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Completing and Closing a Work Order

Work Order offers two different status choices to use when completing work, **Complete** and **Closed Work Orders**. Some organizations prefer to use just one and others will use both. When using both, the Complete status will usually indicate that the work has been done, but there is information that still needs to be added to the work order, such as transactions. The Closed Work Order status is used when all of the information on the work order has been documented. When a work order has been marked in the Closed Work Order status transactions and other notes can no longer be added. **Note: If changes need to be made to a Closed Work Order, you can change the status to Complete, make the necessary changes, and move the status back to Closed.*

How to Change the Status of a Work Order

If you need to change the status of a work order, including marking it Complete or Closed, you can do so from the Work Order form.

- Search for and open the work order.
- Select the new status from the **Status** drop down list.
- Click **Save**.

The screenshot shows the 'Add/Update Work Order' form. The 'Status' dropdown menu is open, displaying a list of status options: New Request, Work In Progress, Complete, Closed Work Orders, Declined, Parts on Order, Duplicate Request, Void, On Hold, Waiting More Information, Open Extended, Pending, Waiting Funding, Deferred, Forwarded, and Suspended. A red arrow points to the 'Complete' option. The form also shows a 'Save' button and a 'Reset' button. The work order number is 205329.

Other Ways to Mark a Work Order Complete or Closed

There are several other ways to mark a work order Complete or Closed:

- Certain roles can mark their assigned work orders **Complete** from the Assigned Work section of their home page.
- Check the **Mark Complete** box and click **Save**.

The screenshot shows the 'ASSIGNED WORK' section. It includes a note: 'Action Taken is saved when Save button is clicked.' There are sorting options for 'Request Age' (Ascending/Descending) and a filter dropdown set to '-- Select Status --'. Below this, there is a list of work orders. The first one is 'Ramsett Park' with a description '106 water fountain by the restroom is broken'. It has a 'Medium' priority and an 'Assign' button. The 'Action Taken' dropdown is set to 'Fixed'. At the bottom, there is a 'Mark Complete' checkbox which is checked, and a 'Save' button. A red arrow points to the 'Save' button.

- If you are adding Purchase Transactions to the work order, you can mark the work order **Complete** from the transaction screen.
- Put a check in the **Complete Work Order** box and click **Submit**.

Trns Date 11/6/2015

Type Materials

Select Supplier or type new one below:

Supplier Home Depot

Invoice/PO #

Budget Code 100-10-101 Maintenance Departm

Purchased by -- Select Purchaser --

Description widgets

Quantity 5

Cost Each 20 % **Markup** % **Discount**

(Note: If no discount or markup, please leave blank. When saved.)

Sales Tax 0

Shipping/Freight

Other Charges

Amount 100.0000

Complete Work Order

- If you are adding Labor Transactions to the work order, you can mark the work order **Closed** from the transaction screen.
- Put a check in the **Work Close?** box and click **Save**.

Save Reset << Prev 10 Next 10 >>

Work Order ID/Location	Work Close?	Tue Nov 3	Wed Nov 4	Thu Nov 5	Fri Nov 6	Sat Nov 7	Sun Nov 8	Mon Nov 9	Total Hours
106 Ramsett Park	<input checked="" type="checkbox"/>	0	0	1.5	0	0	0	0	1.5
		OT	OT	OT	OT	OT	OT	OT	
Fixed <input type="text" value="X"/>		Actual Comp. Date 11/6/2015 <input type="button" value="Enter Materials"/>							
<input type="button" value="Enter Note"/>									
Total Hours		0	0	1.5	0	0	0	0	1.5
Grand Total Hours		0	0	1.5	0	0	0	0	1.5

Save Reset

- You can also **Batch Close** multiple work orders at one time. [Learn more about the Batch Close feature here.](#)

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