Group Tickets Functionality

Last Modified on 05/11/2026 4:28 pm EDT

Once System Inspections have been setup, the generation of the Group Tickets is performed from SedonaSchedule using the Inspection Ticket generation process.

To illustrate how the software generates Group Tickets, we will use the example below. Three Inspections are all due on 04/01/2015; the Exclude from High Frequency Check has been selected on all three inspections and they are all in group number 1.

On the Inspection Creation ribbon, we have selected 04/01/2015 as the Due As Of date. After clicking on the Get Inspections button, the three inspections appear on the list. Next we will click the Create Tickets button.

The Create Inspection Tickets form will be displayed showing which Inspection Tickets will be created; we'll click the Create button to proceed.

Group Tickets Queue

Once the Inspection Tickets have been created, they may be viewed by clicking on the Group Tickets button from the Arrangement Ribbon Group. Clicking the + to the left of each group expands the tree to show a listing of the tickets which are a part of the Group Ticket. The lowest ticket number in the group is flagged (behind the scenes) as the Master Ticket Number. If billing the customer when the work has been completed, the Invoicing is performed through the Master Ticket Number.

Group Tickets Scheduling from the Master Ticket

Technician Appointments for Group Tickets may be scheduled from the Schedule Board using the drag and drop method from the list of Unscheduled tickets. There is a separate Group Ticket scheduling method available which is accessed from the Master ticket of the Group Ticket.

Note: If using Group Ticket scheduling, any appointments created are not available to technicians using the FSU or SedonaX Mobile. All dispatching must be done within SedonaSchedule.

With the Master Ticket open, click on the Ticket Group button on the ribbon.

In the lower tier of the form, click on the Dispatch button. This will open the Group Ticket Dispatch form.

To add a Technician Appointment, click on the Add button on the Dispatch form. The Schedule Board will open to select the date, time-slot and Technician for the appointment. Repeat the process to add additional appointments if needed. Once the appointments have been saved, they will appear on the main Schedule Board.

Group Tickets Appointment Dispatching

Dispatching Technician Appointments for Group Tickets may be performed by double-clicking on the appointment from the Schedule Board, or from the Group Ticket button on the Master Ticket.

All Group Ticket Appointments may be dispatched from the same form by highlighting the appointment in the upper tier, then entering dispatch information in the lower tier.

Group Tickets Invoicing

Group Tickets may only be invoiced from the Master Ticket of the Group. Before an invoice can be created, all appointments must be fully dispatched.
Invoicing Group Tickets is a three-step process:

- Resolve the Group Tickets - this is done from the Master Ticket of the group by clicking on the Group Tickets button [from the ticket]. This will mark all Tickets in the group with the same resolution code.
- Create a Preview Invoice - this gives the User an opportunity to make any corrections before the actual invoice is posted.
- Create Invoice & Close - if satisfied with the preview invoice, clicking a button will create the invoice and set the status to all tickets in the group to Closed.

Resolve the Group Tickets

From the Group Ticket button on the Ribbon of the Master Ticket, click on the Resolve button. The Resolve form will be displayed to select a Resolution code and enter any notes; click on the Resolve button at the bottom of the form when finished.

Create Preview Invoice / Invoice & Close

The Invoice Group Tickets form will be displayed; click on the Preview Invoice button at the bottom of the form.

A preview invoice will be displayed; review the charges to make certain they are correct. If satisfied with the preview invoice, click the Invoice & Close button at the top of the Invoice Preview.

If the charges are not correct, click the Cancel button at the upper right of the Invoice Preview form, then return to the ticket(s) to make the necessary changes to the charges. When ready to invoice repeat the process starting with Resolving the ticket.