

Creating a Service Ticket

Creating a New Service Ticket

- Go to the customer's account.
- Click **Concerns** +, enter a description of the issue (for example, "Water Leak"), and save.
- Click **Projects** + and select the concern you just created.
- In the ticket, click **Visits** and open the visit by its ticket number.
- Click + and add the relevant equipment or job types (for example, a boiler or expansion tank).
- In the Visit tab, set the service date.
- Add the assigned technician.
- Enter the job order.
- Select the arrival window.
- Add any needed parts to the visit.
- Under **Activity** in the top right, click + to see the available note types. Use **Project Note** when the note should be visible to technicians, and enter details relevant to the visit.
- Add a separate activity under **Dispatch** for details the dispatcher needs to see, such as when the customer will be home.
- Open the service board to confirm the ticket now appears there.

Creating a New Visit in the Same Project

Use this when going out again for the same issue.

- Go to the customer's account.
- Click **Projects** and select the applicable project (for example, a water leak). If you don't see your project, toggle **All Projects**.
- In the ticket, click **New Visit**.
- Click the ticket number to open the service ticket.
- Set up the ticket as needed.