

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

SERVICE

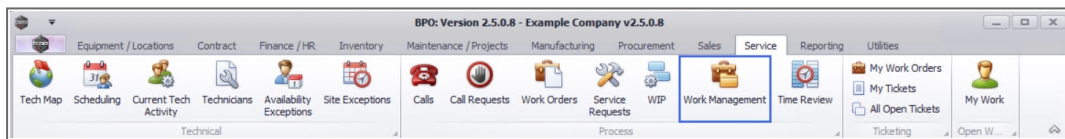
WORK MANAGEMENT – CLOSE A WORK ORDER

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



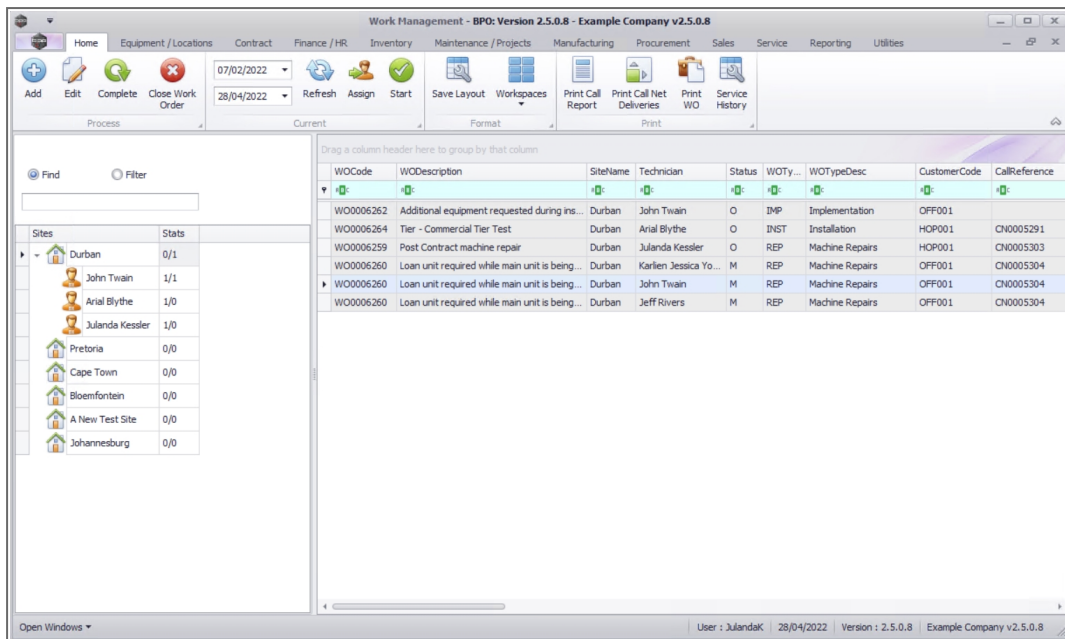
Remember a Work Order must be **Complete**, with **Rectification Comments**, before it can be **Closed**.

Ribbon Access: Service > Work Management



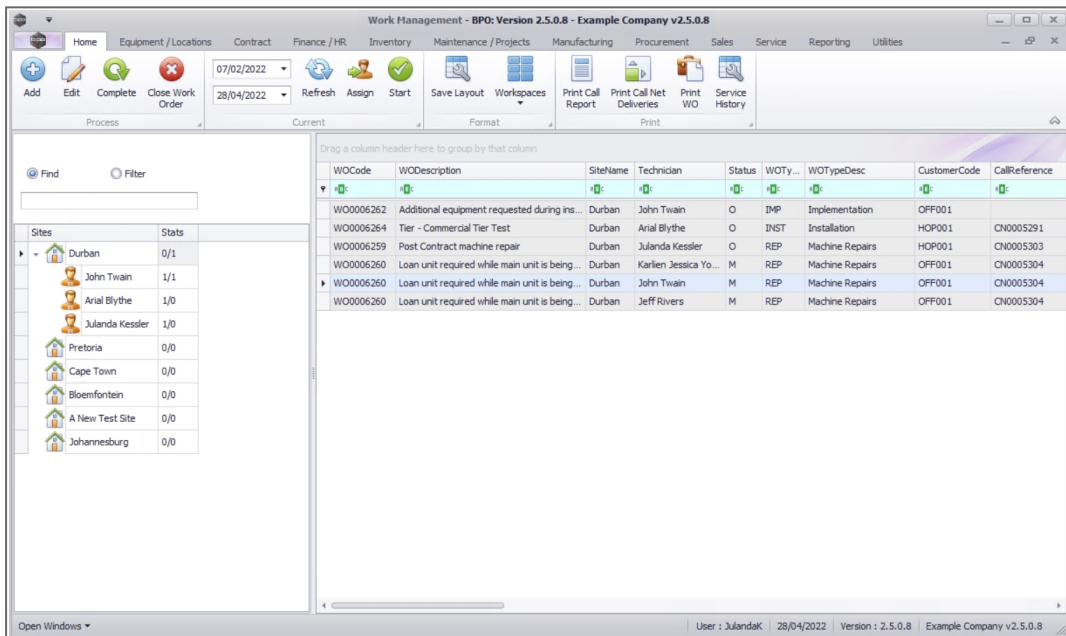
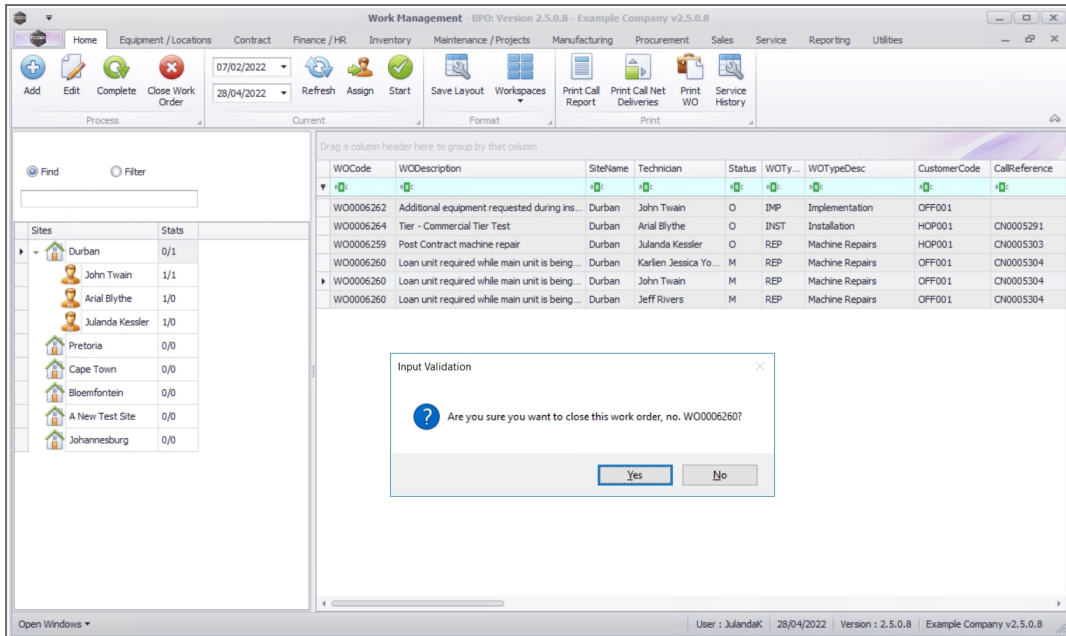
1. The **Work Management** screen will be displayed.
2. Select the **date range** that will contain the **work order** you wish to assign.
3. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.

Click on the **Refresh** button  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).



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 with their respective stats. The technician 'Belinda Sharman' has a stat of '11/1'. A red circle '2' points to this stat, and a red circle '1' points to the 'Belinda Sharman' name in the work order list.

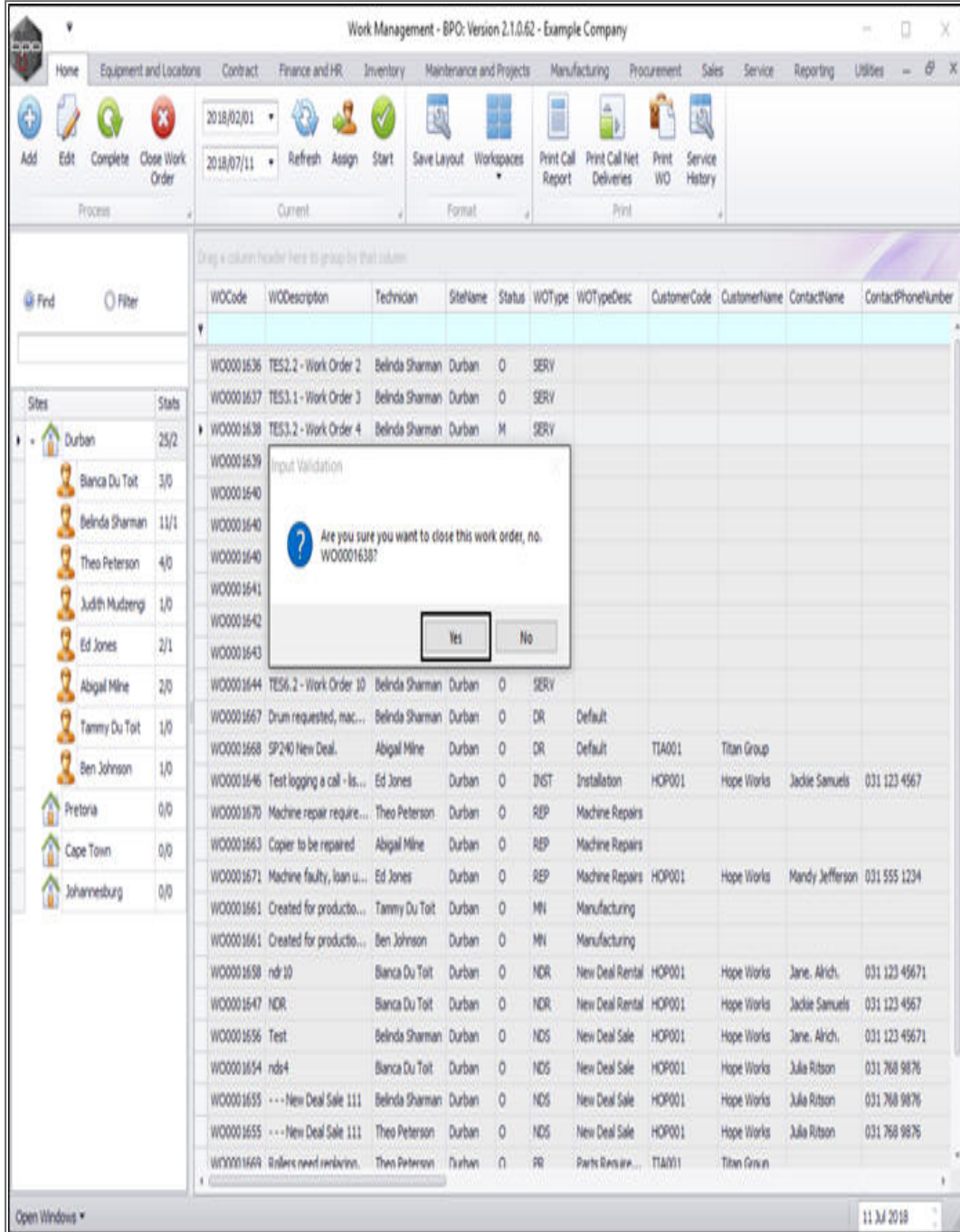
WCode	WDescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
W00001636	TES2.2 - Work Order 2	Belinda Sharman	Durban	O	SERV					
W00001637	TES3.1 - Work Order 3	Belinda Sharman	Durban	O	SERV					
W00001638	TES3.2 - Work Order 4	Belinda Sharman	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	nds4	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 list of work orders with columns: WOCode, WODescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. A sidebar on the left shows a list of sites and technicians. The 'Close Work Order' button is located in the top-left area of the toolbar.

WOCode	WODescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
WO0001636	TES2.2 - Work Order 2	Belinda Sharman	Durban	O	SERV					
WO0001637	TES3.1 - Work Order 3	Belinda Sharman	Durban	O	SERV					
WO0001638	TES3.2 - Work Order 4	Belinda Sharman	Durban	M	SERV					
WO0001639	TES4.1 - Work Order 5	Belinda Sharman	Durban	O	SERV					
WO0001640	TES4.2 - Work Order 6	Belinda Sharman	Durban	O	SERV					
WO0001640	TES4.2 - Work Order 6	Theo Peterson	Durban	O	SERV					
WO0001640	TES4.2 - Work Order 6	Judith Mutzengi	Durban	O	SERV					
WO0001641	TESS.1 - Work Order 6	Belinda Sharman	Durban	O	SERV					
WO0001642	TESS.2 - Work Order 8	Belinda Sharman	Durban	O	SERV					
WO0001643	TES6.1 - Work Order 9	Belinda Sharman	Durban	O	SERV					
WO0001644	TES6.2 - Work Order 10	Belinda Sharman	Durban	O	SERV					
WO0001667	Drum requested, mac...	Belinda Sharman	Durban	O	DR	Default				
WO0001668	SP240 New Deal.	Abigail Milne	Durban	O	DR	Default	TJA001	Titan Group		
WO0001646	Test logging a call - Is...	Ed Jones	Durban	O	INST	Installation	HCP001	Hope Works	Jackie Samuels	031 123 4567
WO0001670	Machine repair require...	Theo Peterson	Durban	O	REP	Machine Repairs				
WO0001663	Copier to be repaired	Abigail Milne	Durban	O	REP	Machine Repairs				
WO0001671	Machine faulty, loan u...	Ed Jones	Durban	O	REP	Machine Repairs	HCP001	Hope Works	Mandy Jefferson	031 555 1234
WO0001661	Created for productio...	Tammy Du Toit	Durban	O	MN	Manufacturing				
WO0001661	Created for productio...	Ben Johnson	Durban	O	MN	Manufacturing				
WO0001658	ndr10	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jane. Alrich.	031 123 45671
WO0001647	NDR	Bianca Du Toit	Durban	O	NDR	New Deal Rental	HCP001	Hope Works	Jackie Samuels	031 123 4567
WO0001656	Test	Belinda Sharman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Jane. Alrich.	031 123 45671
WO0001654	ndr4	Bianca Du Toit	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
WO0001655	--- New Deal Sale 111	Belinda Sharman	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
WO0001655	--- New Deal Sale 111	Theo Peterson	Durban	O	NDS	New Deal Sale	HCP001	Hope Works	Julia Ritson	031 768 9876
WO0001669	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, stating: 'The work order, no. W00001638, has been closed.' with an 'OK' button.

The background table lists work orders with the following columns: WCode, WDescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. The row for W00001638 is highlighted.

WCode	WDescription	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 resharin...	Theo Peterson	Durban	O	PR	Pwrh Require...	TIA001	Titan Group		

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

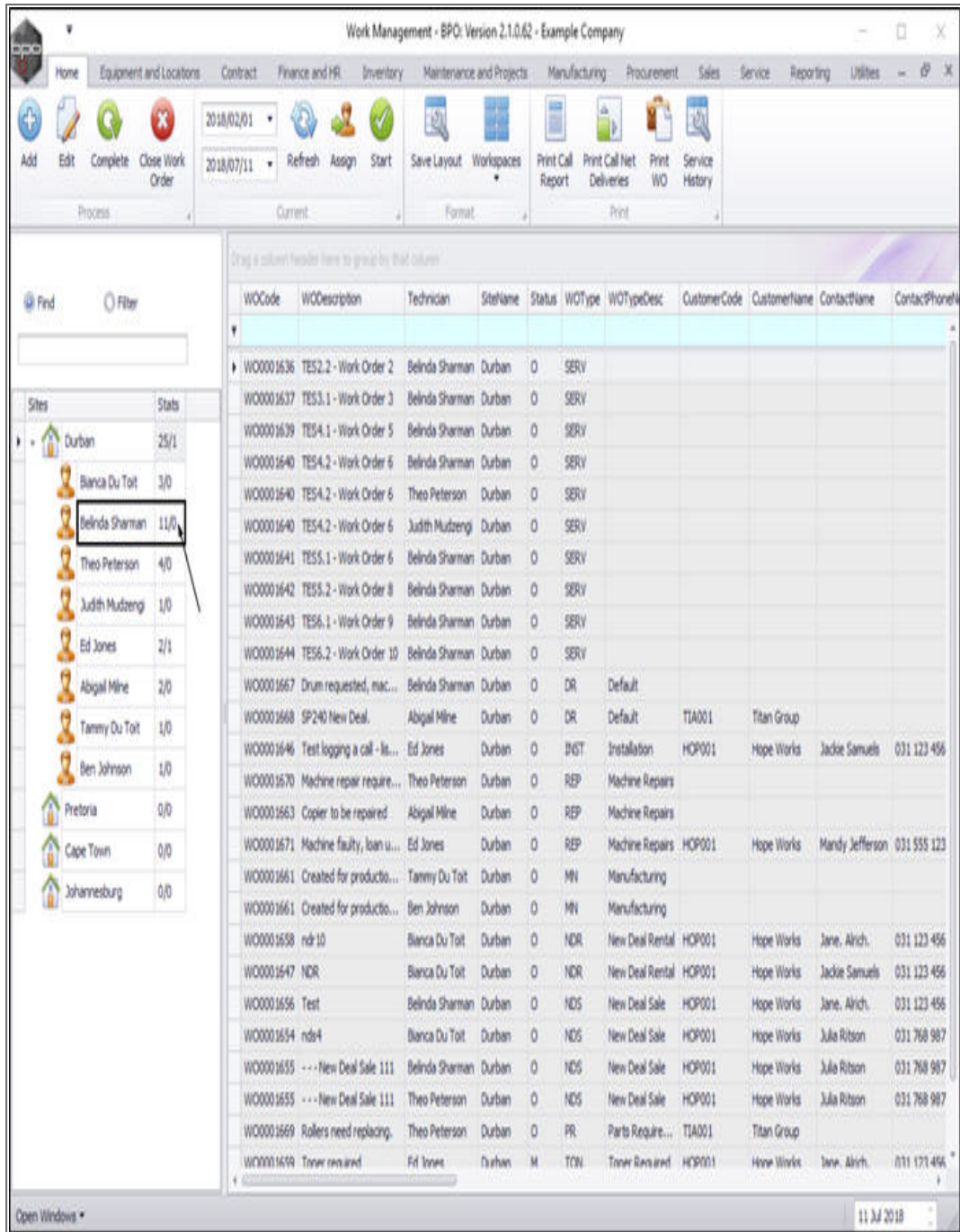
The screenshot shows the 'Work Management - BPO: Version 2.1.0.62 - Example Company' interface. The main window displays a list of work orders with columns for WCode, WCodeDescription, Technician, SiteName, Status, WOType, WOTypeDesc, CustomerCode, CustomerName, ContactName, and ContactPhoneNumber. The 'Stats' column in the 'Sites' sidebar shows the number of work orders assigned to each technician. Two arrows point to the 'Stats' column for Belinda Sharman, which now shows '11/0', indicating that 11 work orders have been assigned and 0 have been closed.

WCode	WCodeDescription	Technician	SiteName	Status	WOType	WOTypeDesc	CustomerCode	CustomerName	ContactName	ContactPhoneNumber
W00001636	TES2.2 - Work Order 2	Belinda Sharman	Durban	0	SERV					
W00001637	TES3.1 - Work Order 3	Belinda Sharman	Durban	0	SERV					
W00001639	TES4.1 - Work Order 5	Belinda Sharman	Durban	0	SERV					
W00001640	TES4.2 - Work Order 6	Belinda Sharman	Durban	0	SERV					
W00001640	TES4.2 - Work Order 6	Theo Peterson	Durban	0	SERV					
W00001640	TES4.2 - Work Order 6	Judith Mudzeng	Durban	0	SERV					
W00001641	TES5.1 - Work Order 6	Belinda Sharman	Durban	0	SERV					
W00001642	TES5.2 - Work Order 8	Belinda Sharman	Durban	0	SERV					
W00001643	TES6.1 - Work Order 9	Belinda Sharman	Durban	0	SERV					
W00001644	TES6.2 - Work Order 10	Belinda Sharman	Durban	0	SERV					
W00001667	Drum requested, mac...	Belinda Sharman	Durban	0	DR	Default				
W00001668	SP240 New Deal.	Abigal Mine	Durban	0	DR	Default	TJA001	Titan Group		
W00001646	Test logging a call - Is...	Ed Jones	Durban	0	INST	Installation	HOP001	Hope Works	Jackie Samuels	031 123 4567
W00001670	Machine repair require...	Theo Peterson	Durban	0	REP	Machine Repairs				
W00001663	Copier to be repaired	Abigal Mine	Durban	0	REP	Machine Repairs				
W00001671	Machine faulty, loan u...	Ed Jones	Durban	0	REP	Machine Repairs	HOP001	Hope Works	Mandy Jefferson	031 555 1234
W00001661	Created for productio...	Tammy Du Toit	Durban	0	MN	Manufacturing				
W00001661	Created for productio...	Ben Johnson	Durban	0	MN	Manufacturing				
W00001658	ndr 10	Bianca Du Toit	Durban	0	NDR	New Deal Rental	HOP001	Hope Works	Jane. Alrich.	031 123 45671
W00001647	NDR	Bianca Du Toit	Durban	0	NDR	New Deal Rental	HOP001	Hope Works	Jackie Samuels	031 123 4567
W00001656	Test	Belinda Sharman	Durban	0	NDS	New Deal Sale	HOP001	Hope Works	Jane. Alrich.	031 123 45671
W00001654	ndr4	Bianca Du Toit	Durban	0	NDS	New Deal Sale	HOP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Belinda Sharman	Durban	0	NDS	New Deal Sale	HOP001	Hope Works	Julia Ritson	031 768 9876
W00001655	--- New Deal Sale 111	Theo Peterson	Durban	0	NDS	New Deal Sale	HOP001	Hope Works	Julia Ritson	031 768 9876
W00001669	Rollers need replacing.	Theo Peterson	Durban	0	FR	Parts Require...	TJA001	Titan Group		
W00001659	Toner required	Ed Jones	Durban	M	TON	Toner Required	HOP001	Hope Works	Jane. Alrich.	031 123 45671

- 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

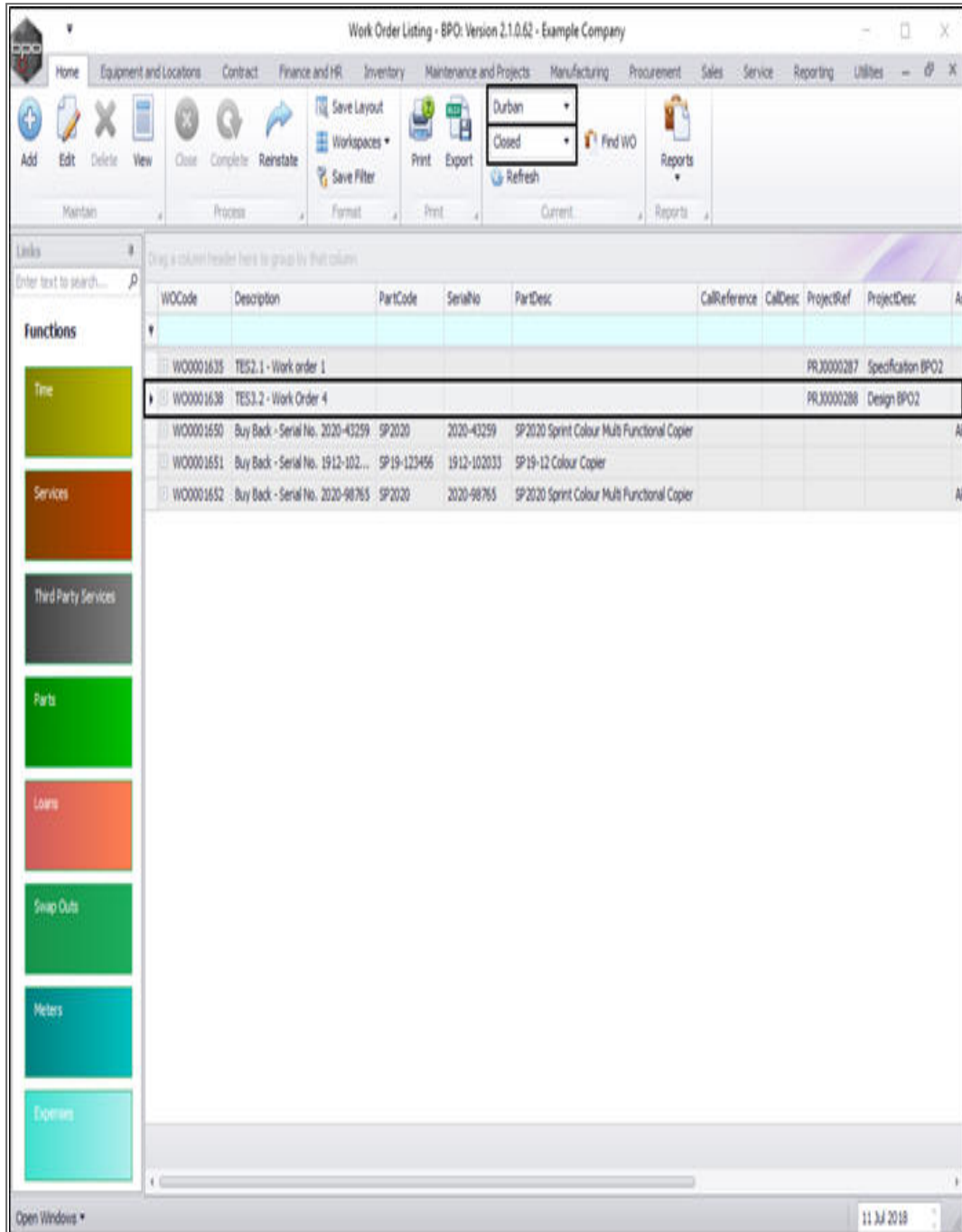
she still has **11** Open but **0** Completed work orders, as the completed Work Order has been **closed** and **removed** from this screen.

- **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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