

SedonaWeb Service Tickets and Documents

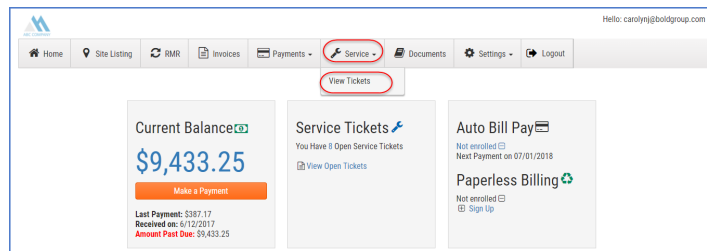
Last Modified on 08/01/2023 12:07 pm EDT

Service Tab

When clicking on the Service Tab, one option is available, View Tickets. When clicking on the View Tickets option, customers are able to do the following:

- View all open tickets
- View all closed tickets
- Export the list of tickets to an excel file
- Upload a document to a particular ticket*

***Your company must purchase the add-on module, SedonaDocs, to be able to use this feature.**



When clicking on the View Tickets option, tickets are listed beginning with the lowest ticket number first. When clicking on a ticket number link, the details of a ticket are viewable.

Ticket Number	Site	Account #	System	Created	Problem	Status	Contact
2928	Ashley, Victoria #2	184-SITE2	CCTV	10/21/20	Can't Set B/A	Scheduled	Jack Ashley
3105	Ashley, Victoria #2	105A	Intrusion	10/21/20	Add Equipment	Open	Jack Ashley
3108	Ashley, Victoria #2	184-SITE2	CCTV	10/21/20	Add Equipment	Scheduled	Jack Ashley
3116	Ashley, Victoria #2	105A	Intrusion	10/21/20	Add Equipment	Dispatched	
3214	Ashley, Victoria	184	CCTV	10/21/20	Add Equipment	Open	
3235	Ashley, Victoria #2	105A	Intrusion	10/21/20	Can't Set B/A	Resolved	
3237	Ashley, Victoria	105	CCTV	10/21/20	Camera	Dispatched	
3357	Ashley, Victoria	105	Intrusion	10/21/20	Add Equipment	Resolved	

At the bottom of the ticket details page, a customer has the ability to upload a document to the ticket being viewed.

The screenshot shows a web interface for a ticket management system. At the top, there is a navigation bar with the ABC COMPANY logo and the user's email address, Hello: carolynj@boldgroup.com. The navigation bar includes links for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. Below the navigation bar, the ticket details for Ticket #2928 are displayed. The ticket information is organized into sections: Customer Information, Technician Information, Site and System Detail, Ticket Detail, and Resolution. The Customer Information section shows Customer Number: 105 and Customer Name: Ashley, Victoria. The Technician Information section shows Technician Name: N/A. The Site and System Detail section shows Site: Ashley, Victoria #2, 2022 Wayne Road, Salem, MI, 48175; System: 184-SITE2; and Type: CCTV. The Ticket Detail section shows Date Created: 10/21/2020, Status: Scheduled, Priority: Medium, Requested By: Jack Ashley, Problem: Can't Set B/A, Comment: testinbg, Description: 425, and Other Notes: 425. The Resolution section shows Code: N/A, Description: 371796, Resolved By: 5/4/2015, and Resolved Note: testinbg. Below the ticket details, there is a Documents section. At the top right of the Documents section, there is a red-bordered button labeled "Upload Document". Below the button, there is a table with columns for Document ID, File Name, File Size, File type, and Download. The table is currently empty, and the text "No items to display" is shown at the bottom right of the table area. The table also includes a "10 items per page" dropdown and a refresh icon.

Customer Information
Customer Number: 105
Customer Name: Ashley, Victoria

Technician Information
Technician Name: N/A
Technician Phone:
Technician Email:

Site and System Detail
Site: Ashley, Victoria #2
2022 Wayne Road
Salem, MI, 48175
System: 184-SITE2
Type: CCTV

Ticket Detail
Date Created: 10/21/2020
Status: Scheduled
Priority: Medium
Requested By: Jack Ashley
Problem: Can't Set B/A
Comment: testinbg
Description: 425
Other Notes: 425

Resolution
Code: N/A
Description: 371796
Resolved By: 5/4/2015
Resolved Note: testinbg

Documents

Upload Document

Drag a column header and drop it here to group by that field

Document ID	File Name	File Size	File type	Download
No items to display				

10 items per page

Upload a Document to a Ticket

While viewing the details of a ticket, at the bottom of the page is a section labeled "Documents". All documents saved with a security level of 1 are viewable to the customer. The customer may also upload a document to the ticket by clicking on the "Upload Document" button.

After clicking on the Upload Document button, the Upload Document form will be displayed. Required fields are Document Type, File Name and User Description. Click in the text box at the bottom of the form. This will open your file explorer to locate the file to upload. When finished, click the Submit button. If all required fields were populated, the customer will receive a confirmation message that the file upload was successful.

Upload Document

Submit Close

System: 105

Document Type: Diagram

File Name: Elephant Bar-floor plan.pdf

User Description: Site map for system 105

References: +

Reference 1: Ref 1

Reference 2: [Text Box]

Reference 3: Ref 3

Reference 4: Ref 4

File Upload Status: File Uploaded Successfully.

Click or drag and drop document here

[Elephant Bar-floor plan.pdf](#)

Once a document was uploaded successfully, it will be displayed in the documents listing.

Document ID	File Name	File Size	File type	Download
2360	Elephant Bar-floor plan.pdf	0.00578403 MB	Diagram	

Documents Tab

To have access to this feature, your company must purchase the add-on module, SedonaDocs.

After clicking on the Documents Tab, any documents saved with a security access level of 1 that are attached to a customer, site, system or ticket will be displayed in a listing. The customer is able to open the document for viewing and may download the document. The customer may also upload documents from this location.

ABC COMPANY

Hello: carolynj@boldgroup.com

Home Site Listing RMR Invoices Payments Service **Documents** Settings Logout

Current Balance

\$9,433.25

Make a Payment

Last Payment: \$387.17
Received on: 6/12/2017
Amount Past Due: \$9,433.25

Service Tickets

You Have 8 Open Service Tickets

[View Open Tickets](#)

Auto Bill Pay

Not enrolled

Next Payment on 07/01/2018

Paperless Billing

Not enrolled

[Sign Up](#)

Download Document

Once the list of documents is displayed, the customer may open the document for viewing or downloading by clicking on the download icon in the Download column of the documents grid.

ABC COMPANY

Hello: carolynj@boldgroup.com

Home Site Listing RMR Invoices Payments Service Documents Settings Logout

Documents [Upload Document](#) [Back](#)

Drag a column header and drop it here to group by that field

Document ID	File Name	File Size (MB,GB)	File type	Download
2360	Elephant Bar-floor plan.pdf	0.00578403 MB	Diagram	

10 items per page 1 - 1 items

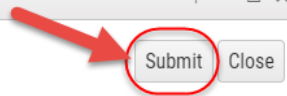
Upload Document

Once the Upload Document form is displayed, the customer must populate the fields highlighted in yellow as displayed in the illustration below:

- Site – Make a selection from the drop-down list
- System - Make a selection from the drop-down list
- Document Type - Make a selection from the drop-down list
- File Name – Whether you drag and drop a file or use your file explorer, this field will automatically populate with the name of the file being uploaded
- User Description – Type in a brief description of the document

When finished, click the Submit button. If all required fields were populated, the customer will receive a confirmation message that the file upload was successful.

Upload Document



Submit Close

Site

References



System

Reference 1

Document Type

File Name

User Description

Click or drag and drop document here