

# How to Close a Work Order

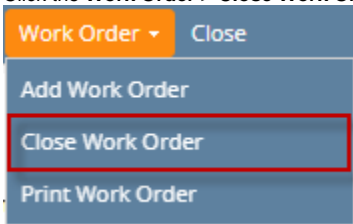
A work order is closed either because it has been completed or the customer cancelled it.

Generally, these are what happens during closing of work order.

- 1. In grid area, the work order will be moved from Status: Open to **Status: Closed** group. The **Date Closed field** (grid area) will be auto-populated.
- 2. The **Status** field will automatically set to Close.
- 3. **Date Scheduled**, **Performer**, and **Additional Info** fields will be disabled.
- 4. The **Date Closed field** will be enabled and will default to the system date when the work order was closed.
- 5. The **Close Reason** field will be enabled and will show blank by default. Select a reason from Close Reason combo box list. If the reason is not on the list, you can add it to [Close Reason](#) screen. Note that this is a required field.
- 6. **Comments** field will be enabled. This is where you can enter comments provided by the performer, or more info on why the work order is closed. This field is optional.

Here's how to close the work order:

- **Via the Close Work Order toolbar button:**
  - 1. [Open the Consumption Sites record](#).
  - 2. Navigate to the **Work Orders tab**. Select the work order that needs to be closed.
  - 3. Click the **Work Order > Close Work Order toolbar button**.



If there are **To Do Items** that are not yet completed, this message will be displayed. Select **Yes** to this confirmation message.



iRely i21

There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?

Yes

No

- 4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel.
- 5. Save the changes in the Consumption Sites record.

- **Via the Status field:**
  - 1. [Open the Consumption Sites record](#).
  - 2. Navigate to the **Work Orders tab**. Select the work order that needs to be closed.
  - 3. Select '**Closed**' from the **Status combo box** list.

Work Order Details

Work Order No

13

Category

C1

Status

Open

Date Scheduled

1/1/2018

Perf

Work Status

Closed

Additional Info

sample work order

Waiting for Parts

Entered By

IRELYADMIN

Date

Create Pending

Date Closed

Clos

Open

Comments

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## iRely i21

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4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel. **Close Reason** field is required.
5. **Save** the changes in the Consumption Sites record.

A work order is closed either because it has been completed or the customer cancelled it.

Here is a sample closed work order.

The screenshot displays the iRely i21 software interface for Consumption Sites. The top menu bar includes options like New, Save, Search, Undo, Attach Device, Site Action, Print Call Entry, Add Call Entry, Dispatch, Contract, Customer, Create Event, Summary List, Work Order, Print Efficiency, and Close. The main area shows a customer record for 'Customer B' with address '111 Princeton Road, Fort Wayne, IN 46808' and phone '2000000000'. Below this is a grid of work orders. The first work order is highlighted, showing it is 'Closed' with a status of 'Closed', work order number '4', and a close reason of 'WORK COMPLETED'. The date closed is '04/27/2016'. The bottom section provides details for this work order, including the date scheduled ('04/20/2016'), performer ('Customer C'), and additional info ('sample work order'). The 'To Do Items' section shows 'SET TANK' and 'LABOR' as completed items. The 'Work Order Details' section shows the entered by ('irelyadmin'), date created ('04/25/2016'), date closed ('04/27/2016'), and close reason ('WORK COMPLETED'). The comments field contains 'Completed work order'.

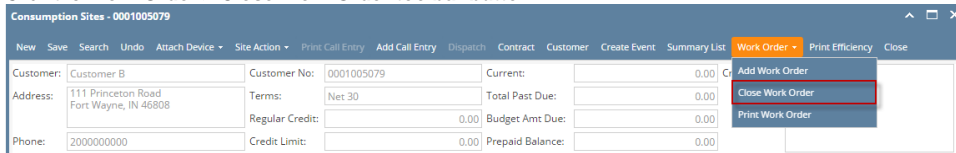
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6. **Comments** field will be enabled. This is where you can enter comments provided by the performer, or more info on why the work order is closed. This field is optional.

- **Via the Close Work Order toolbar button:**

1. [Open the Consumption Sites record.](#)
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.

3. Click the **Work Order > Close Work Order** toolbar button.



If there are To Do Items that are not yet completed, then this message will be displayed. Select **Yes** to this confirmation message.



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There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?

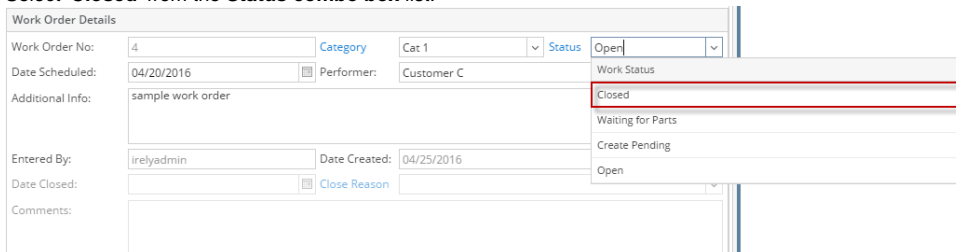
Yes

No

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel.
5. Save the changes in the Consumption Sites record.

• **Via the Status field:**

1. [Open the Consumption Sites record.](#)
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Select '**Closed**' from the **Status** combo box list.



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There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?

Yes

No

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel. **Close Reason** field is required.
5. **Save** the changes in the Consumption Sites record.

Here is a sample closed work order.

The screenshot shows the 'Consumption Sites - 0001005078' window. The 'Work Orders' tab is selected and highlighted with a red box. The 'Status' field is set to 'Closed'. The 'Date Closed' field is populated with '02/08/2016'. The 'Close Reason' field is set to 'WORK COMPLETED'. The 'Comments' field contains the text 'work order is completed'. The 'To Do Items' section shows a list of items: 'SET TANK' and 'LABOR', both with checkmarks in the 'Completed' column. The 'Work Order Details' section shows the 'Work Order No.' as '6', 'Date Scheduled' as '02/10/2016', 'Performer' as 'Customer C', 'Entered By' as 'irelyadmin', and 'Date Created' as '02/08/2016'.

Generally, these are what happens during closing of work order.

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3. **Date Scheduled**, **Performer**, and **Additional Info** fields will be disabled.
4. The **Date Closed** field will be enabled and will default to the system date when the work order was closed.
5. The **Close Reason** field will be enabled and will show blank by default. Select a reason from Close Reason combo box list. If the reason is not on the list, you can add it to **Close Reason** screen. Note that this is a required field.
6. **Comments** field will be enabled. This is where you can enter comments provided by the performer, or more info on why the work order is closed. This field is optional.

• Via the **Close Work Order** toolbar button:

1. [Open the Consumption Sites record.](#)
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Click the **Work Order > Close Work Order** toolbar button.

The screenshot shows the 'Consumption Sites - 0001005078' window. The 'Work Orders' tab is selected. The 'Work Order' toolbar is visible, and the 'Close Work Order' button is highlighted with a red box.

If there are To Do Items that are not yet completed, then this message will be displayed. Select **Yes** to this confirmation message.



iRely i21

There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?

Yes

No

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel.
5. Save the changes in the Consumption Sites record.

- **Via the Status field:**

1. [Open the Consumption Sites record](#).
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Select '**Closed**' from the **Status** combo box list.

The screenshot shows the 'Work Order Details' panel. The 'Status' dropdown menu is open, displaying options: 'Open', 'Create Pending', 'Waiting for Parts', and 'Closed'. The 'Closed' option is highlighted with a red border. The panel also shows fields for 'Work Order No: 6', 'Category: Cat 1', 'Date Scheduled: 02/10/2016', 'Performer: Customer C', 'Entered By: irelyadmin', and 'Date Created: 02/08/2016'. There are also fields for 'Date Closed', 'Close Reason', and 'Comments'.

If there are To Do Items that are not yet completed, then this message will be displayed. Select Yes to this confirmation message.



**iRely i21**

There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?

Yes

No

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel. **Close Reason** field is required.
5. **Save** the changes in the Consumption Sites record.

Here is a sample closed work order.

The screenshot shows the 'Consumption Sites - 0000000023' window. The 'Work Orders' tab is selected. The 'Status' field is set to 'Closed'. The 'Date Closed' field is populated with '06/23/2015'. The 'Close Reason' field is set to 'WORK COMPLETED'. The 'Comments' field contains the text 'this is a sample closed work order.'.

Status	Work Order No.	Close Reason	Date Scheduled	Date Closed	Entered By	Date Created
Closed	11677	WORK COMPLETED	06/23/2015	06/23/2015	AGADMIN	06/23/2015

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2. The **Status** field will automatically set to Close.
3. **Date Scheduled, Performer, and Additional Info** fields will be disabled.
4. The **Date Closed** field will be enabled and will default to the system date when the work order was closed.
5. The **Close Reason** field will be enabled and will show blank by default. Select a reason from Close Reason combo box list. If the reason is not on the list, you can add it to **Close Reason** screen. Note that this is a required field.
6. Comments field will be enabled. This is where you can enter comments provided by the performer, or more info on why the work order is closed. This field is optional.

- **Via the Close Work Order toolbar button:**

1. [Open the Consumption Sites record.](#)
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Click the **Work Order > Close Work Order** toolbar button.

The screenshot shows the 'Consumption Sites - 0000000023' window. The 'Work Orders' tab is selected. The 'Close Work Order' button is highlighted in the toolbar.

If there are To Do Items that are not yet completed, then this message will be displayed. Select **Yes** to this confirmation message.

The screenshot shows the 'iRely i21' confirmation message dialog. The message reads: 'There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?'. The 'Yes' button is highlighted.

4. Fill out the fields – **Date Closed, Close Reason, and Comments** – on the lower part of the Work Order Details panel.
5. Save the changes in the Consumption Sites record.

- **Via the Status field:**

1. [Open the Consumption Sites record.](#)

2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Select '**Closed**' from the **Status** combo box list.

If there are To Do Items that are not yet completed, then this message will be displayed. Select Yes to this confirmation message.

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel. **Close Reason** field is required.
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- **Via the Close Work Order toolbar button:**

1. [Open the Consumption Sites record](#).
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.

3. Click the **Work Order > Close Work Order** toolbar button.

The screenshot shows the 'Consumption Sites - 0000000010' window. The 'Work Order' menu is open, and the 'Close Work Order' option is highlighted with a red box. Other options in the menu include 'Add Work Order' and 'Print Work Order'. The main form contains fields for Customer (UNIOIL PETROLEUM), Address (MAIN STREET CAMBRIDGE, MN 55008), Phone (1000000000), Customer No. (0000000010), Terms (20 - COD), Regular Credit (0.00), Credit Limit (1.00), Current (0.00), Total Past Due (0.00), Budget Amt Due (0.00), and Prepaid Balance (0.00). The bottom of the window has tabs for Site, Detail, Devices, Associated Sites, Appliances, Call Entry, Delivery History, and Event History.

If there are To Do Items that are not yet completed, then this message will be displayed. Select **Yes** to this confirmation message.

The screenshot shows the 'iRely i21' confirmation dialog box. It contains a question mark icon and the text: 'There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?'. There are 'Yes' and 'No' buttons at the bottom.

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel.
5. Save the changes in the Consumption Sites record.

- **Via the Status field:**

1. [Open the Consumption Sites record.](#)
2. Navigate to the **Work Orders** tab. Select the work order that needs to be closed.
3. Select '**Closed**' from the **Status** combo box list.

The screenshot shows the 'Work Order Details' panel. The 'Status' dropdown menu is open, showing options: 'Open', 'Create Pending', 'Waiting for Parts', and 'Closed'. The 'Closed' option is highlighted with a red box. The panel also contains fields for Work Order No. (11676), Date Scheduled (03/12/2015), Additional Info (This is a sample work order), Entered By (AGADMIN), Date Created, Date Closed, and Close Reason.

If there are To Do Items that are not yet completed, then this message will be displayed. Select Yes to this confirmation message.

The screenshot shows the 'iRely i21' confirmation dialog box. It contains a question mark icon and the text: 'There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?'. There are 'Yes' and 'No' buttons at the bottom.

4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel. **Close Reason** field is required.
5. **Save** the changes in the Consumption Sites record.