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[1]. 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.
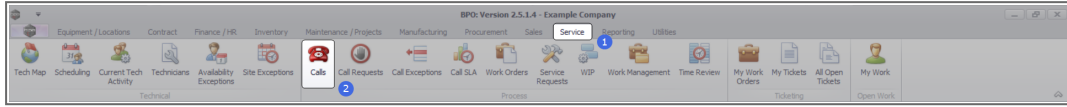
When work is required for a **Company**, such as Building Maintenance or a Machine Repair, then a work order needs to be raised **manually**.

- 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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[1]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.

- 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.

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

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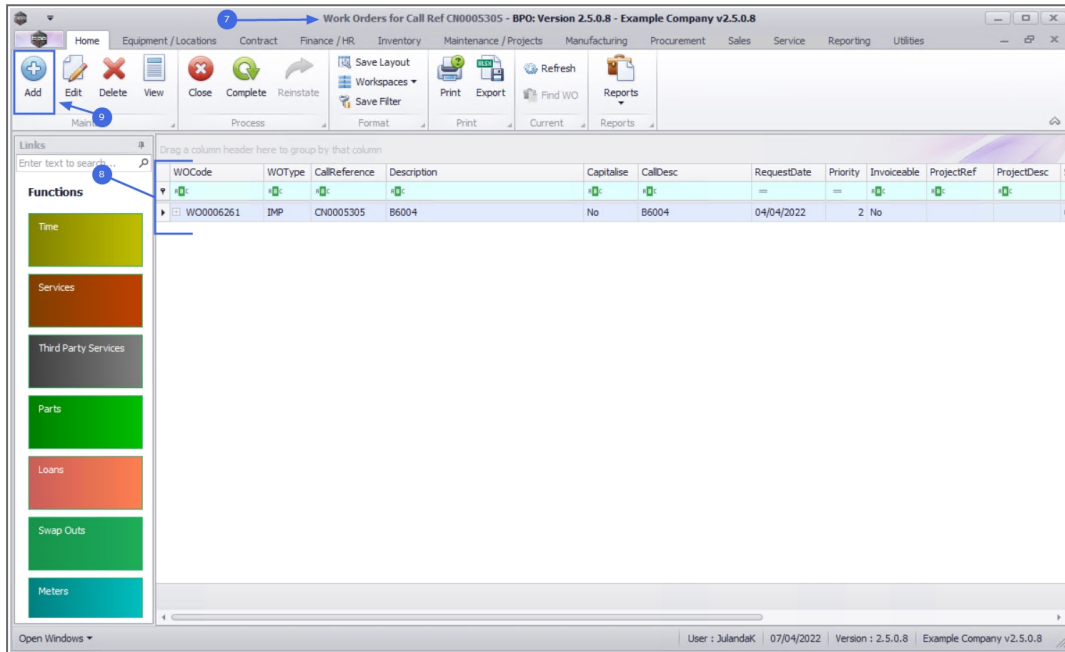
- " The Work Order Maintenance screen will be displayed. " on page 2
- Complete the Work Order details for the call.
- In the **Links** frame note that the **Call Reference** has automatically been linked to the call reference you have selected.
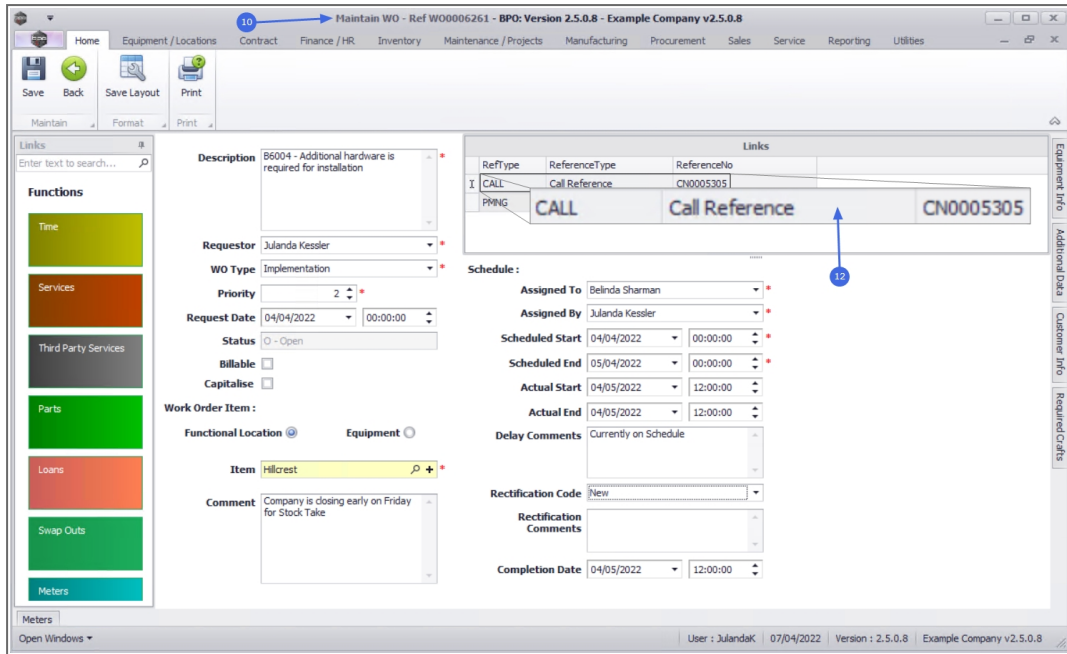
CUSTOMER INFO TAB

- 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.
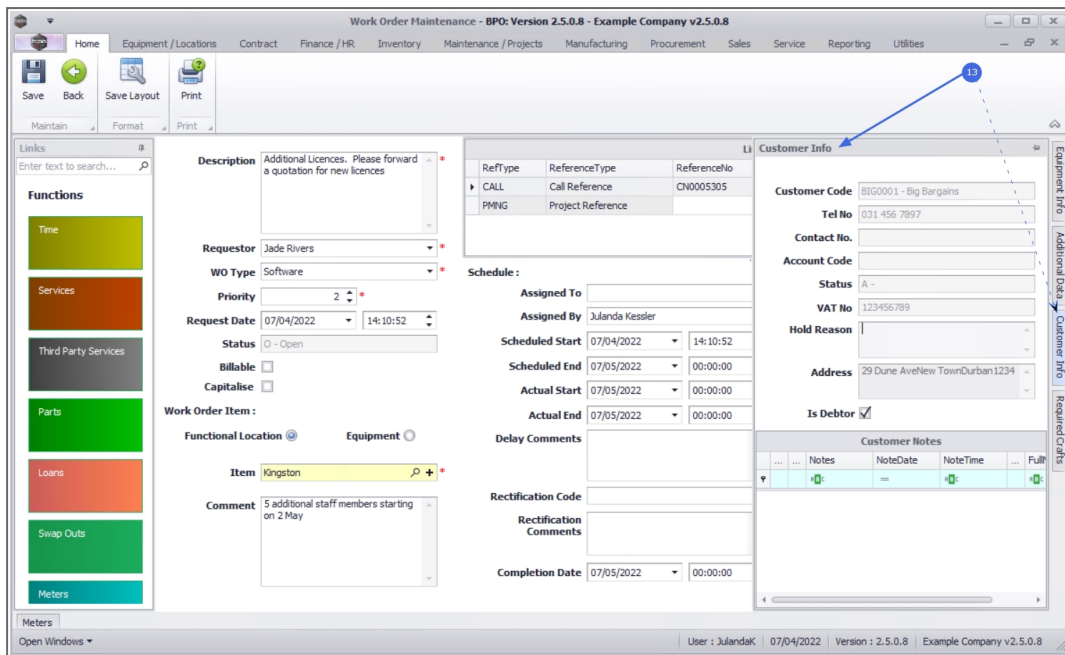
REQUIRED CRAFTS TAB

- 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.
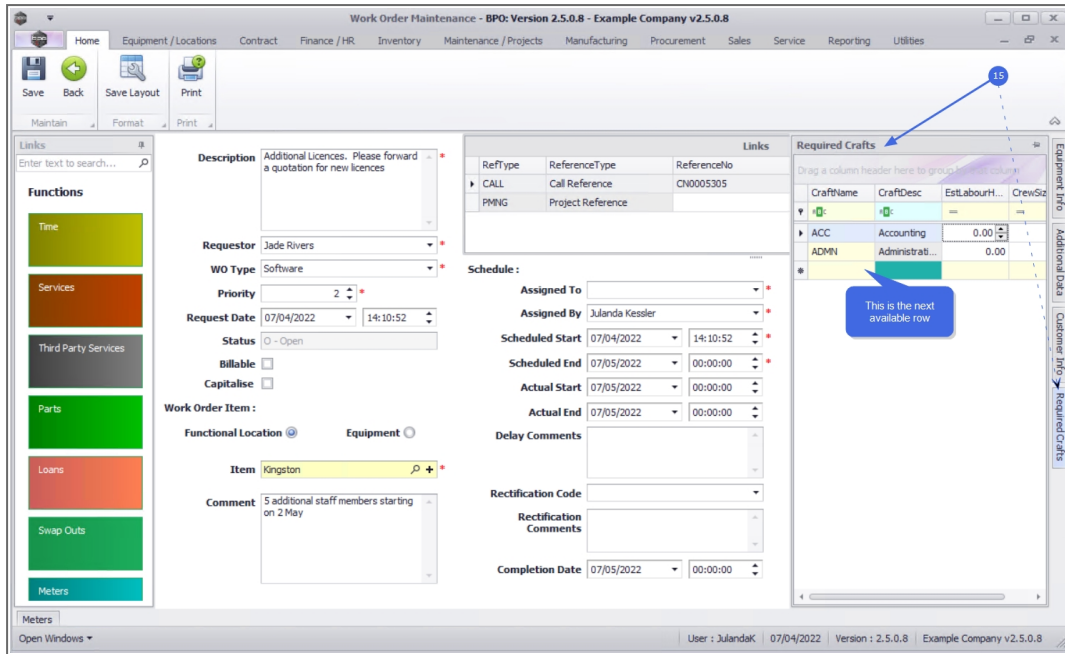
ADDITIONAL DATA TAB

- 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.
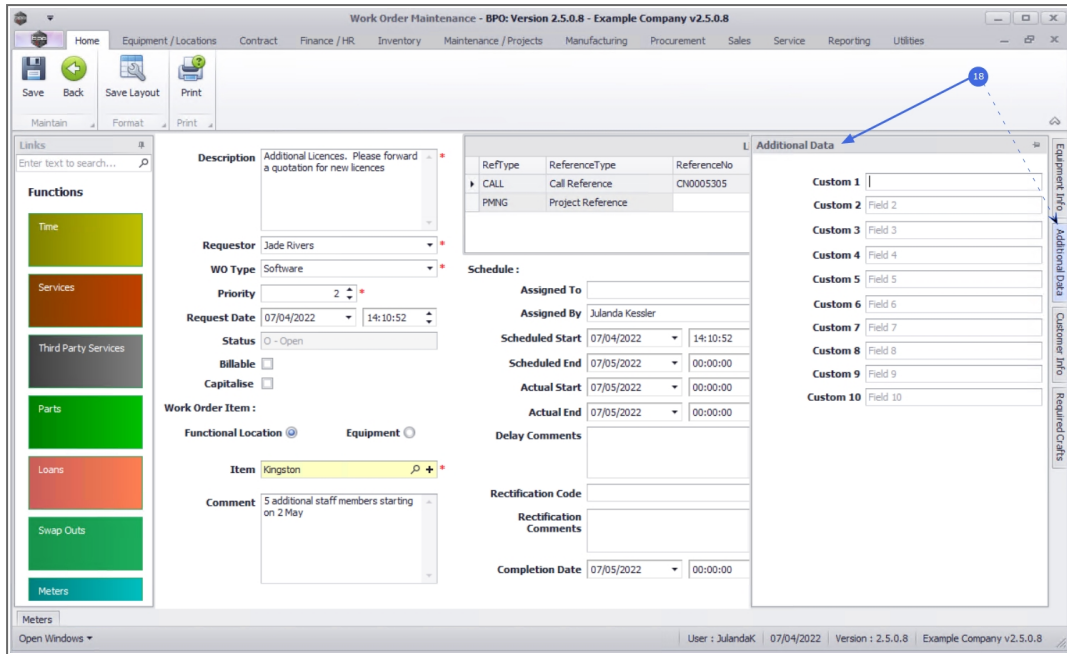
EQUIPMENT INFO TAB

- 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.
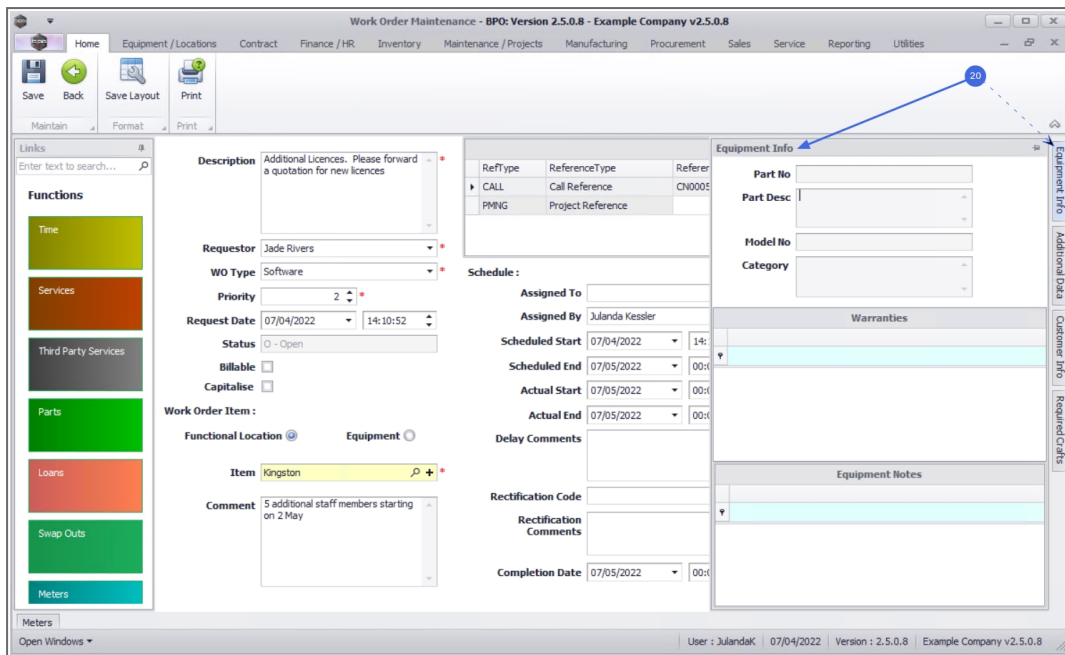
METERS TAB

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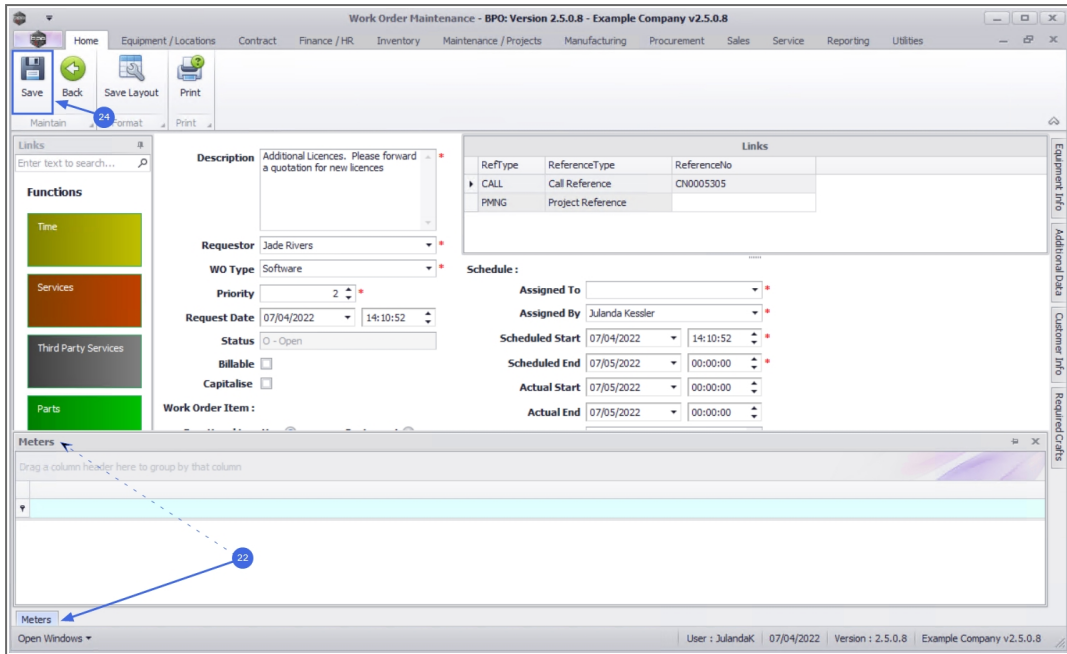
- You will return to the **Work Orders for Call Ref** screen where you can view the linked work order
- **Close** the screen to return to the **Call maintenance** screen.
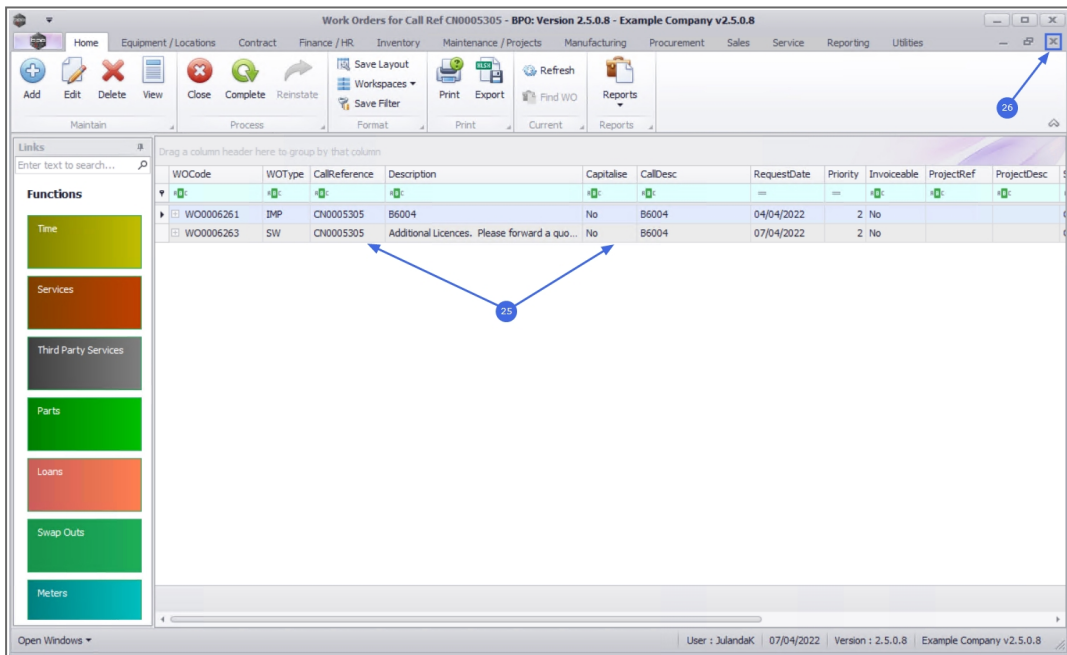
EDIT WORK ORDER

- 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**.
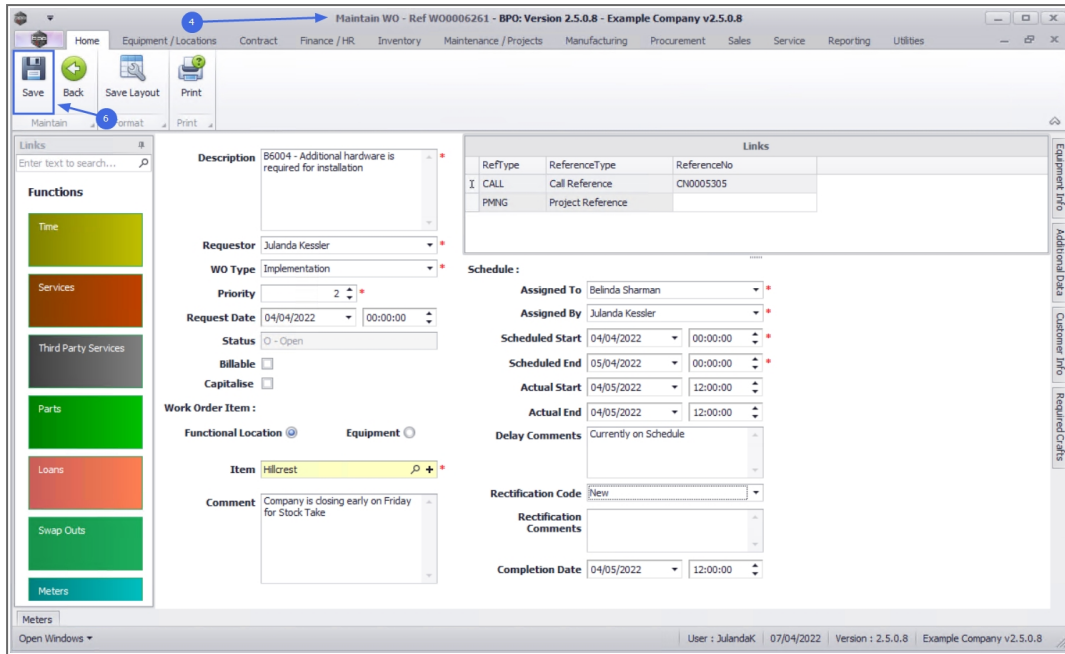
DELETE WORK ORDER

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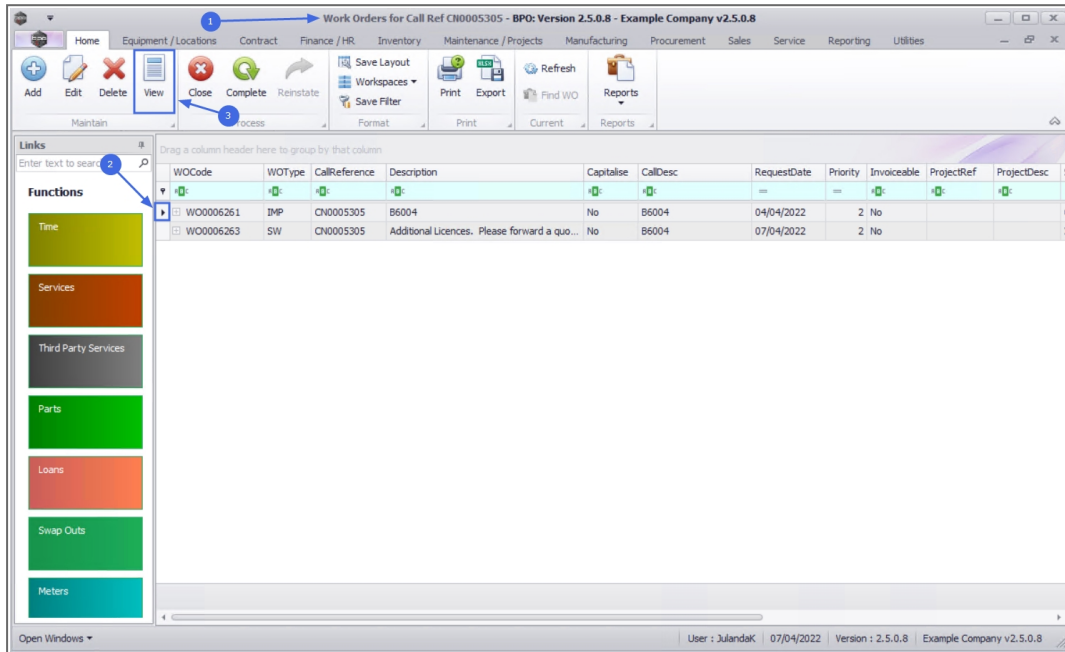
- The **View Work Order - [**work order number**]** screen will be displayed.

> ✏️ 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.
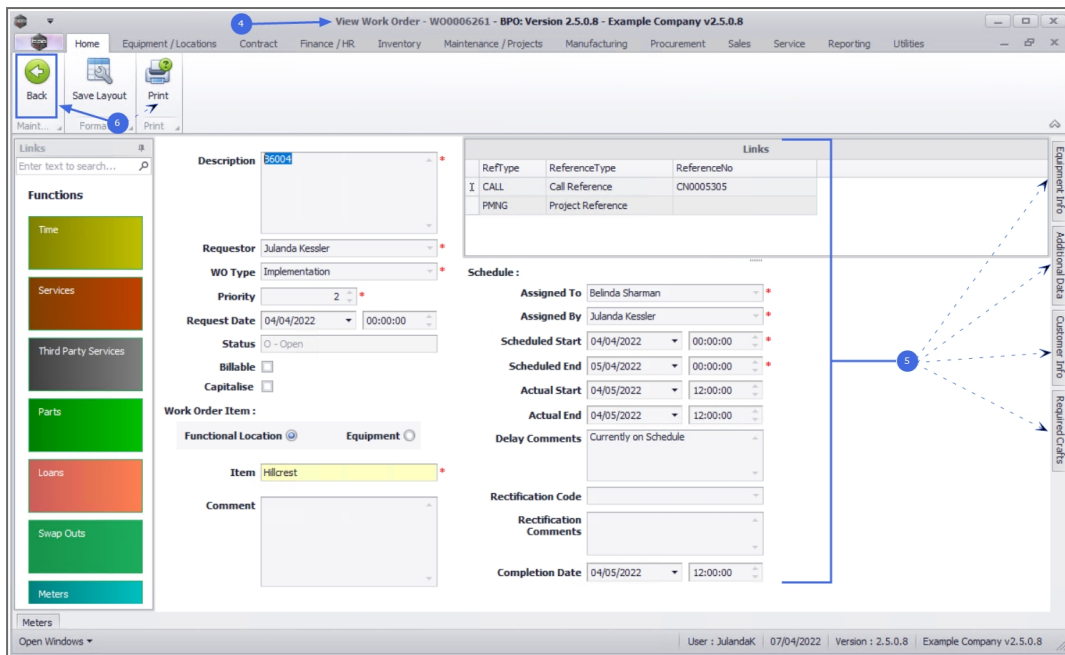
CLOSE WORK ORDER

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

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

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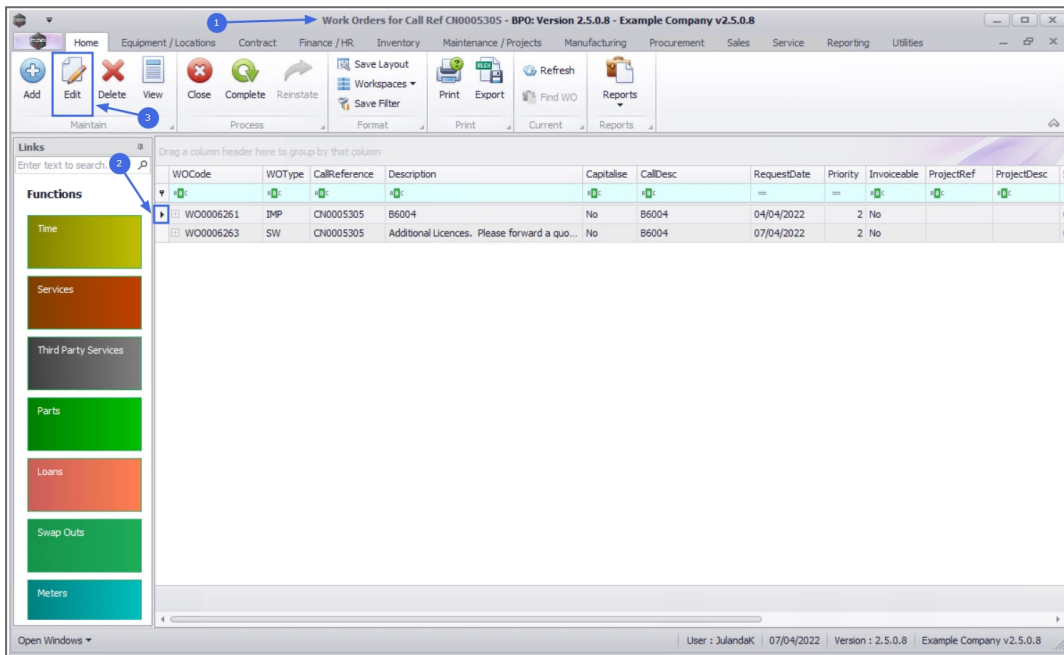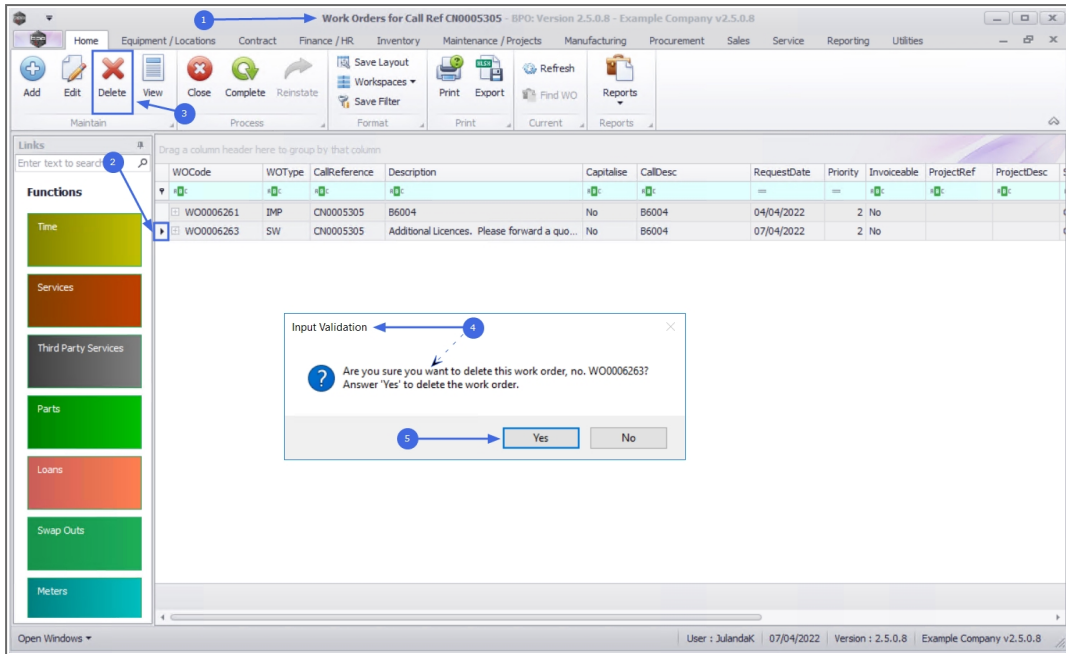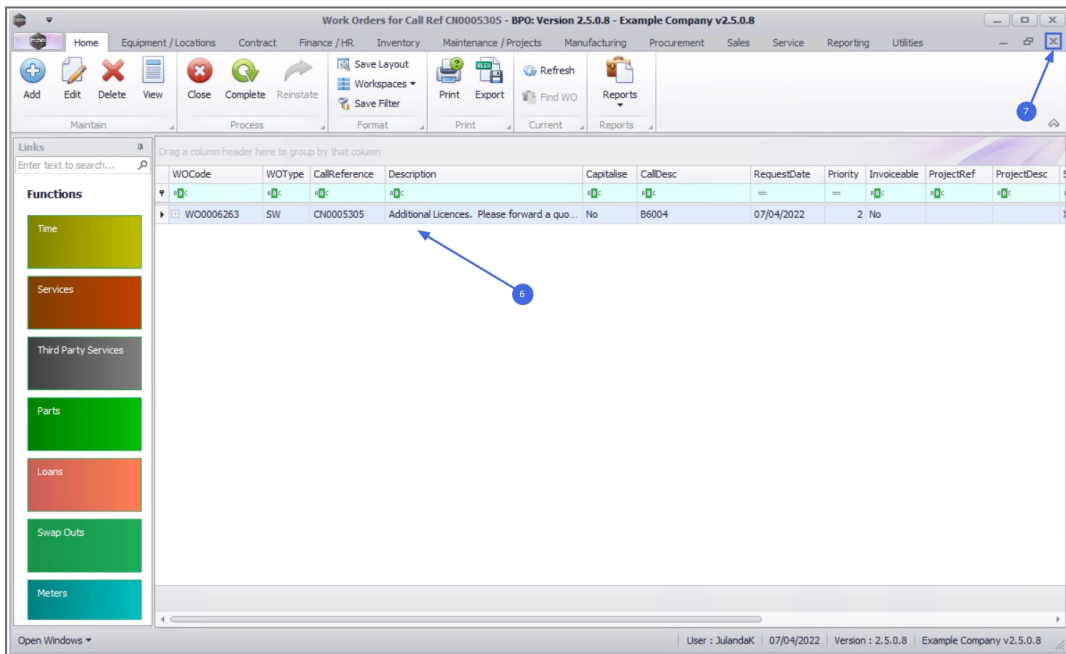- Click on **Yes**.

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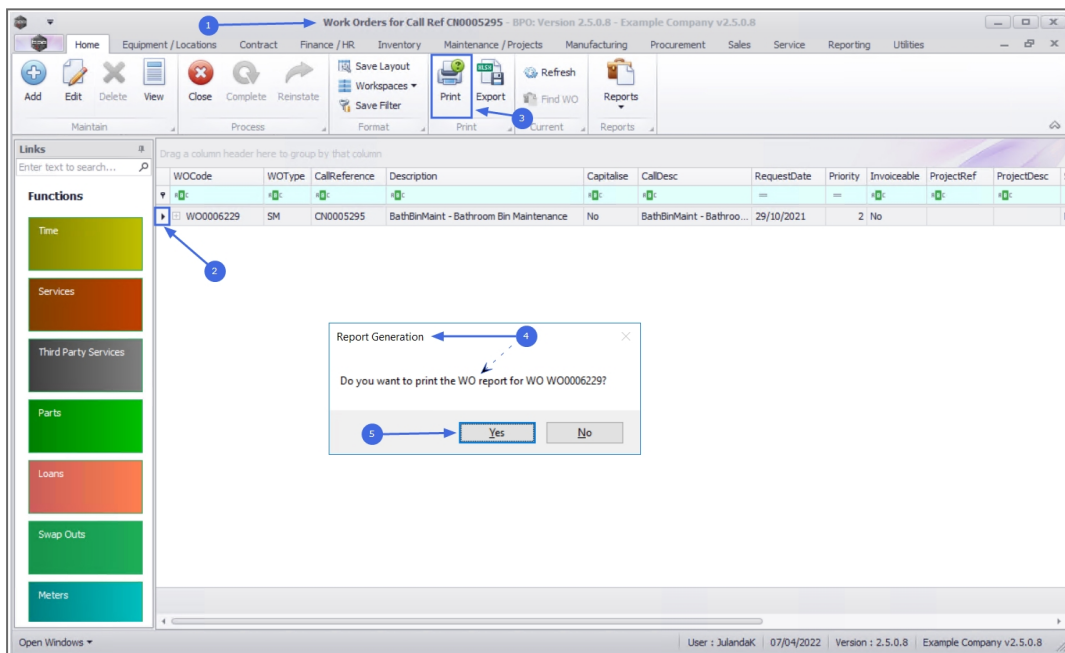
- The Work Order will display in the Reports **Preview** screen.
- From here you can make cosmetic changes to the Work Order, as well as **Save**, **Zoom**, **Add a Watermark**, **Export** or **Email**.
- **Close** the Report Preview screen when done.
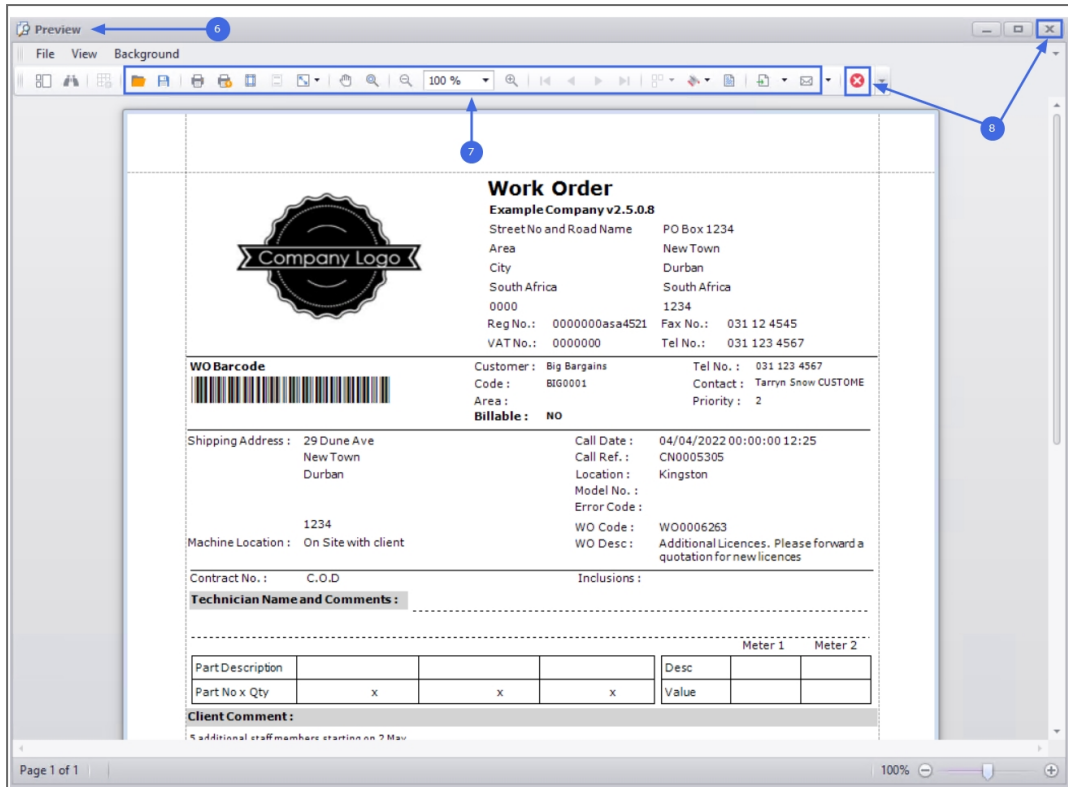
FUNCTION TILES

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
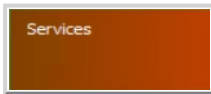
The Services tile will direct you to the **Internal services for WO Code** screen where you can **Add**, **Edit** and **Remove** an Internal Service from the Work Order. Refer to Work Orders - Internal Services
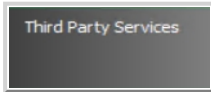
The Third Party Services tile will direct you to the **Service Request for WO Code** screen where you can **Add**, **Edit**, **Delete**, issue a **Requisition** and do **Billing** for the Work Order. Refer to Work Orders - Third Party Service Request

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
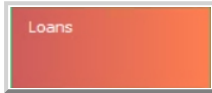
The Loans tile will direct you to the **Loan Requests for WO Code** screen where you can **Add**, **Edit**, **Delete** and view **Returns** on a loan request linked to the Work Order. Refer to Work Orders - Loans
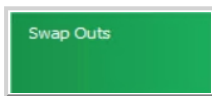
The Swap Outs tile will direct you to the **Swap Outs for WO Code** screen where you can **Add** swap outs on a Work Order. Refer to Work Orders - Swap Outs

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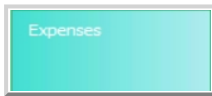
The Equipment tile will direct you to the **Expense Claims for WO Code** screen where you can **Add**, **Edit** and **Delete** and expense claim from the Work Order. Refer to Work Orders - Expenses

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
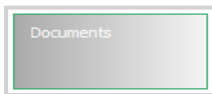
The Documents tile will direct you to the **Documents for Work Order** screen where you can **Add**, **Edit**, **Delete** and **View** a digital documents linked to a work order. Refer to Work Orders - Documents
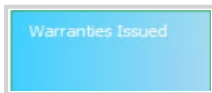
The functions tile will direct you to the **Issued Warranties for WO Code** screen where you can, **Add**, **Edit** and **Delete** a warranty linked to a work order. Work Orders - Warranties Issued
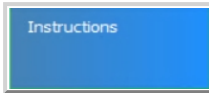
The functions tile will direct you to the **Instructions for WO Code** screen where you can **Add**, **Edit**, **Delete** and **Complete** an instruction for a Work Order. Refer to Work Orders - Task Instructions

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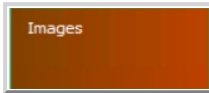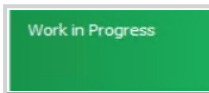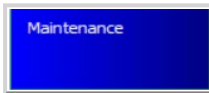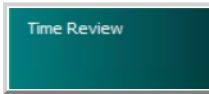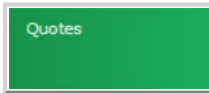
The functions tile will direct you to the **Time Not Billed for Work Order Code** screen where you can **Invoice WO**, **Invoice Project**, **Flag Reviewed** and set **SLA Time** linked to the Work Order. Refer to Work Orders - Time Review

PROCESSING TILES

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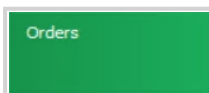
The Orders functions tile will direct you to the **Sales Orders for Work Order** screen where you can **Add**, **Edit**, **Delete**, **View**, **Create Invoice**, **Create New Deal**, **Add**

Items to WO, **New Deal Project**, **Print Sales Order** and **Print a Proforma Invoice**. Work Orders - Orders
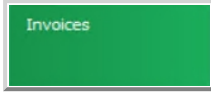
The Invoices functions tile will direct you to the **Sales Invoices for Work Order** screen where you can **Add**, **Edit**, add a **Comment and Reference**, **Print** and **Send Invoices to Print Queue**. Refer to Work Orders - Invoices
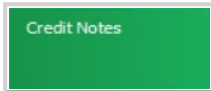
The Credit Notes functions tile will direct you to the **Sales Credit Notes for Work Order** screen where you can **Add**, **Edit**, **Delete**, **View**, **Release for Approval**, **Remove from Approval**, **Approve Cr Note** and **Send Cr Notes to Print Queue**. Refer to Work Orders - Credit Notes

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