

# SedonaSchedule - Ticket Queue

Last Modified on 01/11/2023 3:24 pm EST

The Ticket Queue is one of most accessed features within SedonaSchedule. The Ticket Queue is designed to be a central point of access for all employees involved in Ticket Processing; from Ticket creation through to Invoicing and Closing of Tickets. Each User is able to configure the view of the Ticket Queue to their personal preference for ease in finding the information needed to perform their job.

Service Tickets may be created for purposes other than performing on-site service to your customers. You may create Tickets for internal processing such as programming, downloads, code changes, etc.

In SedonaOffice, there are four types of Tickets:

- **Service Tickets** - These are Tickets where your company is responsible for performing the work.
- **Inspection Tickets** - These types of Tickets are generated in bulk on a periodic basis; usually once a month. The need to generate Inspection Tickets is based upon an Inspection Record that is setup on a customer's System record. On the Inspection setup, a default Service Company is assigned to the Inspection record; this identifies whether your company will be performing the Inspection.
- **Vendor Tickets** - These are Tickets where a Service Provider (subcontractor) is performing the work on the Ticket. If a Service Provider is the typical servicer of the System, you may set the default Service Company on the System record to a Service Provider. When a new Ticket is created, the default Service Company on the System record is used; if that is set to a Service Provider type Service Company, the Ticket will automatically be coded as a Vendor Ticket.

Regular Service Tickets may be turned into Vendor Tickets by changing the Service Company to a Service Provider type [service Company] on the Service Ticket data entry form.

- **Vendor Inspection Tickets** - Similar to regular Inspection Tickets; on the Inspection setup, if a Service Provider type of Service Company is selected, when the Inspection Ticket generation process occurs, Inspection Tickets will be coded as Vendor Inspection type tickets.

When accessing the Ticket Queue you may view a list of each Ticket Type or All Ticket Types.

The Ticket Queue has been designed with pre-defined views to assist Users in performing daily job functions. These pre-defined views are:

- Open Tickets
- Tickets with an Appointment scheduled
- Tickets that have not been scheduled
- Tickets marked as Go-Backs
- Resolved Tickets
- Unresolved Tickets
- Closed Tickets

You are also able to view a list of Tickets based upon your preference by using filtering options.

### **Ticket Queue Colors**

Ticket color display has been coded into the Ticket Queue. The font color of a Ticket displayed in the Ticket Queue depends on the Priority of the Ticket. When a Ticket is initially created, the User must select a Problem Code; in the Problem Code setup table, a default Priority is assigned to that code. The default priority auto-fills into the Ticket, however the User creating the Ticket may choose to either escalate or de-escalate the Ticket Priority. Priority Codes are hard-coded into the software and cannot be added, changed, or deleted. Below are the Priority color codes.

- Low - Green
- Medium - Black
- High - Blue
- Critical - Red

□

### **Ticket Queue - Sorting, Filtering, Grouping**

The Ticket Queue may be sorted, filtered and grouped into a list suitable for your viewing.

- Sorting - When the Ticket Queue is first displayed, it is sorted in Ticket Number order. By clicking on any of the column headers, the list will re-sort alpha-numerically.
- Filters - Filters are helpful when you want to view a particular listing of Tickets.

For example, you want to view all of the Tickets where the Site is in a particular city. When clicking on the filter icon in the column header, a list of choices will be listed for all Tickets currently displayed. You may make one choice from the filter drop-down list. If you want to select more than once choice for the field, then you would need to create a custom filter; this is described below.

To remove a filter, click on the Filter button and select ALL at the top of the drop-down list.

When a Filter has been applied to one or more columns, a gold asterisk  will replace the Filter button.

□

□

### **Custom Filters**

Custom Filters help to refine the list of Tickets displayed in the list depending on what you want to view. For example, you want to see all Tickets where the Priority code is set to Critical or Medium. Below is an example of how to create the Custom Filter.

□

### **Grouping**

Within the Ticket Queue, you may view the Tickets in Groups. When using Groups the view of the Ticket Queue changes to a tree structure. After creating a Group, each line displayed within the Ticket Queue may be expanded to show the Tickets that belong to that Group.

To create a Group, drag and drop the desired field to the gray Filter Bar located above the field names area of the Ticket Queue.

In the example below, we have Grouped the Tickets by the Site city name.

To remove a Group and return to the full Ticket Queue view, drag the Group name displayed in the gray bar down into the list of Tickets.

- 
-