ServiceAutopilot™

TICKETS

USER GUIDE

V2.5 & V3

Contents

What Are Tickets?

In previous versions of Service Autopilot, there were multiple ways you could interact with clients: emails, To Do's, Calls, Damage Cases, Touchpoints. **Tickets** streamline all this functionality into a single feature. With Tickets, you can email clients, record conversations with clients, and make internal notes that the client won't see.

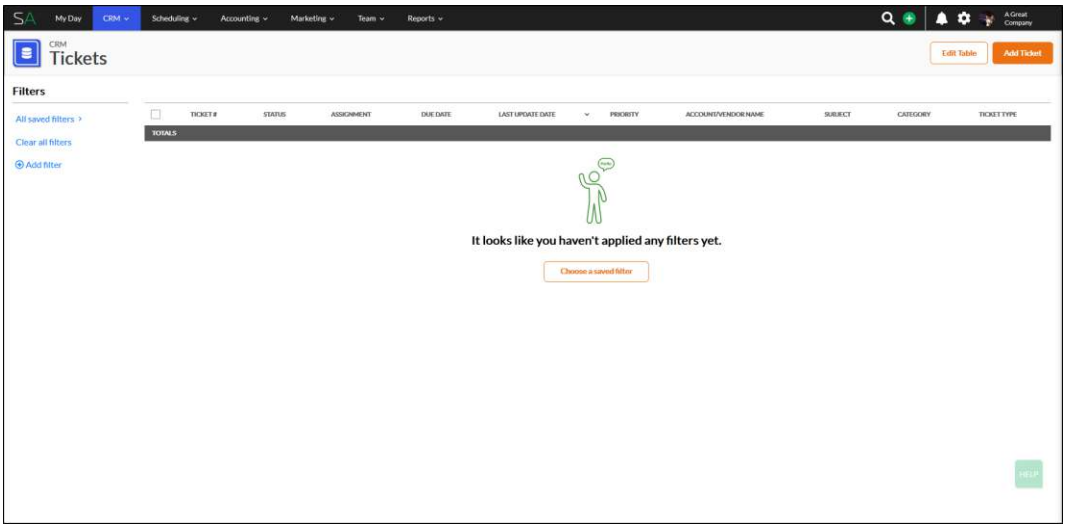
Another component of Tickets is **Calendar Events**. These are used the way you would have previously scheduled a To Do--for non-billable items that need to be completed related to an Account. Any time you have an issue with an Account, the issue can be documented, assigned, and resolved from start to finish within a single Ticket, so you don't have to hunt around for past notes and correspondence.

If you were previously using To Do's in conjunction with other functionality such as Automations, you will not see any changes to that other functionality. All your Automations will work exactly the same and don't require any sort of manual update on your part. All To Do's, Calls, and Damage Cases that existed in SA before the November 13, 2020 release will have been automatically converted to Tickets and Calendar Events.

For more information on this release, see the Release Notes at:
HELP > Knowledge Base > Release Notes > Release Notes for November 13, 2020.

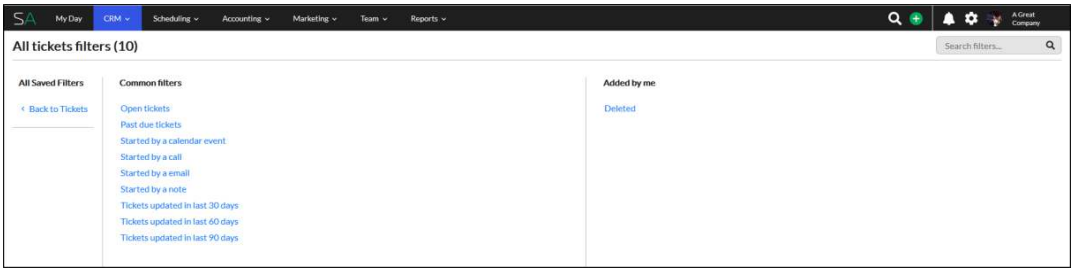
Tickets List – Overview

You can find the Tickets List by going to **CRM > Tickets**. The first time you access this page, no filters will be applied, and no Tickets will display in the table:



Filters will be very useful on this page, particularly if you are generating a lot of Tickets due to things like Automations or bulk emails.

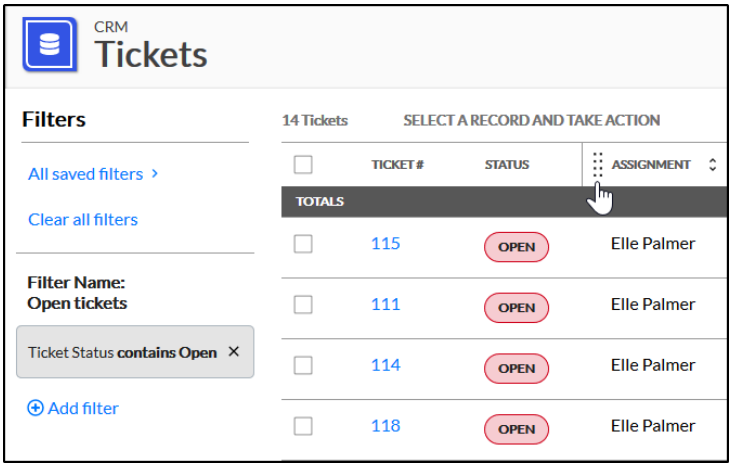
To get started quickly, click **All Saved Filters** at the left to view a list of common filters:



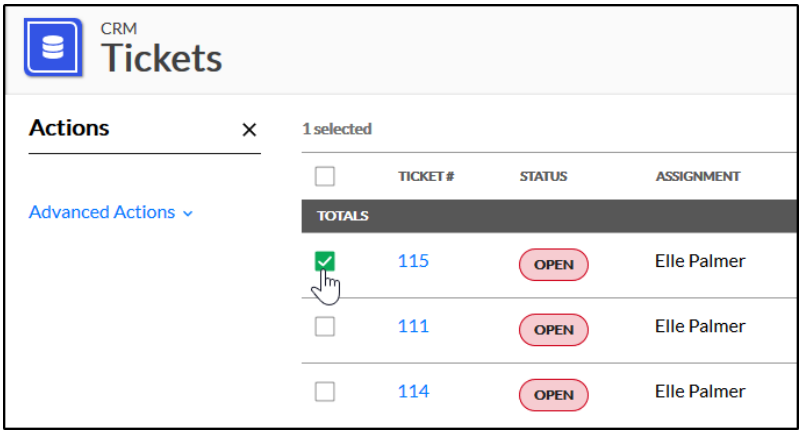
Once a filter is selected, the table will reload to display only the filtered results, and your selected filter will display at the left.

- You can customize any common filter by adding additional filters and saving it for future use.
- You can also create new filters from scratch.
- Any saved custom filters will appear on the All Saved **Filters** list in the "Added by me" column.
- At the top right of the screen:
  - Click **Add Ticket** to add a new Ticket (see "Add Ticket" on page 7)
  - Click **Edit Table** to manage which columns you see in the table and the order in which they appear.

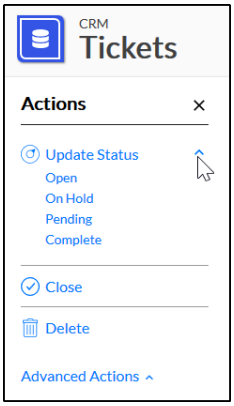
- Move columns in the table by hovering at the left to reveal the double-dotted line:



- Click and drag the double-line to re-position the column.
- Click on the double-arrows on the right side of the column to sort the column in ascending or descending order.
- Any of the blue text is a clickable link.
  - Click a Ticket Number to open the Ticket itself.
  - Click any Account name to open the Account.
- To reveal more actions, check the box next to one or more Tickets to change the menu on the left:



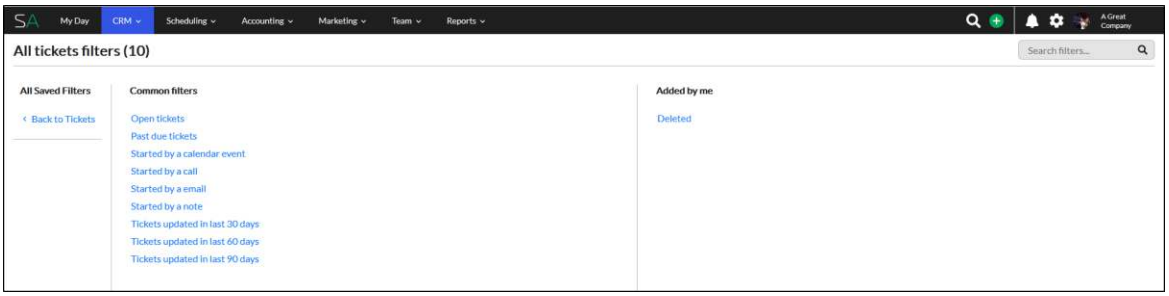
- Click **Advanced Actions** to **Update the Status**, **Close**, or **Delete** one or multiple Tickets:



Tickets Screen Filters

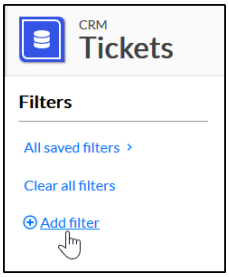
Filters are critical to using the Tickets Screen (**CRM > Tickets**). You actually won't see any Tickets until a filter is applied.

When you first access the Tickets Screen, you can choose one of the pre-built filters on that screen to get started quickly. You can also click **All Saved Filters** to view more pre-built filters:



Any filters you create will appear here as well under **Added by me**. If there is very specific information you want to see, it's a good idea to create your own filters.

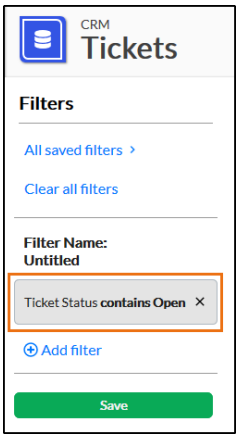
1. To get started, click **Add Filter** from the Tickets Screen:



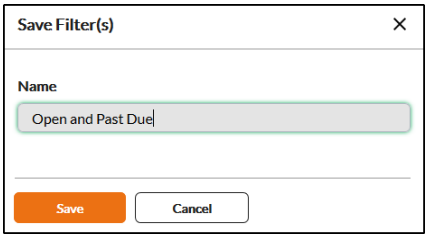
This will reveal the list of all possible filters:

- Account/Vendor Name
- Assignments
- Is High Priority
- Last Updated Date
- Ticket Categories
- Ticket Due Date
- Ticket Number
- Ticket Past Due
- Ticket Status
- Ticket Type
- Vendors

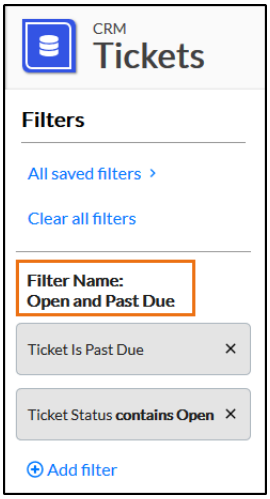
2. Each filter has different criteria. Click on any of them to set specific parameters. Once you've applied a filter, it will appear on the left in a gray box:



3. From here, if the results to not give you what you are looking for, you can click the "**X**" to delete the filter or click **Add filter** to apply additional filters.
4. If you are finished adding filters, click **Save**.
5. In the **Save** dialog, give your filter a name and click **Save**:



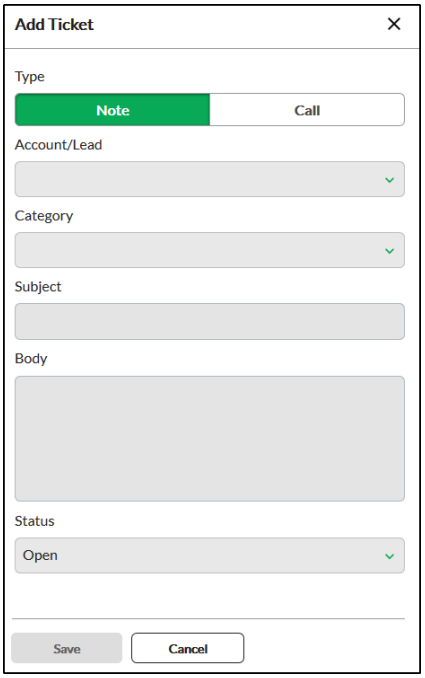
You will remain on that filter view, but the name will now be updated:



6. To create a new filter when you are on a current filter view, click **Clear all filters** to start over.

Add Ticket

There are several ways a new Ticket can be added throughout the system. Each one is detailed below, however, they all collect the same information regardless of how the overlay looks. On some screens, adding a new Ticket will open this overlay:



Here, you can see the following fields that need to be filled out:

- **Type** – select from Note or Call. Typically, "Call" is for when a customer is spoken to over the phone or leaves a voicemail and "Note" is used for any other type of communication. You can filter for this field on the Tickets Screen.
- **Account/Lead** – this field is optional specifically for when you need to make a Ticket for an Account that has not yet been created (such as with a new customer). After the Ticket is created, you can create the new Account and then edit the Ticket to refer to the new Account.
- **Category** – this is a way of categorizing Tickets for your company's most common uses. You can customize the default options by going to **Settings > Ticket Categories**.
- **Subject** – a brief summary of why this Ticket exists.
- **Body** – space for additional details about the Ticket.
- **Status** – this indicates what further action is required on this ticket. For more explanation about Statuses, see "Change the Status of a Ticket" on page 22.

Add a Ticket from the Tickets Screen

1. Go to CRM > Tickets.
2. Click **Add Ticket**.
3. Fill out the overlay that comes out from the right side of the screen.
4. Click **Save**.

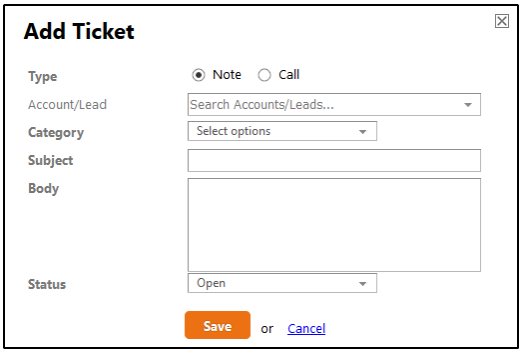
After saving, you will be redirected to the **Review** overlay for the new Ticket.

Add a Ticket from the Quick Add Icon

You can add a Ticket from any screen in SA by clicking the green plus sign in the navigation bar. This is also known as the **Quick Add** icon.

1. Click the **Quick Add** icon.
2. Select **Ticket**
3. Fill out the overlay.

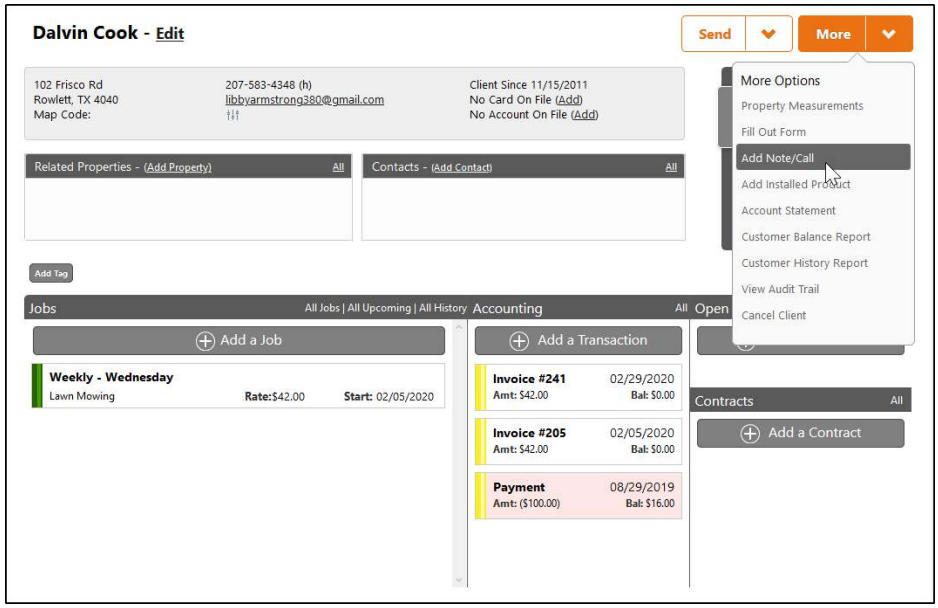
   If you were on any V2 screen, the overlay will have the same fields as previously listed, but it will look like this:



4. Click **Save**.

Add a Ticket from a V2 Client Screen

1. Navigate to a client account screen.
2. Click the **More** dropdown list.
3. Select **Add Note/Call**.

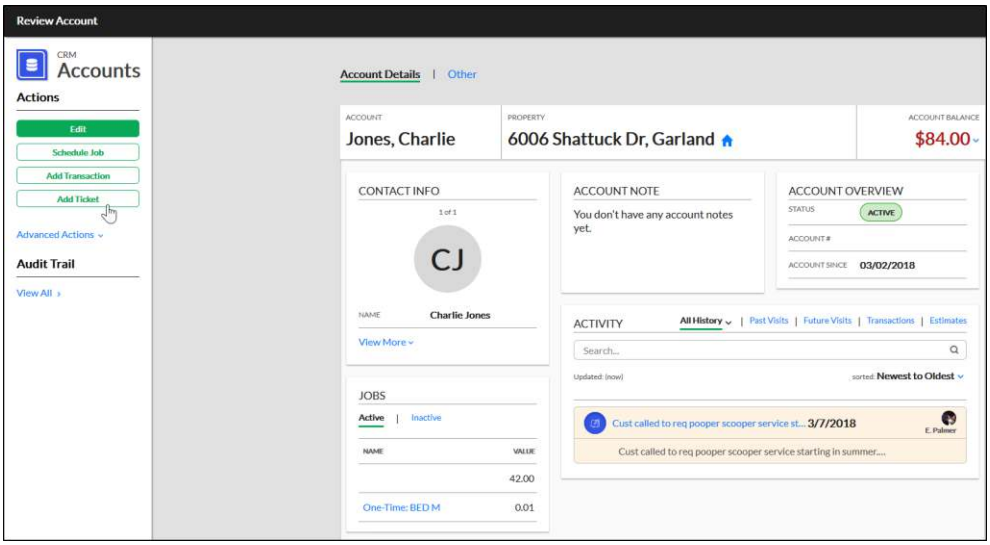


4. The **Account/Lead** field will be filled out automatically. Fill out the rest of the overlay.
5. Click **Save**.

After the Ticket is saved, it will be visible in the **Activity Stream** on the **Client** screen.

Add a Ticket from a V3 Account Overlay

1. Navigate to the Account you want to add a Ticket to.
2. Click **Add Ticket** from the **Actions** menu at the left.

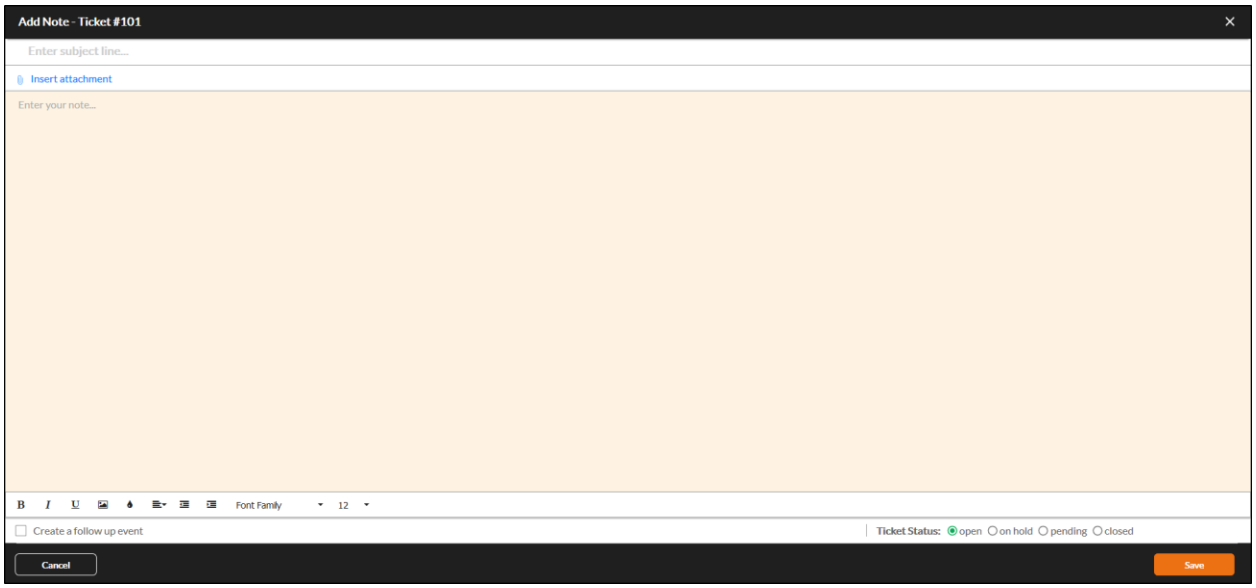


3. The **Account/Lead** field will be filled out automatically. Fill out the remainder of the overlay.
4. Click **Save**.

Add a Ticket to an Existing Ticket

If you need to make an update to an existing Ticket, you will actually be attaching a new Ticket to an existing one. You can do this from the primary ticket (as listed here) or associate the new Ticket to the original one once it is created.

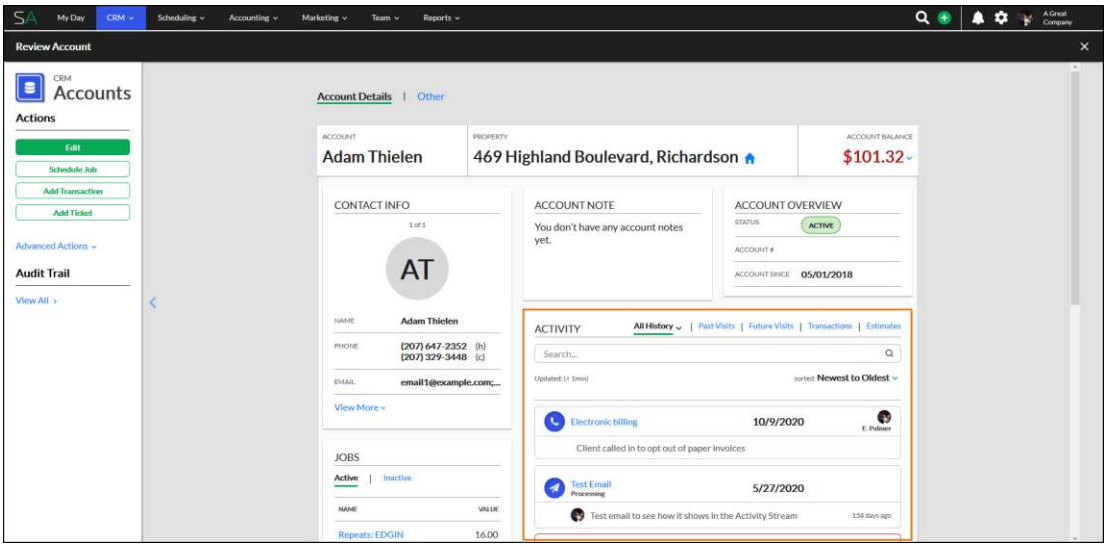
1. Navigate to the **Ticket Review** Overlay for the Ticket you want to add to.
2. Click **Add Note** or **Add Call** depending on the type of Ticket you want to add.
3. Complete the **Add Ticket** overlay:



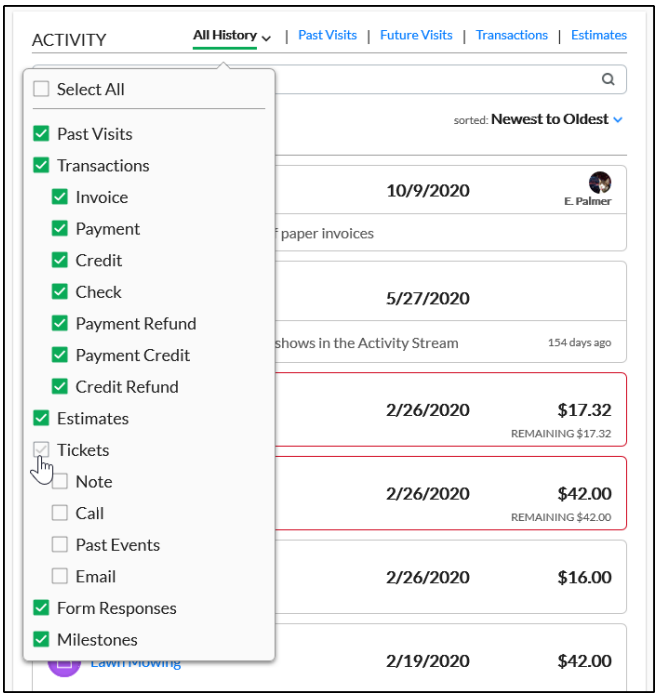
4. Use the check box in the lower left if you need to schedule a Calendar Event related to this Ticket. For more information, see “Add a Calendar Event to a Ticket” on page 24.
5. Click **Save**.

View Tickets on a V3 Account

Tickets are one of many items that can be viewed on a V3 **Account Review** overlay on the Activity Stream:



1. If you don't see Tickets, click **All History** and make sure "Tickets" or one of the sub-selections is selected:



2. Click **All History** again to close the selection list and apply changes.

Any time you make changes to what displays in the Activity Stream, these changes will stay for all Accounts until they are modified again.

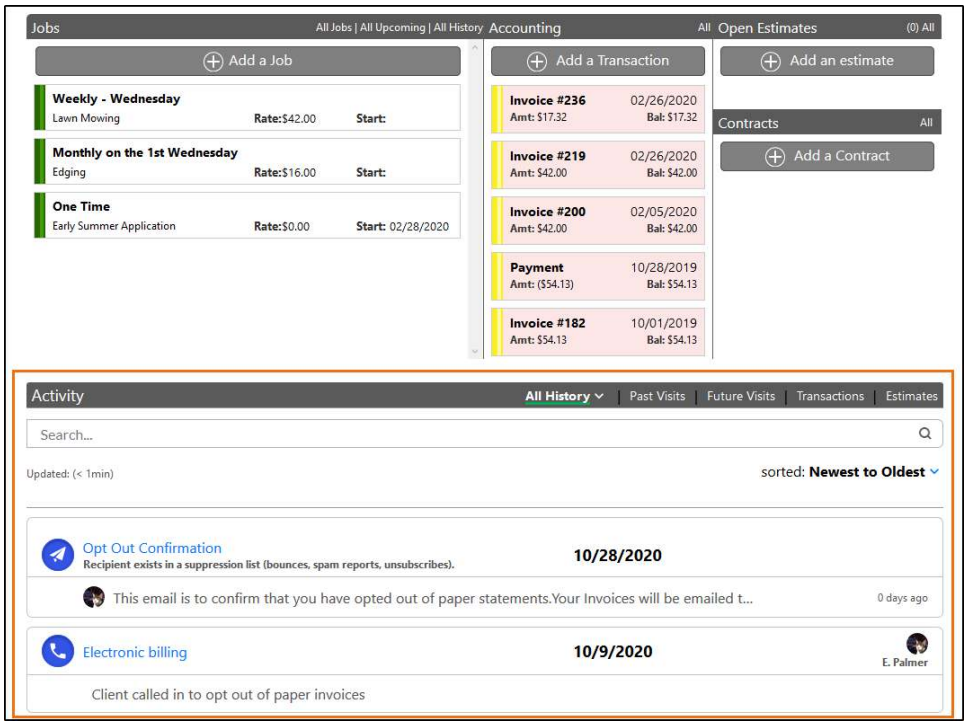
The cards in the Activity Stream will display the subject, date, assignment, and the first line of the body of the Ticket. Additionally, emails will display a status below the subject so you can easily tell if the email has successfully sent:

Click any card to view the **Review Ticket Overlay**.

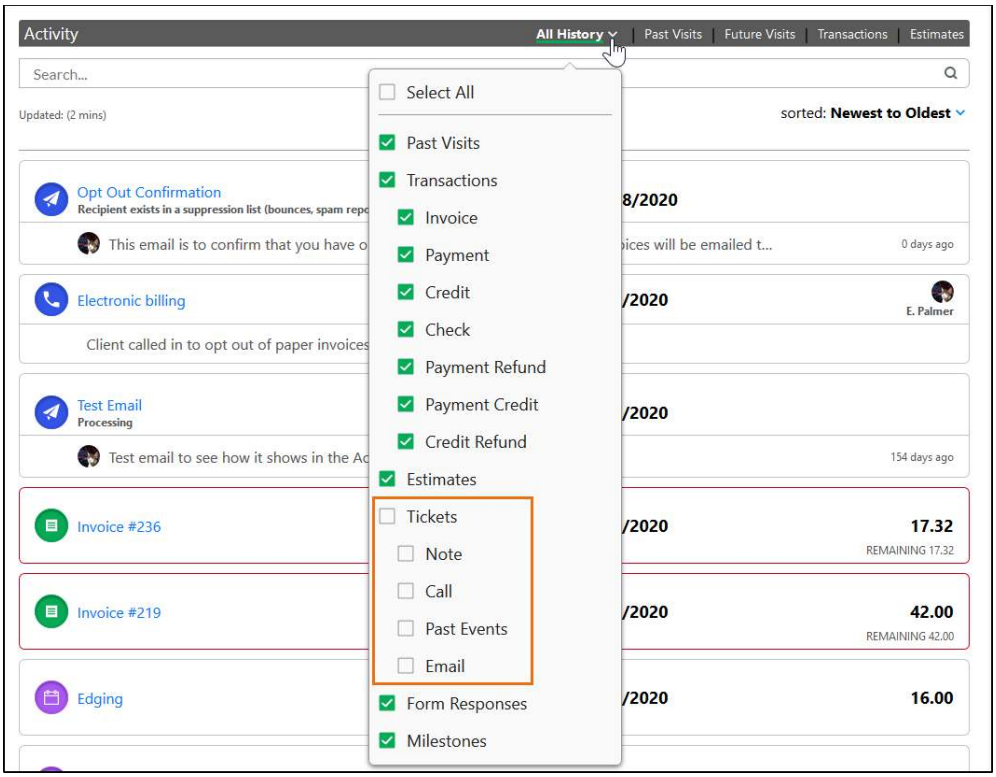
For more information, see “Review Ticket Overlay” on page 15.

View Tickets on a V2 Client Screen

Tickets can be viewed on V2 Client Screens as well as V3 Accounts. The V3 Activity Stream has replaced the “Timeline,” in the same area where it was previously on the screen:



1. Like the **V3 Activity Stream**, you need to select “Tickets” or one of the sub-selections on the **All History** dropdown list before they will display in the Stream:



2. Click **All History** again to close the selection list and apply changes.

   Any time you make changes to what displays in the Activity Stream, these changes will stay for all clients until they are modified again.

   The cards in the Activity Stream will display the Subject, date, assignment, and the first line of the body of the Ticket. Additionally, emails will display a status below the subject so you can easily tell if the email has successfully sent:

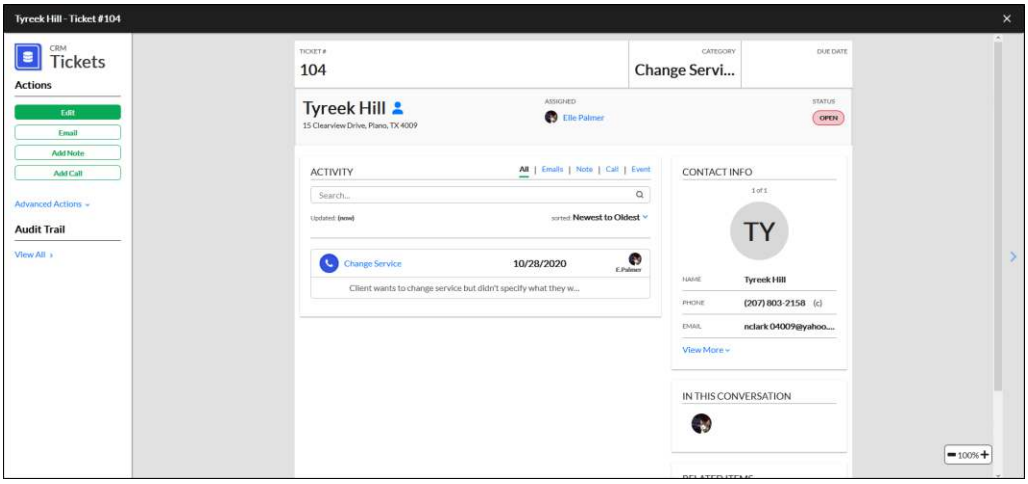
3. Click any card to view the **Review Ticket Overlay**.

   For more information, see “Review Ticket Overlay” on page 15.

   Clicking a Ticket card will open this overlay in a new tab over the **Tickets** screen. If you don’t see the new tab open, be sure to check your pop-up blocker.

Review Ticket Overlay

The **Review Ticket Overlay** is the one you will see when you click an existing Ticket to open it. Like other V3 overlays, there will be a label at the top, an **Actions** menu on the left, and all other information in panels on the right:

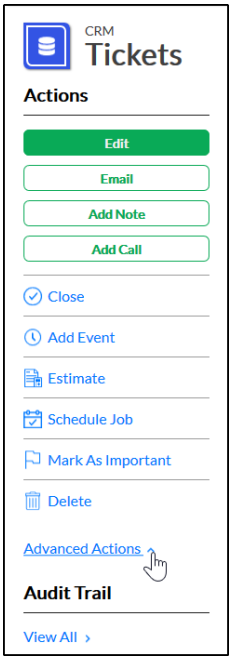


Actions Menu

When you open an existing Ticket, you'll Immediately see four options available:

- **Edit** –make modifications to the Ticket you are currently viewing. (See "Edit Ticket Overlay" on page 19.)
- **Email** – send an email related to this Ticket.
- **Add Note** – add a new Ticket related to the one you are currently viewing. The Ticket Type of "Note" is used for anything that isn't a phone call, such as internal notes.
- **Add Call** – this will also add a new Ticket with a Ticket Type of "Call." This is used for inbound or outbound call records.

Click **Advanced Actions** to see more options:



Close – quickly change the status of the Ticket to "closed" to indicate no further action is required.

Add Event – use this option to quickly add a Calendar Event that is automatically related to the Ticket you are on.

Estimate – create an Estimate that will be related to the Ticket. This will open in a new tab. Only the Account will transfer to the Estimate.

Schedule Job – this will open the Job Wizard so you can schedule a new Job that is related to the Ticket.

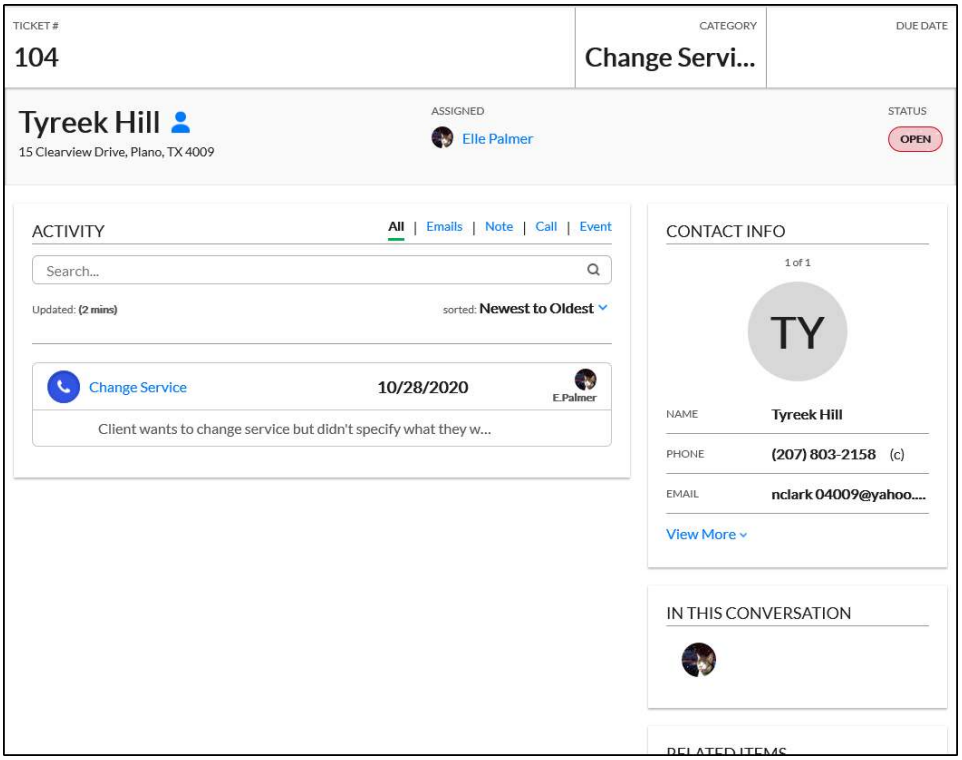
Mark as Important – this will add an "important" badge to the Ticket and can be viewed on the Tickets Screen in the "Priority" column.

Delete – delete the Ticket.

Below **Advanced Actions**, you'll see the **Audit Trail**. It lists all changes made to an item, the user who made the changes, and a timestamp of when they occurred.

Review Panels for Tickets

These panels will tell you all the information you want to know about an existing Ticket:



Ticket Information

- The **Ticket Number**, **Category**, and **Due Date** are at the top.

Account Information

Like other V3 screens, wherever you see blue text is a clickable link.

- Click the person icon to open the **Account Review** overlay.
- Click the assigned Resource to open the Resource's account in a new tab.
- To the right of the assignment, you will see the **Priority** if one is applied, as well as the **Status**.

Activity Stream

The largest panel is the **Activity Stream**. This shows you everything that has taken place on a Ticket including Emails, Calendar Events, and other related Tickets.

- Each card displays the subject, a date, and the first line of the body.
- Emails also have a status so you can know if it was successfully delivered.
- Click any card in the stream to view it.

Contact Information

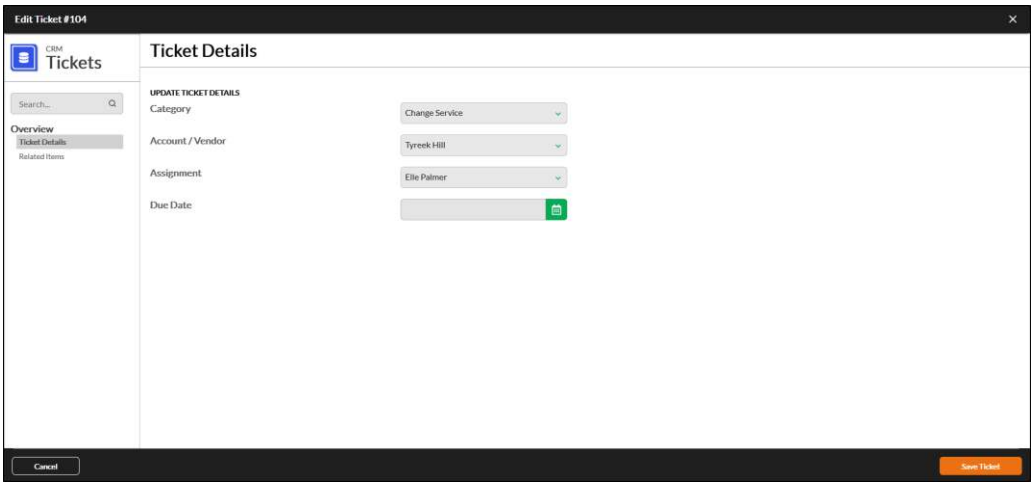
- **Contact Info** displays the basic contact information on the Account in case you need to reference it quickly, such as when giving a Client a call back.
- **In This Conversation** displays any user who has touched the Ticket, such as sending a related email or scheduling a related Calendar Event.

Related Items

- **Related Items** are Estimates, Jobs, and other Tickets that are related to the Ticket in the current view. The idea is to keep everything in a single location throughout the conversation with the client.

Edit Ticket Overlay

This is the overlay you will see when you click the **Edit** button from a **Review Ticket** Overlay (see "Review Ticket Overlay" on page 15).



This overlay is very simple. The idea with Tickets is that you continually add to one without modifying anything that has already been done. This explains why the **Subject** and **Body** can't be modified from the original. You can, however, edit the **Category**, the **Account/Vendor**, the **Resource** assigned to the Ticket, and the date it is due.

Related Items

Use the tab on the left side of the **Edit Ticket** overlay to see **Related Items**:

Use this screen to relate other Tickets, Estimates, or Jobs to the Ticket number at the top of the overlay. Once associated, all related items will appear in the **Activity Stream** by date, and in the "Related Items" panel on the **Ticket Review** overlay.

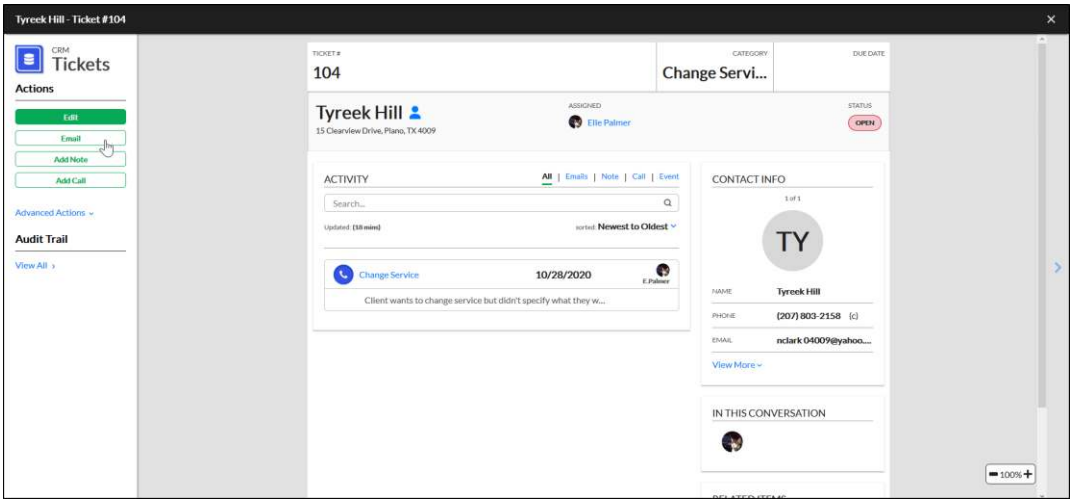
Send an Email from a Ticket

There are many ways in SA to send an email to a client. One such way is from a **Ticket Review** overlay. Tickets open only in V3 screens, so if you're accessing an existing Ticket from the V2 client view, the Ticket will open in a new tab with the **Ticket Review** overlay open over the **Tickets** screen.

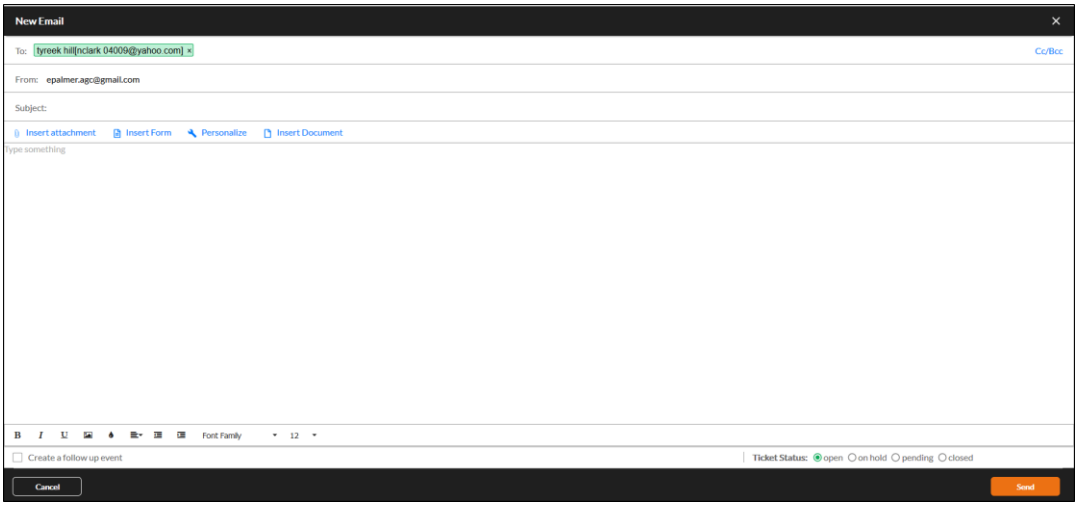
Emails sent from a Ticket Review overlay will automatically be associated to the Ticket so all correspondence can be seen in a single location.

To send an Email from a Ticket, follow these steps:

1. Navigate to a **Ticket Review** overlay.
2. Click **Email** from the **Actions** menu.



3. Fill out the **New Email** overlay as you would any other email.



4. If this email concerns a Calendar Event that needs to be scheduled, you can create the event by checking the box to **Create a follow up event**.
5. Adjust the **Ticket Status** if needed.
6. Click **Send**.

Add a Note or Call to an Existing Ticket

Two of the options on the Ticket Review overlay are to add a Note or add a Call. Clicking either button will create a new Ticket that is related to the original one. To add a new Ticket to an existing Ticket, follow these steps:

1. Navigate to a **Ticket Review** overlay.
2. Click **Add Note** or **Add Call**.
3. Fill out the **Add Ticket** overlay the way you would with any other Ticket.
4. If this Note or Call concerns a Calendar Event that needs to be scheduled, you can create the event by checking the box to **Create a follow up event**.
5. Adjust the **Ticket Status** if needed. It will default to “open.”
6. Click **Save**.

Change the Status of a Ticket

The **Status** of a Ticket indicates what further action is required on it:

- **Open** – this status indicates that some further internal action is required such as follow-up with the client or that a Calendar Event needs to be scheduled.
- **On hold** – use this status if further progress on this Ticket requires action from a third party. Some examples would be if you were waiting for a part to arrive that you need for the Job, or a sub-contractor needs to send you their availability.
- **Pending** - this status is used when you're waiting on something from the Client in order to progress with the Ticket.
- **Closed** – this status indicates the Ticket has been resolved and no further action is required.

Once a Ticket Status has been set, there are a few ways it can be modified.

Change a Status from the Tickets Screen

1. Go to **CRM > Tickets**.
2. Apply a filter to view the Tickets you need to modify.
3. Check the box next to one or more Tickets.
4. Click **Advanced Actions**.
5. Click **Update Status**.
6. Click the status you want to apply to the selected Tickets.

Change a Status from the Review Ticket Overlay

There are two ways to do this depending on if you just need to close a Ticket or if the Status needs to be modified to something other than "closed."

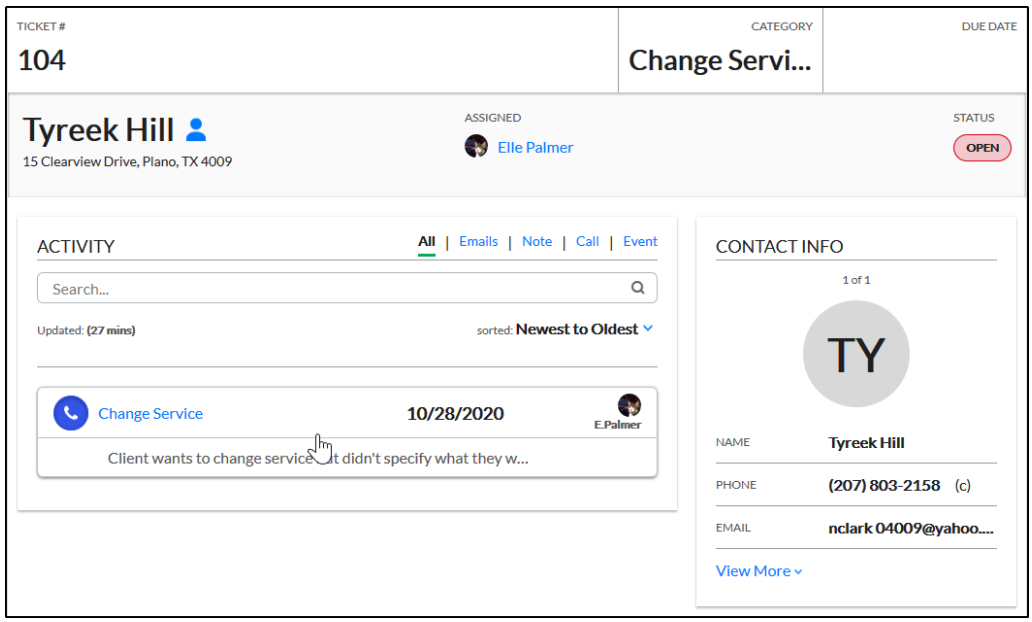
Change the Status of a Ticket to Closed

1. Navigate to a **Review Ticket** Overlay.
2. Click **Advanced Actions** in the Actions menu.
3. Click **Close**.

   A green confirmation message will appear in the upper-right of the screen and the Status will change to "closed" on the overlay.

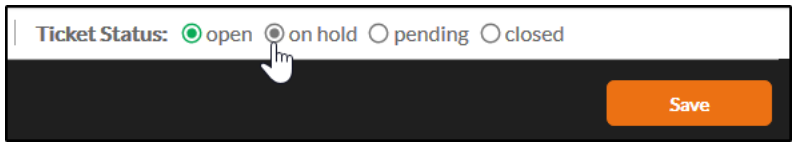
Change the Status of a Ticket to Open, On Hold, or Pending

1. Navigate to a **Review Ticket** Overlay.
2. Click the most recent card in the Activity Stream.



3. Select a **Ticket Status** at the bottom of the overlay.

   Note: Not all events in the Activity Stream will have this option.



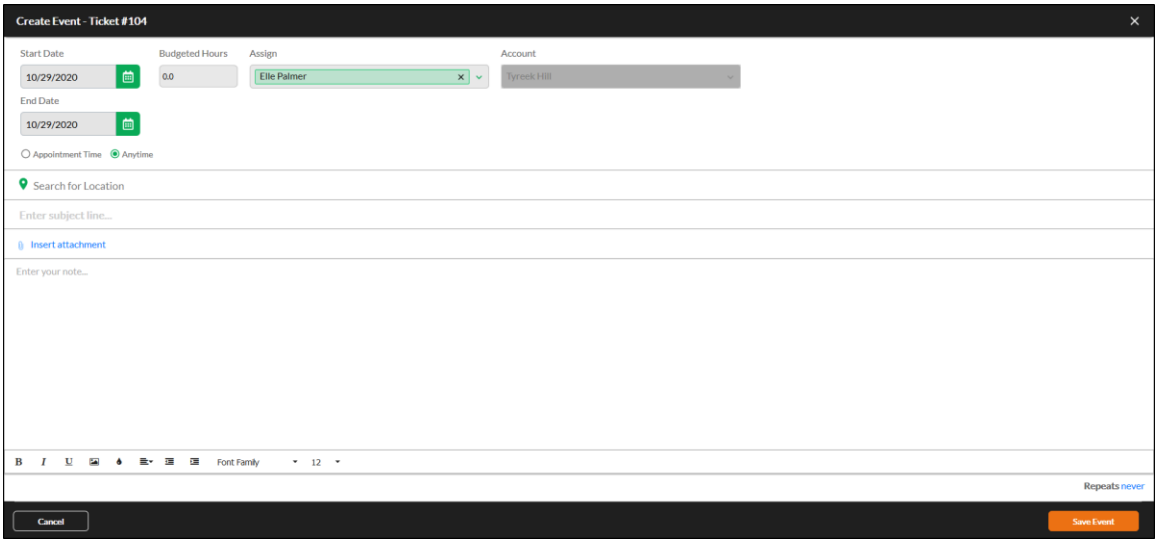
4. Click **Save**.

Add a Calendar Event to a Ticket

A **Calendar Event** is a non-billable event that can be scheduled and visible on your Dispatch Board and Calendar. You might use one for going out to a client's property to do an Estimate, so it gets on a Resource's schedule for the day. While you can't add a Calendar Event when a Ticket is initially created, it can be done from a **Review Ticket** overlay so it is associated to the original Ticket. Follow these steps:

1. Navigate to a **Review Ticket** Overlay.
2. Click **Advanced Actions**.
3. Click **Add Event**.
4. Fill out the **Create Event** overlay.

   The date will automatically be set to the current date, and the Assignment will default to the user you are logged in as.



5. If the Event needs to occur on a repeating basis for this Account and Assignment, you can set this by clicking the "never" link in the lower right corner of the overlay.
6. Click **Save**.

Add an Estimate to a Ticket

One of the options on the **Advanced Actions** list on the **Review Ticket** overlay is to add an Estimate. The workflow for this functionality might be something like this:

1. A Client calls in to request an Estimate. A Ticket is created to record the call and request.
2. A Calendar Event is created from the Ticket to survey the property for the Estimate.
3. An Estimate is created from the original Ticket and sent to the Client.
4. The Client does not respond to the Estimate, so a reminder email is sent through the Ticket.
5. The Client accepts the Estimate, and a new Note is added to the Ticket for the Job to be scheduled.
6. The Job is scheduled from the original Ticket.

This entire history would be visible from the original Ticket as well as any users involved.

To create an Estimate from a Ticket:

1. Navigate to a **Review Ticket** overlay.
2. Click **Advanced Actions**.
3. Click **Estimate**. This will open the Estimate overlay in a new tab. If you don't see the tab, check to make sure it didn't get caught in your pop-up blocker.
4. Fill out the **Estimate** overlay as you would normally.
5. Click **Save.**

Schedule a Job from a Ticket

One of the options on the **Advanced Actions** list on the **Review Ticket** overlay is to add a Job. When a Job is added from a Ticket, it is related to the Ticket and therefore appears on the **Review Ticket** overlay. The Job will also be visible on the **Account** or **Client** screen and everywhere else you would typically find a Job.

To Schedule a Job from a Ticket:

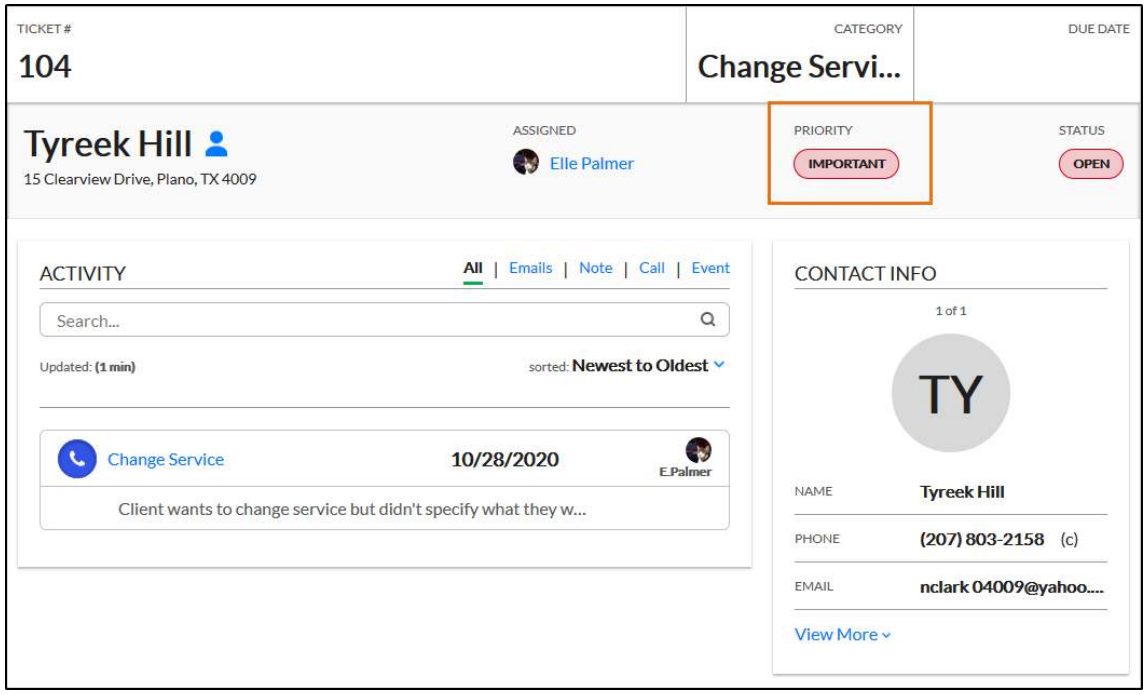
1. Navigate to a Review Ticket overlay.
2. Click **Advanced Actions**.
3. Click **Schedule Job**. This will open the Job Wizard.
5. Fill out the Job Wizard as you would normally. For more information on the Job Wizard, go to **HELP > Knowledge Base > Scheduling > V3 Job Wizard**.
6. Click **Save**.

Mark a Ticket as Important

Marking a Ticket as “important” adds a red **Priority** badge to a Ticket that can be seen on the Tickets list. You might want to add this demarcation if a Ticket requires particular care or is very time sensitive.

To mark a Ticket as important:

1. Navigate to a **Review Ticket** overlay.
2. Click **Advanced Actions**.
3. Click **Mark as Important**. You will immediately see the badge added to the **Review Ticket** overlay to the left of the **Status**.



Delete a Ticket

While Tickets can be deleted, this is not what is known as a "hard delete." The Ticket will disappear from the **Account** and **Tickets** list but can still be viewed if you set the "Ticket Status" filter to "Deleted."

Tickets can be deleted in two ways and restored in one. All are outlined below.

Delete a Ticket from the Tickets Screen

1. Go to **CRM > Tickets**
2. Apply or select a filter so the Ticket(s) you need to delete are displayed
3. Check the box next to one or more Tickets
4. Click **Advanced Actions**
5. Click **Delete**

Delete a Ticket from the Review Ticket Overlay

1. Navigate to a **Review Ticket** overlay
2. Click **Advanced Actions** in the **Actions** menu
3. Click **Delete**

Restore a Deleted Ticket

1. Go to **CRM > Tickets**
2. Click **Add Filter**
3. Select "**Ticket Status**"
4. In the **Contains** dropdown list, select "Deleted"
5. Click **Update Filter**
6. Check the box next to the Ticket(s) you want to restore
7. Click **Restore**

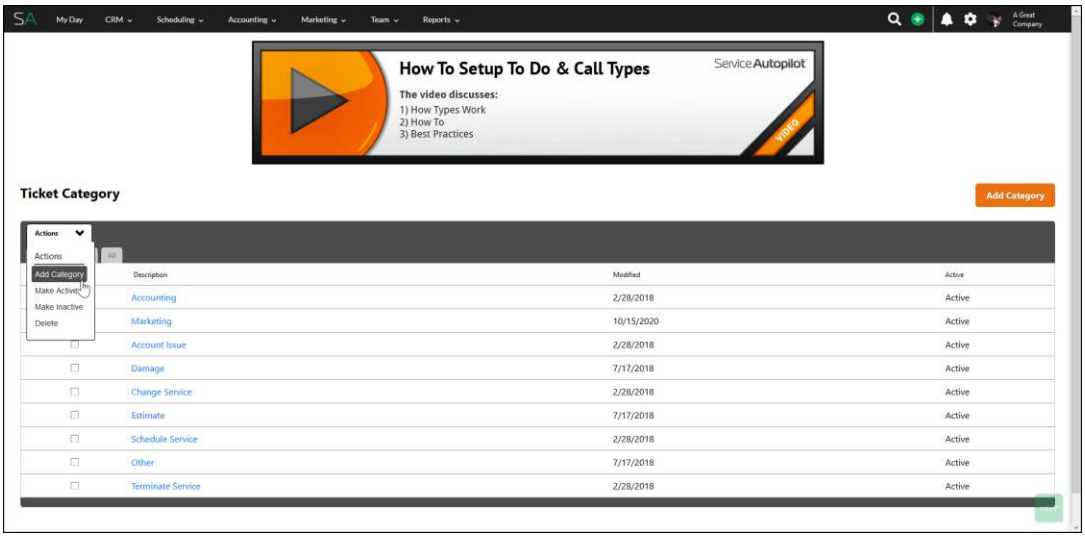
The Ticket will be restored to the previous status before it was deleted, and you can view it using the applicable **Ticket Status** filter.

Manage Ticket Categories

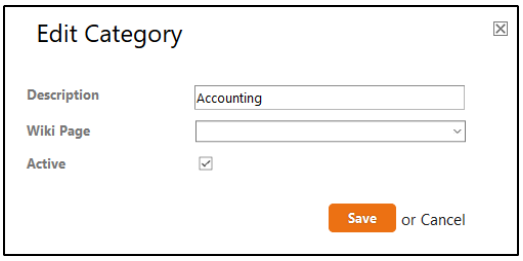
You can customize your Ticket Categories to help adapt the Ticket functionality to your business needs. You might set them up for different types of issues that Clients commonly call in about, or different things that may need to be done for Clients but aren't billed to them as Services.

To manage your Ticket Categories, follow these steps:

1. Go to **Settings > CRM**.
2. Click **Ticket Categories**.
3. To add a new Category, click **Add Category** or go to **Actions > Add Category**.



4. To edit an existing Category, click on the Description. This will open an overlay that looks the same as the **Add Category** overlay:



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5. Add or edit the **Description** field. The Wiki Page selection is optional.

   New Categories will default to an "Active" status.

6. Click **Save**.

The new Category will now appear on the **Category** selection list for all new or existing Tickets.

