

# Group Tickets Design

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Group Tickets processing was designed primarily for use with Inspection Tickets, however this functionality may be used with regular Service Tickets as well.

Inspection Ticket Groups are pre-defined within the Inspection Setup records. Once the Inspection Tickets are generated into their pre-defined groups, a User has the option of either removing one or more tickets from the group or adding one or more tickets to an existing group.

Both Regular Service Tickets and Inspection Tickets may be manually added to an existing Ticket Group as long as the Tickets are associated with the same customer Site.

Regular Service Tickets must be manually grouped if this is desired for the purpose of scheduling, dispatching and invoicing the tickets together as a group.

## **Inspection Linked to a Recurring Line**

There are two basic options available when determining how to use Group Inspection Tickets:

- Link an Inspection Record to a Recurring Line
- Setup Inspection without a Link to a Recurring Line

Using the option of linking an Inspection Setup to a Recurring Line will allow you to cycle bill the inspection services separately from other recurring services if desired. Inspections may only be linked to a recurring line if the Service Level selected on the Inspection setup form has been flagged to require a link to a recurring line.

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Fields are present on the Inspection Setup and the Service Level Setup forms to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Line.

The fields on the right side of the System Inspections setup form are designed for use with Group Tickets.

## **Inspection Groups & High Frequency Inspections**

Inspection Groups are used to group multiple Inspection Tickets and invoice the group of Inspection Tickets on a single invoice for charges that are not billed through the cycle billing process; these are basically time and material type services. On the System Inspection setup form, you may assign a group number to the inspection.

When generating Inspection Tickets, the software program considers the group number to determine which inspections belong together as a group.

An option on the System Inspection setup form; High Frequency Omit, manages Inspection Ticket creation where multiple inspections are performed at different frequencies.

For example, your customer has contracted with your company to inspect their Fire system. This contract requires that your company perform:

- A Quarterly visual and physical test of the fire pump monitored points,
- A Semi-annual test of sprinklers, waterflow switches

- An Annual test of all equipment including sprinklers and waterflow switches.

You would set up each of these as separate inspections and flag as High Frequency Inspections. If all Inspections were to begin on June 1st, when you generate your inspection tickets for June, the only ticket created will be the annual inspection since it is the least frequent. The quarterly and semi-annual inspection records will be advanced to the next logical inspection date. When Inspection Tickets are generated for the month of September, only the quarterly inspection ticket will be created.