

QuikOne FSM

User Guide – Work Order Management

Contents

8. Work Order Management.....	2
8.1 Create a Work Order	2
8.2 Edit Work Order	5
8.3 Add Services	9
8.4 Add Products.....	12
8.5 Add Attachments	15
8.6 Schedule a Work	17
8.7 Dispatch Technician	21
8.8 Reschedule Work	24
8.9 Cancel Work Order.....	25
8.10 Close Work Order.....	26

8. Work Order Management

8.1 Create a Work Order

The screenshot shows the 'Add Work Order' form in a software application. The form is divided into several sections: Customer Details, Job Overview, Execution Type, Work Order Scheduling, Resource Requirement, Assign Technicians, and Request Type. The Customer Details section includes fields for Customer, Email, and Phone Number. The Job Overview section includes fields for Work Order Name, Priority, Due Date, Pre Checklist, Post Checklist, and Billing Address. The Execution Type section includes fields for Service Category, Service Type, and Allocate Service. The Work Order Scheduling section includes fields for Schedule Date, Start Time, End Time, and Estimated Duration. The Resource Requirement section includes fields for Location Type, Job Location, Assign Supervisor, and Assign Technician. The Assign Technicians section includes a map and a list of technicians. The Request Type section includes checkboxes for Free Service Request, Send Mail to Customer, and Send Mail to Technician.

The Create Work Order function is used to schedule and assign service requests to technicians. It captures customer details, service requirements, scheduling information, resource allocation, and communication preferences to ensure efficient execution of field service operations.

Navigation:

Work Order → Work Order → Create Work Order

Create a New Work Order

To create a new work order:

1. Navigate to **Work Order → Work Order → Create Work Order**.

2. Under **Customer Details**, select the customer. Customer contact information is populated automatically.
3. In the **Job Overview** section:
 - Enter the **Work Order Name**.
 - Select the **Priority**.
 - Specify the **Due Date**.
 - Select the **Pre Checklist** and **Post Checklist** (if applicable).
 - Select the **Billing Address**.
 - Enter a job description.
4. Under **Execution Type**, choose either:
 - **Service** – for service-based work orders.
 - **Product** – for product-related work orders.
5. Select the following:
 - Service Category
 - Service Type
 - Allocated Service
6. Enable **Need to Collect Requirement** if additional customer requirements must be captured during service.
7. In the **Work Order Scheduling** section:
 - Select **One Time** or **Recurring**.
 - Enter the Schedule Date.
 - Specify the Start Time and End Time.
 - Review the Estimated Duration.
8. In the **Resource Requirement** section:
 - Select the Job Location (Location or Premises).
 - Choose the Service Location.
 - Assign a Supervisor (optional).
 - Filter technicians by required skills (optional).
 - Assign the Technician.
9. Use the **Nearest Technicians** or **Nearest Hubs** option to identify resources based on proximity.
10. Configure additional request options:
 - Free Service Request
 - Send Mail to Customer
 - Send Mail to Technician
11. Click **Save** to create the work order.

Work Order Scheduling

The system supports flexible scheduling options:

- **One-Time** work orders for single service visits.

- **Recurring** work orders for preventive maintenance or periodic services.
- Configurable start time, end time, due date, and estimated duration.
- Automatic technician recommendations based on location and distance.

Resource Allocation

During work order creation, users can assign field resources by:

- Selecting the service location.
- Filtering technicians based on skills.
- Assigning a supervisor.
- Assigning one or more technicians.
- Identifying the nearest available technicians or service hubs using map-based location intelligence.

Communication Options

Users can optionally:

- Send an email notification to the customer.
- Send an email notification to the assigned technician.
- Mark the request as a free service request when applicable.

Work Order Information

Each work order stores the following information:

- Customer Details
- Work Order Name
- Priority
- Due Date
- Pre-Service Checklist
- Post-Service Checklist
- Billing Address
- Service Category
- Service Type
- Allocated Service
- Schedule Details

- Assigned Supervisor
- Assigned Technician(s)
- Job Location
- Estimated Duration
- Communication Preferences
- Request Type
- Work Order Status

Note: After the work order is created, it can be scheduled, tracked, updated by field technicians, and monitored throughout its lifecycle until completion.

8.2 Edit Work Order

Work Order

Work Order / Service-Order / WO-2026-2

Back

Customer

Request

Quotations

Work Order

Scheduler

Reports

Create Customer

Create Request

Create Quotations

Create Work Order

Create Scheduler

Reports

BASIC INFO

Company Name

David

Email

weniv72881@ayable.com

Direct Line

4524527877

Location

Nungambakkam Railway St...

Work Order ID

WO-2026-2

Work Order Details

Schedules

Requirements

Before After Images

Service Checklist

Notes

Work Progress

Invoice

Receipt

Job Sheet

Timesheet

Customer Feedback

Technician Feedback

Timeline

Edit Work Order

CREATED

Convert Status To

Job Overview

Work Order Name*

Maintenance Service

Priority*

High

Due Date*

31-08-2026

Pre Checklist

Technician Schedule Pre Checklist

Post Checklist

Technician Schedule Post Checklist

Billing Address*

Kodambakkam Railway Station, Taylor Estate...

Description

Maintenance Service

Execution Type

Service

Product

Service Category*

Maintenance Services

Service Type*

Plumbing Services, Electrical Repair

Allocate Service*

Fan Installation, Switch Board Repair

Need to Collect Requirement

Work Order Scheduling

One Time

Recurring

Frequency*

Daily

Repeat Every*

1

Recurrence Start Date*

07-08-2026

Start Time*

01:30 am

End Time*

04:30 am

Estimated Duration

3.00

Recurrence End

End Date

Occurrences

Number Of Occurrences*

10

Resource Requirement

Location Type

Location

Premises

Premises*

Work Location

Assign Supervisor

Select

Filter By Technician Skills

Select Technician Skills

Assign Technician *

Mahesh

Assign Technicians

Radius Up to:

10 km

15 km

20 km

25 km

Nearest Technicians

Nearest Hubs

No nearest technicians found

There are no technicians within 10 km radius of this job location.

Request Type

Free Service Request

Edit Work Order

The **Edit Work Order** function allows authorized users to modify an existing work order after it has been created. Users can update job details, scheduling information, assigned resources, service information, and communication preferences based on operational requirements.

Navigation:

Work Order → Work Order → Select a Work Order → Edit Work Order

Edit an Existing Work Order

To modify an existing work order:

1. Navigate to **Work Order → Work Order**.
2. Open the required work order.
3. Update the required information, such as:
 - Work Order Name
 - Priority
 - Due Date
 - Billing Address
 - Description
4. Modify the service details if required:
 - Service Category
 - Service Type
 - Allocated Service
5. Update the scheduling information:
 - One-Time or Recurring schedule
 - Frequency
 - Repeat Interval
 - Start Date
 - Start Time
 - End Time
 - Estimated Duration
 - Number of Occurrences (for recurring work orders)
6. Update resource allocation:
 - Job Location or Premises
 - Supervisor
 - Technician Skills
 - Assigned Technician(s)
7. Configure communication options if required.
8. Click **Save** to update the work order.

Modify Scheduling

Users can modify scheduling information based on customer requirements.

Supported updates include:

- Change due date.
- Change service date and time.
- Convert between **One-Time** and **Recurring** schedules (where applicable).

- Update recurrence frequency and duration.
- Modify estimated service duration.

Reassign Resources

Users can update resource assignments at any time by:

- Assigning a different technician.
- Assigning or changing the supervisor.
- Filtering technicians by skills.
- Selecting technicians using the **Nearest Technicians** option.
- Updating the work location or premises.

Update Work Order Status

The **Convert Status To** option allows authorized users to move the work order through its lifecycle.

Depending on the current status and user permissions, work orders can be progressed through statuses such as:

- Created
- Scheduled
- In Progress
- Completed
- Cancelled

Status changes are recorded in the work order timeline for audit purposes.

Editable Work Order Information

The following information can be updated:

- Work Order Name
- Priority
- Due Date
- Billing Address
- Description
- Pre-Service Checklist
- Post-Service Checklist

- Service Category
- Service Type
- Allocated Service
- Schedule Details
- Resource Assignment
- Supervisor
- Assigned Technician(s)
- Job Location
- Estimated Duration
- Communication Preferences
- Request Options

Note: All modifications made to a work order are recorded in the system and reflected in the **Timeline** section, providing a complete audit trail of changes throughout the work order lifecycle.

8.3 Add Services

Service

Product

Service Category*

Service Type*

Allocate Service*

☐ Need to Collect Requirement

Work Order Scheduling

☒ One Time
 ☐ Recurring

Schedule Date*

Start Time*

End Time*

Estimated Duration (Hours)

DD-MM-YYYY

HH:MM

HH:MM

Estimated Duration

Resource Requirement

Location Type

☒ Location
 ☐ Premises

Job Location*

Select

+

Assign Supervisor

Filter By Technician Skills

Assign Technician *

Select

Select Technician Skills

Select Technician

Assign Technicians

Radius Up to:

10 km

15 km

20 km

25 km

Nearest Technicians

Nearest Hubs

Select a location to view suggested technicians

Choose a job location to find nearest technicians or hubs based on distance.

The **Services** section allows users to define the service to be performed, configure the work schedule, and assign the appropriate technician for executing the work order.

This section ensures that the right service is scheduled and allocated to qualified field personnel based on availability, skills, and proximity.

Navigation

Work Order → Work Order → Create Work Order → Add Services

Configure Service Details

To add services to a work order:

1. Navigate to **Work Order → Work Order → Create Work Order**.
2. Under **Execution Type**, select **Service**.
3. Select the **Service Category**.
4. Select the **Service Type**.
5. Select the **Allocated Service**.
6. Enable **Need to Collect Requirement** if the technician must capture additional customer requirements during the service visit.

Configure Work Order Schedule

Configure when the service should be performed.

1. Select one of the scheduling options:
 - **One Time** – For a single service visit.
 - **Recurring** – For periodic or preventive maintenance services.
2. Enter the following scheduling information:
 - Schedule Date
 - Start Time
 - End Time
3. Review the **Estimated Duration**, which is calculated based on the selected schedule.

Assign Resources

Specify the personnel responsible for executing the work order.

1. Select the **Location Type**:
 - Location
 - Premises

2. Select the **Job Location**.
3. Assign a **Supervisor** (optional).
4. Filter technicians using **Technician Skills**.
5. Select the **Assigned Technician**.

Assign Technicians by Proximity

The system provides location-based technician recommendations.

Users can:

- Search for the **Nearest Technicians**.
- Search for the **Nearest Hubs**.
- Configure the search radius:
 - 10 km
 - 15 km
 - 20 km
 - 25 km

After selecting a job location, the system displays the nearest qualified technicians or service hubs based on the selected radius.

Service Scheduling Features

The Add Services section supports:

- One-time and recurring scheduling
- Service Category and Service Type selection
- Allocation of predefined service offerings
- Requirement collection during service
- Skill-based technician filtering
- Supervisor assignment
- Technician assignment
- Location-based technician recommendations
- Distance-based resource allocation

Note: The assigned technician becomes responsible for executing the work order. Once the work order is saved, it is available in the technician's schedule and can be tracked through the Work Order lifecycle until completion.

8.4 Add Products

Service

Product

Product Source

☒ Customer Product ☐ Master Product

Apply Service To

☒ All Product ☐ Specific Product

Service Category*

Service Type*

Requested Service*

Service Category

Service Type

Requested Service

Filter

Select Category

Select Brand

Search By Product Name...

Select Category

Select Brand

Search by product name...



No products found

☐ Need to Collect Requirement

Work Order Scheduling

☒ One Time ☐ Recurring

Schedule Date*

Start Time*

End Time*

Estimated Duration (Hours)

DD-MM-YYYY

HH:MM

HH:MM

Estimated Duration

Resource Requirement

Location Type

Job Location*

Location

Premises

Select

Assign Supervisor

Filter By Technician Skills

Assign Technician *

Select

Select Technician Skills

Select Technician

Assign Technicians

Radius Up to: 10 km 15 km 20 km 25 km

Nearest Technicians

Nearest Hubs



Select a location to view suggested technicians

Choose a job location to find nearest technicians or hubs based on distance.

The **Products** section allows users to create product-based work orders by selecting customer-owned products or products from the master catalog. Users can specify the required service, schedule the work, and assign technicians to perform the service.

Navigation

Work Order → Work Order → Create Work Order → Product

Select Product Source

To create a product-based work order:

1. Navigate to **Work Order → Work Order → Create Work Order**.
2. Under **Execution Type**, select **Product**.
3. Choose the **Product Source**:
 - **Customer Product** – Select from products already registered for the customer.
 - **Master Product** – Select from the organization's master product catalog.

Configure Product Service

Specify the service to be performed on the selected product.

1. Select whether the service applies to:
 - **All Products**
 - **Specific Product**
2. Select the following:
 - Service Category
 - Service Type
 - Requested Service
3. Enable **Need to Collect Requirement** if additional customer requirements must be captured during service execution.

Search and Select Products

Users can locate products using the available filters.

Available filters include:

- Product Category
- Product Brand
- Product Name

After applying the filters, select the required product(s) for the work order.

Configure Work Order Schedule

Schedule when the product service should be performed.

1. Select one of the scheduling options:
 - **One Time** – Schedule a single service visit.
 - **Recurring** – Schedule periodic service visits.
2. Enter the following details:
 - Schedule Date
 - Start Time
 - End Time
3. Review the calculated **Estimated Duration**.

Assign Resources

Allocate field resources for the work order.

1. Select the **Location Type**:
 - Location
 - Premises
2. Select the **Job Location**.
3. Assign a **Supervisor** (optional).
4. Filter technicians by required skills.
5. Assign the technician responsible for the service.

Assign Technicians Using Location Intelligence

The system recommends nearby resources based on the selected job location.

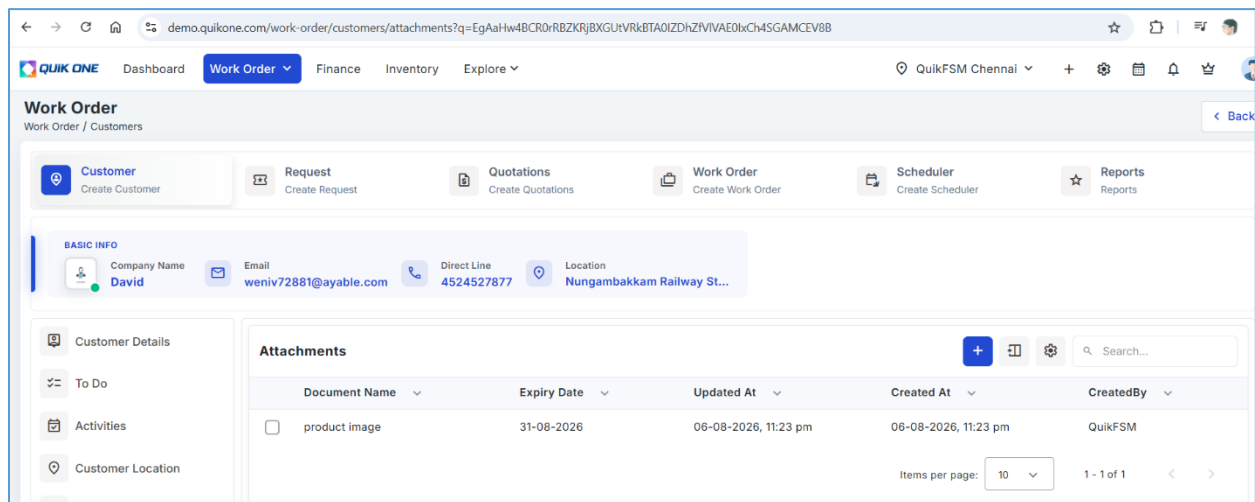
Users can:

- Search for **Nearest Technicians**.

- Search for **Nearest Hubs**.
- Configure the search radius:
 - 10 km
 - 15 km
 - 20 km
 - 25 km

The system displays the nearest available technicians or service hubs that meet the selected criteria.

8.5 Add Attachments



The **Attachments** section enables users to upload and manage supporting documents related to a customer or work order. These attachments provide technicians and office staff with easy access to reference materials such as product images, invoices, warranty documents, manuals, agreements, and other relevant files.

Navigation

Work Order → Customer → Attachments

Add a New Attachment

To upload an attachment:

1. Navigate to **Work Order → Customer → Attachments**.
2. Click the **+ (Add)** button.
3. Enter the required attachment information:
 - Document Name
 - Expiry Date (if applicable)
4. Browse and select the file to upload.
5. Click **Save**.

The attachment is uploaded and becomes available in the customer's attachment list.

View Attachments

The Attachments screen displays all uploaded documents associated with the selected customer.

The list includes the following information:

- Document Name
- Expiry Date
- Updated Date
- Created Date
- Created By

Search Attachments

Users can quickly locate uploaded documents using the **Search** box.

Search can be performed using:

- Document Name
- Uploaded By

Manage Attachments

Authorized users can perform the following actions:

Work Order

Work Order ID:

Customer
John Doe

Reported
Issue Report

Quotations
Order Quotation

Work Order
Create Work Order

Schedule
View Schedule

Reports
Report

[Add New](#)
[Inventory Item](#)
[Device](#)

[Email](#)
[SMS](#)

[Print](#)
[Share](#)

[Email Log](#)
[Location](#)
[Hangerbakken Railway St.](#)

[Work Order Log](#)
[WO-2020-0](#)

Work Order Details

- Schedules**
- Requirements
- Before After Images
- Service Checklist
- Status
- Work Progress
- Invoice
- Receipt
- Job Sheet
- Timeline
- Customer Feedback
- Technician Feedback
- Timeline

Add Scheduler

Work Order Window

Work Order*

WO-2020-0 (Select)

Scheduler Name*

Maintenance Service

Due Time

(04:30 am) X

☐ Verify technician before due time and if overdue

Pre Checklist

Technician Schedule Pre Checklist X

Post Checklist

Technician Schedule Post Checklist X

☐ Need to collect requirement

Schedule Window

Schedule Date	Start Time	End Time	Estimated Duration (hrs)
10-08-2021 X	07:30 am X	04:30 pm X	0.00

Scheduled Instructions

Instructions

Execution Type

[Schedule](#)
[Product](#)

Service Category*

Maintenance Services

Service Type*

Pumbing Services, Electrical Repair

Alocate Service*

Fix Installation, Switch Board Repair

Resource Requirement

Location Type

[Location](#)
[Priorities](#)

Job Location*

Select X

Assign Supervisor

Select X

Filter by Technician Skills

Select: Technician Skills X

Assign Technician*

Wahyud X

Assign Technicians

Station Name	Green	White	Red	Yellow	Assigned Status
+					

Select a location to view suggested technicians

Assigned Location will show suggested technicians

Payment Term

☐ Free Service Request

Technician Instruction

Technician Instruction

☐ Send Mail to Customer

☐ Send Mail to Technician

Items & Services

Service

No Service items available

Material

Material details not found

Financial Summary

Subtotal	Discount	Gross Total
Rp.00	0	Rp.00

The **Scheduler** module is used to plan and assign work orders to technicians. It allows users to define the work schedule, execution type, assign technicians, configure service details, and review the financial summary before scheduling the job.

Navigation

Work Order → Scheduler → Add Scheduler

Create a Work Schedule

To schedule a work order:

1. Navigate to **Work Order → Scheduler**.
2. Select the **Work Order** to be scheduled.
3. Enter the **Scheduler Name**.
4. Specify the **Due Time**.
5. Select the **Pre Checklist** and **Post Checklist**.
6. Enable **Need to Collect Requirement** if additional requirements need to be captured during service.

Configure Schedule Window

Specify the planned service timing.

Enter:

- Schedule Date
- Start Time
- End Time
- Estimated Duration (Hours)
- Scheduled Instructions for the technician

Select Execution Type

The scheduler supports two execution methods:

Service

Used when the work order is service-based.

Select:

- Service Category
- Service Type
- Allocated Service

Product

Used when the work order involves customer or master products.

Users can:

- Select Customer Product or Master Product
- Apply service to all products or selected products
- Search and choose the required product(s)

Configure Resource Requirement

Specify the resources required for executing the work order.

Location Type

Choose either:

- Customer Location
- Customer Premises

Technician Assignment

Configure:

- Job Location
- Assign Supervisor
- Filter technicians by skills
- Assign Technician

The system also provides:

- Nearest Technician recommendation
- Nearest Hub recommendation
- Technician search within configurable distance:
 - 10 km

- 15 km
- 20 km
- 25 km

Click **Assign Technicians** to allocate the selected technician.

Configure Request Options

Additional scheduling options include:

- Free Service Request
- Technician Instructions
- Send Email to Customer
- Send Email to Technician

These options help automate communication and provide technicians with service-specific instructions.

Review Items & Services

The scheduler displays all services and materials associated with the work order.

Service

Displays:

- Selected services
- Service charges
- Quantity
- Pricing

Material

Displays:

- Materials required
- Allocated inventory
- Quantity
- Material cost

Review Financial Summary

The Financial Summary automatically calculates:

- Subtotal
- Discount
- Discount Type (Percentage or Amount)
- Grand Total

The values are updated automatically whenever services or materials are modified.

Save the Schedule

After verifying all scheduling information:

1. Review the schedule details.
2. Verify technician allocation.
3. Confirm service and material information.
4. Review the financial summary.
5. Click **Save**.

The work order schedule is created and assigned to the selected technician(s).

8.7 Dispatch Technician

The screenshot displays the 'Work Order' section of the QuikOne application. The top navigation bar includes 'Dashboard', 'Work Order' (selected), 'Finance', 'Inventory', and 'Explore'. The main content area is titled 'Resource Requirement' and contains the following fields and controls:

- Location Type:** Radio buttons for 'Location' (selected) and 'Premises'.
- Job Location:** A dropdown menu with 'Select' and a plus icon.
- Assign Supervisor:** A dropdown menu with 'Select'.
- Filter By Technician Skills:** A dropdown menu with 'Select Technician Skills'.
- Assign Technician:** A dropdown menu with 'Select Technician'.
- Assign Technicians:** A button with a plus icon.
- Radius Up to:** A set of radio buttons for '10 km' (selected), '15 km', '20 km', and '25 km'.
- Nearest Technicians:** A button with a plus icon.
- Nearest Hubs:** A button with a plus icon.

At the bottom, there is a map area with a location pin icon and the text: 'Select a location to view suggested technicians. Choose a job location to find nearest technicians or hubs based on distance.'

The **Dispatch Technician** section enables planners or dispatchers to assign the most suitable technician to a work order based on location, skills, availability, and proximity. The system also recommends nearby technicians and service hubs to optimize response time.

Navigation

Work Order → Create/Edit Work Order → Resource Requirement

Configure Resource Requirement

Before dispatching a technician, complete the resource requirement details.

Location Type

Select the location where the work will be performed.

Options:

- **Location** – Customer service location.
- **Premises** – Customer premises or facility.

Job Location

Select the customer location or premises where the service is required.

Users can also create a new job location using the **(+)** button if the required location is not available.

Assign Supervisor

Select the supervisor responsible for monitoring the work order.

This field is optional and can be used for escalation and approval workflows.

Filter by Technician Skills

Filter technicians based on their competencies.

Examples include:

- Electrical
- Plumbing
- HVAC
- Pest Control
- Installation
- Maintenance

The technician list is filtered to display only technicians matching the selected skills.

Assign Technician

Select the technician who will execute the work order.

Only eligible technicians are displayed based on availability and applied filters.

Find the Nearest Technician

The system can recommend technicians based on their proximity to the job location.

Users can specify the search radius:

- 10 km
- 15 km
- 20 km
- 25 km

Click **Nearest Technicians** to display technicians within the selected radius.

The recommendation is generated using the technician's latest recorded location.

Find the Nearest Service Hub

Click **Nearest Hubs** to identify the closest warehouse or service hub to the job location.

This helps:

- Reduce travel time.
- Improve spare part availability.
- Optimize technician dispatch.

Assign Technician

Once the required technician is selected:

1. Verify the job location.
2. Apply skill filters if required.
3. Select the technician.
4. Click **Assign Technicians**.

The technician is linked to the work order and becomes responsible for executing the scheduled service.

8.8 Reschedule Work

The screenshot displays the 'Edit Scheduler (SC-2026-11)' interface. At the top right, a yellow 'SCHEDULED' button is next to a 'Convert Status To' dropdown menu. The dropdown menu is open, showing three options: 'Completed' (with a green checkmark icon), 'Cancelled' (with a red X icon), and 'Rescheduled' (with a yellow calendar icon). Below the menu, the form fields include: 'Work Order*' (WO-2026-2 (David)), 'Scheduler Name*' (Maintenance Service), 'Due Time' (04:30 am), and a 'Need to collect requirement' checkbox. There are also sections for 'Pre Checklist' and 'Post Checklist', each with a dropdown menu.

The **Reschedule Work** feature allows dispatchers or service coordinators to modify the scheduled service date and/or time when a technician or customer is unavailable, operational priorities change, or unforeseen circumstances prevent the original schedule from being completed.

A scheduler can be rescheduled directly from the **Edit Scheduler** page by changing its status.

Navigation

Work Order → Scheduler → Edit Scheduler → Convert Status To → Rescheduled

Procedure

1. Open the required **Scheduler** record.
2. Click **Convert Status To**.
3. Select **Rescheduled** from the available status options.
4. Update the schedule details, such as:
 - Schedule Date
 - Start Time
 - End Time
 - Due Time (if required)
 - Assigned Technician (optional)
 - Job Location (optional)
5. Enter the reason for rescheduling, if applicable.
6. Save the scheduler.

The scheduler status is updated to **Rescheduled**, and the revised schedule becomes the active service schedule.

Available Status Options

The scheduler can be converted to one of the following statuses:

- **Completed** – Marks the scheduled work as successfully completed.
- **Cancelled** – Cancels the scheduled service.
- **Rescheduled** – Moves the work to a new date and/or time.

8.9 Cancel Work Order

The **Cancel Work Order** feature allows authorized users to terminate a work order that is no longer required. A work order may be cancelled due to customer requests, duplicate requests, scheduling conflicts, incorrect work order creation, or operational constraints.

Cancelling a work order prevents further scheduling and service execution while preserving the work order history for audit purposes.

Navigation

Work Order → Open Work Order → Convert Status To → Cancelled

Cancel a Work Order

To cancel an existing work order:

1. Open the required **Work Order**.
2. Click **Convert Status To**.
3. Select **Cancelled**.
4. Enter the cancellation reason (if enabled by system configuration).
5. Save the work order.

The work order status is immediately updated to **Cancelled**.

8.10 Close Work Order

The **Close Work Order** feature is used to officially complete and close a work order after all scheduled activities, services, inspections, documentation, billing, and customer confirmations have been completed. Once closed, the work order becomes read-only and is retained for historical reference, reporting, and auditing.

Navigation

Work Order → Open Work Order → Convert Status To → Closed

Close a Work Order

To close a completed work order:

1. Open the completed **Work Order**.
2. Verify that all scheduled activities have been completed.
3. Ensure the technician has submitted the required work details.

4. Complete any remaining documentation, such as:
 - Service Checklist
 - Before & After Images
 - Notes
 - Job Sheet
 - Timesheet
 - Customer Feedback
 - Technician Feedback
5. Generate and verify the invoice and receipt, if applicable.
6. Click **Convert Status To**.
7. Select **Closed**.
8. Confirm the action.
9. The work order status is updated to **Closed**.