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 > Create New Work Order - Purchasing Purchase Items Dispatched Receipt Purchase Items Remaining Items Not Required Remove Linked Work Order - Purchasing Submit - Purchasing

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