

Change Work Order Details

📅 Wed, Jan 17, 2024 📁 [Agent Actions - Reactive, Quote, PPM, Audit](#)

1. Changes to a Work Order can be made from Agent Actions - "Change Caller":

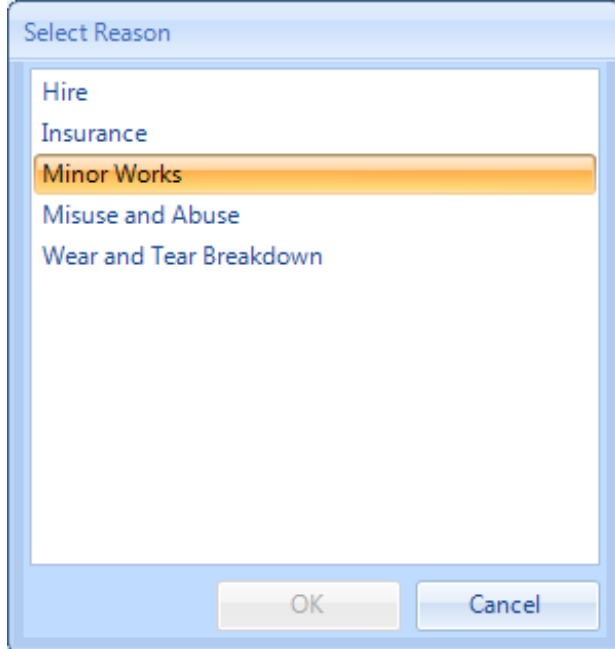
Contact Type	Name	Telephone	Email
All	Filter...	Filter...	Filter...
Client Contact	Smith	123456789 / 09876543	

Contact Type	Client Contact	Name	Smith
Number	123456789 / 09876543	Email	

OK Cancel

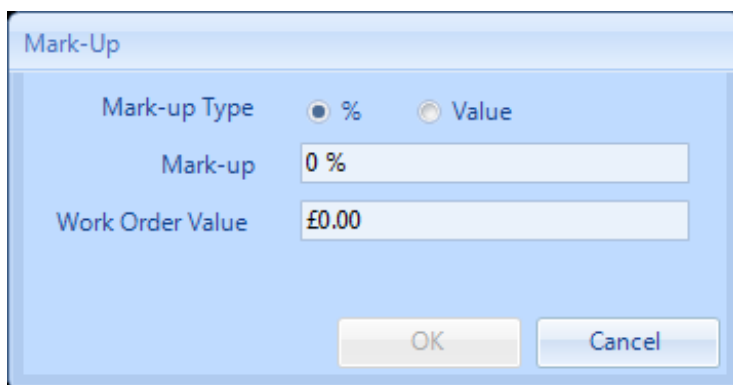
2. Click on any of the fields that require editing and once completed click "OK". Clicking "Cancel" will exit without making any changes to the Work Order.

3. Changes to a Work Order can also be made from Agent Actions - "Change Reason":



4. Click on any new Reason in the list and click "OK". Clicking "Cancel" will exit without making any changes to the Work Order.

5. Changes to a Work Order can also be made from Agent Actions - "Change Mark-Up":



6. The Mark-Up field allows the User to add a marked up price to the Work Order. This is the cost that will be visible to the Client.

7. Changes to a Work Order can also be made from Agent Actions - "Change Capital Budget":

Capital Budget

9020541, 12/13 FRA Switch Period Clear

Code	Description	Start Date	End Date	Total Budget
Filter...	Filter...			Filter...
9020541	12/13 FRA	01/04/2012	31/03/2013	£0.00
49061 1213	49061	01/04/2012	31/03/2013	£0.00
49087 1213	49087	01/04/2012	31/03/2013	£0.00
BOOTS BUD3	Boots Budget	01/04/2012	31/03/2013	£0.00
6020462 1213	Chiller	01/04/2012	31/03/2013	£0.00
9020146 1213	Electrical T&I	01/04/2012	31/03/2013	£0.00
6005323 1213	Fashion Brands	01/04/2012	02/04/2012	£0.00
9020141 1213	Fire Risk Assessment	01/04/2012	31/03/2013	£0.00
9020021 1213	Fire Safety Works	01/04/2012	31/03/2013	£0.00
9020023 1213	H&S Minor Works	01/04/2012	31/03/2013	£0.00
9002181 1213	Lift Replacement	01/04/2012	31/03/2013	£0.00
LIFT REP3 1213	Lift Replacement 2	01/04/2012	02/04/2012	£0.00
6004725 1213	Profit Protection	01/04/2012	02/04/2012	£0.00
6006121 1213	Profit Protection 2	01/04/2012	02/04/2012	£0.00

OK Cancel

8. This will give the User the choice of all applicable Capital Budget Codes for this Work Order. If the relevant Capital Code is not shown then it may be down to the incorrect Finance Period being displayed. To change this, click the "Switch Period" button and select the relevant Finance Period from the drop down. Once selected click "OK".

Finance Period

Finance Period 01/04/2012 - 31/03/2013

OK Cancel

9. Click "OK" to commit any of the changes made. Clicking "Cancel" will exit without making any changes to the Work Order.

10. Changes to a Work Order can also be made from Agent Actions - "Change Location":

Select Location

Location: Ground Floor, Sales Floor, Entrance/Foyer, car-park entrance

Level 1	Level 2	Level 3
Filter...	Filter...	Filter...
Ground Floor	Sales Floor	ATM Room
Ground Floor	Sales Floor	Baby Change/Parent & Child
Ground Floor	Sales Floor	BWS
Ground Floor	Sales Floor	Checkouts
Ground Floor	Sales Floor	Cig Kiosk
Ground Floor	Sales Floor	Cleaners Cupboard
Ground Floor	Sales Floor	Clothing
Ground Floor	Sales Floor	Customer Café
Ground Floor	Sales Floor	Customer Service Desk
Ground Floor	Sales Floor	Disabled Customer Toilets
Ground Floor	Sales Floor	Dry Cleaning
Ground Floor	Sales Floor	Entrance/Foyer

Location Extra

OK Cancel

11. This will give the User a choice of all available Locations for this Work Order. Clicking "Cancel" will exit without making any changes to the Work Order.

12. Changes to a Work Order can also be made from Agent Actions - "Change Asset":

Select Assets

1 available asset, 0 filtered assets, 1 selected asset

Select All Clear All Select All Filter Clear All Filter

	Operational	Asset Number	Known As Name	Level	Area	Location	Location Extra	Manufacturer	Status
<input type="checkbox"/>		Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
<input checked="" type="checkbox"/>	No	123456	Escalator	Default Level	Default Area	Default Location		Unknown	In Service

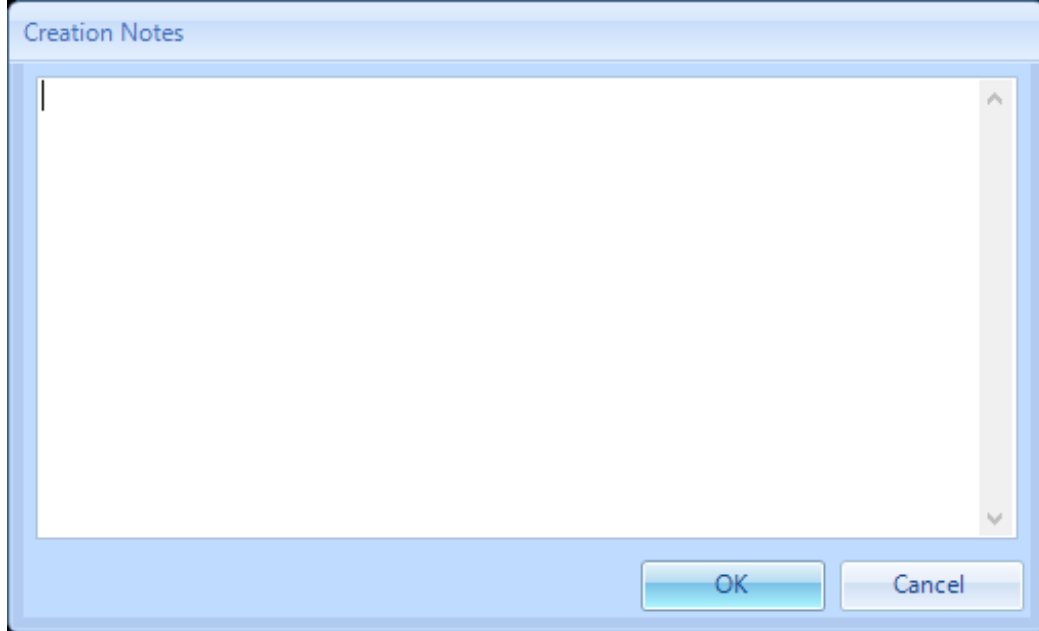
OK Cancel

13. This will give the User a choice of all available assets for this Work Order. Clicking "Cancel" will exit without making any changes to a Work Order.

14. Any changes made will be reflected in the events log on the Work Order.

Event		>>
Outcome	Date	
Agent - Location Changed	15/02/2013	
Agent - Caller Changed	15/02/2013	
Agent - Accepted - No ETA...	14/02/2013	
Agent - Assigned by Email	24/01/2013	
Agent - Resource Allocated...	24/01/2013	
Agent - Work Order Created	24/01/2013	
Event	Change - Location	
Outcome	Agent - Location Chan...	
Date	15/02/2013 15:56	
Event Creator	Donna.Louise	
Deleted Locati...	Ground Floor, Sales Flo...	
Added Location	Ground Floor, Sales Flo...	

15. Changes to a Work Order's Creation Notes can also be made from Agent Actions - "Change Creation Notes":



16. In changing the Creation Notes, the main Creation Notes window on the Work Order Detail page will show the new Creation Notes that have been added, and a new event of "Creation Notes Edited" will be added which will show what the previous notes were and what they have been changed to.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=289>