SedonaWeb Service Tickets and Documents

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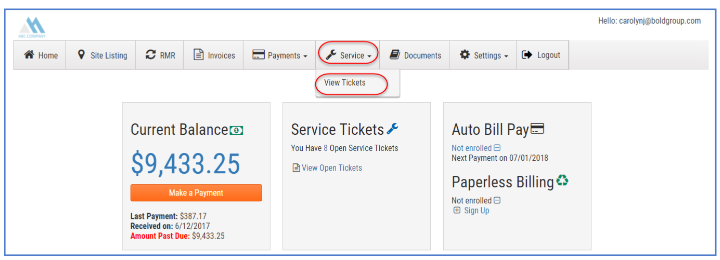
Service Tab

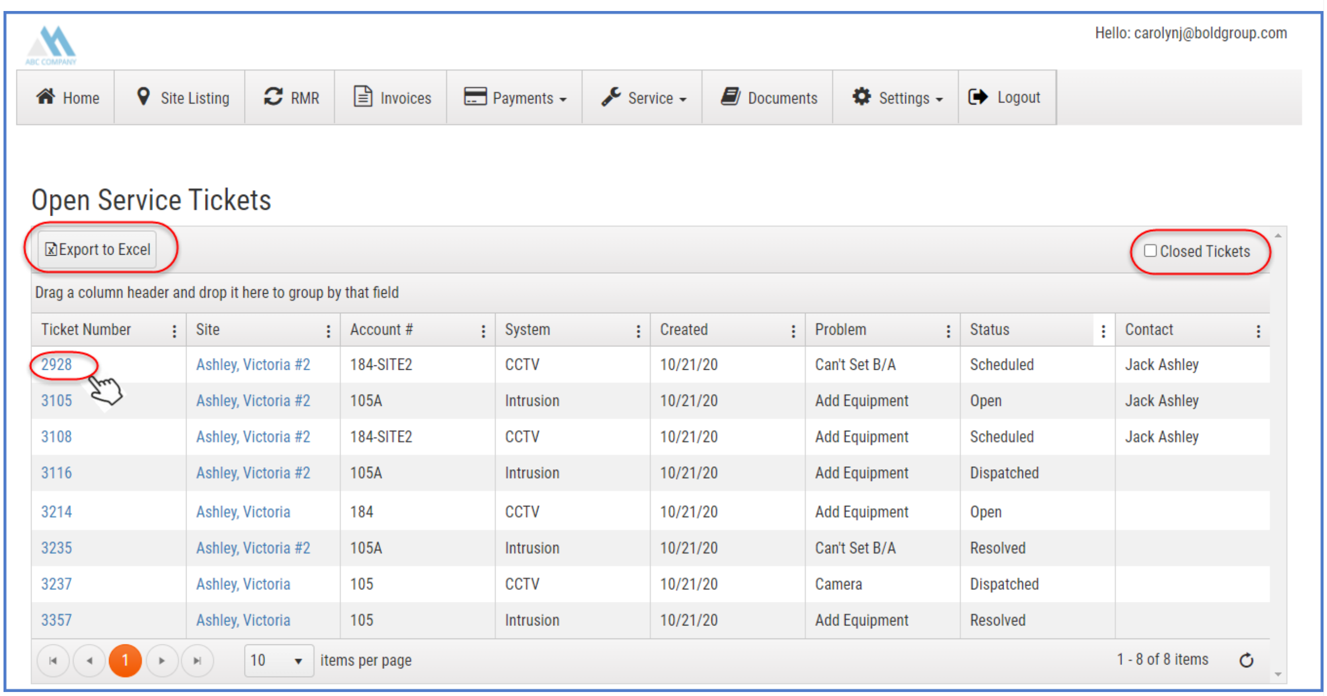
When clicking on the Service Tab, one option is available, View Tickets. When clicking on the View Tickets option, customers are able to do the following:

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

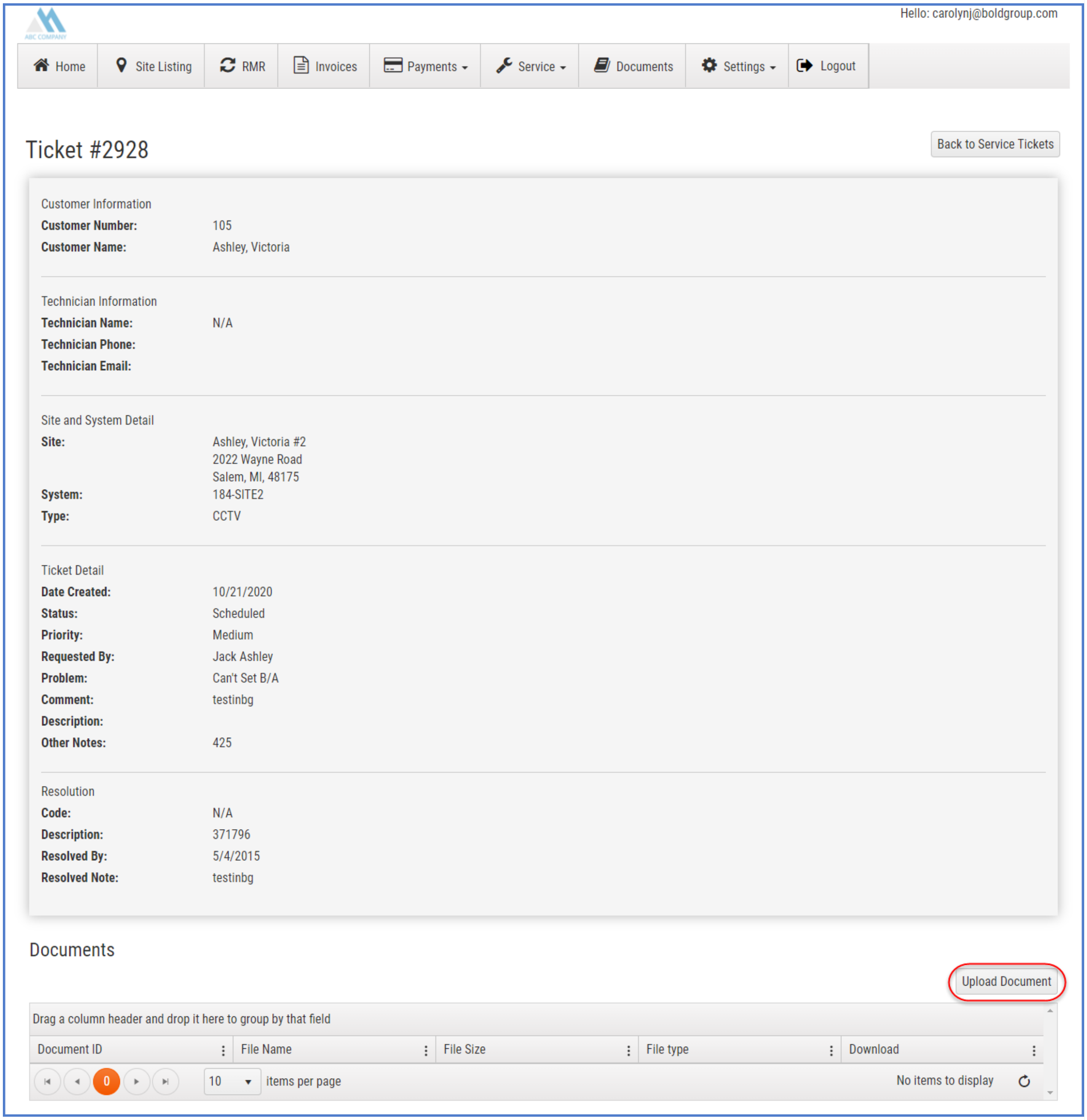
***Your company must purchase the add-on module, SedonaDocs, to be able to use this feature.**



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.



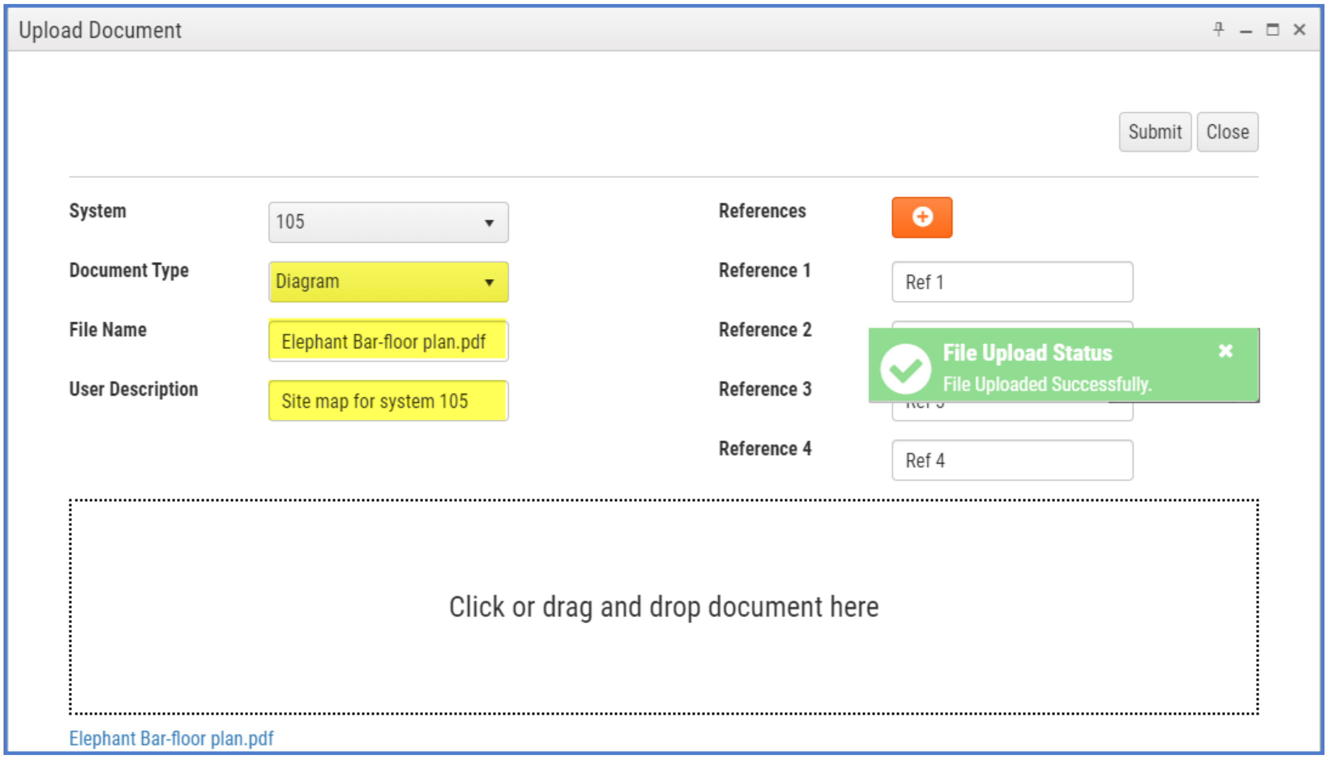
At the bottom of the ticket details page, a customer has the ability to upload a document to the ticket being viewed.



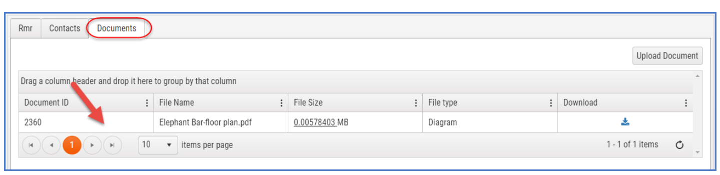
Upload a Document to a Ticket

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.



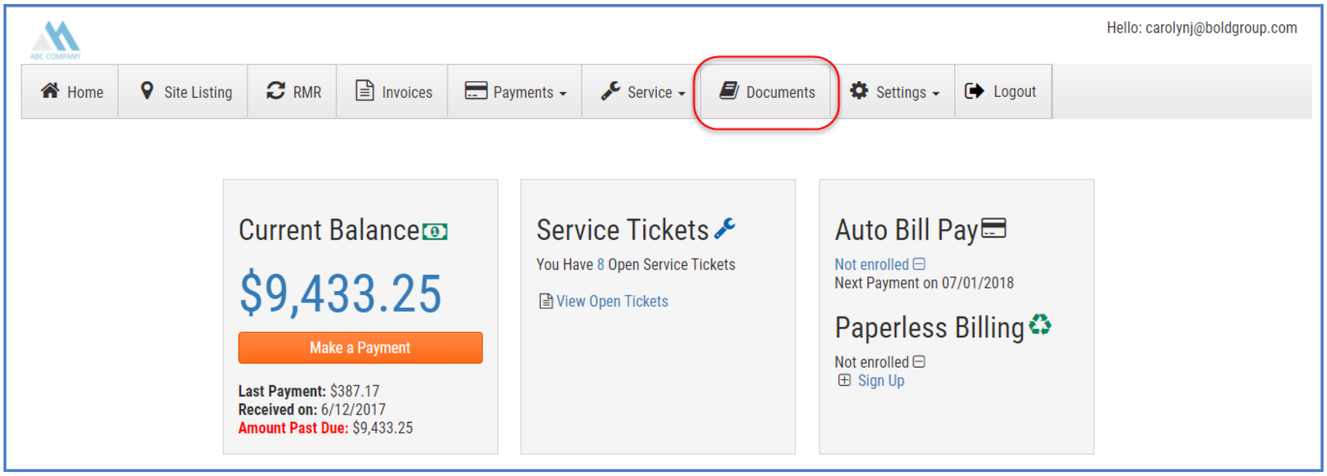
Once a document was uploaded successfully, it will be displayed in the documents listing.



Documents Tab

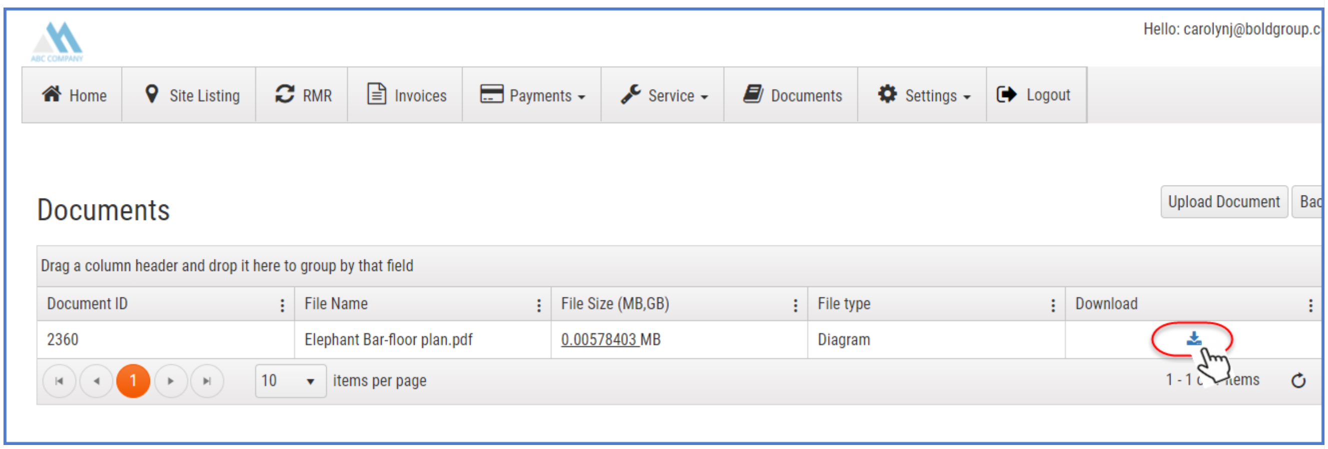
To have access to this feature, your company must purchase the add-on module, SedonaDocs.

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.



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.

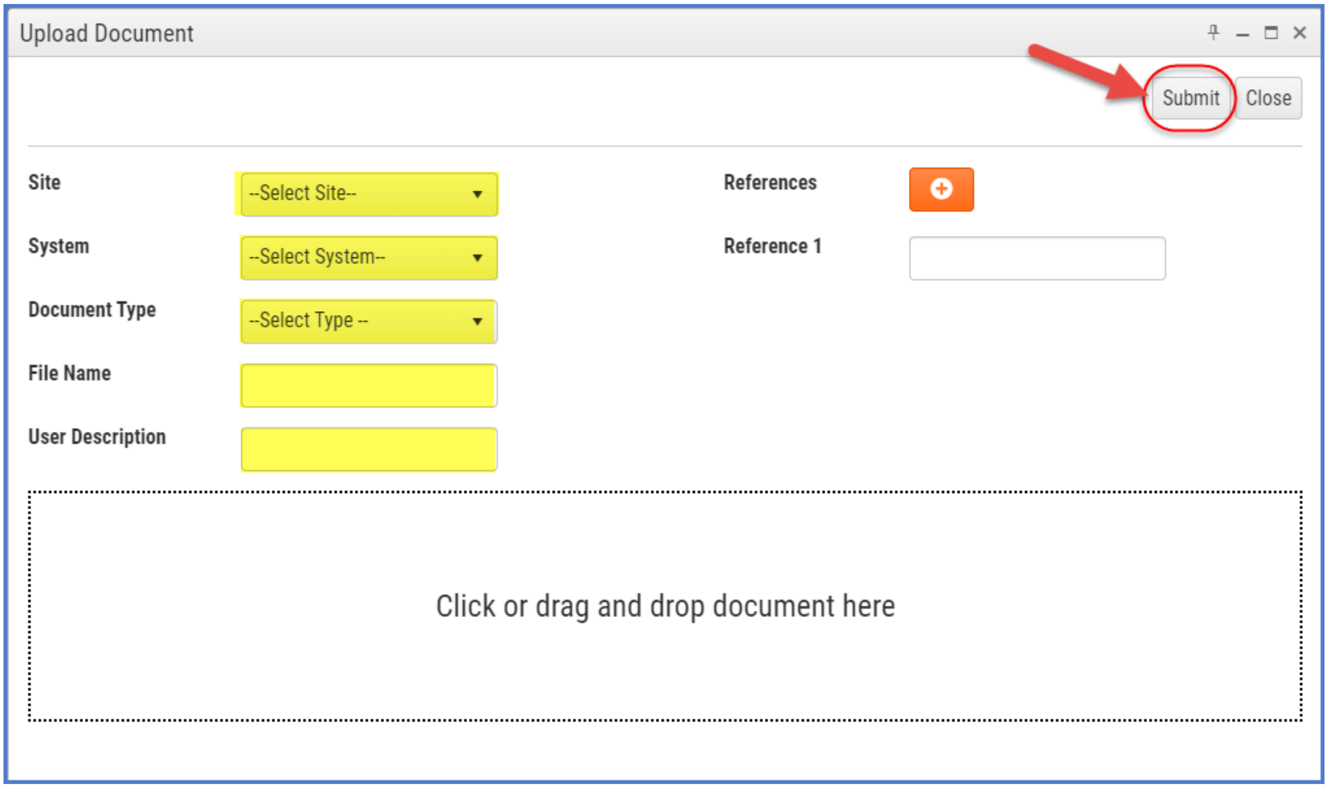


Upload Document

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
--Select Site--
System
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Document Type
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File Name
User Description
References
Reference 1
Click or drag and drop document here