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?



- 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	Cate	gory	C1	~	Status	Open	 ~
Date Scheduled	1/1/2018	Perf	Work Statu	s				
Additional Info	sample work order		Closed					
			Waiting for	Parts				
Entered By	IRELYADMIN	Date	Create Pen	ding				
Date Closed		Clos	Open					
Comments								

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?



- 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.

lere is	a samp	le closed v	vork	orde	r.												
onsumpt	ion Sites - 00	01005079															
New Sav	e Search U	Indo Attach Devic	:e∓ Si	te Action	 Print 0 	Call Entry Add	I Call Entry	Dispatch	Contract	Customer Crea	ate Event	Summary	List Work	Order -	Print Effi	ciency Cl	ose
ustomer:	Customer B			Custom	ner No:	0001005079		C	urrent:			0.0	0 Credit N	ote:			
ddress:	111 Princeto	on Road IN 46808		Terms:		Net 30		Т	otal Past	Due:		0.0	0				
	Tore wayne,	114 40000		Regular	r Credit:			0.00 E	Budget Am	it Due:		0.0	0				
ione:	200000000)		Credit l	imit:			0.00 P	repaid Ba	lance:		0.0	0				
howing	1 Consumptio	on Site	Site	Detail	Devices	Associated	Sites Ap	pliances	Call Entry	Delivery History	Event His	tory W	ork Orders	Attach	ment (0)	Audit Log	(17)
+ 9,	Filter Record	s (F3)	BB Li	ayout	Q , Filte	r Records (F3)											
ddress		Description	Statu	s 🔺		Work	Order No.		Close	Reason	Da	ate Sched	uled Date (Closed	Entered	By Da	te Created
11 Prince	ton Road	Tank B	Statu	s: Closed													
			Close	:d		4			WOR	K COMPLETED	04	/20/2016	04/27	/2016	irelyadır	in 04	/25/2016
			Deta	ails Att	achment ((0)											
			To D	o ltems			Work	Order Deta	ils								
			Q, C	pen ×	Remove		Work (Order No:	4		Categ	ory	Cat 1		 Status 	Closed	
			Item:	s		Completed	Date S	cheduled:		0/2016	Perfo	rmer:	Custome				×
			SET 1	ANK			Additio	onal Info:	sam	ple work order							
			LABO	DR													
							Entere	d By:			Date	Created:	04/25/20	16			
									irely	admin	Durc		04/23/20	10			
							Date C	losed:	irely 04/2	admin 7/2016	Close	Reason	WORK CO	OMPLETE)		~
							Date C Comm	losed: ients:	irely 04/2 Com	admin 7/2016 pleted work order	Close	Reason	WORK CC	DMPLETE)		<u> </u>
							Date C Comm	losed: ients:	04/2 Com	admin 7/2016 pleted work orde	Close	Reason	WORK CC	DMPLETE)		
		Þ					Date C	losed: ients:	irely 04/2 Com	admin 7/2016 pleted work order	Close	Reason	WORK CC	DMPLETE)		

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.
- 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.

Consumpti	on Sites - 0001005079						~ _ ^
New Save					er Create Event Summary List	Work Order - Print Efficiency	
Customer:	Customer B	Customer No:	0001005079	Current:	0.00 C	Add Work Order	
Address:	111 Princeton Road	Terms:	Net 30	Total Past Due:	0.00	Close Work Order	
	Fort wayne, in 40808	Regular Credit:	0.00	Budget Amt Due:	0.00	Print Work Order	·
Phone:	200000000	Credit Limit:	0.00	Prepaid Balance:	0.00		

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?



- 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:	4	Category	Cat 1	✓ Status	Open v
Date Scheduled:	04/20/2016	Performer:	Customer C		Work Status
Additional Info:	sample work order				Closed
					Waiting for Parts
					Create Pending
Entered By:	irelyadmin	Date Created:	04/25/2016		Open
Date Closed:		Close Reason			
Comments:					

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



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



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

Here is a	sample	closed v	vork c	order.												
Consumpti	on Sites - (0001005078														□ ×
New Save	e Search	Undo Atta	ch Device	e 🔻 Site	Action -	Print Call E	ntry + C	Call Entry Di	spatch Contr	act C	Customer C	reate Event Su	mmary List W	ork Order 👻 Pi	rint Efficiency	Close
Customer:	Customer	A		Cus	tomer No:	0001005	5078		Current:			0.00) Credit Note:			
Address:	1234 Mair	n St.		Ter	ms:	Due on	Receipt		Total Past D	ue:		0.00)			
	i uit wayi	ie, in 4000 i		Reg	gular Credit	:		0.00	Budget Amt	Due:		0.00)			
Phone:	1000000	00		Cre	dit Limit:			0.00	Prepaid Bala	ance:		0.0)			
Showing	Consump	tion	Site	Detail	Devices	Associat	ed Sites	Appliances	Call Entry	Deliv	ery History	Event History	Work Orders	Audit Log (46)		
	54 0	1. (50)	881	avout	Q. Filte	r Records ((F3)						-			
+ 4	Filter Reco	rds (F3)	Stati	15	- Incc	Wor	k Order N	Io. C	lose Reason		Date Schedu	Date Closed	Entered By		Date Cre	ated
1234 Main	St	Tank A														
123111011	20	Torney 1	Close	us: close	a	6		14		ED	02/10/2016	02/08/2016	irelyadmin		02/08/20	16
			CIUS	eu		0			ORK COMPLET	LD	02/10/2010	02/00/2010	ireiyaumin		02/00/20	10
			To D)o ltems			Wo	rk Order Det	ails							
				Dnen D	C Remove		We	rk Order Nei	6			Catagoni	Cas 1	Crature		
			ltem	c .		ompleted		rk Order No:	0			category	Cat I	V Status	Liosed	
			SET	TANK	,		Dat	e Scheduled:				Performer:	Customer C			~
			LAB	DR		~	Add	litional Info:	I NIS IS		pie work or					
							Ent	ered By:	irelyad	min		Date Created:	02/08/2016			
							Dat	e Closed:	02/08/2	2016		Close Reason	WORK COMPL	ETED		~
							Cor	nments:	work o	rder is	s completed					
4																
														Dama	4 -61	
\bigcirc	A 🖂 Z	aved												Page	1 OF 1	

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.

• 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.

Consumpti	on Sites - 0001005078									~ 🗆 >
New Save	e Search Undo Attach Device	- Site Action -					Create Event			Print Efficiency
Customer:	Customer A	Customer No:	0001005078		Current:		0.00	Credit Note:	Add Work Ord	er
Address:	1234 Main St.	Terms:	Due on Receip	t	Total Past	Due:	0.00		Close Work On	der
	Port Wayne, IN 40801	Regular Credit:		0.00	Budget Ar	mt Due:	0.00		Print Work Ord	ier
Phone:	100000000	Credit Limit:		0.00	Prepaid B	alance:	0.00			

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?



- 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:

- Open the Consumption Sites record.
 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:	б	Category	Cat 1	✓ Status	Open v
Date Scheduled:	02/10/2016	Performer:	Customer C		Work Status
Additional Info:	This is a sample work or	der			Open
					Create Pending
					Waiting for Parts
Enterned Pur	to all so allocation	Data Created	02/08/2016		Closed
Entered by:	ireiyadmin	Date created:	02/08/2010		
Date Closed:	0	Close Reason			~
Comments:					

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



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



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

Here is a sample closed work order.

Consum	ption	Sites - 0	000000	023															2	
New Si	ave	Search	Vindo	Attach D	evice	Site Actio	► n Prin	t Call Entry	Call Entry	y Dispat	ch Contra	t Crea	te Event S	Summary I	ist Work O	rder Print Ef	ficiency	Close		
Customer:	UN1	I OIL				Customer	No: 00	00000023			Current:				0.000000	Credit Note:				
Address:	CAS	SAGO CI	DMER TY, 550	13		Terms:	20	- COD			Total Past	Due:			0.000000					
						Regular C	redit:		0.	.000000	Budget Ar	nt Due:			0.000000					
Phone:	260	000000	0			Credit Lin	iit:		1	.000000	Prepaid B	alance:			0.000000					
Showing 1	Consi	umption S	ite	~	Site	Detail	Devices	Associated	d Sites	Appliance	es Call E	ntry C	Delivery Hist	tory Ev	ent History	Work Orders	1			
0 Q 💡	Fil	ter Reco	rds (F3)		- File	ayout 🗸 🏹	Filter I	Records (F3)												
Address			Descrip	otion	Statu	s 🔺		Work O	rder No.		Close	Reason		Dat	e Scheduled	Date Closed	Ente	ered By	Date Created	
CASH CUST	TOMER	2	Site 1		Statu	ıs: Closed														
					Close	d		11677			WORK	COMPLE	TED	06/2	23/2015	06/23/2015	AGA	ADMIN	06/23/2015	-11
				4	To Do	Items			Work 0	Order Deta	ails									
					Q v	iew 😑 R	move		Work	Order No	: 11	.677		Stat	us:	Closed			٩.	-
					Items	;		Completed	Date S	Scheduled				🖪 Perf	ormer:					
					SET T	ANK R		V V	Additi	onal Info										
									Entere	ed By:	A	GADMIN		Date	e Created:	06/23/2015				
									Date 0	Closed:	06	6/23/20	15	Close	e Reason:	WORK COMPI	LETED		9	
									Comm	ients:	th	is is a sa	ample close	ed work o	order.					
				F																
🛛 😳 🖓	Sav	red														14	A Pa	ige	1 of 1 🕨	

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.

• 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.

Consur	nption Sites - 0000000023									
New	Save Search Undo Attach Device	Site Action	Print Call Entry	Dispatch C	ontract Create Eve	nt Summary List	Work Order	Print Efficiency	Close	
Customer	UNI OIL	Customer No:	000000023	Curre	ent:	0.0	Se Add W	ork Order		
Address:	CASH CUSTOMER CHISAGO CITY: 55013	Terms:	20 - COD	Total	Past Due:	0.0	٠٠٠٠ 🕲			
	G115800 G117, 55015	Regular Credit:	0.00	00000 Budg	et Amt Due:	0.0	Close 1	Work Order	1	
Phone:	260000000	Credit Limit:	1.00	00000 Prepa	aid Balance:	0.0	<u> </u>			
Showing	3 Consumption Site 🔣 Site	Detail Devic	ces Associated Sites A	ppliances (Call Entry Deliver	y History Event I	Print V	/ork Order		
0 Q °	Filter Records (F3)	Layout 🗸 🍸 📊	ter Records (F3)				-			

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.

Work Order Details			
Work Order No:	11677	Status:	Open 🔍 🗸
Date Scheduled:	06/23/2015	Performer:	Work Status
Additional Info:	this is a sample work or	der	Open
			Create Pending
			Waiting for Parts
Entered Dur	ACADMIN	Data Graatadu	Closed
Entered by:	AGADMIN	Date created:	00/23/2013
Date Closed:		Close Reason:	Q.~
Comments:			

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

incerview and the second	
There's an existing To Do Item(s) which is not completed. Do you want to continue closin 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 fiel d is required.
- 5. Save the changes in the Consumption Sites record.

Here is a sample closed work order.

Consum	ption Sites -	0000000	010												× □ ×
New S	ave Search	S Undo	Attac	h Devic	e Site A	🔁 🗸	Print Call Entry	Call Entry	Dispatch	Contract	Create Ever	it Summary Lis	t Work Or	der Print Efficie	ncy Close
Customer:	UNIOIL PE	ROLEUM	1		Customer	No:	0000000010		Current:			0.00	Credit Not	te:	
Address:	MAIN STREET CAMBRIDGE, MN 55008		Terms: Regular C	20 - COD Credit:		Total Past Du 0.00 Budget Amt D		st Due: Amt Due:	Due: 0.00						
Phone:	10000000	00			Credit Lim	it:		1.00	Prepaid	Balance:		0.00			
Showing 1	Consumption	Site	«	Site	Detail	Devic	es Associated	Sites App	iances	Call Entry	Delivery His	story Event H	listory V	Work Orders	
🗋 🔍 Fi	Iter:		٩	Filte	r:			٩							
Address		Descri	ption	Statu	us 🔺		Work Order	No.	Close	Reason	D	ate Scheduled	Date Close	ed Entered By	Date Created
MAIN STREET Sample Site Status: Closed															
Closed 11676				11676	CUSTOMER CANCELED 03/12/2015 03/12/2015 AGADMIN 03/12/2015						03/12/2015				
				To D	o Items			Nork Order De	tails						
			4	D E	dit 😑 Re	move		Nork Order N	0.	11676		Status:	Closed		v
				Item	IS		Completed)ate Schedul	ed:			Performer:	Compan		
				PICK SET	UP TANK TANK			Additional Inf							
							8	Entered By:		AGADMIN		Date Created:	03/12/2	2015	
							E	Date Closed:		03/12/20	15 🖪	Close Reason:	CUSTON	IER CANCELED	🗸
							(Comments:		This is a s	ample close	d work order.			
4			•							L					

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.
- Via the Close Work Order toolbar button:

 - Open the Consumption Sites record.
 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.

Consump	👔 Consumption Sites - 000000010 🙁 🖻 🔀														
	2 🔍 🎸		•	. 📑	•				1	\bigotimes	-	₿.			
New Sa	we Search Unde	o Attac	h Device	e Site Actio	on Pr		Call Entry		Contract	Create Event	Summary List	Work Order	Print Efficiency	Close	
Customer:	UNIOIL PETROLEU	UM		Customer No	: 0000	0000010		Current:			0.00	😴 add M	(ork Order		
Address:	MAIN STREET	55008		Terms:	20 -	COD		Total Pa	ast Due:		0.00		IOIK OIDEI		
	CAMBRIDGE, MIN 33008			Regular Cred	it:	: 0.00 Budget Amt Due:			0.00	Close Work Order					
Phone:	100000000			Credit Limit:			1.00	Prepaid	Balance:		0.00	<u>S</u>	Work Order		
Showing 1	Consumption Site	~	Site	Detail [evices	Associated 9	Sites App	oliances	Call Entry	Delivery Histo	ory Event His	Print V	Work Order		
📄 🔍 Fil	ter:	٩	Locat	ion Informatio	n					Site Informat	tion	-			
f there are To Do Items that are not yet completed, then this message will be displayed. Select Yes to this confirmation message.															
📳 iRe	ly i21													×	

?	There's an existing To Do this Work Order?	Item(s) which is not	completed. [Do you want to continue closing
		Yes	No	

- Fill out the fields Date Closed, Close Reason, and Comments on the lower part of the Work Order Details panel.
 Save the changes in the Consumption Sites record.
- Via the Status field:

 - Open the Consumption Sites record.
 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:	11676	Status:	Open	··· •			
Date Scheduled:	03/12/2015	Performer:	Filter Records				
Additional Info:	This is a sample work	c order	Work Status				
			Open				
			Create Pending				
Entered By:	AGADMIN	Date Created:	Waiting for Parts				
Date Closed:		Close Reason:	Closed				
If there are To Do I	tems that are not	vet complete	d then this message will	he displayed Select Ves to this			

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 fiel d is required.
- 5. Save the changes in the Consumption Sites record.