

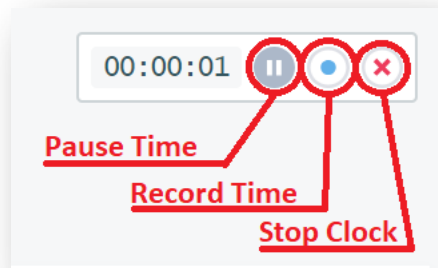


How to Log Time and Close Your Ticket

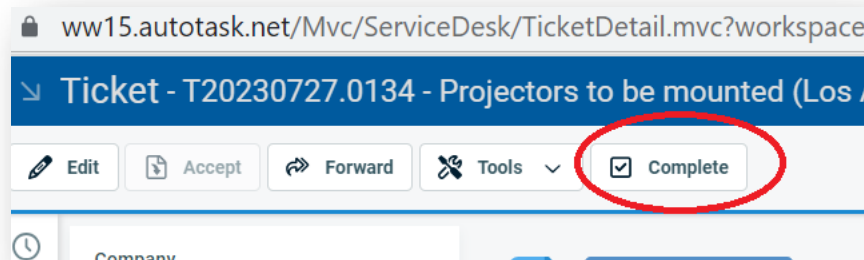
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Each ticket in the Autotask ticketing system is designed to keep track of the time of each engineer who works on the ticket. This crucial function impacts billing, scheduling, and reporting. It is critical that Autotask tickets correctly reflect the 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 screenshot shows a software interface with a top navigation bar containing four tabs: 'Activity', 'Attachments (0)', 'Charges & Expenses (0)', and 'Service Calls & To-Dos (1)'. The 'Service Calls & To-Dos (1)' tab is highlighted with a red border. Below the tabs are two buttons: 'New Service Call' and 'New To-Do'. The main area displays a table with the following columns: 'Type', 'Description/Regarding', 'Assigned To', 'Start Date', 'End Date', 'Duration (Hours)', and 'Complete'. A single row is visible in the table with the following data: 'Type' (icon of a calendar), 'Description/Regarding' (This is an example service call to be used in the example ticket.), 'Assigned To' (Johnson, Jennifer), 'Start Date' (10/25/2023 08:00 AM), 'End Date' (10/25/2023 09:00 AM), 'Duration (Hours)' (1.0000), and 'Complete' (Complete). At the bottom of the table, there is a pagination bar showing '1 - 1 of 1', a page number '1' in a blue box, and '25 rows per page'.

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

The screenshot shows a 'New Ticket Time Entry' window. At the top, there are three buttons: 'Save & Close', 'Save & New', and 'Save & Forward/Modify'. Below these buttons is a search bar with the text 'Enter Speed Code or Choose Template'. A red arrow points to the 'Time Worked' field, which is circled in red. The 'Time Worked' field shows '0 h 1 m'. Above the 'Time Worked' field, there is a timeline from 07 AM to 06 PM. A red arrow points to the 'Time Worked' field with the text 'The time spent by the technician working on the ticket is automatically recorded.' Below the 'Time Worked' field, there are two text areas: 'Summary Notes' and 'Internal Notes'. The 'Summary Notes' field has a red text box with the text 'Notes typed in this box will be sent to the customer.' The 'Internal Notes' field has a red text box with the text 'Notes typed in this box will be visible only to internal personnel.' At the bottom of the window, there is a checkbox labeled 'Append Summary Notes to Resolution' and a notification icon.

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.

The screenshot shows the 'New Ticket Time Entry' form. At the top, there are buttons for 'Save & Close', 'Save & New', and 'Save & Forward/Modify', along with a search bar for 'Enter Speed Code or Choose Template'. Below these are two checkboxes: 'Append Summary Notes to Resolution' and 'Internal Notes visible to Co-managing Users'. A red text annotation says 'Select who to notify about the ticket closure'. Below this is a section titled 'Quick Notification (Notify via "TO")' which contains six checkboxes: 'Primary Resource (Elvis Miranda)', 'Secondary Resources', 'Account Manager (Chant Vartanian)', 'Ticket Contact (Geland Cabrillos)', 'Additional Contacts', and 'Ticket Creator (Geland Cabrillos)'. Below this is a section titled 'Add New Attachments' which contains a button '+ Add Attachment' and a table with columns 'Name', 'File/Folder/URL', and 'Size (KB)'. A red text annotation says 'Add Attachments'. Below the table, there is a red text annotation: 'To add additional email recipients, select the "Notification" link: Type addresses in the "to" field'. At the bottom, there is a 'Notification' toggle switch, which is currently turned off, and a red arrow points to it.

New Ticket Time Entry

Save & Close Save & New Save & Forward/Modify Enter Speed Code or Choose Template

Append Summary Notes to Resolution Internal Notes visible to Co-managing Users

Select who to notify about the ticket closure

Quick Notification (Notify via "TO")

Primary Resource (Elvis Miranda) Ticket Contact (Geland Cabrillos)
Secondary Resources Additional Contacts
Account Manager (Chant Vartanian) Ticket Creator (Geland Cabrillos)

Add New Attachments

+ Add Attachment **Add Attachments**

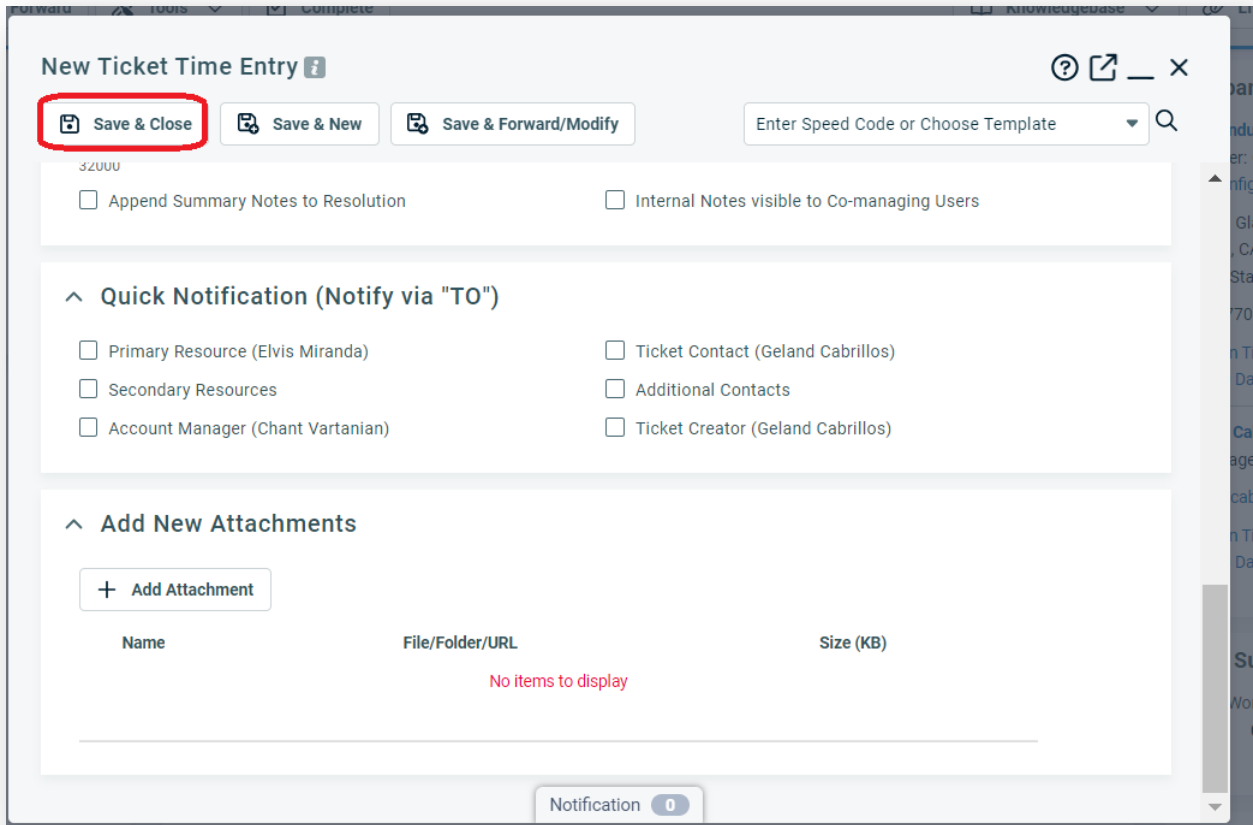
Name	File/Folder/URL	Size (KB)
No items to display		

**To add additional email recipients, select the "Notification" link:
Type addresses in the "to" field**

Notification 0

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.



The screenshot shows a web application window titled "New Ticket Time Entry". At the top, there are three buttons: "Save & Close" (highlighted with a red rectangle), "Save & New", and "Save & Forward/Modify". To the right of these buttons is a search bar with the placeholder text "Enter Speed Code or Choose Template". Below the buttons, there are two checkboxes: "Append Summary Notes to Resolution" and "Internal Notes visible to Co-managing Users". Underneath these is a section titled "Quick Notification (Notify via 'TO')". This section contains two columns of checkboxes. The first column includes "Primary Resource (Elvis Miranda)", "Secondary Resources", and "Account Manager (Chant Vartanian)". The second column includes "Ticket Contact (Geland Cabrillos)", "Additional Contacts", and "Ticket Creator (Geland Cabrillos)". Below the notification section is a section titled "Add New Attachments". It features a button labeled "+ Add Attachment" and a table with three columns: "Name", "File/Folder/URL", and "Size (KB)". The table is currently empty, with the text "No items to display" centered below the headers. At the bottom right of the form, there is a "Notification" button with a "0" next to it.

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.