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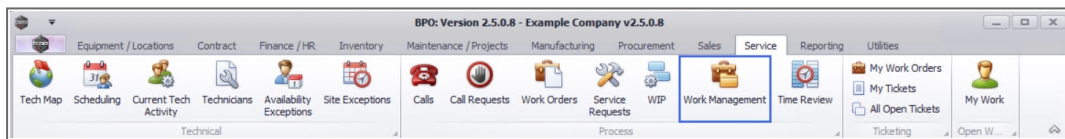
SERVICE

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 [Refresh] to update the screen.
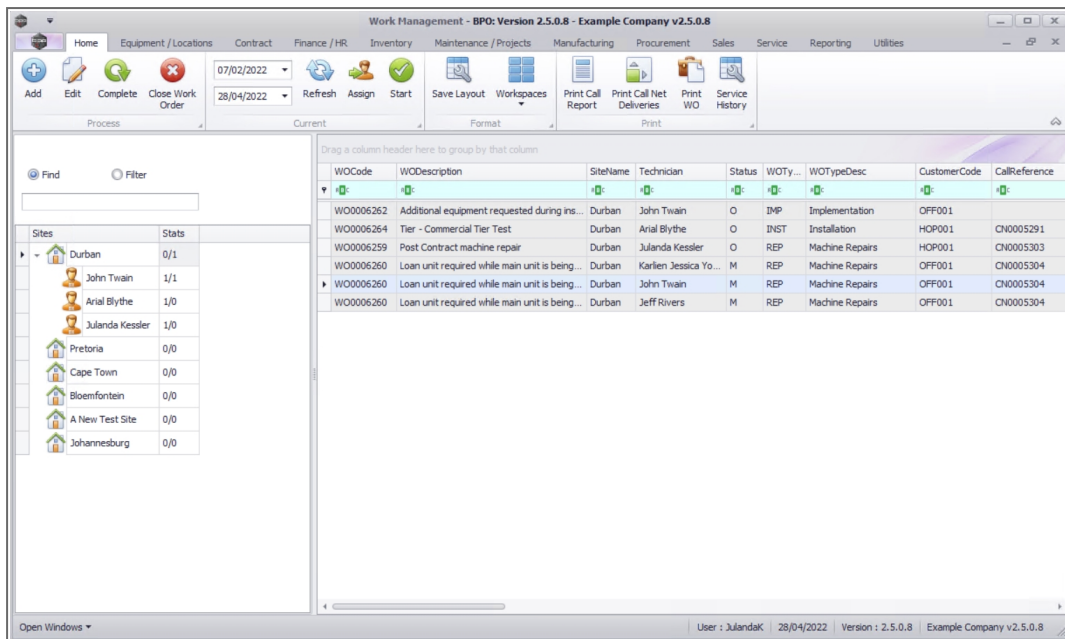
CLOSE THE WORK ORDER

- 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 <u>after</u> it has been Completed).
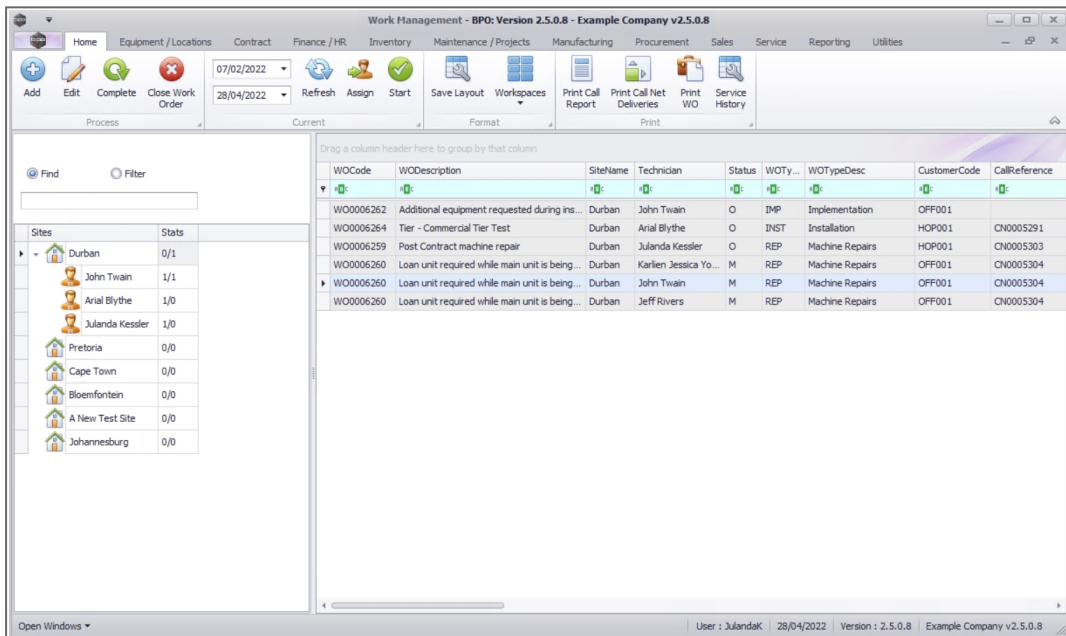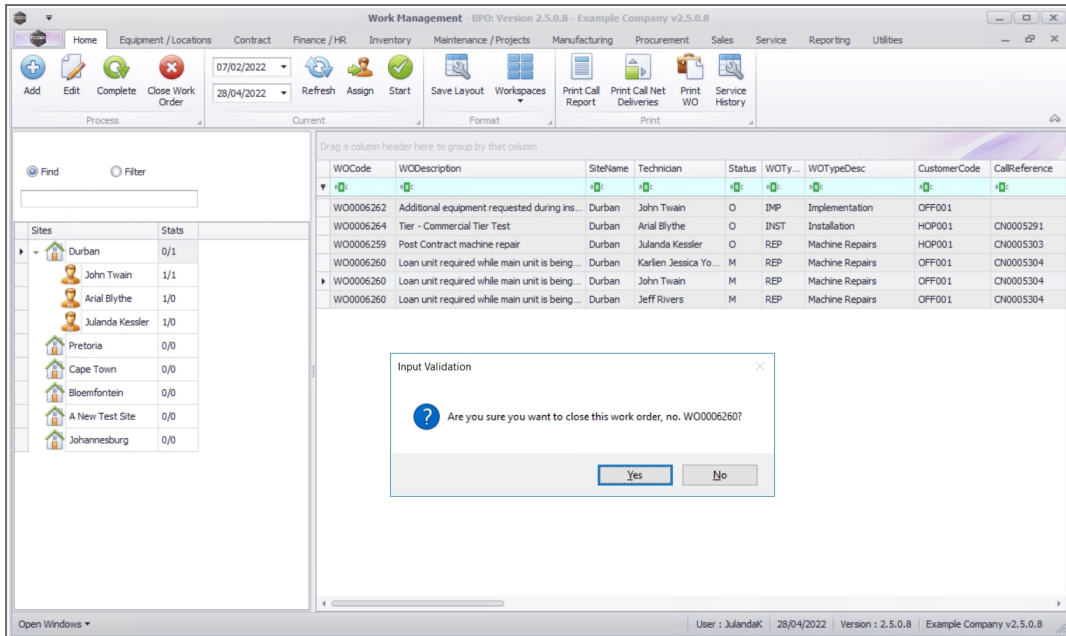
It is also worth noting in this image;

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** <u>Open</u> and **1** <u>Completed</u> Work Order (we will see this change later in this manual).

- 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**.

- An **Input Validation** message box will pop up asking;
  - **Are you sure you want to close this work order, no. [ ]?**
- Click on **Yes**.
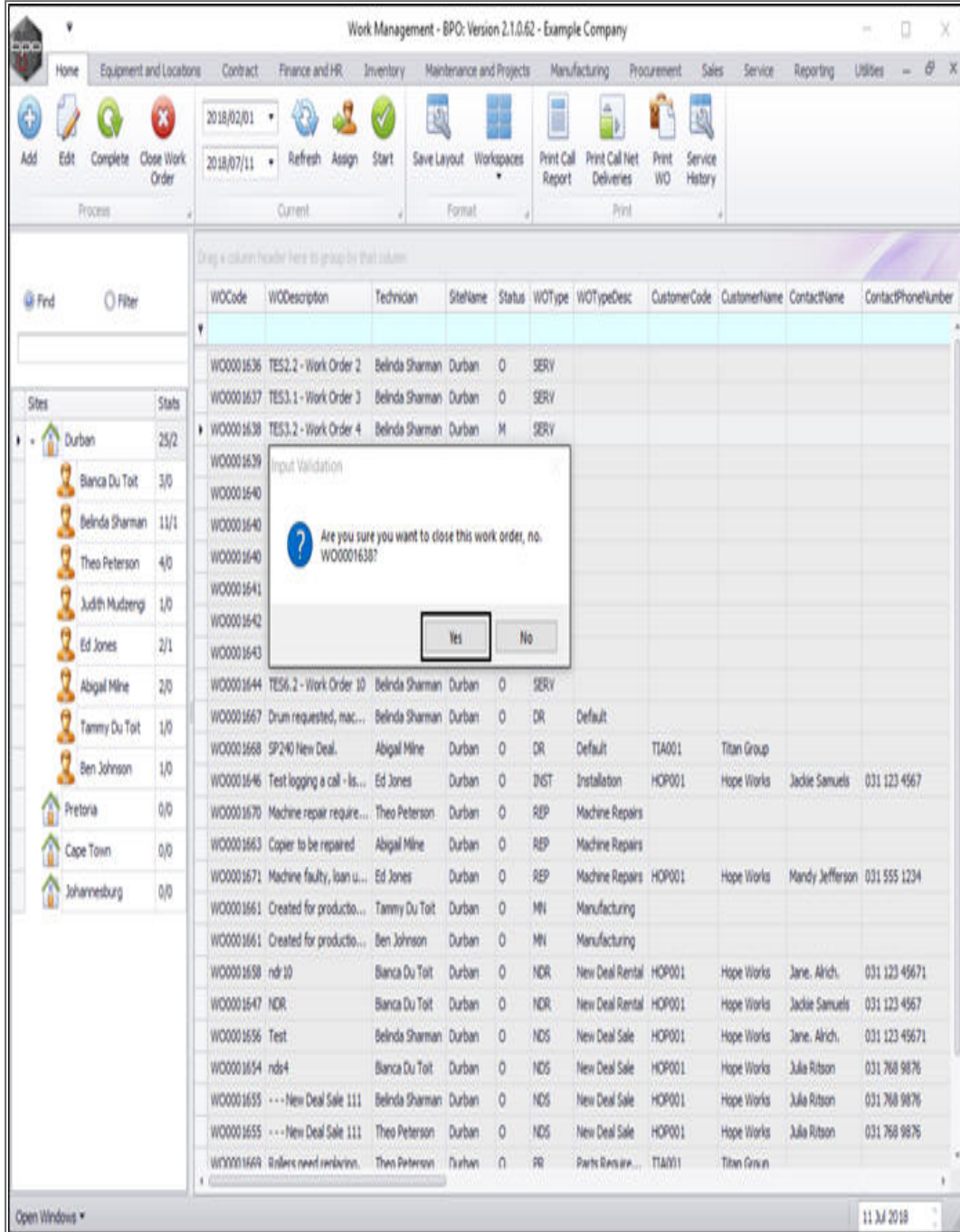
- A **Processing** message box will pop up informing you that;
  - **The work order, no. [ ] has been closed.**
- Click on **OK**.

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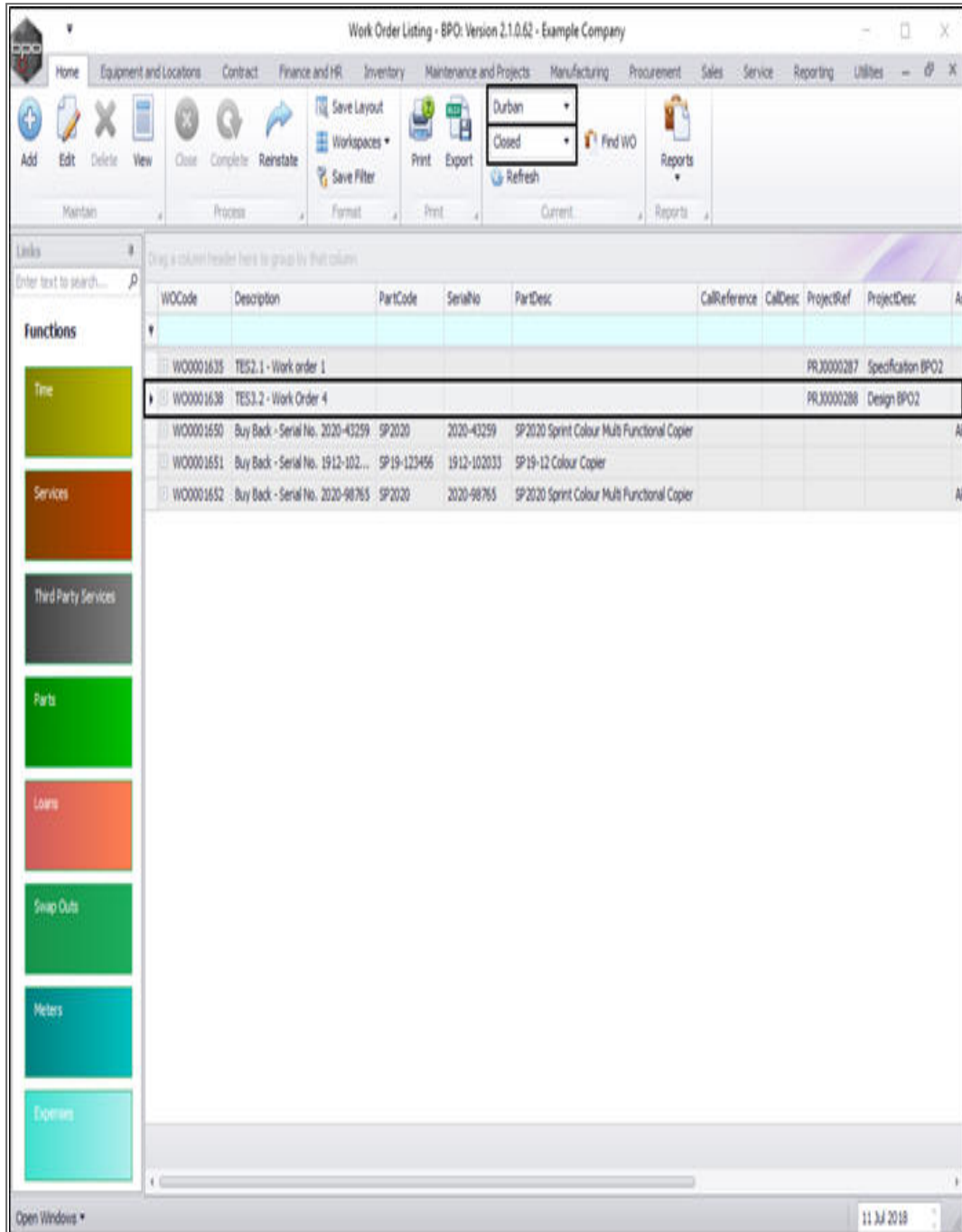
she still has **11** Open but **0** Completed work orders, as the completed Work Order has been **closed** and **removed** from this screen.

- **Note**: You may need to **Refresh** the screen to see the Stats column changes.
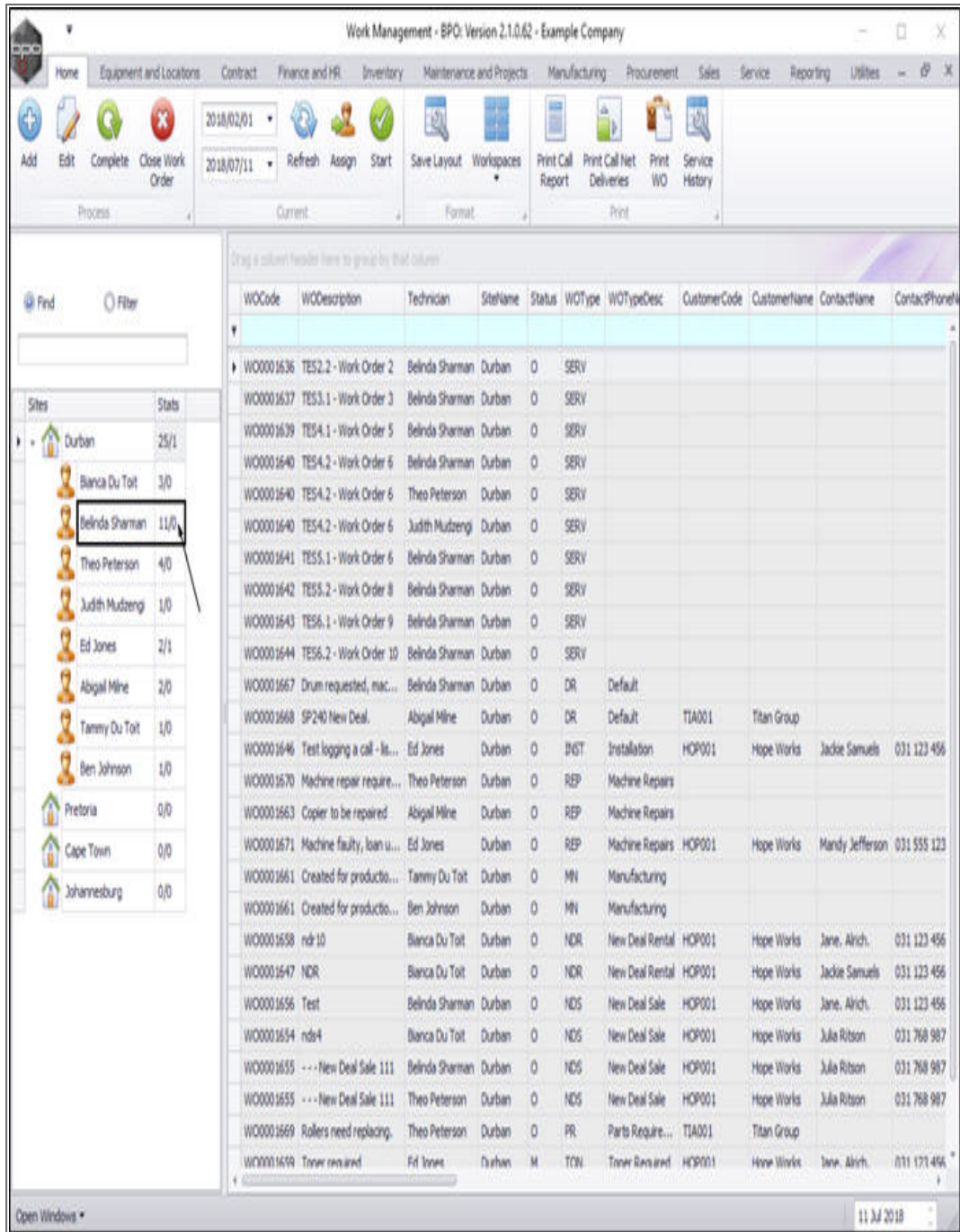
- You can find the closed Work Order in the **Work Order Listing** screen where the correct **site** is selected and the **status** is set to **Closed**.

- **[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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