

Close a Ticket-Billable

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When Invoicing a Ticket, the user has the option of creating the invoice and closing the ticket once the invoice has posted. If the user opts not to close the ticket after invoicing, then it will have to be closed manually.

Before Closing any ticket, the user should review several items for accuracy prior to closing. Your company may want to create a "cheat sheet" to use until you are comfortable with the process of reviewing ticket that need to be closed.

Items to Review

- Ticket Custom Fields - make certain all have been populated according to your company's policies and procedures.
- Ticket Appointments - make certain:
 - All appointments have been fully dispatched.
 - Verify the dispatch times are correct.
 - If there are scheduled appointments that were never performed, delete these.
- Documents - Make certain any pertinent documents have been attached to the ticket according to your company's policies and procedures.
- Notes - Read all ticket notes. If the technician indicated that new parts were installed or parts were replaced, check the Equipment and Parts tab to make certain the parts were put on the ticket.
- Equipment and Parts - Make certain all parts used by the technician are listed. If existing parts were replaced, make certain to perform the part replacement function.
- Journal -
 - Review the Journal Detail to make certain no unexpected expenses were recorded against the ticket.
 - Review the Parts Reconcile to make certain all parts have been properly issued to the ticket.
- Other Items - If Other items were added with a zero sales price, make certain this is accurate.
- Purchase Orders - If any purchase orders were created for the ticket, make certain they are all marked as Closed. If not, and the parts or expense items were received, perform the Receive PO transaction.

Once you are satisfied with the ticket review, navigate to the Service Ticket tab and click the Close Ticket button at the lower right of the form.

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Note: Once a ticket is closed, the only thing you can do is add additional notes.

A confirmation message will be displayed. Click the Yes button to proceed with closing the ticket.

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