

Repairs & Tickets

Create repair tickets, track device work, communicate progress, and complete repairs.

- [1. Create a Repair](#)
 - [How to create a new repair ticket](#)
 - [How to select the customer, category, device, and issues](#)
 - [How to record device intake details securely](#)
 - [How repair price, diagnostic fee, deposit, and tax work at intake](#)
- [2. Repair Ticket Information](#)
 - [How to open an existing repair](#)
 - [How to edit repair customer and device information](#)
- [3. Repair Profile Navigation](#)
 - [How to use the Repair Profile](#)
- [4. Repair Appointments](#)
 - [How to create and manage a repair appointment](#)
- [Repairs & Tickets overview](#)

1. Create a Repair

Create a repair ticket from customer selection through pricing and checkout.

1. Create a Repair

How to create a new repair ticket

Create a repair ticket to record the customer, device, reported issues, intake details, and expected charges.

Complete the six steps

1. **Select customer:** Find or create the customer, then continue.
2. **Choose category:** Select the device category or use Other.
3. **Enter device:** Select an inventory product when available or type the device name.
4. **Select issues:** Search configured issues, select all that apply, or add another issue.
5. **Add intake details:** Enter IMEI or serial, bin location, alternate contact, problem description, and device password or pattern when authorized.
6. **Set pricing:** Enter repair price, optional diagnostic fee, deposit, and tax.

Create the ticket

Select **Create Ticket** to save without checkout, or **Create Ticket and Checkout** when payment should be handled immediately. Enable automatic label printing when the intake station is configured for it.

1. Create a Repair

How to select the customer, category, device, and issues

Customer

Choose the customer who owns the device. Confirm the name and contact information before continuing.

Category and device

Select the closest configured category. If inventory is enabled, you may select a product; otherwise type a clear device name. Use Other only when no suitable category exists.

Issues

Search and select every reported issue. Custom issues should describe the symptom rather than promise a diagnosis. For example, use “Does not charge” instead of “Charging port must be replaced” until inspection confirms the cause.

How to record device intake details securely

Complete intake details carefully so technicians can identify, locate, test, and return the correct device.

- **IMEI or serial:** Record the identifier from the device when available.
- **Item location:** Enter the bin, shelf, or intake location.
- **Alternate contact:** Use only when another authorized person may be contacted.
- **Problem description:** Record the customer's report and visible symptoms.
- **Password or pattern:** Record only with customer authorization and according to business privacy policy.

Do not place passwords, patterns, or sensitive customer data in general notes, printed labels, or public messages.

1. Create a Repair

How repair price, diagnostic fee, deposit, and tax work at intake

Pricing at intake establishes the expected repair charge and any amount collected before work begins.

1. Enter the repair price or estimate used by the business.
2. Add the diagnostic fee when it applies.
3. Enter the deposit being collected.
4. Select the correct tax template.
5. Review subtotal, tax, total, paid amount, and balance due.
6. Create the ticket or continue to checkout.

A deposit reduces the balance but does not by itself mark the repair completed. Diagnostic fees and minimum deposits can be configured in Repair Settings.

2. Repair Ticket Information

Open and edit the customer, device, issue, and problem details on a repair.

How to open an existing repair

1. Open **Repair** and select **List**.
2. Search by customer, phone, device, ticket ID, IMEI, or serial information when available.
3. Use date and delivery-status filters to narrow results.
4. Select the repair row or choose **Open** from its action menu.

The Repair Profile shows financial totals and the workflow steps used to review, settle, and return the device.

How to edit repair customer and device information

Open the Repair Profile and use the edit controls beside the information that needs correction.

- Update device name, IMEI or serial, and bin location.
- Change the device category.
- Add or remove reported issues.
- Edit the problem description.
- Update alternate contact or other additional details.

Delivered repairs lock some core fields. Reopen the repair through the supported workflow when legitimate post-delivery changes are required.

3. Repair Profile Navigation

Understand the repair profile, workflow steps, pricing summary, and available actions.

How to use the Repair Profile

The Repair Profile combines financial information and three working stages.

1. **Repair Information:** Review customer, device, category, issues, and problem description.
2. **Review & Settle:** Manage pricing, payments, tasks, parts, vendor work, checklists, notes, and completion.
3. **Return Device:** Set repair result and delivery or handoff status.

The header shows subtotal, sales tax, total, paid, and balance due, with actions to edit pricing or receive payment.

4. Repair Appointments

Create and manage repair appointments when enabled.

4. Repair Appointments

How to create and manage a repair appointment

When Repair Appointments are enabled, use them to reserve intake or service time before a ticket is created.

1. Open the Repair Appointments area.
2. Select **Add**.
3. Choose the customer and appointment date and time.
4. Record the device and requested work.
5. Save the appointment.
6. Update or remove it if the customer reschedules or cancels.

At arrival, confirm the information and create the actual repair ticket. An appointment is not a replacement for the repair record.

Repairs & Tickets overview

Use Repairs & Tickets to create a complete intake record and open the Repair Profile.

The current intake follows six steps: customer, category, device, issues, intake details, and pricing. After creation, use the profile to edit allowed details and move through Repair Information, Review & Settle, and Return Device.

Continue through Repair Operations

- [Dashboard and history](#)
- [Repair work and status](#)
- [Payments, documents, and closeout](#)
- [Repair settings](#)