


Work Order Messages

Wed, Jan 17, 2024  Work Orders

Work Order Messages are a way for Clients and Resources to update Work Orders and be informed of the changes made by each party. These changes could range from adding notes and documents to requesting an ETA/providing an ETA and a message is received when the other User performs the action. For example: if a Client User adds notes to the Work Order, the Resource User will receive a message with the Work Order Number, who it was from and the notes that were added.

Messages can be seen by clicking the "Work Order Messages" button.

1. Clicking the "Work Order Messages" displays the Messages tab. This tab shows all messages the User has received in the last 30 days. Each message contains the following details:

- Client
- Subject (the first 200 characters of the note from the message, if it exists)
- Status (Not Set, Action, Info - see further details below)
- Building Name
- Type of Work Order (Reactive/Quote/PPM/etc)
- Work Order Number
- Event Date (the date the Event occurred)
- Event Created By (who created the Event)
- Event Description (the action of the Event that occurred, for example, Notes Added, Additional Engineers Requested, etc).

Once any of these messages have been read the event description on the Work Order and in the table below will be updated stating when it was read and by whom. The actions that cause messages to be sent are configurable, but standard actions are:

- ETA Provided - This is any action that includes the provision of an ETA
- ETA Requested
- Add Notes
- Add Documents
- Request Additional Engineers
- Refuse Additional Engineers

Messages that are in **Bold** are unread and messages that have been read are not bold.

Client	Subject	Status	Building Name	Type of Work Order	Work Order Nº	Event Date	Event Created By	Event Description
Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
Demo Client	No issues with external signage	Not Set	Luton	PPM	1123825	09/11/2017 14:25:07	Service Callout (Widd...	Notes Added
Demo Client	7010929 - Passed to our pricing team. Awaiting quote for the filming required.	Not Set	Watford	Reactive	1130247	09/11/2017 14:26:14	Service Callout (Glass...	Notes Added
Demo Client	7011080 - Works completed, we are awaiting the engineers worksheet.	Not Set	Perth	Reactive	1130426	09/11/2017 14:32:10	Service Callout (Glass...	Notes Added
Demo Client	requested photo will attend tonight if photo received	Not Set	Sheffield - The Moor	Reactive	1133363	09/11/2017 14:38:29	Service Callout (Widd...	Notes Added

Note: By default, only unread messages are shown. To show read messages, right-click and select "Include Read Messages". The actions, in the right-click menu, "Mark as read" and

"Mark as unread" can also be used to determine whether a message is marked as read or unread.

Any messages for Work Orders that are completed or cancelled will be removed from the Messages table.

2. Double-click, select a message and click "Next" or right-click the message and click "Open Message" to open the message. This displays the main details of the message such as the ETA that was provided or the notes that were added. Once finished viewing the message, click the "Close" button to close it.

The screenshot shows a window titled "Message Information". It contains a form with the following fields:

Client	Ostara	Event	Add Notes
Building Name	BEDFORD PFS	Event Creator	Anna Phils
Work Order	7464943	Notes	Notes added as part of test
Event Date	25/06/2014 10:07		
Event Created By	Anna Phils		
Event Description	Notes Added		

A "Close" button is located at the bottom right of the window.

Note: If the message is for Notes Added then, where the notes can be found, a hyperlink will be shown. Clicking this link will display the notes in full in a separate window. Once they have been read, this window can be closed using the "Close" button.

The screenshot shows a window titled "Notes". It contains a large text area with the text "Notes added as part of test". A "Close" button is located at the bottom right of the window.

3. If it is required, the User can also view the Work Order the by right-clicking the message and clicking the "View Work Order" action. The Work Order will then be opened in a separate tab.

4. The Messages List can also be used as a To Do/Follow Up list using the Status column. The Status of a message will initially read "Not Set", however by right clicking a message you can change the status to "Mark As Info" and "Mark As Action" - this allows someone using the Message List to filter on the Status column and only look at those that require "Action".

Messages against a Work Order will remain Unread in the Messages List for a period of seven days following Completion/Cancellation of the Work Order. After seven days the system will automatically mark the Message as Read.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=250>