

Agent Actions - Reactive, Quote, PPM, Audit Introduction

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Agent Actions are all accessible through the 'Agent Action' button on the helpdesk. The actions available to the Agent are dependent on the status of your Work Order. Once the Work Order has been created and the Resource and schedule set the following Agent Actions can be available in the drop down. Each Agent Action (once complete) will show as an Event in the right-hand Events window within the helpdesk page. This makes for both quick reference against all actions performed for the specific Work Order number but also acts as a permanent record for audit history and reporting. Agent Actions should be used to update a Work Order if email correspondence is received, or if you are not updating in real time. All possible Agent Actions are:

- [Accept Job](#)
- [Accept/Refuse Additional Engineers](#)
- [Add Notes - Public](#)
- [Add Notes - Private](#)
- [Add/Edit/View Documents](#)
- [Add/Edit/View Meter Reading](#)
- [Add/View/Delete Certificates](#)
- [Allocate Resource and/or Set Schedule](#)
- [Assign Job](#)
- [Amend Start and Stop Times](#)
- [Batch Release](#)
- [Cancel Job](#)
- [Change Resource](#)
- [Change Work Order Details](#)
- [Convert Work Order](#)
- [Edit Notifications](#)
- [Edit Staged Payments](#)
- [Edit Work Order](#)
- [ETA Provided](#)
- [Information](#)
- [Link Work Order > Create New Work Order](#)
- [Link Work Order > Link Existing](#)
- [Make CIS](#)
- [No Answer](#)
- [Provide Feedback](#)
- [Recall Job](#)
- [Reference Provided](#)
- [Reinstate Work Order](#)
- [Remedial Works Required Introduction](#)
- [Remote Fix](#)
- [Request ETA](#)

[Resource Unable to Accept Work](#)
[Remove Linked Work Order](#)
[Set Accrual to Zero](#)
[Set Estimate](#)
[Set Fixed Cost](#)
[Start Job > Admin](#)
[Start Job > Field Team](#)
[Stop Job > Admin](#)
[Stop Job > Field Team](#)
[Stop Job > Work Not Completed](#)
[Work Order Documents](#)

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