14ᵗʰ ANNUAL USERS CONFERENCE
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Service 101 – Part 2

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SedonaSchedule – Ticket Queue

The Ticket Queue is designed to be a central location for viewing and working with Tickets. Each User is able to configure the view of the Ticket Queue to their personal preference for ease in finding the information needed to perform their job.

In SedonaOffice, there are four types of Tickets:

- **Service Tickets** - These are Tickets where your company is responsible for performing the work.

- **Inspection Tickets** - These types of Tickets are generated in bulk on a periodic basis; usually once a month. The need to generate Inspection Tickets is based upon an Inspection Record that is setup on a customer's System record. On the Inspection setup, a default Service Company is assigned to the Inspection record; this identifies whether your company will be performing the Inspection.

- **Vendor Tickets** - These are Tickets where a Service Provider (subcontractor) is performing the work on the Ticket. If a Service Provider is the typical servicer of the System, you may set the default Service Company on the System record to a Service Provider. When a new Ticket is created, the default Service Company on the System record is used; if that is set to a Service Provider type Service Company, the Ticket will automatically be coded as a Vendor Ticket.

  Regular Service Tickets may be turned into Vendor Tickets by changing the Service Company to a Service Provider type [service Company] on the Service Ticket data entry form.

- **Vendor Inspection Tickets** - Similar to regular Inspection Tickets; on the Inspection setup, if a Service Provider type of Service Company is selected, when the Inspection Ticket generation process occurs, Inspection Tickets will be coded as Vendor Inspection type tickets.
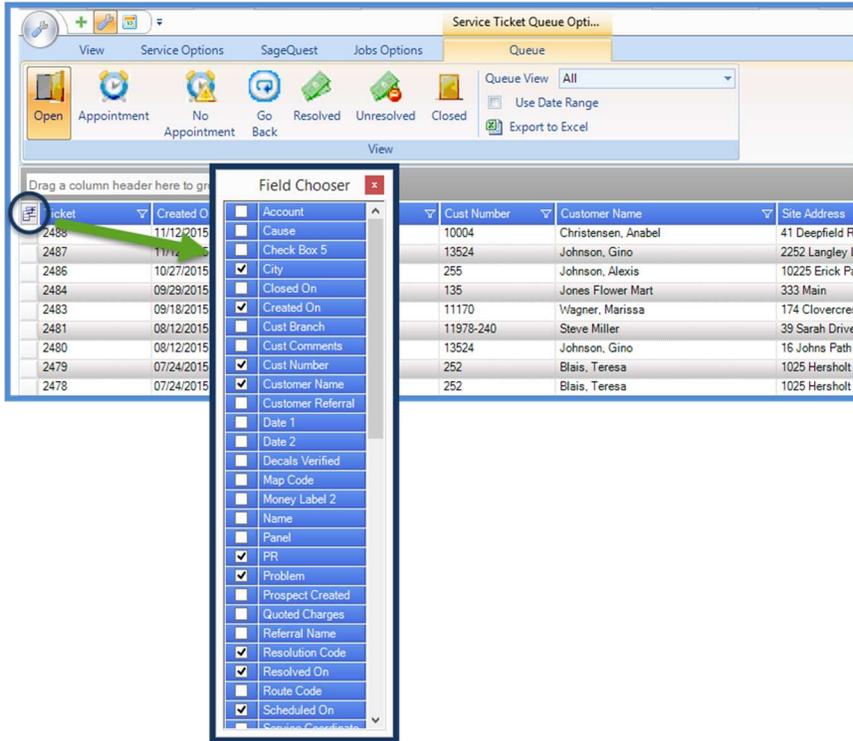
Notes

Configuring the Ticket Queue

When first accessing the Ticket Queue, all available columns of data are displayed. Each User may pick and choose which columns they desire to be displayed each time the Ticket Queue is accessed. Once the columns have been selected, the software will remember these settings every time the User logs into SedonaSchedule.

Notes

Clicking on the Field Chooser at the upper left of the Ticket Queue will display a list of all the available columns from which to select.

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Once the desired fields have been selected, you may re-arrange the order of the columns by dragging to the desired location.

Notes

Column widths may also be adjusted to the User's preference.

Notes

Sorting Filtering & Grouping

The Ticket Queue may sorted and filtered to display the list of Tickets in the fashion desired by the User.

Sorting

Sorting is accomplished by clicking on the header name of any of the displayed columns within the Ticket Queue.
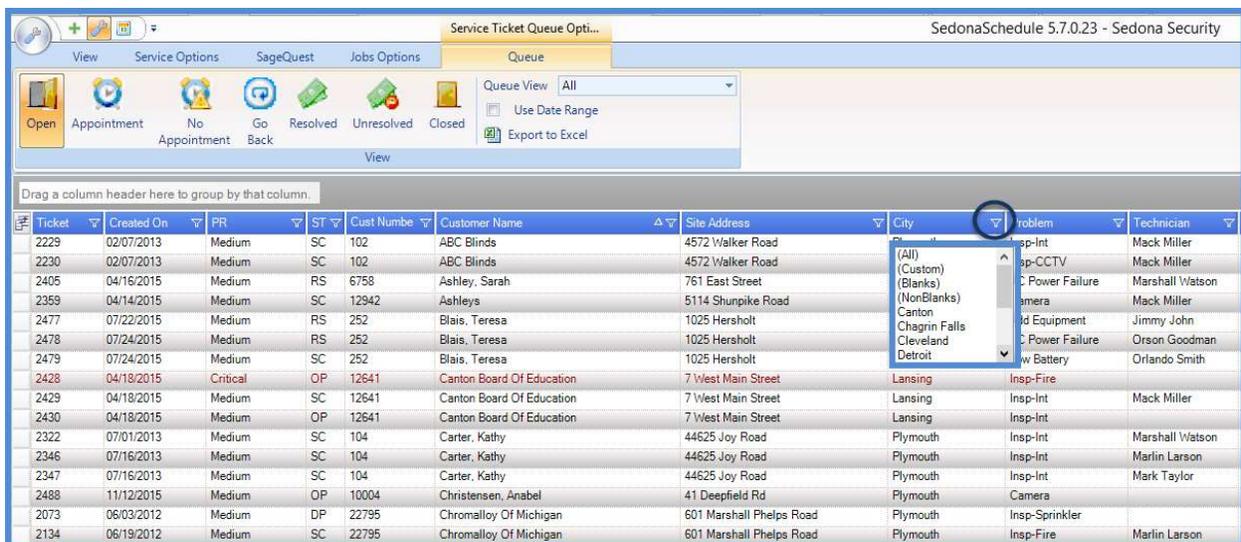

Notes

Filtering

Filtering is used to narrow down the list to just the Tickets you want to work with.

For example, you want to view all of the Tickets where the Site is in a particular city. When clicking on the filter icon in the column header, a list of choices will be listed for all Tickets currently displayed. You may make one choice from the filter drop-down list. If you want to select more than once choice for the field, then you would need to create a custom filter.

To remove a filter, click on the Filter button and select *ALL* at the top of the drop-down list.

When a Filter has been applied to one or more columns, a gold asterisk will replace the Filter button.


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Custom Filters

Custom Filters help to refine the list of Tickets displayed in the list depending on what you want to view. For example, you want to see all Tickets where the Priority code is set to Critical or Medium.

Notes

Grouping

Within the Ticket Queue, you may view the Tickets in *Groups*. When using Groups, the view of the Ticket Queue changes to a tree structure. After creating a Group, each line displayed within the Ticket Queue may be expanded to show the Tickets that belong to that Group.
To create a Group, drag and drop the desired field to the gray Filter Bar located above the field names area of the Ticket Queue. In the example below, we have grouped the Tickets by the Site city name.

To remove a Group and return to the full Ticket Queue view, drag the Group name displayed in the gray bar down into the list of Tickets.

Notes

Ticket Colors

Ticket color display has been coded into the Ticket Queue. The font color of a Ticket displayed in the Ticket Queue depends on the Priority of the Ticket. When a Ticket is initially created, the User must select a Problem Code; in the Problem Code setup table, a default Priority is assigned to that code. The default priority auto-fills into the Ticket, however the User creating the Ticket may choose to either escalate or de-escalate the Ticket Priority. Priority Codes are hard-coded into the software and cannot be added, changed, or deleted. Below are the Priority color codes.

- Low - Green

- Medium - Black

- High - Blue

- Critical – Red

Notes

Ticket Status

Each Ticket is automatically assigned a Status depending on what actions have been performed on the Ticket. Below is a list of the system defined status. The Ticket Status is displayed in the header area of a Ticket and is one of the available columns within the Ticket Queue.

OP – Open: Ticket created but no appointment created.
SC – Scheduled: At least one Technician Appointment has been scheduled.
IP – In Process: Technician Appointment has been marked as "Dispatched" or "Arrived".
DP – Departed: Technician Appointment has been marked as "Departed" and no Resolution Code was selected.
RS – Resolved: A Resolution Code has been selected for the Ticket.
GB – Go Back: The Go-Back option was selected when completing a Technician Appointment Dispatch.
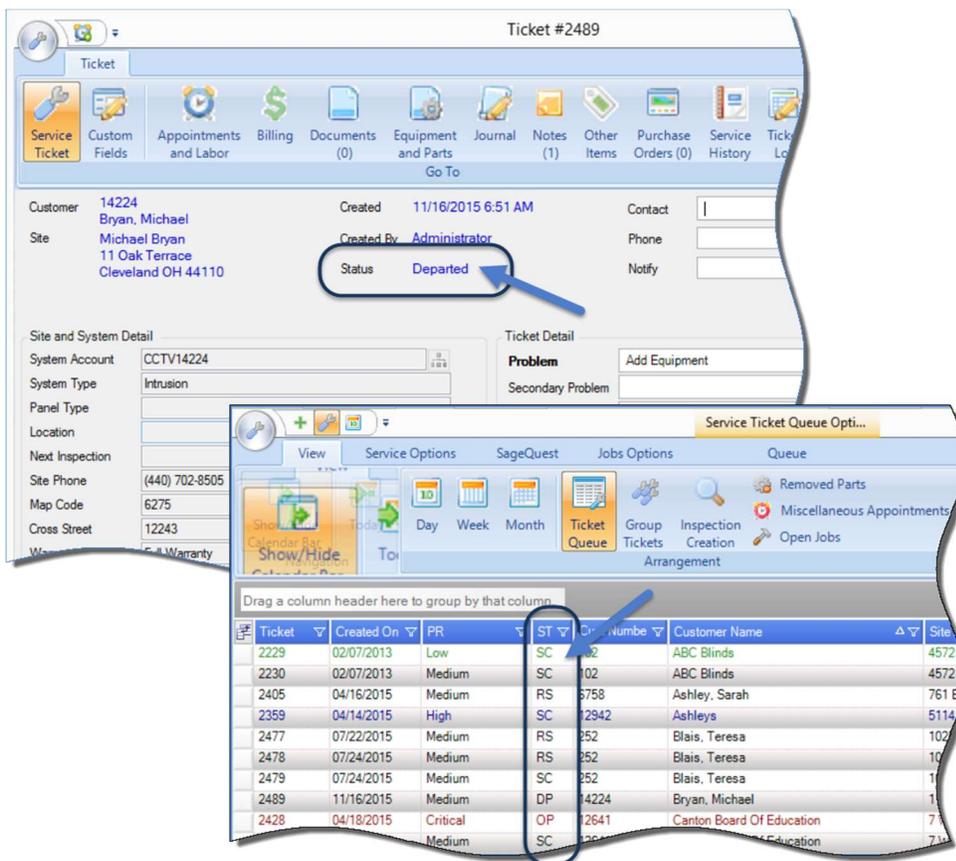
Ticket Queue Ribbon

Ticket Type Selector

When accessing the Ticket Queue you may view a list of each Ticket Type or All Ticket Types.

Notes

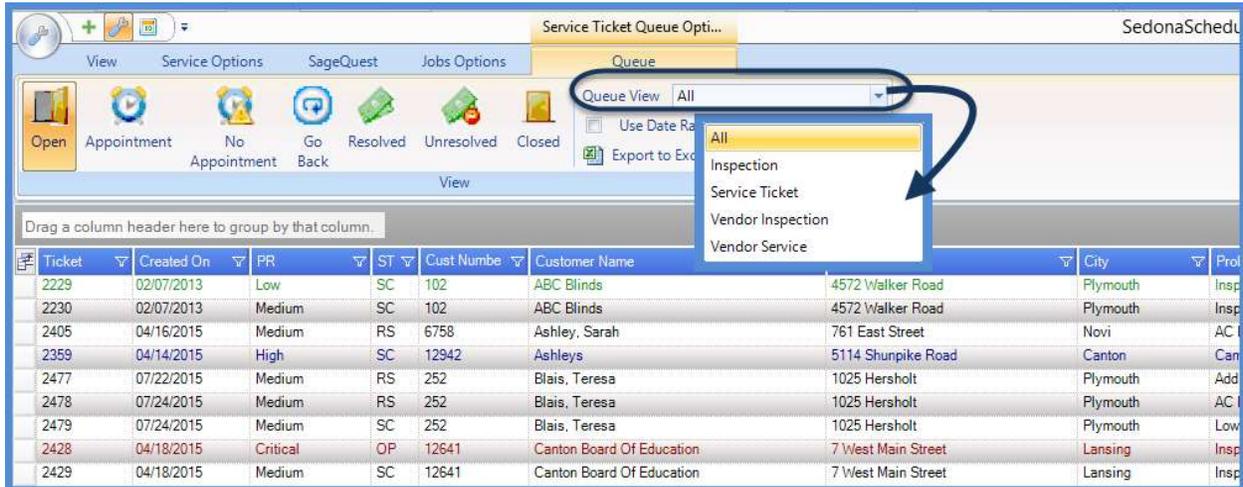**Pre-Defined Ticket List Views**

The Ticket Queue has been designed with pre-defined views to assist Users in performing daily job functions. These pre-defined views are:

- Open Tickets

- Tickets with an Appointment scheduled

- Tickets that have not been scheduled

- Tickets marked as Go-Backs

- Resolved Tickets

- Unresolved Tickets

- Closed Tickets

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