

Scheduling the Visit / invoicing ticket

Making a Ticket

From the Office

- Two ways: from the customer's account, or from the **Work Order** button on the board. Work Orders are only handy if you know the technician, the date, and time.
- **Best practice:** create it from the **customer's account**. This shows visit history and any open projects.

From the Field (On-Call Technician, via the App)

- Search for the customer.
 - Tap **Create Emergency Ticket**.
 - Add the concern and submit.
 - The ticket appears on the technician's board/job list.
1. Go to the customer's account.
 2. Click **Service**.
 3. Click **Add Concern**.
 4. Add a project on the same concern.
 5. Click **Visits**, then click the service ticket number.
 6. Schedule the date and arrival window.
 7. Add labels.
 8. Add notes.
 9. Add parts, if applicable.
 10. Set the status to **Ready for Dispatch**.

STATUS FLOW: As the technician works the job, status updates automatically:
In Progress → Completed → Checked.

Managing Visits Within a Project

- To add multiple visits to one project, click **New Visit** in the open project
- You can merge or split a project.
- Add the part and quantity as needed.
- The **Financials** tab is where the system automatically processes billing information.

While the Technician Is On-Site

- The technician has access to the ticket and records all information here.
- They update the status from **In Progress** to **Work Performed** to **Complete**.
- To resolve a ticket, go to **Overview** and click the green **Resolve** button to close it out.

Billing

- Click into **Future Work**, then **Financials**, to see the amount of work performed.
- Note whether the work is billable and generate the invoice.
- Add any additional parts or an emergency visit fee to the invoice.
- Once ready to bill, mark as **Checked** and post the bill.
- If the customer is on auto-billing, their card or ACH will be charged automatically.
- If you need to mail the invoice instead, click **View Bill** and mail it.

Revision #1

Created 2026-09-08 20:51:45 UTC by Kozy Operations

Updated 2026-09-08 20:54:21 UTC by Kozy Operations