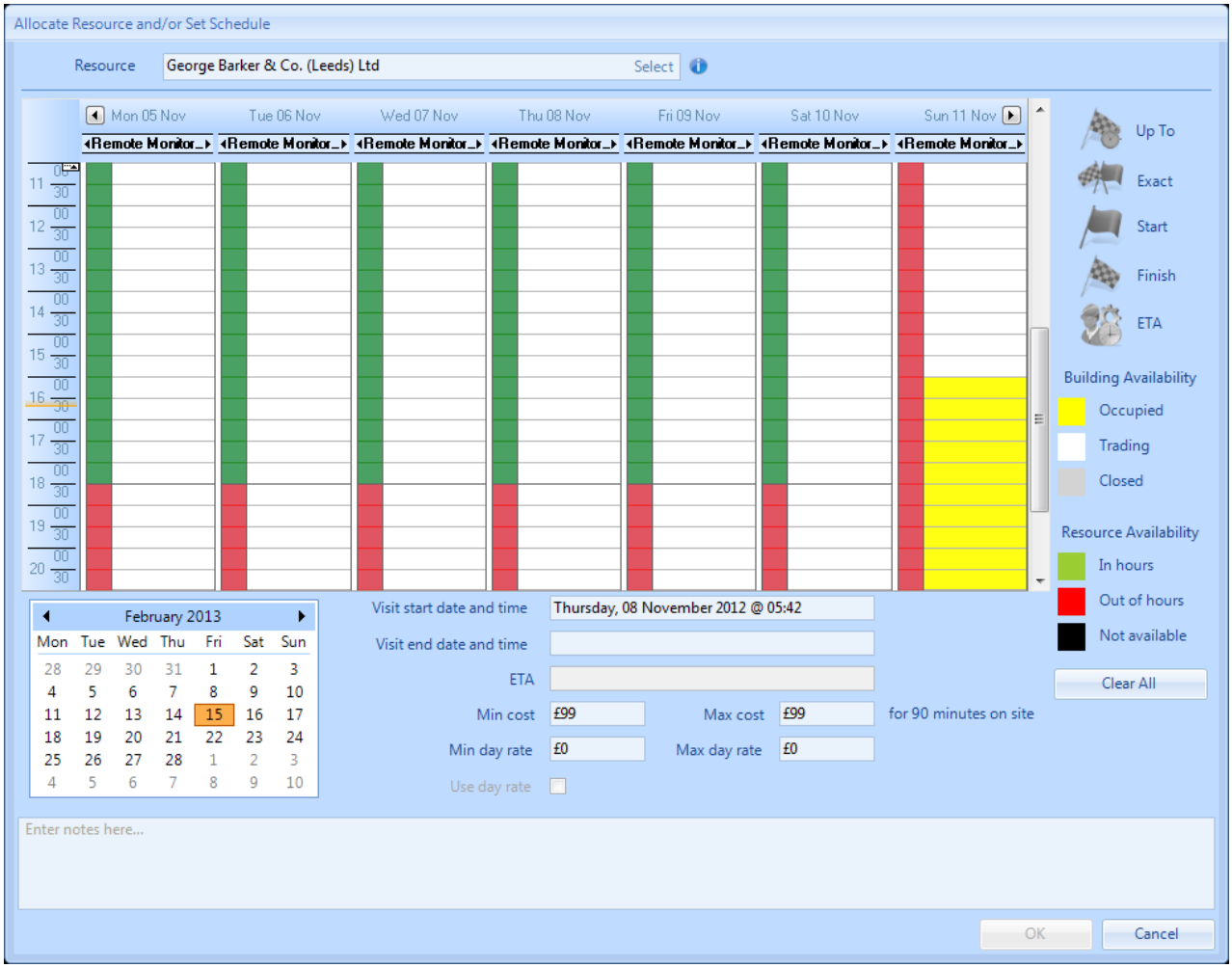
Change Resource

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

This should be used if the original Resource is unable to accept work or an Authorisation to alter the Resource allocated to the work has been received. The Rules surrounding reallocation where the original Resource is still assigned are bespoke to each Management Company so be sure the appropriate Authorisation to change the Resource in line with the company internal processes and procedures have been received.
This is done from Call In Actions, Call Out Actions and Agent Actions.

1. Click on Allocate Resource and/or Set Schedule:



2. The Resource already selected will be shown at the top of this screen.

3. To allocate a different Resource please see Allocate Resource and/or Set Schedule.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=288