# Service ticketing system

Service Ticket list is displayed on landing page.

Status can be changed by call center member besides each ticket item.

Pdf icon shown for only verified or submitted status items click of which will generate pdf report

## Service ticketing UI data fields

### Service ticket fields

User raise new ticket and enter data into following fields.

1. Status : New ; Scheduled(Open); Submitted; Verified; Cancelled; on-Hold;
2. Bank – drop down with option to select existing bank
3. Department – drop down to select a department
4. Type(Division): Auto ; CPV/AVR ; CPV-PF ; Credit card ; Heavy Equipment ; Mandoob-ILC-Buyer-Trade ; Mandoob-WTO-Seller-Wholesale (drop down list type names from Survey\_Types)

Service Request details:

1. Reference No:
2. Description: Multiline
3. Status\_Reason: Multiline
4. Priority: Standard; High;Urgent; Critical;
5. Due Date: Date
6. Date Created: Date and time
7. Submission date: Date and time
8. Surveyor : select surveyor from drop down
9. Customer available time: From Datetime - To Datetime

Lessee/Supplier/Buyer Information:

1. Name:
2. Company Name:
3. Phone: Landline – Text Box; Mobile – Text Box
4. Address: Address Line1 – Text Box; AddressLine2 – Text Box

### Bank Fields (Client master)

To add a bank user enter data into following fields.

(Bank)

1. Client name – Text Box to enter Bank Name – Client Name
2. Client\_Code – Text Box for code

(Contact)

1. First Name \* - Text Box
2. Last Name \* - Text Box
3. Email – Text Box

(Details)

1. Address – Text Box ( Enter a location )
2. Room/Apt# - Text Box
3. Phone – Text Box
4. Alt Phone – Text Box
5. Landline phone – Text Box
6. Fax – Text Box
7. Client Type – Drop down to select 1-Bank or 2-Individual
8. Notes/Contract Info – Multiline text box 4000 Char max.
9. Comments – Multiline Text Box with latest comment on top.

### Service Summary Dashboard.

From Date

To Date

Between the date specified following information displayed as hyperlinks

Service Request Added - #

Banks Added - #

Service Requests Past Due - #

Click of hyperlink leads to corresponding Lists.

### Service List

For each service item in the list following properties are displayed.

<ClientName>-<SurveyType> (This is hyperlink to create or open Survey item. Not a hyperlink for Call center member)

Survey on <Submission\_Date> or <Due\_Date> by <Surveyor-Name>

<Service Status> editable to change status

Survey <Service\_ID> (hyperlink to service ticket)

<Customer Address location> (on Mouse hover show full customer address as tooltip)

Following additional information shown when open the existing service request

**Last log**: [Aug 29, 2015 11:22:41 AM] *Status changed* - Open: On Hold

Created: *Aug 29, 2015 10:10:45 AM* • Last Updated: *Aug 29, 2015 11:22:49 AM* • Time Elapsed: *0day 5hrs 4mins*

### Client List

For each Client (bank) item in the list following properties are displayed.

Email; Phone; Full Address; Room/Apt#; Business Unit; Unique ID;

Service location items are also included in the list if check box of service locations display is checked.

Click of any item in the list leads to record view of the item.

## Service ticketing system DB entities

1. Service\_Tickets
2. Client\_Master
3. Department
4. Survey\_Types

Entity Name: Service\_Tickets

Add Reason Field that is updated on status change.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Name** | **Data Type** | **Default value** | **Description** |
| Service\_Ticket\_ID | Key type | NA | Primary Key |
| Bank\_ID | Key type | NA | Reference to Bank Entity |
| Contact\_ID | Key type | NA | Reference to Contacts Entity |
| Status | Int | New | Holds enumeration values: New ; In-Progress; on-Hold; Completed; Billed; Closed; |
| Survey\_Type\_ID | Key type | NULL | Reference to Survey\_Type Entity |
| Bank\_Reference\_No | Varchar(50) | NULL | Alphanumeric bank reference number |
| Description | Text | NULL | Description of Service in multiline text |
| Priority | Int | Standard | Enum values : Standard; High; Urgent; Critical; |
| Due\_date | Date | Today’s date | Due date for service ticket |
| Date\_Created | DateTime | Date time for Now | Date and time when this ticket created |
| Assign\_Surveyor\_ID | Key type |  |  |
| Cust\_Avail\_From | DateTime | NULL | Customer availability from date |
| Cust\_Avail\_To | DateTime | NULL | Customer availability To date |
| Cust\_Name | Varchar(75) | NULL | Customer name – Lessee/Supplier/Buyer |
| Cust\_Address | Varchar(200) | NULL | Customer Address |
| Cust\_Landline | Varchar(50) | NULL | Customer landline Phone Number |
| Cust\_Mobile | Varchar(25) | NULL | Customer mobile Number |
|  |  |  |  |

Entity Name: Client\_Master

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Name** | **Data Type** | **Default value** | **Description** |
| Client\_ID | Key type | NA | Primary Key |
| Client\_Name | Varchar(75) | NA | Name of the client/Bank |
| Client\_Code | Varchar(10) | NA | Short code for the Client name |
| Service\_Tax\_ID | Key type | NA | Reference to Service\_Tax Entity |
| Contact\_FirstName | Varchar(100) |  | Contact first name |
| Contact\_LastName | Varchar(100) | NA | Contact last name |
| Contact\_Email | Varchar(100) | NA | Contact email |
| Address | Varchar(200) | NULL | Address of client/Bank |
| Room\_No | Varchar(10) | NULL | Room or Apartment Number of client/Bank |
| Phone | Varchar(25) | NULL | Phone Number |
| Alternate\_Phone | Varchar(25) | NULL | Alternate Phone Number |
| Landline\_No | Varchar(25) | NULL | Landline Number |
| Fax | Varchar(25) | NULL | Fax number |
| Bank\_Type | Int | NULL | Enumerations: Residence; Commercial |
| Terms | Int | NULL | Enumerations: 1% 10 Net 30; 2% 10 Net 30; Due on Receipt; Net 15; Net 30; |
| Notes | Text | NULL | Contract Information |
| Comments | Text | NULL | Comments with latest updates prefixed to existing value. |

Entity Name: Department

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Name** | **Data Type** | **Default value** | **Description** |
| Department\_ID | Key | NA | Primary Key |
| Department\_Name | Varchar(50) | NA | Department name |
| Client\_ID | Key | NA | Reference to Client\_master |
| IsActive | Bit | 0 | 0-Inactive;1-Active |

Entity Name: Survey\_Types

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Name** | **Data Type** | **Default value** | **Description** |
| Survey\_Type\_ID | Key | NA | Primary Key |
| Survey\_Type\_Name | Varchar(50) | NA | Survey type Name |
| Master\_Survey\_type\_ID | Key | NULL | Reference to other item in same table. This field is null for basic survey type. |
|  |  |  |  |