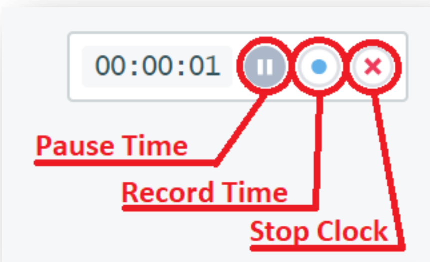
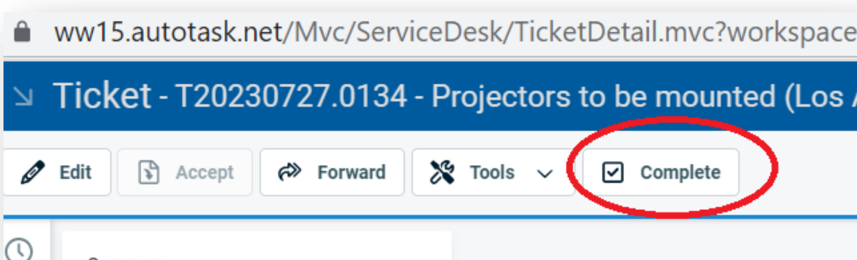
Each ticket in the Autotask ticketing system is designed to keep track of the time of each engineer who works on the   This crucial function impacts billing, scheduling, and reporting. It is critical that Autotask tickets correctly reflect the amount of time it takes to resolve them.

Whenever the ticket window is active, there is a timer in the upper right hand corner. This timer displays a clock indicating how long the ticket window has been open. The buttons on the clock will allow you to pause the clock, or record or clear your time.

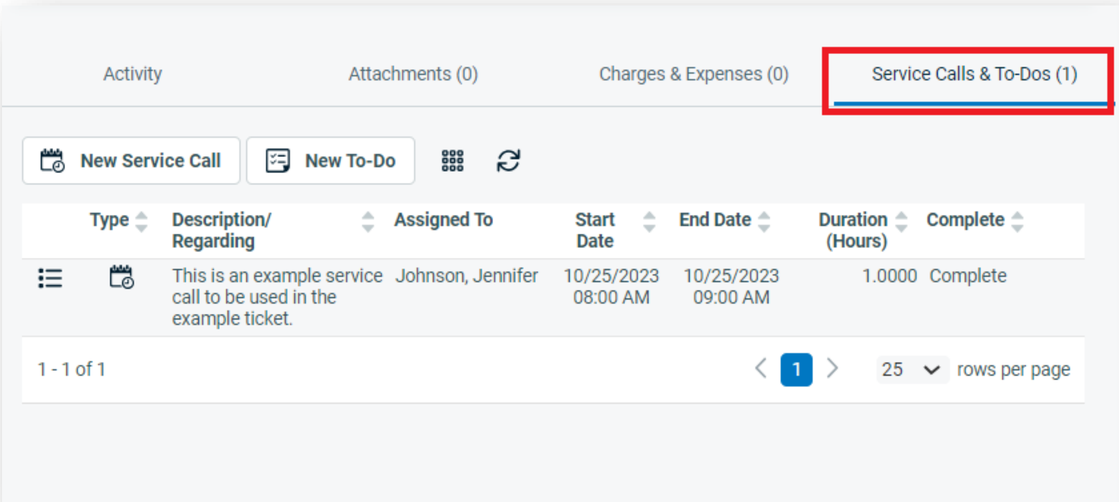


Use the "Complete" button if all work on the ticket has been finished, and the ticket is to be closed.

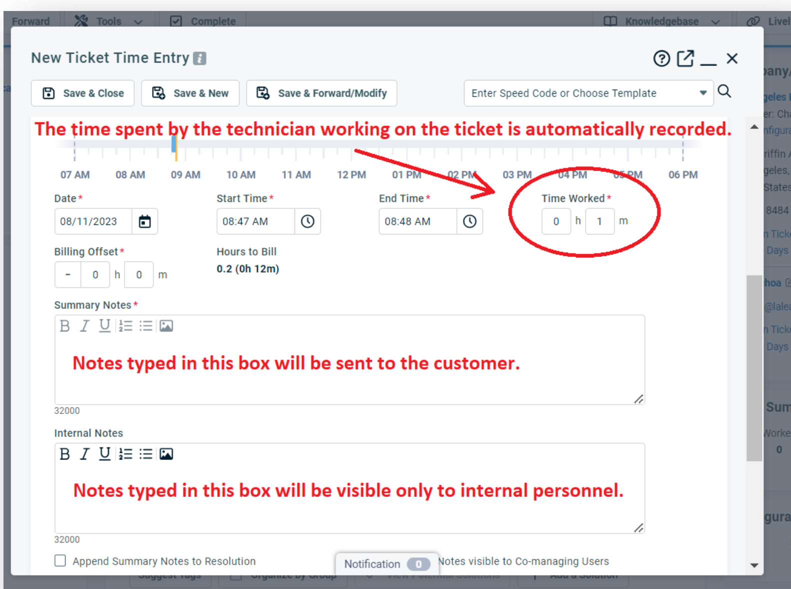


Either button will bring you to the New Ticket Time Entry screen. The difference is that using the "complete" button will automatically change the ticket status to "Completed." Using the "Record Time" button will bring you to the same screen, but will not update the status.

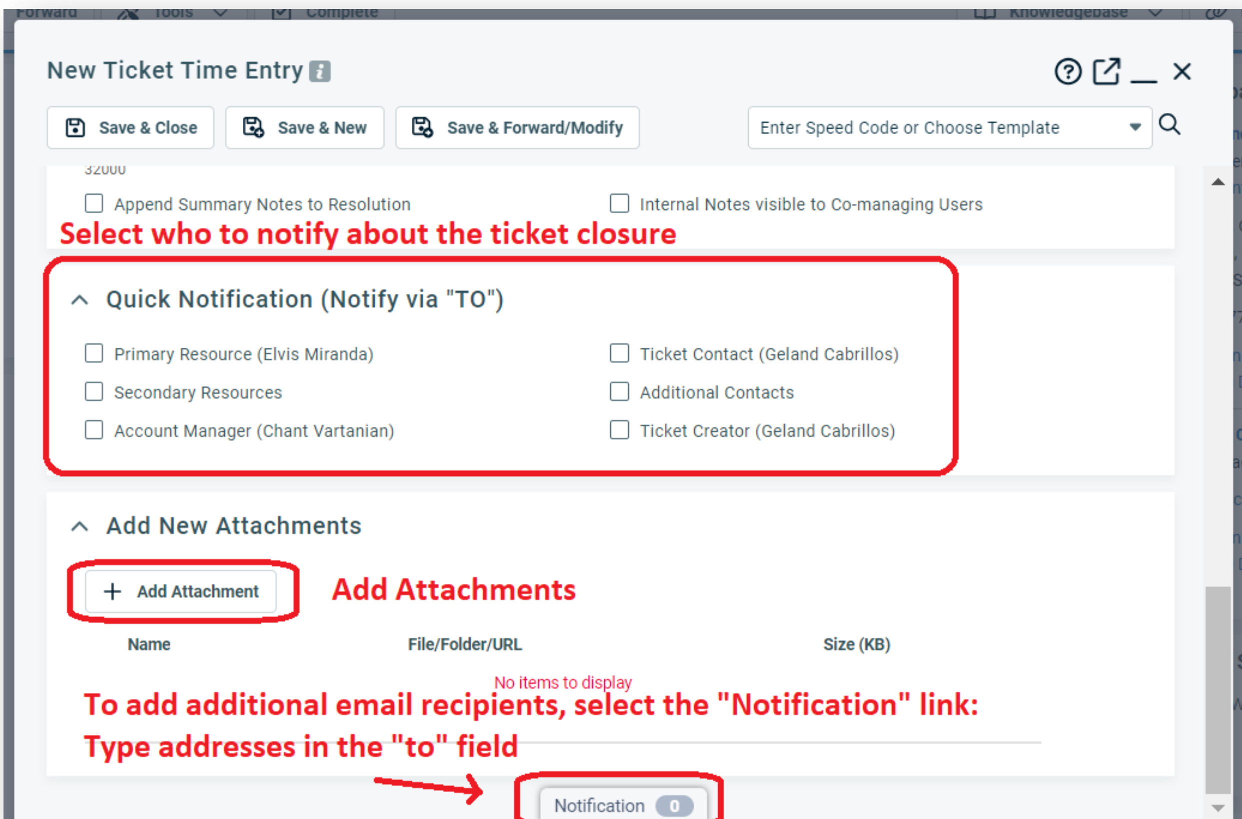
Remember that a ticket can only be placed into Completed status once all work has been finished. If that work involved a service call, the service call is a separate entity, and must be completed before closing the ticket. The service call will be visible on the "Service calls and to dos" tab. To close the service call, hover over the three lines and select "Complete service call." The service call will immediately be placed into Completed status. Once all service calls have been placed into Completed status, the completion of the ticket, itself, may proceed.



The New Time Ticket Entry window will initially open so that the Summary Notes field is visible.

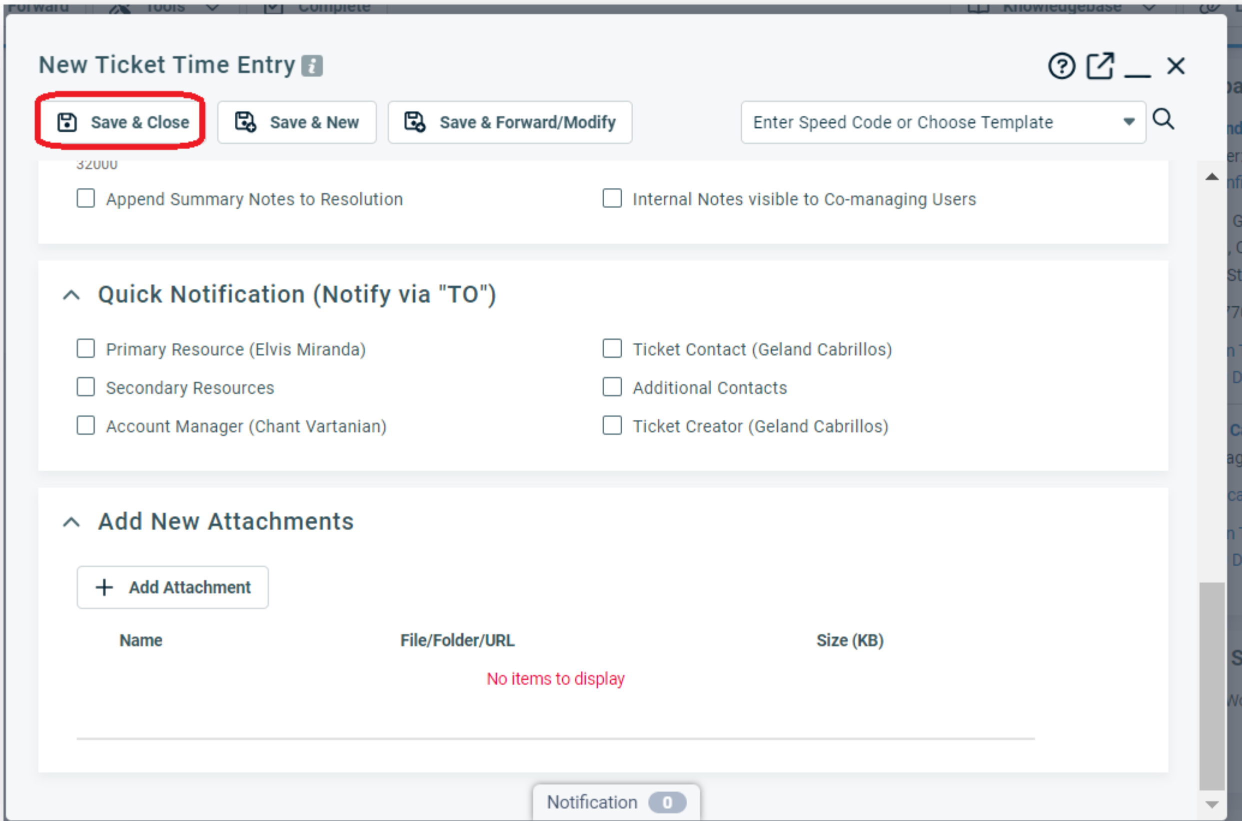


When completing a ticket, or logging your time, notes may be entered on either the Summary Notes field, or the Internal Notes field. The customer will be able to read any notes placed in the Summary Notes field. If you are completing the ticket, it's important to put in a note of what you actually did to fix the customer's problem. Be as specific as possible. Another technician, or the customer themselves, may need to refer to your notes if the problem should recur in the future.



An automated email is sent to the customer if the time on the ticket is updated, or if the ticket is completed. If you wish to send this notification to additional people, the Quick Notification area will allow you to easily select the most likely recipients, such as extra contacts, or co-managing agents. If you would like to notify persons that are not included in these check boxes, select the notification tab at the very bottom of the page.

Once all fields have been completed, click the "Save and Close" button to close the ticket.



Please direct any questions about this training material to your manager or supervisor. Thank you for reviewing this training document, and remember to work smart.