



Tracking incidents such as customer support calls, service requests, etc. can be managed with the Tickets utility in Riata CRM™. The Tickets utility is designed to help companies provide timely customer service.

Customer incident tracking includes:

- Help Desk
- Service Department
- Return Merchandise Authorization
- Repair Department
- Training and Other Add-on Services

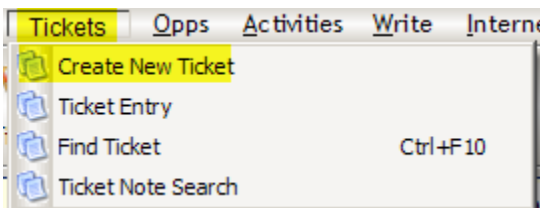
Once a Riata CRM Ticket is issued each person involved in the implementation process can track the progress to incident resolution. Dates, times, names, and notes can be recorded for each action taken on the incident. If linked to a qualified accounting system an employee working on the incident can assign inventory items such as parts, labor, etc. to a Ticket. When the service issue has been resolved the outcome and resolution to the incident are recorded and the Ticket is closed. A closed Ticket can be converted to an Order based on the inventory items assigned to the Ticket.

Set Up Ticket Categories & Types

The list of ticket categories and types can be customized to reflect the type of customer services rendered by the company. Categories are first established, then the types for each Category.

Go to Tools | Customize | Ticket Categories. Examples of Ticket Categories would include warranty service, customer support, return merchandise authorizations, etc. A minimum of one Category must be established.

Ticket Types are created after the Categories are listed. Go to Tools | Customize | Ticket Types. A "Type" is used to describe the current attribute of the selected Category. For example, a Return Merchandise Authorization (RMA) is selected as the Category for a new Ticket to be issued. Three Types have been created for this Category: Approved, In House, Returned to Customer. "Approved" is selected when the RMA is first issued to the customer. "In House" is selected when the item is received in the repair department. "Returned to Customer" is entered when the repairs are completed and the item is shipped out of the service department back to the customer. The service manager can run a "Ticket Listing Report" to audit the status of RMA transactions to organize schedules, calculate work loads, track progress by Ticket, etc.



A new Ticket is initiated by clicking Tickets in the top menu bar, select Create New Ticket.

As shown below, a new Ticket has been issued authorizing merchandise to be returned. The red arrows identify three data entries that are used to manage the progress and completion of this Ticket:

1. Ticket #
2. The date of approval, with description of the part and service required.
3. Task - assign an Activity to the next person that should follow up on this Ticket. (See Activities Guide for instructions to assign follow up Activities).

Jim Boatwood
Kemah Baordwalk Marina
555 Bradford Street
Kemah, TX 77565
281/334-2284

Ticket #: 0510-000017 Open

Technician: Alan Slivinski Category: RMA-Return Merchandi Type: Approved

Stamp

Time /Qty: 0.00 Item: Price: 0.00 Billable No Documents

Tech ID	Status	Date
ADS	Approved	5/11/2010 9:35 AM
ADS 05/11/10 09:35:23 Water pump leaking.		

An open Ticket is updated by adding entries to it.

Locate the ticket - there are two ways to find a specific Ticket. 1. On the customer record the lower tool bar will have a Tickets box displayed. Mouse click it to see the Ticket. Click on the Ticket line; 2. Click "Tickets" in the upper tool bar of the customer record, click Find Ticket, enter all or part of the Ticket number.

Notice the Ticket to the right. Progress to resolution of the RMA can be seen. ADS changed the Type to "In House", entered a part order and assigned a follow up Activity to Bill Thompson who has reported what will be done to repair the part.

The next step will be for BTOM to complete the repairs, change the Type to "Returned to Customer". In the final step the Ticket will be closed and the part billed to the customer. See next page.

Ticket #: 0510-000017 Open

Technician: Bill Thompson Category: RMA-Return Merchandi Type: In House

Stamp

Time /Qty: 0.00 Item: Price: 0.00 Billable No Documents

Tech ID	Status	Date
BTOM	In House	5/11/2010 10:12 AM
BTOM 05/11/10 10:11:20 Sealing tape must be replaced; do pressure check.		
ADS	In House	5/11/2010 9:53 AM
ADS	Approved	5/11/2010 9:35 AM
ADS 05/11/10 09:35:23 Water pump leaking.		

Jim Boatwood
 Kemah Baordwalk Marina
 555 Bradford Street
 Kemah, TX 77565
 281/334-2284

Ticket #: **0510-000017** **Closed**
 Technician: **Bill Thompson**
 Category: **RMA-Return Merchandi**
 Type: **Returned to Customer**
 Stamp:

BTOM has completed the repair work, changed the Type, and has closed this Ticket.

 Notice that the upper tool bar has changed with an icon on the left to Bill this ticket.

 Click the Bill icon, Riata CRM will verify that an Order should be created for this Ticket. By selecting "Yes" an Order # will be displayed and is ready to be converted to an invoice in the accounting system.

 The details of this Ticket are included in the Ticket Listing Report shown below.

Time /Qty: 0.00
 Item:
 Price: 0.00
 Billable:
 No Documents

Tech ID	Status	Date
BTOM	Returned to Customer	5/11/2010 10:22 AM
BTOM 05/11/10 10:21:51 Repairs completed, pressure hold to spec. (Ticket closed by BTOM on 05/11/2010) ←		
BTOM	In House	5/11/2010 10:12 AM
BTOM 05/11/10 10:11:20 Sealing tape must be replaced; do pressure check.		
ADS	In House	5/11/2010 9:53 AM
ADS	Approved	5/11/2010 9:35 AM

Create Order from Ticket

Order # 594 created.

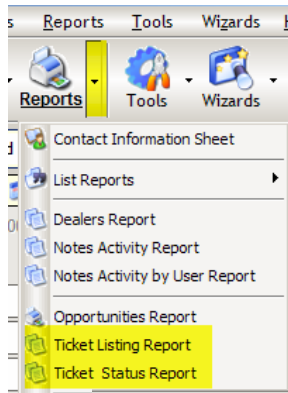
Type	Number	Date	Order Number	Amount	SlsPrsn	PO Number	Ship Via
Order	594	5/11/2010	None	4.50	BTOM	Ticket # 0510-000...	DHL
Ordered	Shipped	Item Number	Description	Tax	Item	Price	Item Total
1.00	0.00	TAPE	10 Rolls of Tape	N		4.50	4.50

Ok

Ticket: 0510-000017, Status: Closed, Category: RMA-Return Merchandi **Jim Boatwood**
 Kemah Baordwalk Marina {KEM001}
 555 Bradford Street
 Kemah, TX 77565
 Phone: 281/334-2284

ADS	Approved	05/11/2010 09:35:59	0.00	0.00	N	594
ADS 05/11/10 09:35:23 Water pump leaking.						
ADS	In House	05/11/2010 09:53:07	1.00	4.50	Y	594
BTOM In House BTOM 05/11/10 10:11:20 Sealing tape must be replaced; do pressure check.						
BTOM	Returned to Customer	05/11/2010 10:22:26	0.00	0.00	N	594
BTOM 05/11/10 10:21:51 Repairs completed, pressure hold to spec. (Ticket closed by BTOM on 05/11/2010)						
Totals for Ticket # 0510-000017			1.00	4.50		
Grand Totals:			1.00	4.50		

Ticket Reports



There are two types of reports available to audit and manage the Tickets file. The reports are accessed by clicking Reports in the top toolbar, then select the report type.

1. The Ticket Listing report provides the ability to search and print tickets based on a variety of qualification options including: specific date range, technician, ticket status, a keyword contained in a ticket notepad and other options. Below is an example of the options list and a sample Ticket Listing Report.

2. The Ticket Status Report provides a summary list of tickets configured according to the selected options in the Ticket Status Report options list as seen below. A sample Ticket Status Report is at the bottom of this page.

View E-Mail Print Exit

Ticket Listing Report

Start Date: 04/01/2010
 End Date: 04/30/2010
 Technician: Select Users (Blank for all)
 Ticket Status: 3. Assigned to Tech (Blank for all)
 Ticket Category: TECH-Tech Support (Blank for all)
 Notes Search: (Blank for all)
 First Four of Category: (Blank for all)
 Customer #: (Blank for all)
 Beginning Ticket #: - (Blank for all)
 Ending Ticket #: - (Blank for all)
 Options: Include only open Ticket Entry
 Sort by: Ticket #
 Technician
 Date

View E-Mail Print Exit

Ticket Status Report

Customer #: [] Include only open Ticket
 From: 01/01/2000 To: 12/31/2100
 Ticket #: - To: -
 Technician: [] (Blank for all)
 Ticket Status: 3. Assigned to Tech
 Category: [] 1st Four: []
 Notes Search: []
 Sort by: Ticket #
 Technician
 Date
 Customer Status
 Ticket Category
 Ticket Status

Ticket Listing Report

Technician	Entry Description	Created	Estimated Time	Billing	Billable	Order #
Ticket: 0510-000016, Status: Open, Category: SERV-Service Jim Boatwood						
Kemah Boardwalk Marina [KEM001] 555 Bradford Street Kemah, TX 77565 Phone: 281/334-2284						
ADS	1. Configure Work Order	05/11/2010 08:34:09	1.00	250.00	Y	
ADS 05/11/10 08:32:49 They need a lot of help.						
Totals for Ticket # 0510-000016			1.00	250.00		
Grand Totals:			1.00	250.00		

Ticket Status Report

Sorted by Technician

Ticket #	Cust #	Company Name	Cust Stat	Ticket Cat	Ticket Status	Technician	Status Date	Open/Closed	Age
0109-000008	CARD01	CAROL & CO.	Customer	SERV	3. Service Tech	ADS	01/12/2009	Open	484
0109-000005	CARD01	CAROL & CO.	Customer	SERV	1. Incoming Request	ADS	01/12/2009	Open	484
1109-000009	SAM001	SAMPLE CONSULTING	Prospect	SERV	2. Service Tech notified	ADS	11/06/2009	Open	186
1209-000012	DDP001	DATA DEVELOPERS PLUS	Prospect	BIDC	Maintenance	ADS	12/02/2009	Open	160
1209-000013	FLO092	Florida Grand Opera	Customer	SERV	1. Configure Work Order	ADS	12/02/2009	Open	160
Ticket Status Statistics:			ADS	Qty:	5	% Qty of total report:	23.81	Avg Age of Category:	294

Product specifications, availability and price are subject to change without notice.