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":

Select Contact					,			
Contact Type		Name			Telephone		Email	
All	•	Filter			Filter		Filter	
Client Contact		Smith		123456789 / 09	123456789 / 09876543			
Contact Type	Client Cor	ntact		•	Name	Smith		
Number	123456789	9 / 09876543			Email			

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":

Mark-Up			
Mark-up Type	• %	💿 Value	
Mark-up	0 %		
Work Order Value	£0.00		
		ОК	Cancel

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	RA Switch Period Clear							
Code	Code Description		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	Ŧ			
			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		•
		ОК	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 car-park entrance		OK					
	Location Extra		OK	Cance				

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":

Se	elect Assets									
	1 av	available asset, 0 filtered assets, 1 selected asset Clear All Filter Clear All Filter								
		Operational	Asset Number	Known As Name	Level	Area	Location	Location Extra	Manufacturer	Status
			Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	V	No	123456	Escalator	Default Level	Default Area	Default Location		Unknown	In Service
									ОК	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	15/02/2013					
Agent - Caller Cha	anged	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 Ord	er Created	24/01/2013				
Event	Change - Location					
Outcome Agent - L		ation Chan				
Date	15/02/2013 15:56					
Event Creator	Donna.Loui	se				
Deleted Locati	Ground Flo	or, Sales Flo				
Added Location	Ground Flo	or, Sales Flo				

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

Creation Notes	
OK Cancel	5

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.

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