

# How to Close a Work Order

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

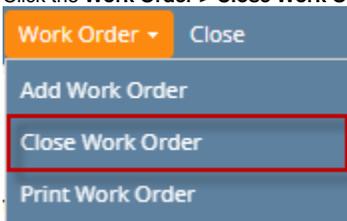
Generally, these are what happens during closing of work order.

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

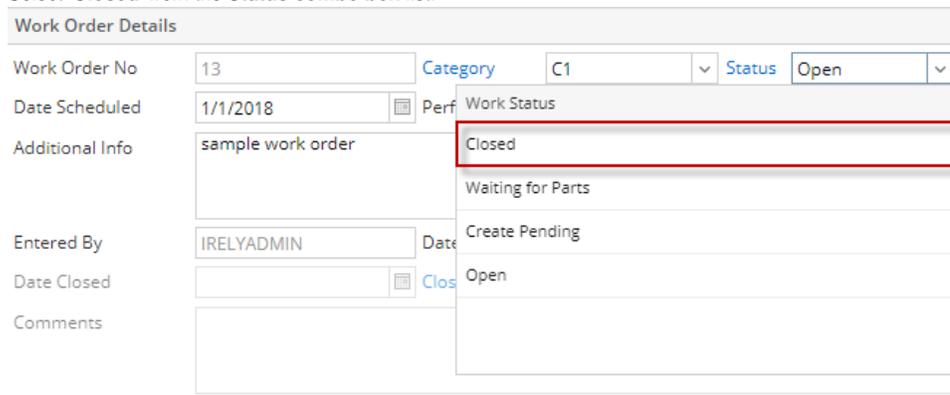
There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?



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.

A screenshot of the 'Work Order Details' form. The form has a light grey header. Below the header, there are several fields: 'Work Order No' (13), 'Category' (C1), 'Status' (Open), 'Date Scheduled' (1/1/2018), 'Additional Info' (sample work order), 'Entered By' (IRELYADMIN), 'Date Closed', and 'Comments'. A dropdown menu for 'Work Status' is open, showing options: 'Closed', 'Waiting for Parts', 'Create Pending', and 'Open'. The 'Closed' option is highlighted with a red rectangular border.

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. **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.

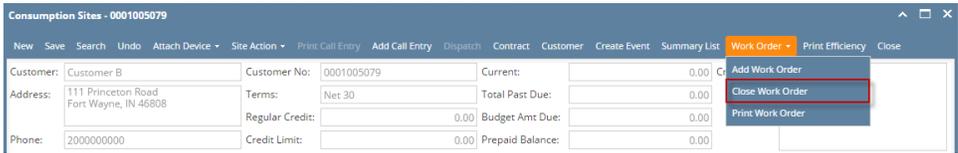
Generally, these are what happens during closing of work order.

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.



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**

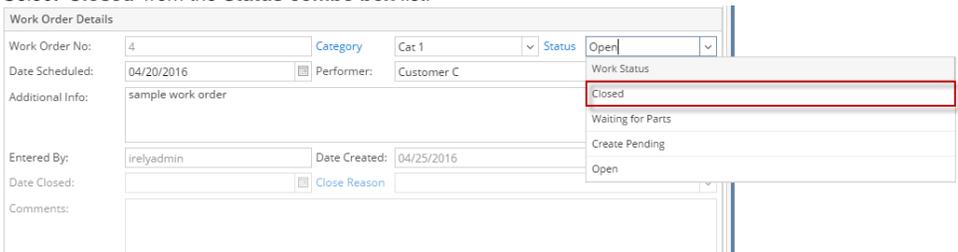
There's an existing To Do Item(s) which is not completed. Do you want to continue closing this Work Order?



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.



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. **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 active, displaying a table with one record: Status: Closed, Work Order No.: 6, Close Reason: WORK COMPLETED, Date Scheduled: 02/10/2016, Date Closed: 02/08/2016, Entered By: irelyadmin, Date Created: 02/08/2016. Below the table, the 'Work Order Details' section shows: Work Order No.: 6, Category: Cat 1, Status: Closed, Date Scheduled: 02/10/2016, Performer: Customer C, Additional Info: This is a sample work order, Entered By: irelyadmin, Date Created: 02/08/2016, Date Closed: 02/08/2016, Close Reason: WORK COMPLETED, and Comments: work order is completed.

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.

The screenshot shows the 'Consumption Sites - 0001005078' window with the 'Work Order >' dropdown menu open. The 'Close Work Order' option 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' form. The 'Status' dropdown menu is open, showing options: 'Open', 'Create Pending', 'Waiting for Parts', and 'Closed'. The 'Closed' option is highlighted with a red border. Other fields visible include 'Work Order No: 6', 'Category: Cat 1', 'Date Scheduled: 02/10/2016', 'Performer: Customer C', 'Entered By: irelyadmin', and 'Date Created: 02/08/2016'.

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



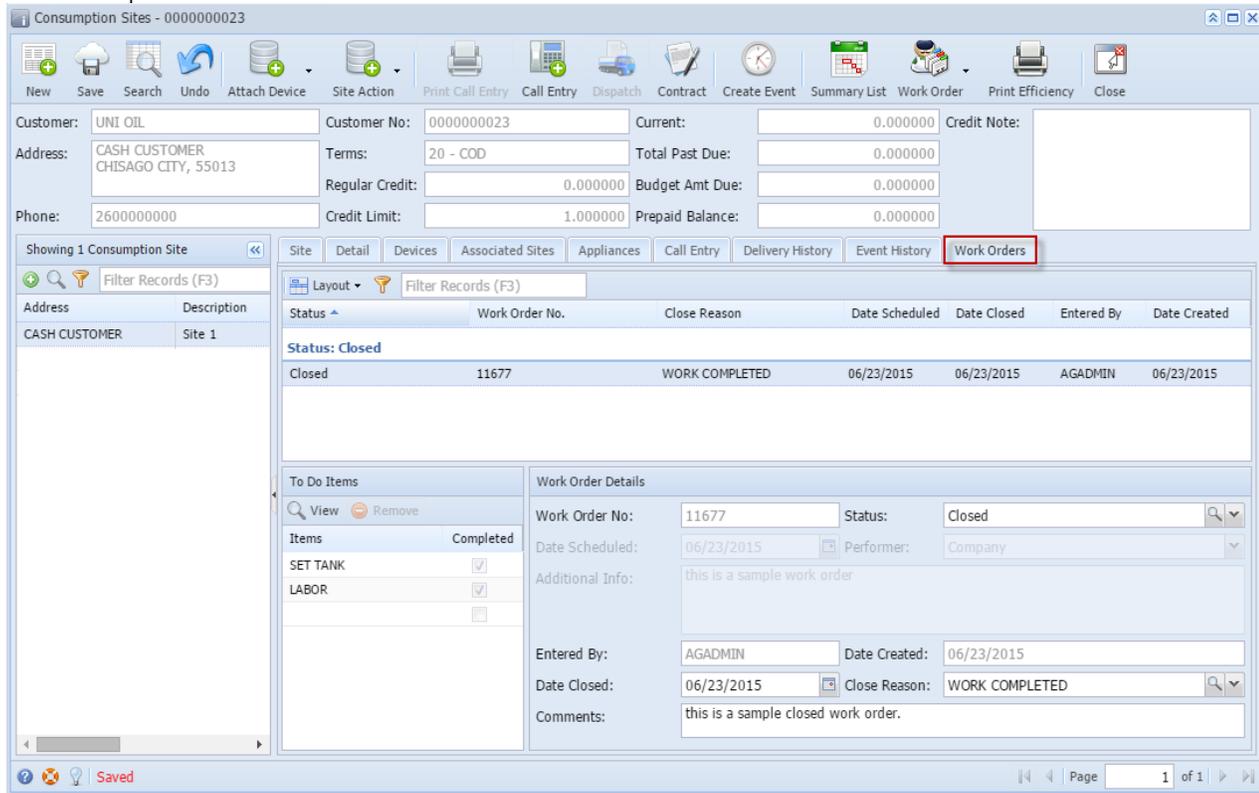
**iRely i21**

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.

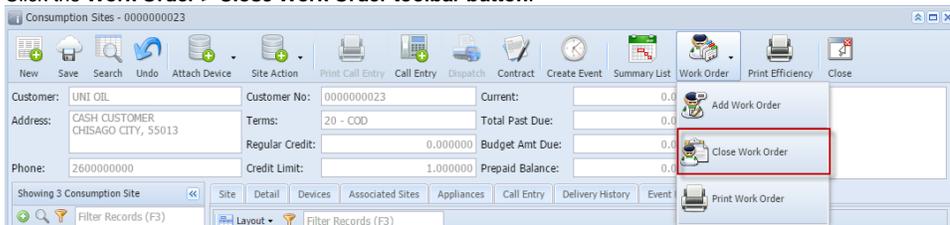


Generally, these are what happens during closing of work order.

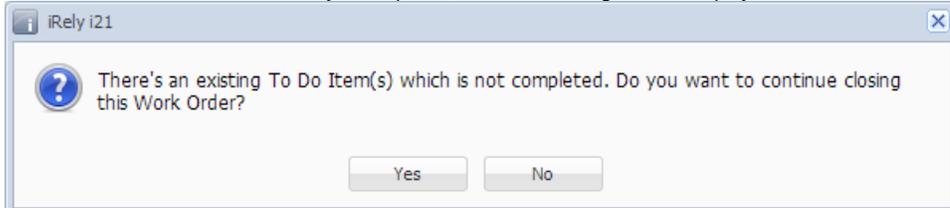
1. In grid area, the work order will be moved from Status: Open to **Status: Closed** group. The **Date Closed** field (grid area) will be auto-populated.
2. The **Status** field will automatically set to Close.
3. **Date Scheduled, Performer, and Additional Info** fields will be disabled.
4. The **Date 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.



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.
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 order

Entered By: AGADMIN Date Created: [blank]

Date Closed: [blank] Close Reason: [blank]

Comments: [blank]

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.

Consumption Sites - 000000010

Customer: UNIOIL PETROLEUM Customer No: 000000010 Current: 0.00 Credit Note: [blank]

Address: MAIN STREET CAMBRIDGE, MN 55008 Terms: 20 - COD Total Past Due: 0.00

Phone: 1000000000 Regular Credit: 0.00 Budget Amt Due: 0.00

Credit Limit: 1.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Status	Work Order No.	Close Reason	Date Scheduled	Date Closed	Entered By	Date Created
<b>Status: Closed</b>						
Closed	11676	CUSTOMER CANCELED	03/12/2015	03/12/2015	AGADMIN	03/12/2015

To Do Items

Items	Completed
PICK UP TANK	<input checked="" type="checkbox"/>
SET TANK	<input checked="" type="checkbox"/>

Work Order Details

Work Order No: 11676 Status: Closed

Date Scheduled: 03/12/2015 Performer: Company

Additional Info: This is a sample work order

Entered By: AGADMIN Date Created: 03/12/2015

Date Closed: 03/12/2015 Close Reason: CUSTOMER CANCELED

Comments: This is a sample closed work order.

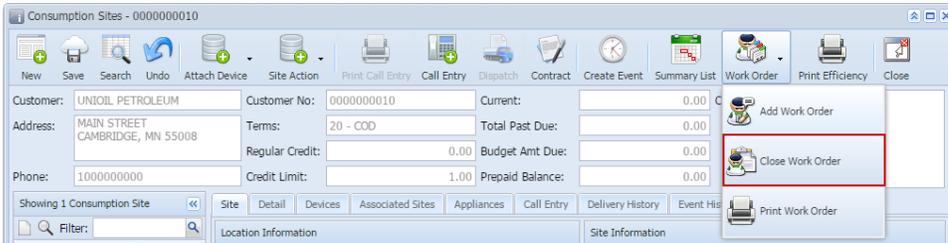
Generally, these are what happens during closing of work order.

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.

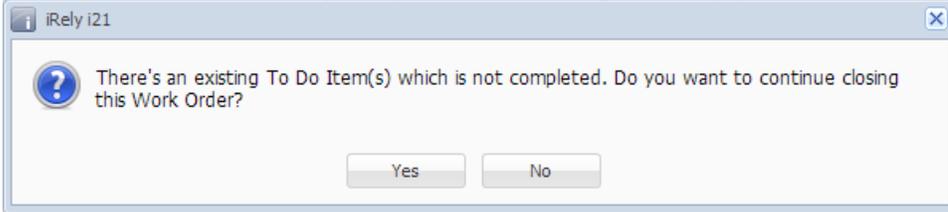
- **Via the Close Work Order toolbar button:**

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.



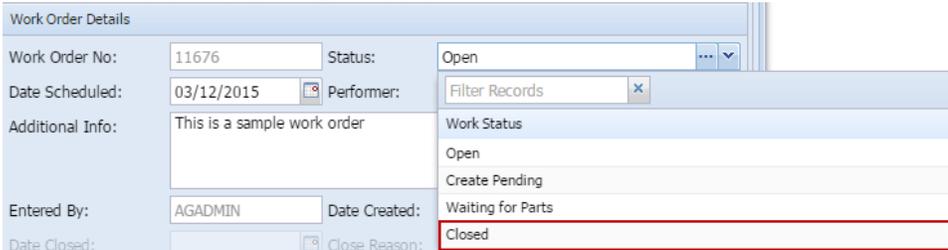
If there are To Do Items that are not yet completed, then this message will be displayed. Select **Yes** to this confirmation message.



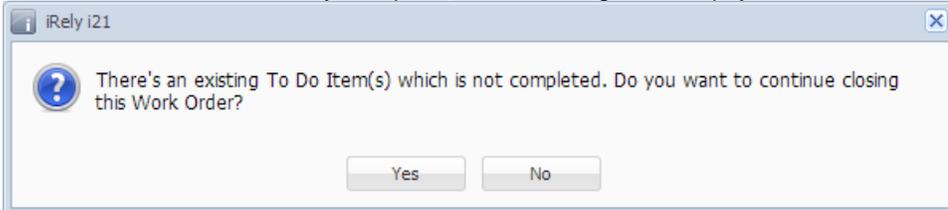
4. Fill out the fields – **Date Closed**, **Close Reason**, and **Comments** – on the lower part of the Work Order Details panel.
5. Save the changes in the Consumption Sites record.

• **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.
5. **Save** the changes in the Consumption Sites record.