

Create Tickets in Reports Dashboard

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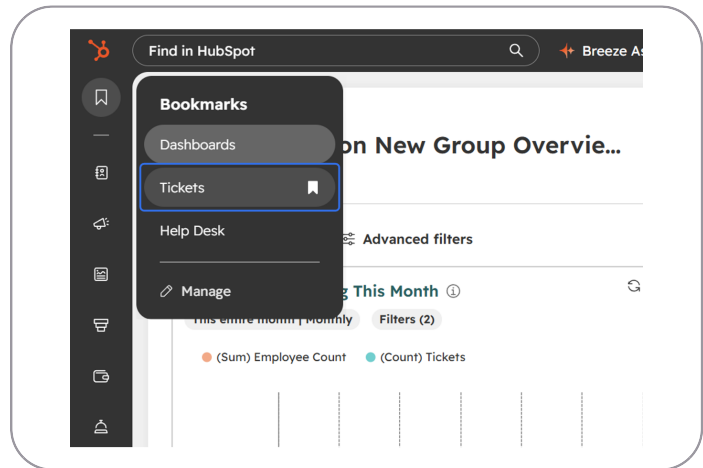
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Reports dashboard

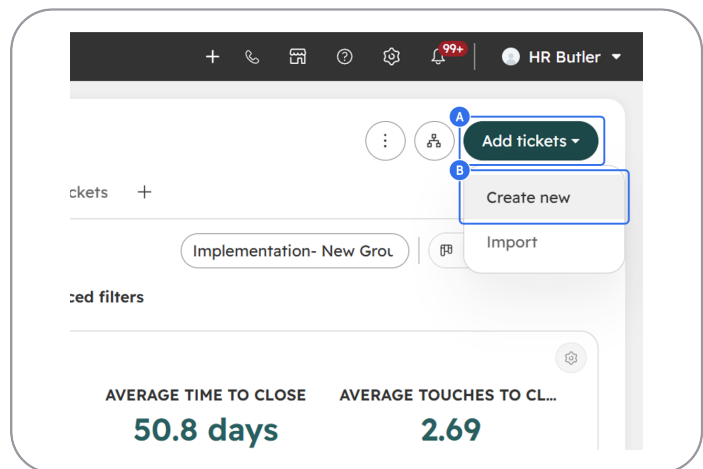
1

Click on Tickets



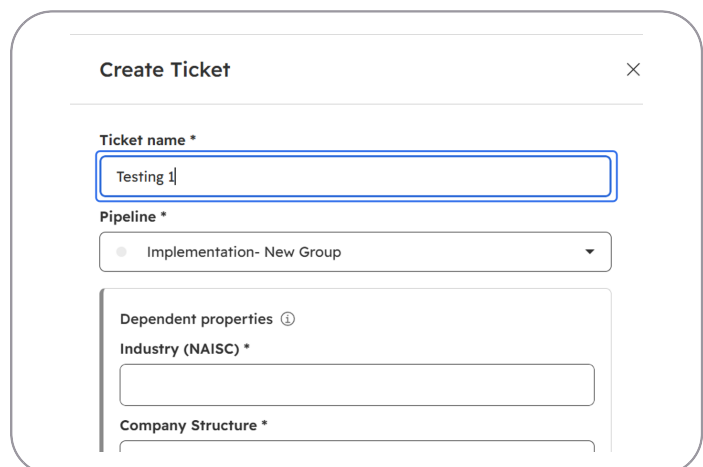
2

A. Click on Add tickets
B. Click on Create new



3

Type Ticket name



4

- A. Click on Pipeline
- B. Select Pipeline

The screenshot shows a 'Create Ticket' form. On the left, there's a sidebar with 'Assigned tickets' and 'Implementations' tabs. The main form has fields for 'Ticket name *' (filled with 'Testing 123'), 'Pipeline *' (a dropdown menu), and a search bar. The dropdown menu is open, showing a list of pipeline options: 'Implementation- New Group', 'Tax Notices', 'Implementation- New Group', 'Implementation- Modules', 'Payroll- Correction Payroll Request', 'Benefits - Medical Renewal Quotes', and 'Benefits - Medical Renewal Request'. The 'Implementation- New Group' option is highlighted. Below the dropdown, there are fields for 'Current Payroll Vendor' and 'Current Payroll Provider: Other/Not Listed'.

5

- A. Type Ticket description
- B. Click on Level of Importance
- C. Select Level of Importance

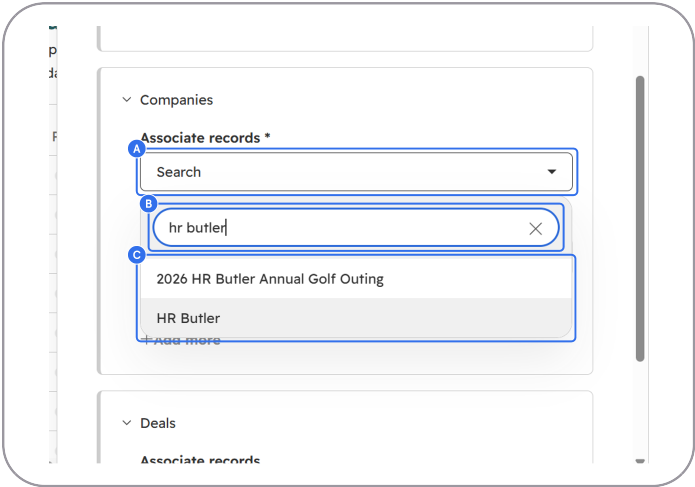
The screenshot shows the 'Create Ticket' form with the 'Ticket description *' field filled with 'Testing 123'. Below it, the 'Level of Importance *' dropdown menu is open, showing a list of importance levels: 'Low', 'Medium', 'High', and 'Emergency'. The 'Low' option is highlighted. The dropdown menu is also labeled with 'B' and 'C'.

6

- A. Click on Category (Please Choose One...)
- B. Select Category

The screenshot shows the 'Create Ticket' form with the 'Category' dropdown menu open. The dropdown menu is labeled with 'A' and 'B'. It shows a list of categories: 'General inquiry', 'Payroll', 'Benefits', 'Implementation', 'Sales', and 'Tax'. The 'Implementation' category is selected, indicated by a checkmark. Below the dropdown, there are buttons for 'Create', 'Create and add another', and 'Cancel'.

- 7
- A. Click on Associate records under the Companies Section
B. Type HR Butler
C. Select HR Butler



- 8
- Click on Create

