Sedona-X Mobile: Service Tickets
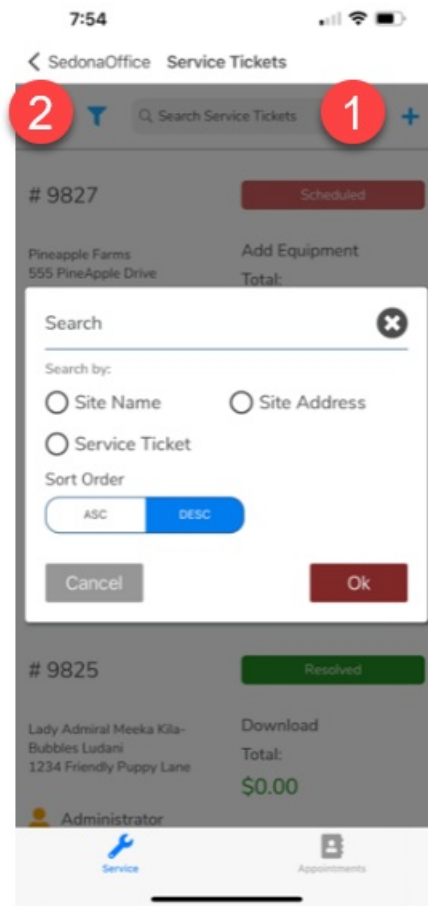
Searching for Service Tickets

On the home screen of the app select the hamburger menu on the left side. Choose the **Service Tickets** option to the left. Once selected this option will show all open service tickets. Click on the appropriate ticket you wish to open.
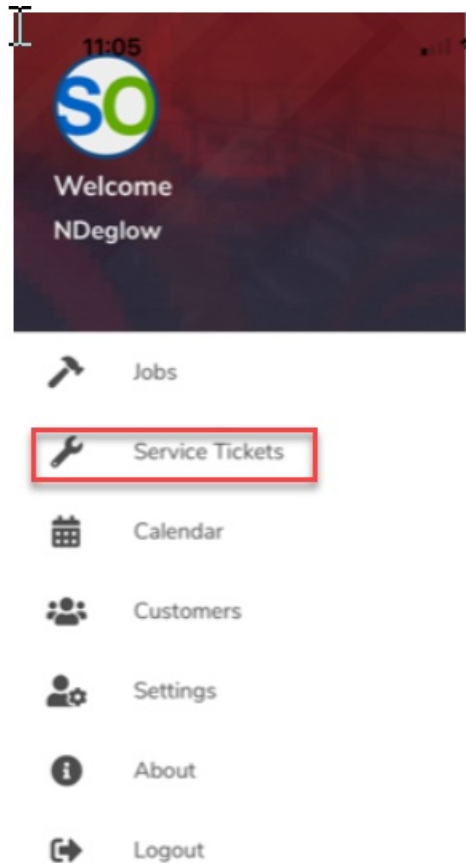
Two options are available for searching:

1. The search field at the top of the screen that says "Search Service Tickets".
2. The filtering section to the left (blue funnel). The user has the ability to filter by site name, site address, or service ticket number. The sorting order can be changed as well.

TIP: When searching for service tickets make sure the correct selection is made in the filtering option. If, for example, you are looking for a service ticket by number, make sure the service ticket option is check marked.

Adding a Service Ticket

Choose the blue plus symbol at the top of the screen to add a new ticket. Choose a customer, a site, and a system, and select the Ok button. Ticket information is required to complete the ticket generation process. Fill in all required fields then select the save icon at the top right corner.

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Ticket Info

*Problem:
Add Equipment

Secondary Problem:
Camera

Estimated Length (mins)
60.00

*Service Company:
Blue

*Service Level
Time and Material

*Expertise Level
3 Medium

Customer Comments
Camera screen is black

PO Number
7873SOW

Editing a Service Ticket

The fields on the ticket info can be edited by clicking on the blue pencil at the top of the screen.

More...

Service Level, History, Customer Notes, Site Notes, Custom Fields, Documents, Contacts, Other Items, and Service Reports are found in this section.

- **Service Level**- This section covers the charges a customer will incur during the ticket process. Labor, Parts, Other Materials, Regular Rate, Overtime Rate, Holiday Rate, Billing Increments, and Trip Charge. These settings are built into the Sedona Setup section in SedonaOffice

- **History**- This section shows all of the customer's history

- **Site Notes**- Any new or old notes can be saved here

- **Custom Fields-** A custom section allowing custom tables for extra drop-down options. Items would only be available after being built into SedonaOffice through the SedonaOffice Setup section

- **Documents**- All current and new documents can be stored here along with photos

- **Contacts**- Any preexisting customer contacts or new contact can be stored here by clicking on the plus symbol

- **Other Items**- Other chargeable items such as fuel charges can be added here by clicking the plus symbol. Items would only be available after being built into SedonaOffice through the SedonaOffice Setup section

- **Service Reports**- Service ticket reports can be generated and stored in the document section

Want to learn more about Service Tickets?

https://youtu.be/5jymYu71XyM