

Closing Work Orders

NOTE: The fields displayed on the screen may vary from the illustrations below based on an individual user's security rights or based on the specific configuration of the database. For any questions related to these fields, contact your system administrator. For additional definitions of fields which are not shown below, see Online Help.

ADD LABOR COSTS
ADD MATERIAL COSTS
ADD OTHER COSTS

LABOR-Employee	Date	Time Started	Time Finished	Hours	Rate/Hr	Type	M/U
Smith, J.	7/20/2011	PM	PM			REG	☒

Charge To:
Plumbing
Description:
ADD

TOTALS SUMMARY

Total Labor:	\$0.00
Total Materials:	\$0.00
Total Other Costs:	\$0.00
Grand Total:	\$0.00

CLOSE WORK ORDER:

Closing Comments:

☒ Append to Statement of Work

Failure Code:

External WO#:

Cost Code:

Asset: [Select](#)

Date Closed: Time:

Click CLOSE to close this work order: CLOSE

NOTE: Using **Append to Statement of Work** will insert the **Closing Comments** into the **Statement of Work** field on the Request Details page. This may be helpful because the Statement of Work field is a column in the Request Summary report.

CLOSE WORK ORDER:

Closing Comments:

☒ Append to Statement of Work

Failure Code:

External WO#:

Cost Code:

Asset: [Select](#)

Date Closed: Time:

Click CLOSE to close this work order: CLOSE

You can close a work order from either the **Work Order – Financial** page, as shown in the example on this page, or from the **Request Details** page, as shown on the next page.

1. From the **Work Order – Financial** page, enter notes in the **Closing Comments** field. Usually this is a Repair Description.
2. It is recommended to leave the box checked to **Append to Statement of Work**.
3. Select an **Asset** if tracking work done on a piece of equipment that is in the system.
4. Select a **Failure Code** if using this field to track the cause of failures requiring corrective work.
5. Enter a **Date Closed** and **Time** if desired to reflect a date/time prior to the current date. If you leave this field blank, the **Date Closed** will default to the current date/time.
6. Click **CLOSE** to change work order status to Closed.

UPDATE REQUEST | [Reclassify WO](#)

General Comments: Water is leaking in the kitchen.

Assigned To: Smith, Joe **Status:** Closed

Closed By: Select... **Date Closed:** **Time:**

Billable?: Yes **1.00 Hrs \$50.00** **Billing Status:** Not Billed

Asset: Not Selected [Select](#) [Clear](#) **Failure Code:** Select...

Statement of Work: Water is leaking in the kitchen.
 Repaired leaky valve.

Re-schedule for: 9:00 AM

Re-Notify? ☐

Click UPDATE to save: **UPDATE**

NOTE: You may also copy the Comments (repair description) into the **Statement of Work** field, without deleting the description that is already in that field. This may be helpful because the Statement of Work field is a column in the Request Summary report.

UPDATE REQUEST | [Reclassify WO](#)

General Comments: Repaired leaky valve.

Assigned To: ABC Sample Company (TEST ONLY) **Status:** Closed

Closed By: **Date Closed:** 7/16/2013 **Time:** 8:00 AM

7. From the **Request Details** page, enter notes in the **General Comments** field. Usually this is a Repair Description.
8. Select an **Asset** if tracking work done on a piece of equipment that is in the system.
9. Select a **Failure Code** if using this field to track the cause of failures requiring corrective work.
10. **Closed By** is seldom used, and only if the Request Summary report should show the work order was closed by another user.
11. Enter a **Date Closed** and **Time** if desired to reflect a date/time prior to the current date. If you leave this field blank, the **Date Closed** will default to the current date/time.
12. Select the appropriate closing status and click **UPDATE**.