

Revert Status of Records

You can revert the status of cancelled or terminated work orders and service appointment records back to their previous state. You can also revert a completed service appointment.

(i) Permission Required: <u>Revert</u>

To revert the status of a record:

1. Click the record whose status you want to revert, and in the [Module] Details page, select Revert.

CS FSM Home Customers - Work Ord	der Management 🗸 🛛 Dispatcl	h Console Services And Parts Assets	Workforce 🗸 R	eports	🕂 🕸 🗘 🏐
Work Orders > W01193 Leaky faucet Cancelled O Critical Ø Service Not yet	Invoiced 🛛 🛥 Mary Cooper				Download V Edit V
Work Order Status	Timeline Services a	nd parts Service appointments	Notes Related	list Invoices	Print
Cancelled	Services				
	Service Line Item Name	Service	Quantity List P	rice Tax Name	Line Item Amount
Work Order Details -	SVC-4465	Plumbing	1 \$ 26	.00 T1[12.23%]	\$ 22.45
🗟 Requests	↔ New Not yet Invoiced				
🗟 Estimates	Parts				
ह Parent Work Order 🛛					

2. Click **Revert** in the confirmation message.



The following tables detail the statuses the record will have after their status is reverted.



/Termination						
	Work Orders					
New	Cancelled	New				
Scheduled Appointment	Cancelled	New				
In Progress	Cancelled	In Progress				
In Progress	Cancelled	In Progress				
	Work Order Line Items					
New	New	New				
Scheduled	New	New				
In Progress	Partially Completed	Partially Completed				
Completed (completed the associated service appointment)	Completed	Completed				

Status Before Cancellation /Termination	On Cancellation /Termination	After Reverting			
S	ervice Appointments				
New	Cancelled	New			
Scheduled	Cancelled	Scheduled			
Dispatched	Cancelled	Dispatched			
In Progress	Cancelled	In Progress			
In Progress	Cancelled	In Progress			
Service Appointments Line Items					
Scheduled	Cancelled	Scheduled			
Scheduled	Cancelled	Scheduled			
Scheduled	Cancelled	Scheduled			
In Progress	Partially Completed	Partially Completed			
In Progress (resumed work)	Partially Completed	Partially Completed			

Revert a Completed Service Appointment

You can revert the status of a completed service appointment. After a service appointment is completed, its completed line items will have a **Partially Complete** option. Using this option, you can revert the status of a completed service appointment. To do so:

1. Click **Partially Complete** for any of the completed line items.

CS FSM Home Customers ~ Work Or	der Management – Dispatch Console Services And Parts Asse	ets Workforce ~ Reports	(†	ه 4 ⁹ 🗐				
Service Appointments WO1193 AP-1158 Leaky faucet Completed Service Not yet Invoiced	🖮 Emily Raymond 🛛 🚯 37 s		Download V Edit	~ < >				
Service Appointment Information	Timeline Services and parts Time sheets Servi	ce reports Trips Notes						
 Service(s) Plumbing (SVC-4465) 	Services							
Scheduled Time	Service Line Item Name Service	Quantity List Price Ta	ax Name Line Item Amount					
Jun 10, 2024 02:30 PM Jun 10, 2024 03:30 PM Scheduled 01:00:00 Duration (IHH:mm:ss)	SVC-4465 Plumbing ⊗ Completed ③ Partially Complete ■ Not yet Invoiced	1 \$ 20.00 T1	1 [12.23%] \$ 22.45					
🛅 Actual Time	Parts	Parts						
Jun 10, 2024 02:17 PM Jun 10, 2024 02:18 PM	No Records Found							
Duration (HH:mm:ss) Assigned Service Resources Emily Raymond (Lead)		Sub ⁻ Tax A	Total \$ 20.00 Amount \$ 2.45					
Contact Details -		Adju	istment					

2. Click **Partially Complete** in the confirmation message.

€ FSM Home Customers → Work Ord	der Management 🧹 🛛 Dispatch	h Console Services And Parts Assets	Workforce \sim	Reports	8	\$ 4 <mark>9</mark> 🕕
Service Appointments , WO1193 , AP-1158 Leaky faucet Completed Service Not yet Invoiced of Service Appointment Information	Emily Raymond 🕚 37 s	How would you like to proceed? Do you want to Partially Complete the Lir	ne Item Trips	Do	ownload ~ Edit	
 Service(s) Plumbing (SVC-4465) 	Services	Cancel Partially Com	plete			
Scheduled Time	Service Line Item Name	Service	Quantity List	st Price Tax Name	Line Item Amount	
Jun 10, 2024 02:30 PM Jun 10, 2024 03:30 PM O Scheduled 01:00:00 Duration (HH:mm:ss)	SVC-4465	Plumbing 	1 \$	20.00 T1 [12.23%]	\$ 22.45	
📾 Actual Time	Parts					
Jun 10, 2024 02:17 PM Jun 10, 2024 02:18 PM Actual 00:00:37 Duration (Hithmores)		No Reco	ords Found			
 Assigned Service Resources Emily Raymond (Lead) 				Sub Total Tax Amount Discount	\$ 20.00 \$ 2.45 	
Contact Details +				Adjustment		

3. Click **Keep it in "In Progress"** in the confirmation message.

€ FSM Home Customers → Work Or	rder Management 🤟 Dispatc				8	\$\$ 4 <mark>9</mark> 🕕
Service Appointments WO1193 AP-1158 Leaky faucet Completed Service Not yet Invoiced	Emily Raymond AP-1158				Download 🗸 Edit	\checkmark
Service Appointment Information	Timeline Associate you like to	d Appointment AP-1158 has "Partial keep the appointment in "In Progre	ly Completed" line item ess"?	ns. Do Notes		
 Service(s) Plumbing (SVC-4465) 	Services	ncel Complete Appointment	Keep it in "In Prog	press"		
Scheduled Time	Service Line Item Name	Service	Quantity	List Price Tax Name	Line Item Amount	
Jun 10, 2024 02:30 PM Jun 10, 2024 03:30 PM © Scheduled 01:00:00 Duration (HH:mm:ss)	SVC-4465	Plumbing 	1	\$ 20.00 T1 [12.23%]	\$ 22.45	
💼 Actual Time	Parts					
Jun 10, 2024 02:17 PM Jun 10, 2024 02:18 PM Actual 00:00:37			No Records Found			
Assigned Service Resources Emily Raymond (Lead)				Sub Total Tax Amount Discount	\$ 20.00 \$ 2.45 	
Contact Details -				Adjustment		

The status of the service appointment will be reverted to **In Progress**. The status of the line item will change to **Partially Completed**. If you choose **Complete Appointment** in the above confirmation message, then the status of the service appointment will change to **Completed**. The status of the line item will change to **Partially Completed**.

CS FSM Home Customers 〜 Work Orde	er Management 🗸 🔹 Dispatch Cons	sole Services And Parts Assets	Workforce ~ Repor	ts	H	ŵ t <mark>9</mark>	۲
Service Appointments > WO1193 > AP-1158 Leaky faucet In Progress Service Not yet Invoiced	Emily Raymond 🕚 1 Hr			Complete	Work V Edit	× <	>
Service Appointment Information	Timeline Services and part	arts Time sheets Service rep	oorts Trips I	Notes			
 Service(s) Plumbing (SVC-4465) 	Services						
📰 Scheduled Time	Service Line Item Name Ser	ervice	Quantity List Price	Tax Name	Line Item Amount		
Jun 10, 2024 02:30 PM Jun 10, 2024 03:30 PM C Scheduled 01:00:00 Duration (HH:mm:ss)	SVC-4465 Plu ⊗ Partially Completed C Resume Work ▼ # ⊮ Not yet Invoiced	umbing	1 \$ 20.00	T1 [12.23%]	\$ 22.45		
🛅 Actual Time	Parts	ts					
Jun 10, 2024 02:17 PM & Assigned Service Resources		No Record	ds Found				
Emily Raymond (Lead)				Sub Total	\$ 20.00		
Contact Details				Tax Amount	\$ 20.00		
Company Feltz Printing Service (Sample)				Discount Adjustment			

Points to remember

• When you try to revert a service appointment, if all its line items are active in any other service appointments associated with the parent work order, then you will encounter an error.



When you try to revert a service appointment, if only few of the line items are active in any other service appointments associated with the parent work order, then the status of the service appointment will be reverted with the status of these line items unchanged.

CS FSM Home Customers ~ Work Or	rder Management 🤟 Dispatc	h Console Services And Parts Assets	Workforce	~ Report		+	\$ \$	
Service Appointments > WO-470 > AP-419 Sundry tasks Dispatched Ø Service Not yet Invoiced	🗑 Alicia Florrick 🔹 1 Hr				Start	Work Y Edit	v <	
Service Appointment Information	Timeline Services a	nd parts Service tasks Time she	eets Se	rvice reports	Trips Note	es		
 Service(s) AC Repair (SVC-482) 	Services							
Lawn Maintenance (SVC-483)	Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount		
 Scheduled Time Jun 12, 2024 02:30 AM Jun 12, 2024 03:30 AM 	SVC-482 ② Scheduled ③ Start Work 魣 Not yet Invoiced	AC Repair 	1 Hours	\$ 20.00	SalesTax [6.25%]	\$ 21.25		
Scheduled 01:00:00 Duration (HH:mm:ss) Actual Time	SVC-483 Cancelled Not yet Invoiced	Lawn Maintenance	1 Hours	\$ 20.00	SalesTax [6.25%]	\$ 21.25		
Service Appointment not yet started ② Assigned Service Resources	Parts							
Alicia Florrick (Lead)		No Records Found						
Contact Details								
Lo Company Acmente.					Sub Total	\$ 40.00		
(8) Contact Kalinda Sharma					Tax Amount	\$ 2.50		
🖂 Email					Discount			
🗞 Phone					Adjustment			

• If after reverting the status of a service appointment, changes are made that result in the duration of the service appointment, then it will affect the number of appointments used for the service appointment.