Agent Actions - Purchasing Introduction

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