

Open Service Ticket Cost

Last Modified on 02/19/2024 12:50 pm EST

The purpose of this report is to review the profitability of service tickets for companies using WIP. The report provides estimated income and expense analysis broken out by Materials, Labor, and Other for service tickets open as of a selected date.

Note: This is a custom report designed by a particular SedonaOffice customer based upon their specifications. This report cannot be modified and is available for use by all SedonaOffice customers. If the original designer of the report decides to make changes to the report, no notification is provided of any modifications or changes.

Report Options



Ticket Type

The options section, below Ticket Status, looks at the inspection flag and service company on the closed ticket. The value selected in this section determines what technicians and service companies are available to select on the lower half of the form.

- Show only Service Tickets - gives you tickets that are not inspections and are not for a third party service provider.
- Show only Inspection Tickets - gives you tickets that are inspections and are not for a third party service provider.
- Show only Vendor Service Tickets - gives you tickets that are not inspections and are for a third party service provider.
- Show only Vendor Inspection Tickets - gives you tickets that are inspections and are for a third party service provider.
- Show all of the above - does not limit the results by ticket verses inspection ticket or who the service company is on the ticket.

The value selected in this section changes what technicians and service companies are available to select on the lower half of the screen. The word 'Inspection' appears at the bottom of service tickets that are inspections. Problem Code does not control this. It is controlled by if the service ticket was generated from a scheduled inspection.



Group By

You have the ability to add a group to this report. You may group by the following fields:

- (None)
- Branch
- Problem

- Service Company
- Service Level
- Technician
- Route

The following example is the detail section if you select to group by Technician.



The summary section at the end of the report will subtotal by Problem Code for the selected group.



Sort By

You can choose to sort service tickets within the Group By option you selected by the following fields:

- Creation Date
- Customer Number
- Site Name
- Ticket Number
- Route

Printing Options

The Options section on the right of the form (below Group By and Sort By), is Printing Options. You can select Summary Only or Single Line Detail, not both.

- Summary Only - If you choose to print a summary only version, this report will not list each service ticket but will still provide subtotals based on the Grouping you selected.
- Single Line Detail - If you choose to print a Single Line Detail, this report will show only the first line for each ticket in the detail section. It will not include the Customer Number, Site Name or Site Address. The grouping and summary sections behave the same as if this option was not checked.



- Print Resolution Note - If selected, the resolution note will display as a third line for each ticket. This option is not available if you have Single Line Detail or Summary Only selected.

Branches

- By default, this list is set to show only active branches. To show all branches in the list, uncheck Hide Inactive Branches.
- Only service tickets for sites belonging to the selected branches will be included.

Technicians

By default, this list is set to show all technicians who are employees. To show only active employees in the list, check Hide Inactive Technicians.

- If you select Show only Vendor Service Tickets, the list of technicians will change to only third party service providers.
- If you select Show all of the above, the Technicians list will include employees and third party service providers.

Service Companies

By default, this list is set to show only your active service companies. To show all of your service companies in the list, uncheck Hide Inactive Service Companies.

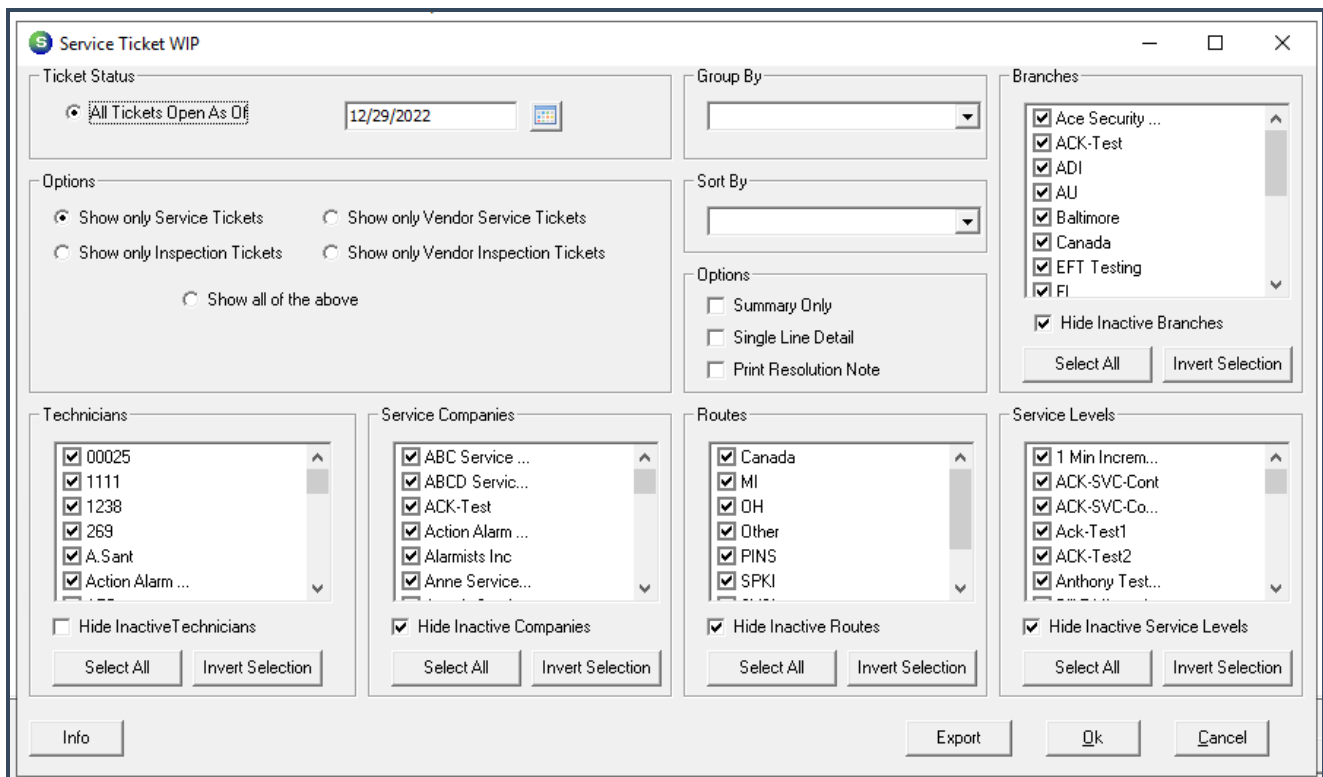
- If you select Show only Vendor Service Tickets, the list of service companies will change to only third party service providers.
- If you select Show all of the above, the list of service companies will include your service companies and third party service providers.

Routes

- By default, this list is set to show only active routes. To show all routes in the list, uncheck Hide Inactive Routes.

Service Levels

By default, this list is set to show only active service levels. To show all service levels in the list, uncheck Hide Inactive Service Levels.



Info Button

This button brings up a copy of this document.

Export Button

This button exports the detail section directly to a csv that you can open in Excel. There is minimal formatting of the data. Each record is only on one row. There are no summary sections. There are no page headers or footers to remove.

Troubleshooting

If you are not seeing a service ticket that you are expecting to see on this report, try changing the report selection options to:

- Show all of the above for Ticket Type
- Make sure all of the Hide Inactive options are NOT checked
- Do not select specific Branches, Technicians, Service Companies, Routes, and Service Levels.

Doing the above should remove all of the selection criteria except the date range. If your service ticket now appears, try running the report again by adding one criteria at a time and rerunning the report.