Agent Actions - Purchasing Introduction

Wed, Jan 17, 2024 Agent Actions - Purchasing

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 Supplier and delivery date 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:

Acknowledge
Add Notes
Cancel Job - Purchasing
Delivery Dates Provided
Edit Purchase Items
Edit Delivery Charge
Link Work Order > Create New Work Order - Purchasing
Link Work Order > Existing - Purchasing
Purchase Items Dispatched
Receipt Purchase Items
Remaining Items Not Required
Remove Linked Work Order - Purchasing
Submit - Purchasing

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=335