Ticket Form and Field Definitions

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Ticket Header

The left side of the Ticket Header displays the Customer Number and Name along with the Site Name and address. In the center of the Header, the Ticket Creation date/time, the Created By (User name creating the Ticket), and the current ticket Status. The right side of the Header is where the User will select or enter Contact information. Contact information is not required to save the Ticket, however it is a good practice to fill in this information for future reference by other staff members.

- Contact Field - You may make a selection from the drop-down list to select from the Site Contacts on file. If no Contacts appear in the drop-down list, you may create a Contact record on the fly by clicking on the telephone icon to the right of the Contact field and filling out the information. This contact will then be saved to the Site Contact list for future use and fill in on the current Service Ticket. If you do not want to select an existing contact or create a contact record, you may manually type in the Contact Name, phone number, and in the Notify field you may enter the contact's email address. The contact name and phone number will print on a Ticket and be displayed to Technician's using the FSU (field service unit).
- Phone Number Field - If a Contact Name was selected from the drop-down list, the associated phone number will automatically populate this field. You may change this to a different phone number if needed. If the phone number is changed, it will only affect this ticket and will not update the contact record on file.
- Notify Field - If a Contact Name was selected from the drop-down list, the associated email address (if any) will automatically populate this field. You may manually type in an email address. If your company is using SedonaSync and it is your policy is to email notifications to the customer regarding the Ticket, then this field must be populated.

Site and System Detail

The left side of the New Ticket form is mostly display-only information related to the System for which the ticket is being created. There are two data entry fields below the System Information; Service Company and Service Level.

System Information

Key fields from the System record is displayed such as the System Type, Panel Type and Location, etc. If recurring inspections have been setup for the System, the Next Inspection Date will be displayed. If the System is still covered by the initial Warranty, the expiration dates will be displayed. If the System Warranty period has expired, the word Expired will display in the Warranty End field.

Comments & Notes - The information in both of these fields may be very lengthy; hovering your mouse over the field will display the entire text entered on the System record.

- **Service Company** - The Service Company will default from the System record associated with this ticket. This may be changed if necessary. Clicking on the drop-down arrow to the right of the field will list any alternate Service Companies setup on the System record; you may select one of these if appropriate. You may also click on the pencil icon to the right of the field; this will open the Service Company selection list and will include all selections from the Service Company setup table including Service Providers (subcontractors). If a Service Provider type Service Company is selected, once the Ticket is saved, the Ticket will become a Vendor Ticket.

- **Service Level** - The Service Level will default from the System record associated with this ticket. The Service Level controls the billing rules for the Ticket. This may be changed if necessary.

Ticket Detail - Data Entry Fields

The right side of the form is where most of the data entry is performed. Each data entry field will be explained below. When finished filling in the New Ticket form, click on the Save button located at the lower right of the form to continue processing.

- Problem Code – This is a required field – make a selection from the drop-down list that best describes the purpose of the ticket being created.
- Secondary Problem – If there are choices available when clicking on the drop-down list, make the appropriate selection according to your company's policies and procedures.
- Route Code - If your company is using Routes, this field will automatically populate with the Route assigned to the System record; you may change this if necessary.
- Expertise Level, Priority and Estimated Length – These three fields will automatically be filled in based on the Problem Code selected. Each of these field choices may be overridden. The Estimated Length value is used when scheduling a Technician appointment – this is the amount of time (in minutes) required to complete the service call (including drive time to the site).
- Comments – This field is used to enter a brief note as to the purpose of the ticket. After saving the ticket, any information entered into this field will create the first Ticket Note which is viewable from the Notes button on the Ticket. If a comment is not entered into this field prior to the initial save of the Ticket, but information is later entered into this field, the information will not be saved to the Ticket Notes. A maximum of 256 characters are allowed in the Comments field.
- Service Coordinator – The staff member responsible for managing this ticket. If your company is using this field, make the appropriate selection from the drop-down list.
- Technician – You may make a selection from the drop-down list if you have a preferred Technician for the Ticket. This will not create or schedule an appointment – just a reminder to the person scheduling appointments.
- PO# - If your customer has provided a purchase order number to be used when invoicing the Ticket, enter that value into this field. If the PO# field label is displayed with a bold font, this indicates a PO# is required for the Ticket; the ticket may not be saved without entering information into this field.
- Category – This field typically should not be changed – this is for accounting purposes and the default is coming

from setup options.

- Resolution – A User will make a selection in this field once the work has been completed. The choices in the drop-down list define how the Ticket was Resolved.
- Use Payment Information On File – If the customer has a credit card and/or bank information on file, and the customer has given you permission to charge the credit card or bank for the total invoice amount for the ticket, click the appropriate radio button. Once the invoice is saved, and EFT transaction will automatically be created.

  If the customer does not have information on file, the radio buttons will be dimmed-out. User permissions are required to be able to select one of the radio buttons. If this area is completely dimmed-out, this indicates the user does not have the appropriate permissions for this function.