Create Work Order from an existing Incident

This procedure shows how to create a Work Order for a request that currently exists as an Incident

1. Starting from the Overview Console, open a separate tab (or window) by clicking on the links for the Work Order Console and the Incident Management Console.

2. This example shows the Incident Console on the left and the Work Order Console on the right. Open the desired Incident in the Incident Console and click ‘New Work Order’ in the Work Order Console.

3. There is no button to copy details from an Incident to a Work Order. Instead copy the relevant fields (such as Customer, Notes, Summary, Assignee, etc.) from the Incident to the Work Order.
4. If the Incident contains a significant amount relevant details you can optionally create a Relationship between the new Work Order and the Incident by going to the Relationship tab in the Work Order, copy/paste in the Incident ID, click the search button to find the Incident, then click the Relate button.

5. This Work Order now has a Relationship to the Incident and the details can be reviewed if needed by opening the Incident.

6. If the intent is to cancel the Incident, set the Status to Cancelled. Keep in mind the customer will receive a notification of their request being cancelled so you may wish to first send them a brief email indicating why the Incident is being cancelled and that a new request is being created in its place. Save the Incident to ensure the Status is changed to Cancelled.

7. Saving the Work Order after sending the customer email will ensure their notifications arrive in the right order.