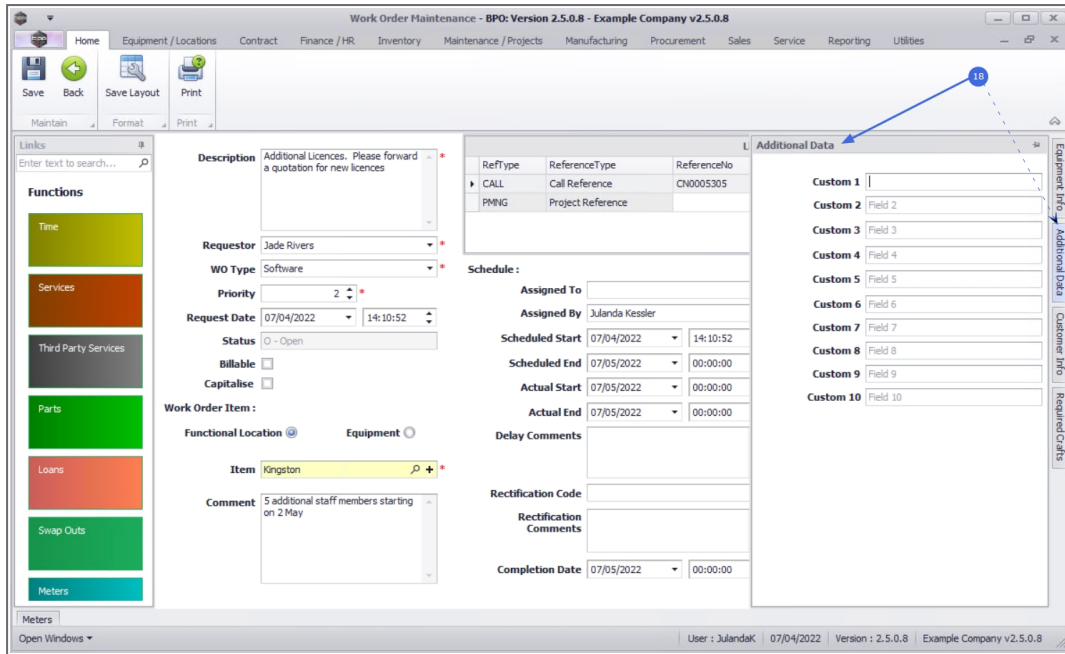
- Click on the **Required Crafts** tab to expand the Required Crafts docking panel.
- Crafts that have already been identified for the work order will be listed.
-  **Right click** on the next active row in the **Craft Name** field to add any additional craft(s) needed for carrying out this Work Order.



## ADDITIONAL DATA TAB

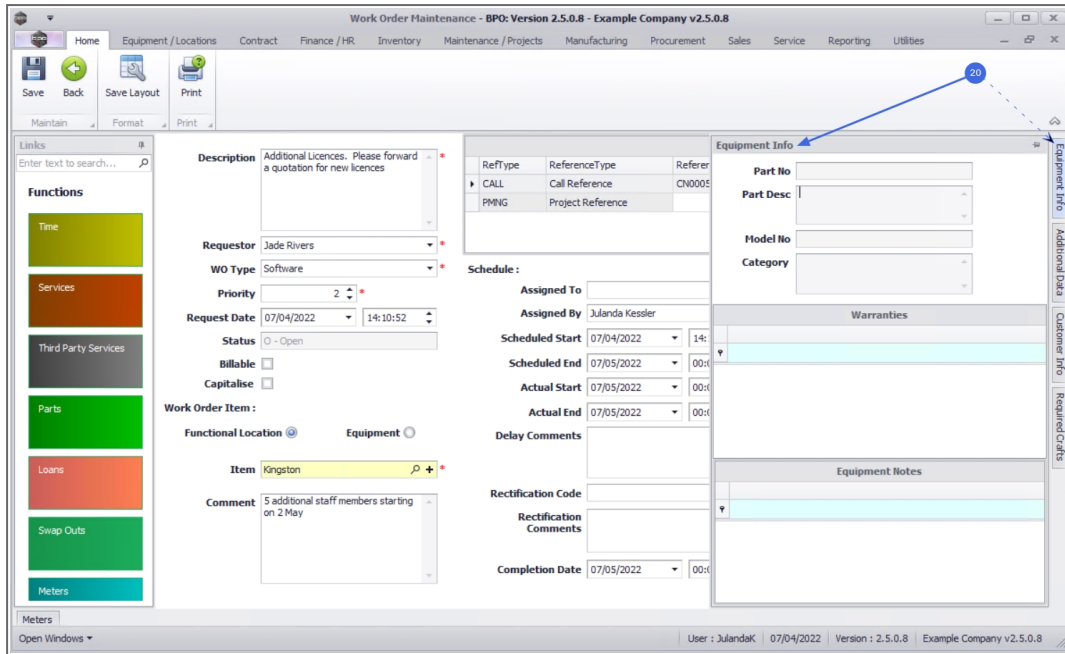
- Click on the **Additional Data** tab to expand the **Additional Data** docking panel.
- You can view and rename the **Custom** fields **1 - 10**, that can be utilised for additional information required for this Work Order that is not covered on the Work Order screen. Rename the field labels to suit your company requirements.





## EQUIPMENT INFO TAB

- Click on the **Equipment Info** tab to expand the **Equipment Info** docking panel.
- When addressing the **[+]** icon in the **Item** field, this panel can be viewed for additional information about the selected **equipment item**, including any warranties and/or equipment notes if applicable.



## METERS TAB

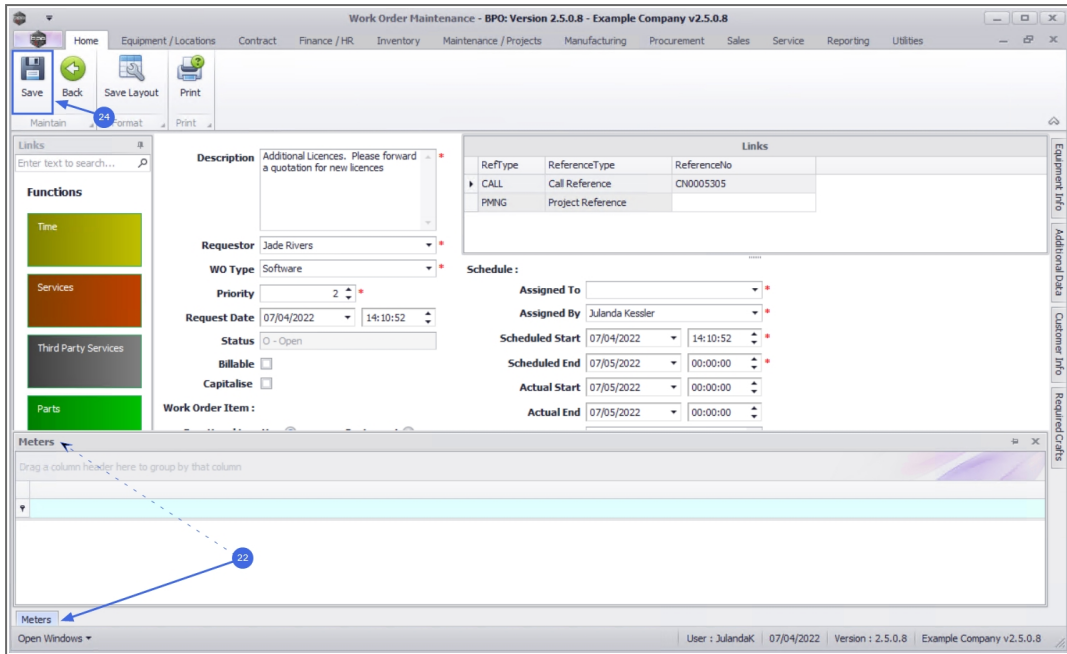
- Click on the Meters tab to expand the **Meters** docking panel.
- You will be able to view the meter history information for the Item referencing on the Work Order, if applicable.



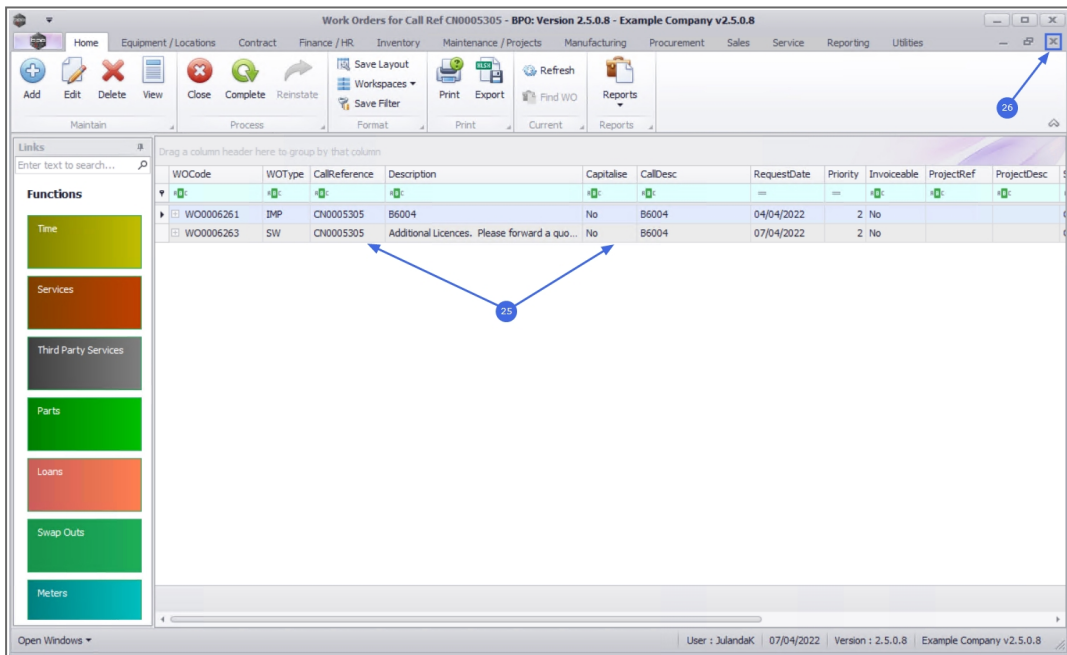
For a detailed handling of this topic refer to [Work Orders - Add a Work Order](#)

## SAVE WORK ORDER

- When you have finished adding details to the screen, click on **Save**.



- You will return to the **Work Orders for Call Ref** screen where you can view the linked work order
- **Close** the screen to return to the **Call maintenance** screen.



## EDIT WORK ORDER

- From the **Work Orders for Call Ref** [call reference number] screen,
- Click on the **row** of the work order you wish to edit.
- Click on **Edit**.



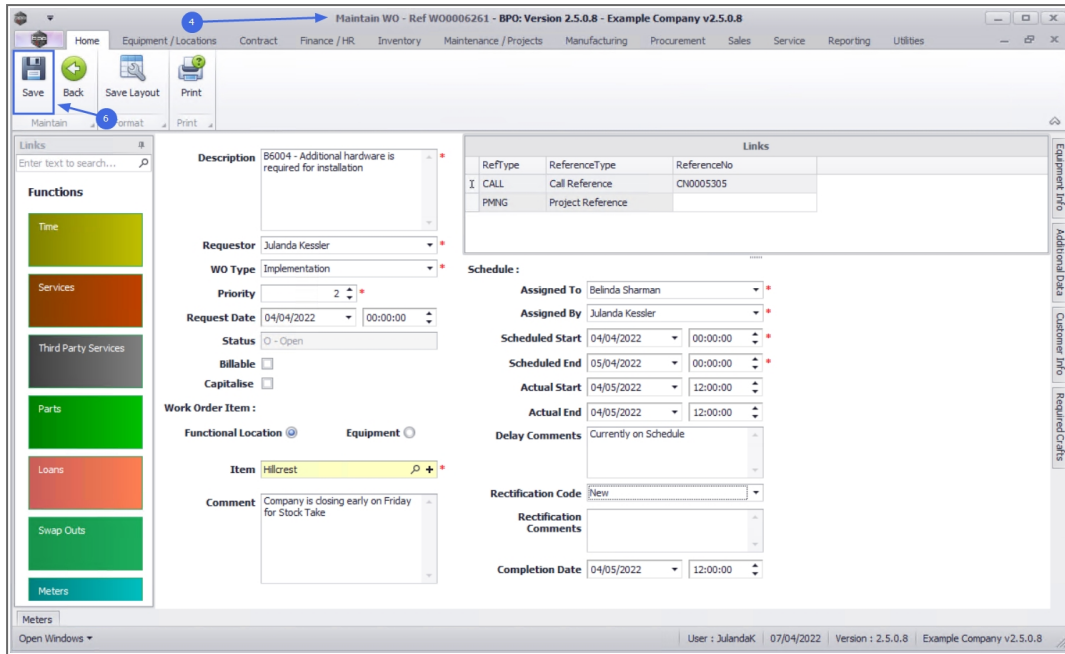
Short cut key: Right click to display the **All groups** menu list. Click on **Edit**.

- " The Maintain WO - Ref [work order number] screen will be displayed. " on page 2
- You can make the changes to the **Work Order information** screen, **Required Crafts** tab or **Additional Data** tab as required.



For a detailed handling of this topic refer to [Work Orders - Add a Work Order](#)

- When you have made the necessary changes, click on **Save**.



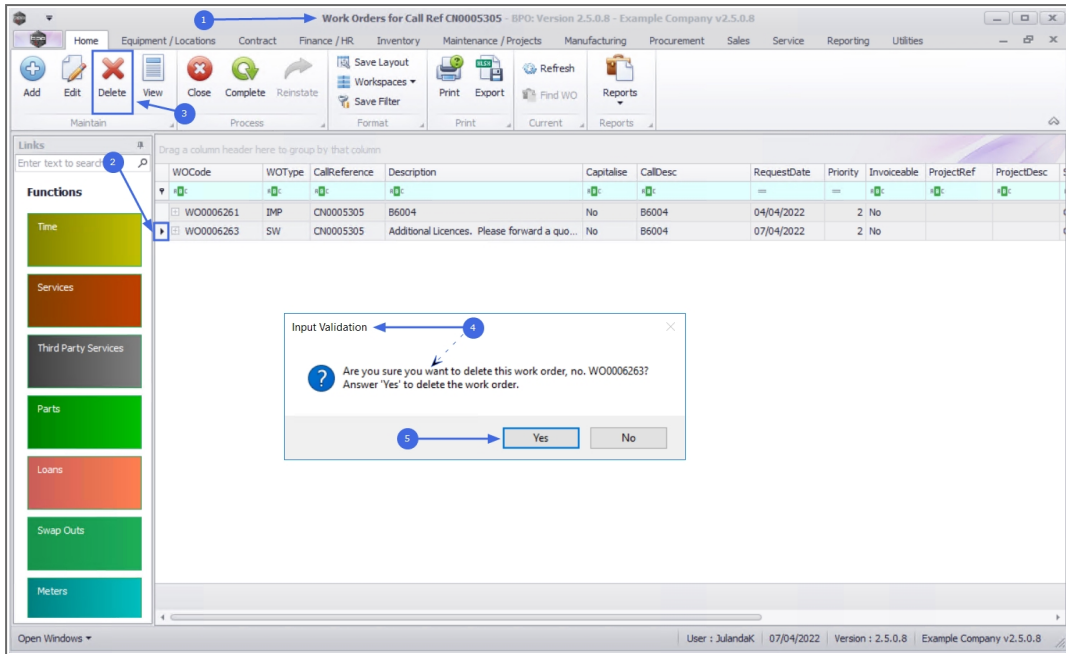
## DELETE WORK ORDER

- From the **Work Orders for Call Ref** [call reference number] screen,
- Click on the **row** of the work order you wish to remove.
- Click on **Delete**.

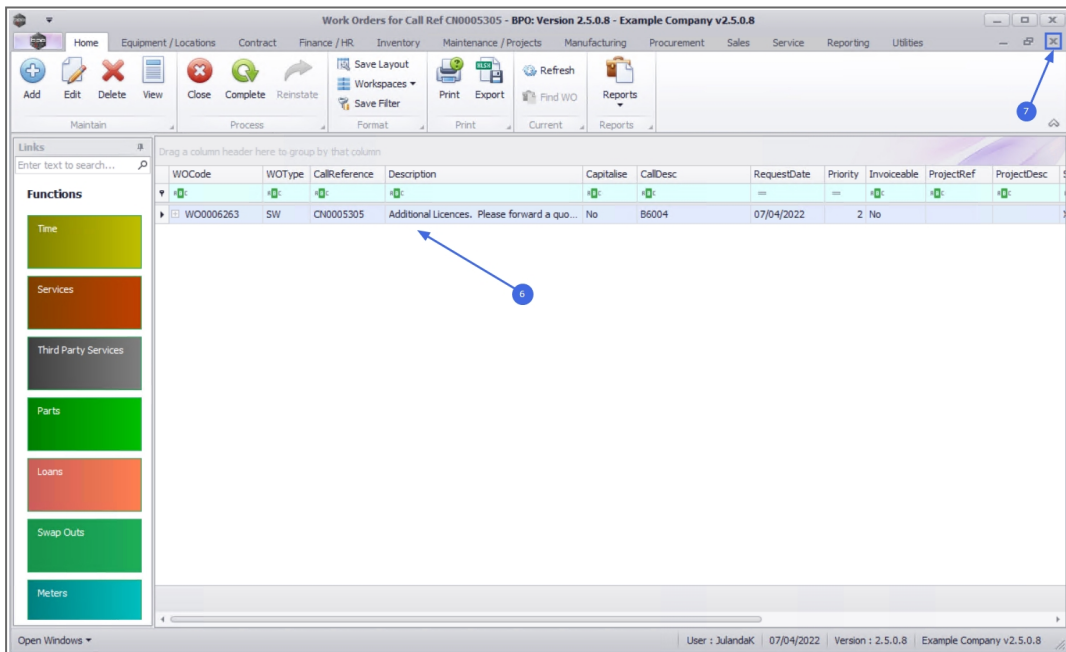


Short cut key: Right click to display the **All groups** menu list. Click on **Delete**.

- When you receive the **Input Validation** message to confirm;
  - **Are you sure you want to delete this work order, no. [work order number]? Answer 'Yes' to delete the work order.**
- Click on **Yes**.

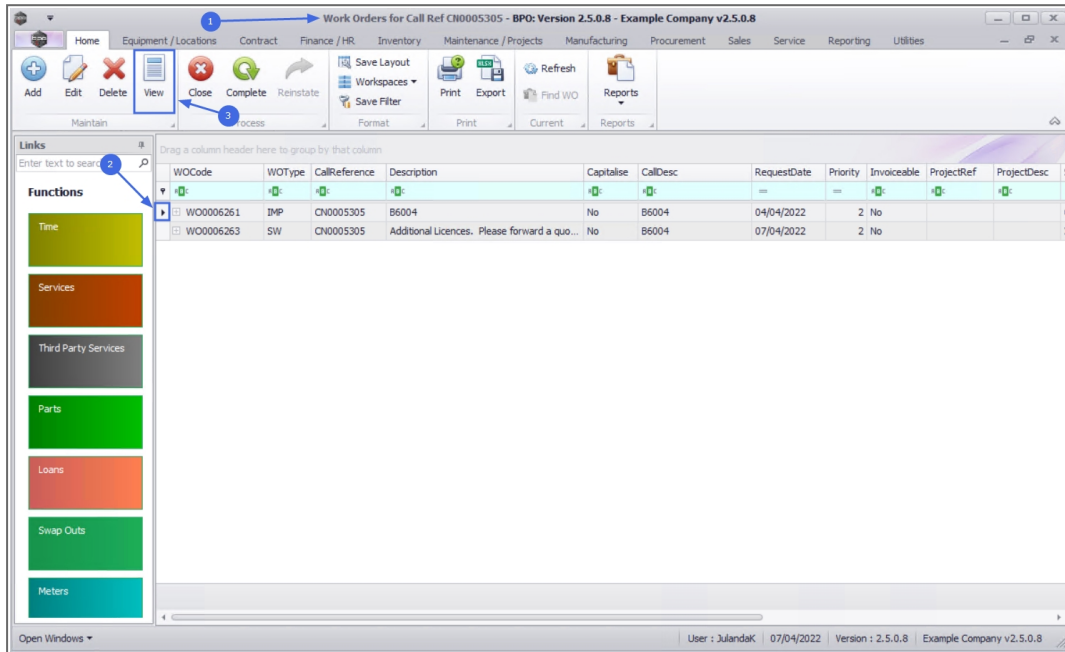


- The work order has been removed from the **Work Orders for Call Ref** screen.
- Click on the **Close** button to return to the Call maintenance screen.



## VIEW WORK ORDER

- From the **Work Orders for Call Ref** [call ref number] screen,
- Click on the **row** of the work order you wish to view.
- Click on **View**.



- The **View Work Order -** [work order number] screen will be displayed.



Note that only the **Back** button is available on this screen as this screen is view only.

- From here you can view the **Work Order details**, **Customer Info**, the **Required Crafts**, **Additional Data** or the **Equipment Info** for the work order.
- Click on **Back** to return to the Work Order, or
  - Click on **Print** to [Print the Work Order](#).

## CLOSE WORK ORDER

All work order transactions must be completed, for instance issuing parts, invoicing etc., before a work order can be closed. The system will prevent you from closing the work order if a transaction still needs to be processed on the work order.

You must have successfully completed the work order, before it can be closed.

- From the **Work Orders for Call Ref** [call ref number] screen will be displayed.
- Click on the **row** of the work order that needs to be closed.



Note that you will only be able to close a work order that has been completed.

- Click on **Close**.





Short cut key: Right click to display the **All groups** menu list. Click on **Close**.

- 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.**
- Click on **Yes**.



For a detailed handling of this topic refer to [Work Orders - Close Work Order](#)

WOCODE	WOTYPE	CallReference	Description	Capitalise	CallDesc	RequestDate	Priority	Invoiceable	ProjectRef	ProjectDesc
W00006261	IMP	CN0005305	B6004	No	B6004	04/04/2022	2	No		
W00006263	SW	CN0005305	Additional Licences. Please forward a quo...	No	B6004	07/04/2022	2	No		

Scroll to view the **Status** for the Work Order in the Status column.

The Status has changed to **C - Closed**.

## COMPLETE WORK ORDER

Work orders linked to a project should be completed when the work required has been done.

- The **Work Orders for Call Ref** [call reference number] screen will be displayed.
- Click on the **row** of the Work Order you wish to complete.
- Click on **Complete**.



**Short cut key: Right click to display the All groups menu list. Click on Complete.**

- When you receive the **Input Validation** to confirm;
  - **Are you sure you want to complete this work order, no. [work order number]? Answer 'Yes' to complete the work order.**
- Click on **Yes**.



For a detailed handling of this topic refer to [Work Orders - Complete a Work Order](#)

The screenshot shows the 'Work Orders for Call Ref' application window. The main window title is 'Work Orders for Call Ref CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8'. The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Add, Edit, Delete, View, Close, Complete, Reinststate, Save Layout, Workspaces, Save Filter, Print, Export, Refresh, Find WO, and Reports. A table displays work order data with columns: WOCODE, WOTYPE, CallReference, Description, Capitalise, CallDesc, RequestDate, Priority, Invoiceable, ProjectRef, and ProjectDesc. Two rows are visible: WO0006261 (IMP) and WO0006263 (SW). An 'Input Validation' dialog box is open in the foreground, containing the text: 'Are you sure you want to complete this work order, no. WO0006261? Answer 'Yes' to complete the work order.' The dialog has 'Yes' and 'No' buttons. Numbered callouts (1-5) indicate the sequence of actions: 1 points to the 'Complete' button in the toolbar; 2 points to the 'WOCODE' column header; 3 points to the 'Complete' button in the context menu; 4 points to the question mark icon in the dialog; and 5 points to the 'Yes' button in the dialog.

WOCODE	WOTYPE	CallReference	Description	Capitalise	CallDesc	RequestDate	Priority	Invoiceable	ProjectRef	ProjectDesc
WO0006261	IMP	CN0005305	B6004	No	B6004	04/04/2022	2	No		
WO0006263	SW	CN0005305	Additional Licences. Please forward a quo...	No	B6004	07/04/2022	2	No		

## REINSTATE WORK ORDER

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

- From the **Work Orders for Project Ref** [project ref number] screen will be displayed.
- Click on the **row** of the closed work order that needs to be reinstated.



Note the status for the work order as **C - Closed**.

- Click on **Reinstate**.



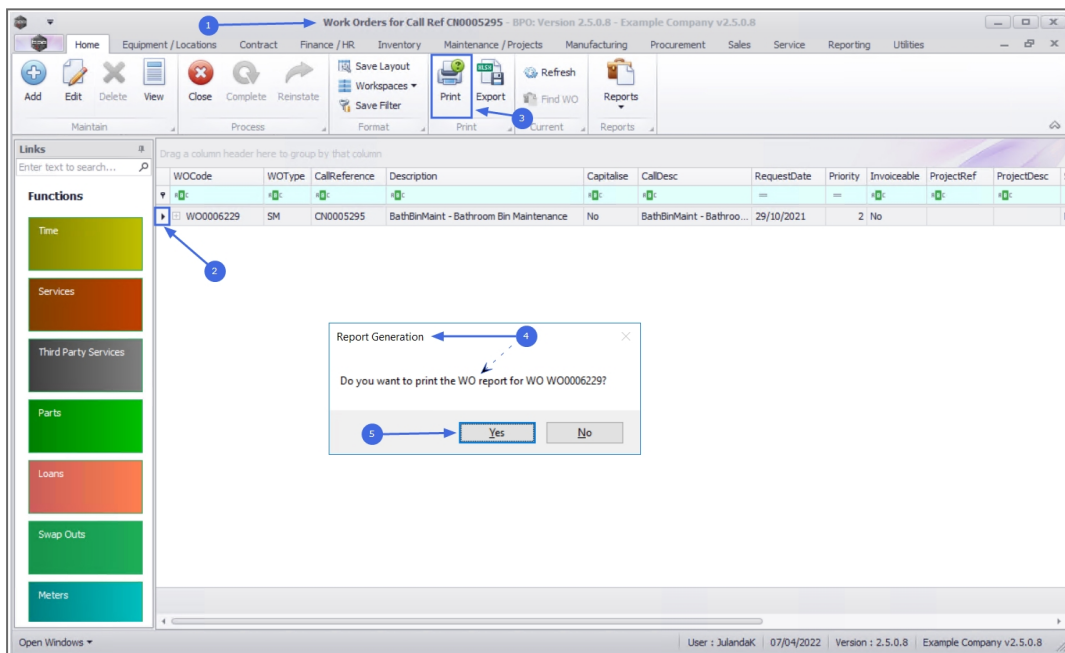
**Short cut key: Right click to display the **All groups** menu list. Click on **Reinstate**.**

- When you receive the **Input Validation** message to confirm;
  - **Are you sure you want to re-instate this work order, no. [work order number]? Answer 'Yes' to re-instate the work order.**
- Click on **Yes**.

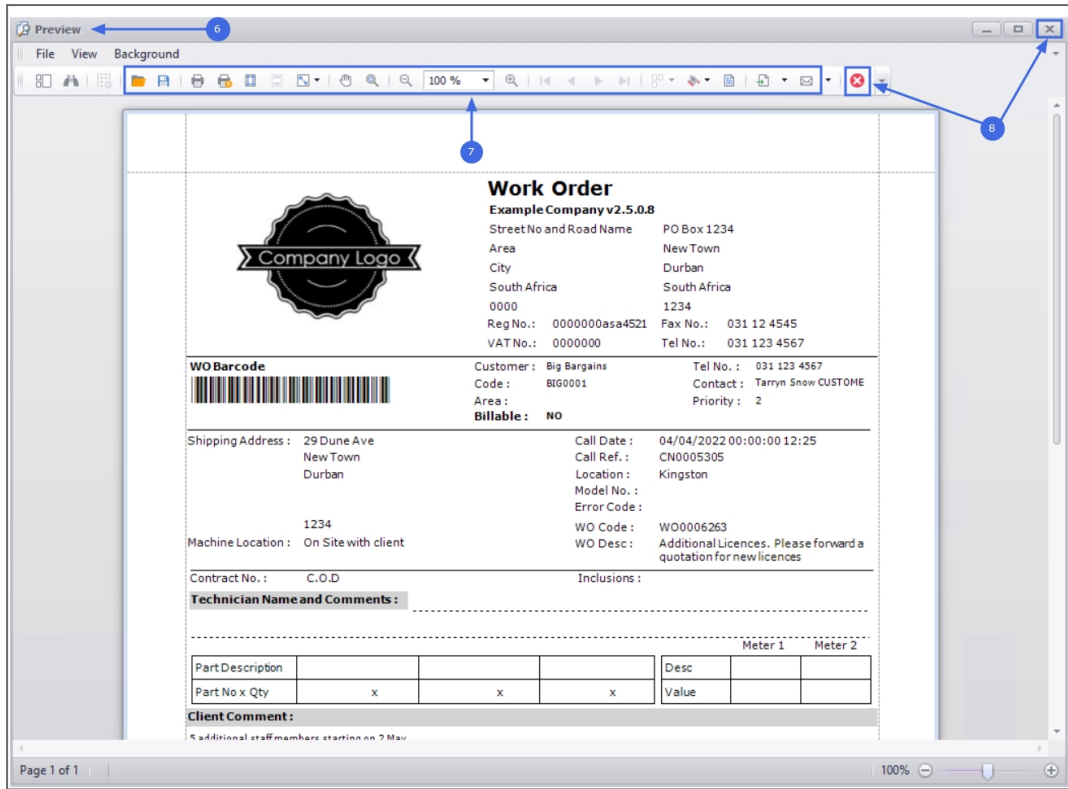


## PRINT WORK ORDER

- From the **Work Orders for Call Ref [call reference]** screen,
- Click on the **row** of the work order you wish to print the work order report for.
- Click on **Print**.
- When you receive the **Report Generation** message to confirm,
  - **Do you want to print the WO report for [work order number]?**
- Click on **Yes**.



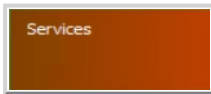
- The Work Order will display in the Reports **Preview** screen.
- From here you can make cosmetic changes to the Work Order, as well as **Save, Zoom, Add a Watermark, Export** or **Email**.
- **Close** the Report Preview screen when done.



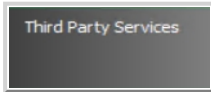
## FUNCTION TILES



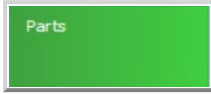
The [Times](#) tile will direct you to the **Time booking for Work Order** screen where you can **Add, Edit** and **Delete** Labour Time for a Work Order linked to a Project. Refer to [Work Orders - Time Booking](#)



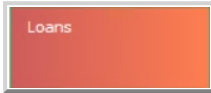
The [Services](#) tile will direct you to the **Internal services for WO Code** screen where you can **Add, Edit** and **Remove** an Internal Service from the Work Order. Refer to [Work Orders - Internal Services](#)



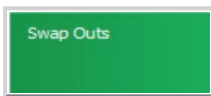
The [Third Party Services](#) tile will direct you to the **Service Request for WO Code** screen where you can **Add, Edit, Delete**, issue a **Requisition** and do **Billing** for the Work Order. Refer to [Work Orders - Third Party Service Request](#)



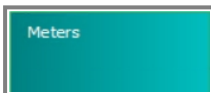
The [Parts tile](#) will direct you to the **Service Request for WO Code** screen where you can, **Add, Edit, Remove** an Internal Service to a Work Order, as well as view **Requisitions, Issues** and **Transfers**, maintain **Notes, Change the Warehouse, Remap a Part** or **Create a Part** on the Work Order. Refer to [Work Orders - Part Requests](#)



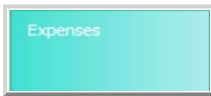
The [Loans tile](#) will direct you to the **Loan Requests for WO Code** screen where you can **Add, Edit, Delete** and view **Returns** on a loan request linked to the Work Order. Refer to [Work Orders - Loans](#)



The [Swap Outs tile](#) will direct you to the **Swap Outs for WO Code** screen where you can **Add** swap outs on a Work Order. Refer to [Work Orders - Swap Outs](#)



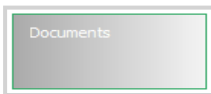
The [Meters tile](#) will direct you to the **Meters for WO Code** screen where you can view the list of meter readings against the work order. Refer to [Work Orders - Meters](#)



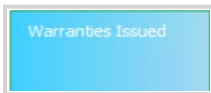
The [Equipment tile](#) will direct you to the **Expense Claims for WO Code** screen where you can **Add, Edit** and **Delete** an expense claim from the Work Order. Refer to [Work Orders - Expenses](#)



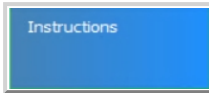
The [Travel tile](#) will direct you to the **Travel Claims for WO Code** screen where you can **Add, Edit** and **Delete** a travel claim from the Work Order. Refer to [Work Orders - Travel](#)



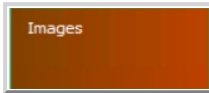
The [Documents tile](#) will direct you to the **Documents for Work Order** screen where you can **Add, Edit, Delete** and **View** a digital documents linked to a work order. Refer to [Work Orders - Documents](#)



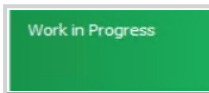
The [functions tile](#) will direct you to the **Issued Warranties for WO Code** screen where you can, **Add, Edit** and **Delete** a warranty linked to a work order. [Work Orders - Warranties Issued](#)



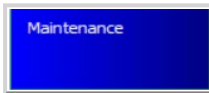
The functions tile will direct you to the **Instructions for WO Code** screen where you can **Add, Edit, Delete** and **Complete** an instruction for a Work Order. Refer to [Work Orders - Task Instructions](#)



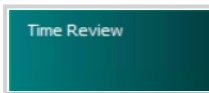
The functions tile will direct you to the **Images for WO Code** screen where you can view and **Print** the images linked to the Work Order. Refer to [Work Orders - Images](#)



The functions tile will direct you to the **Work in Progress for WO Code** screen where you can **Return, Invoice WO** and **Invoice Call(s)** linked to the Work Order. Refer to [Work Orders - Work in Progress \(WIP\)](#)



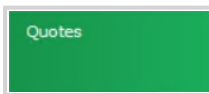
The functions tile will direct you to the **Maintenance Methodology for location** screen where you can **Add, Edit** and **Delete** a maintenance methodology from a Work Order. Refer to [Work Orders - Maintenance](#)



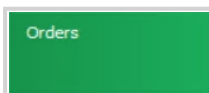
The functions tile will direct you to the **Time Not Billed for Work Order Code** screen where you can **Invoice WO, Invoice Project, Flag Reviewed** and set **SLA Time** linked to the Work Order. Refer to [Work Orders - Time Review](#)

## PROCESSING TILES

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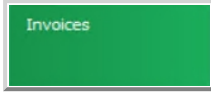


The [Quotes functions tile](#) will direct you to the **Sales Quotes for Work Order** screen where you can **Add, Edit, Delete, View, Accept, Reject, Covert** and **Clone** a Quote linked to a Work Order. Refer to [Work Orders - Sales Quotes](#)

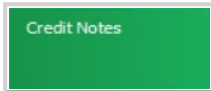


The [Orders functions tile](#) will direct you to the **Sales Orders for Work Order** screen where you can **Add, Edit, Delete, View, Create Invoice, Create New Deal, Add**

Items to WO, New Deal Project, Print Sales Order and Print a Proforma Invoice. [Work Orders - Orders](#)



The [Invoices functions tile](#) will direct you to the **Sales Invoices for Work Order** screen where you can **Add, Edit**, add a **Comment and Reference, Print** and **Send Invoices to Print Queue**. Refer to [Work Orders - Invoices](#)



The [Credit Notes functions tile](#) will direct you to the **Sales Credit Notes for Work Order** screen where you can **Add, Edit, Delete, View, Release for Approval, Remove from Approval, Approve Cr Note** and **Send Cr Notes to Print Queue**. Refer to [Work Orders - Credit Notes](#)

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