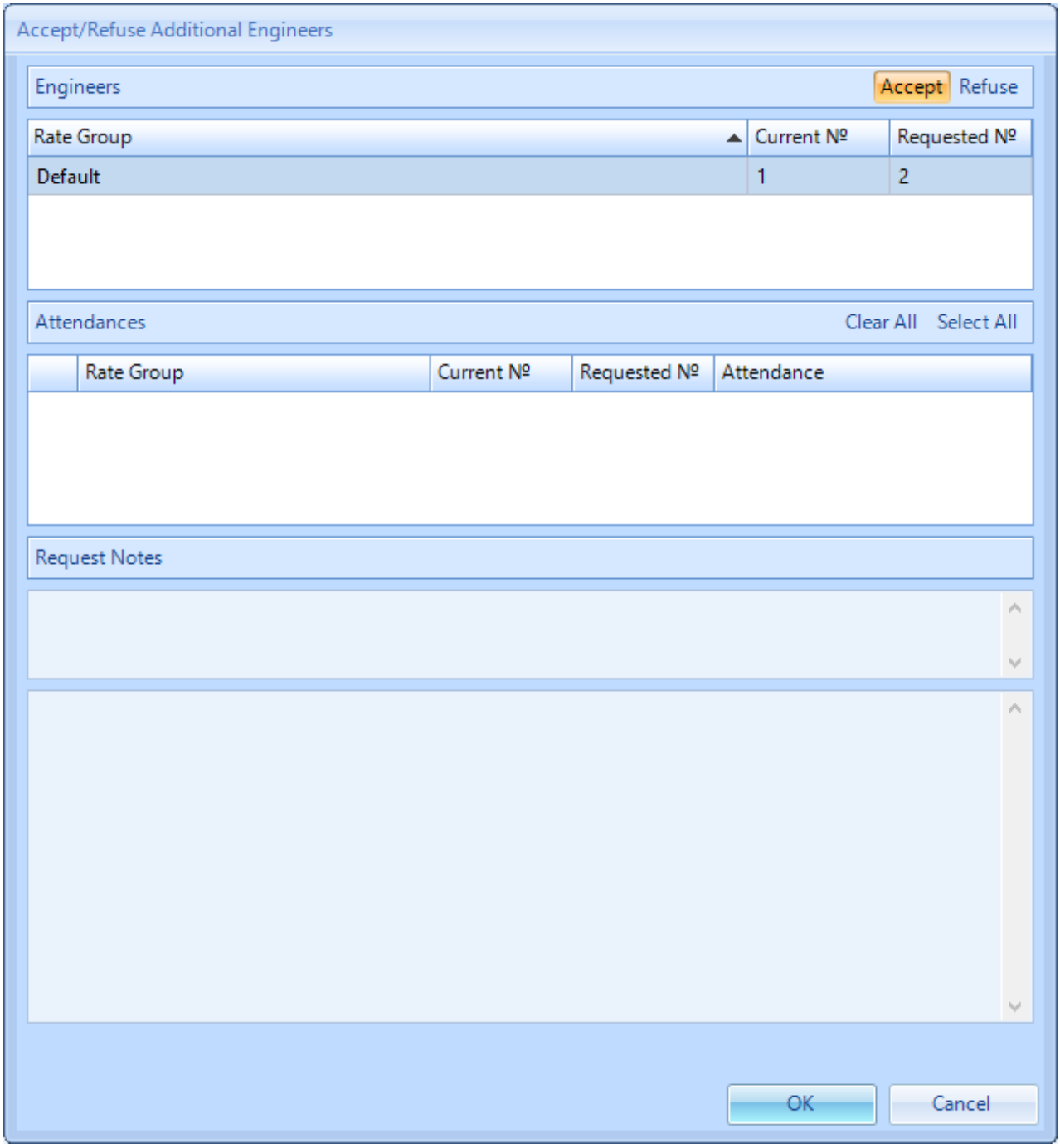
Accept/Refuse Additional Engineers

Wed, Jan 17, 2024 Agent Actions - Reactive, Quote, PPM, Audit

After an engineer sends through a request for additional engineers, the Client then has the option to either accept the request or refuse it. This is done by using the "Accept/Refuse Additional Engineers" option from the Agent Actions menu.

1. From the Helpdesk Work Page screen, click the "Agent Actions" button and select "Accept/Refuse Additional Engineers" from the menu. This screen will then open:



2. The additional engineers request can be seen in this screen. It shows how many engineers are currently attending the job and how many engineers have been requested for the job for each Rate Group, along with any notes relating to the request. Selecting a request will display the details of that request, such as any notes added in the "Request Notes" section, along

with the "Accept" and "Refuse" buttons at the top. Clicking "Accept" will enable the "Attendances" section and allow the User to associate this request to any visits that have already taken place, if the request was supposed to have been made earlier, or to not associate to an attendance and only apply the request as of now. Clicking "Refuse" will grey out this area. Notes regarding the decision can be made in field at the bottom.

If the request(s) is acceptable, click "Accept" against the desired requests and click "OK" to apply the changes. This will change the number of engineers. If the request(s) is unacceptable, select "Refuse", enter any notes as to why the request is being refused and click "OK". The current number of engineers will stay as it is.

Note: If the user has accepted by mistake then the "Request Additional Engineers" action will need to be completed and number of engineers adjusted accordingly. Followed by the "Agent Action - Accept/Refuse Additional Engineers"

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