Convert Work Order

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

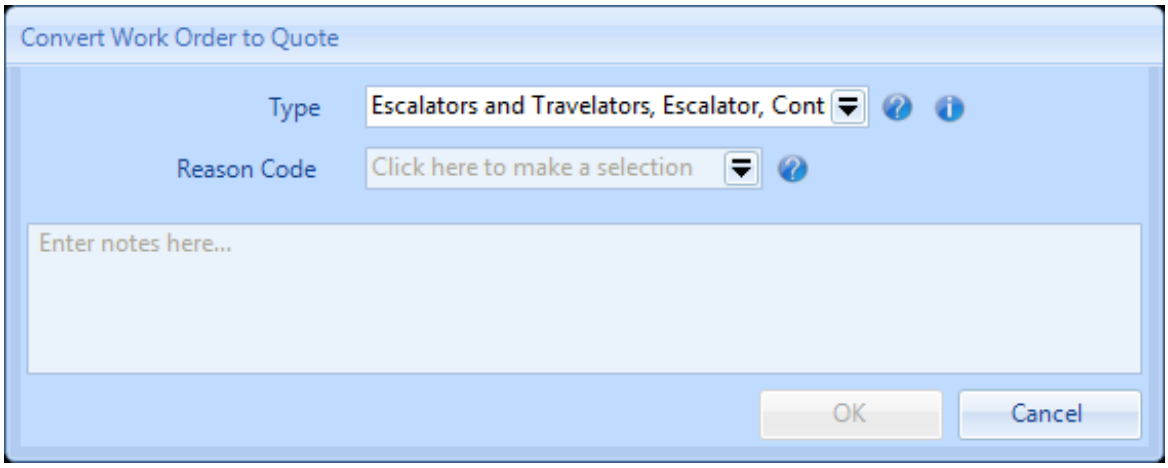
There may be the occasion with a Work Order when multiple prices for the work are requested, or when the work is expected to exceed a value set for reactive works. In these cases, the Work Order would be converted into a Quote.
This is done via the following steps:

1. From Agent Actions menu, click on "Convert Work Order to Quote".

2. Click on the drop down arrow to select the equipment type for the Quote Work Order.

3. Select the reason that the work is being carried out from the drop down list.

4. Add any additional notes that may be relevant.
5. Once this has been completed, click the "OK" button to be taken back to the Work Order Details screen.



Note: The "?" tool tips will give helpful hints on what is required in the fields.

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