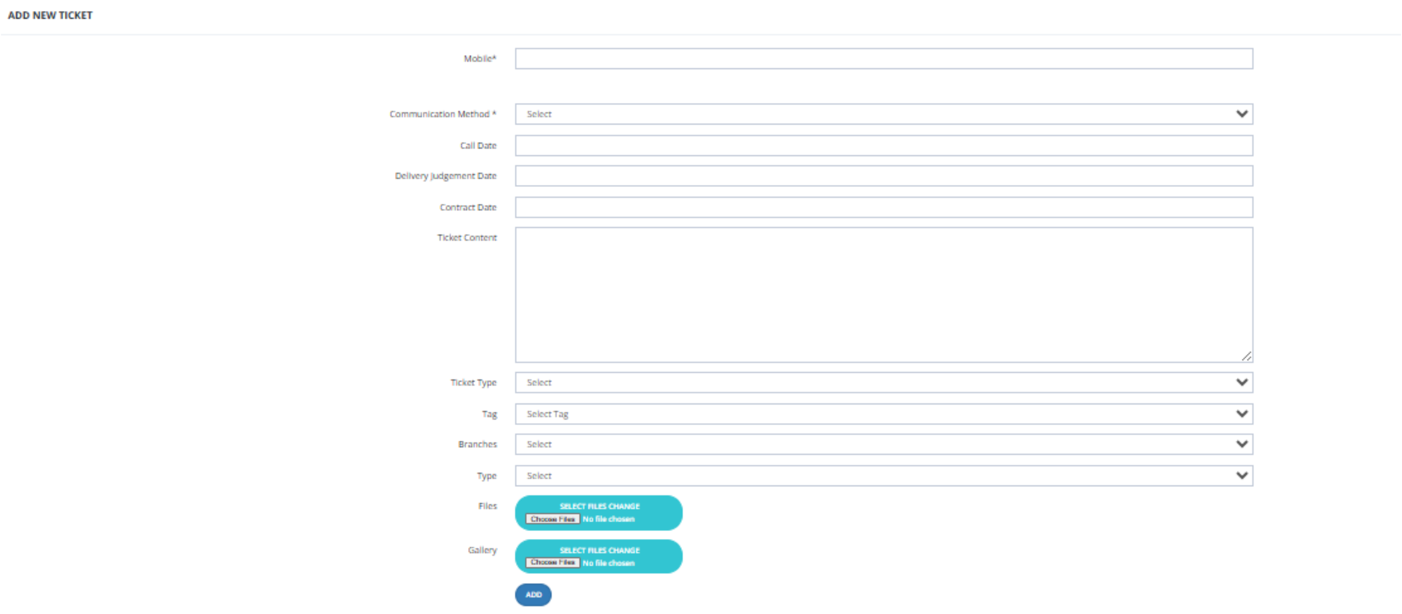
Ticket

Overview

Use **Ticket** when an existing **client** (not just a lead) calls with a request, complaint, or issue. Tickets are routed to the **Customer Service (CS)** team.

> ⚠ **Important:** The caller must have a **Client Profile** in the system for a ticket to be created. If they only exist as a lead (no client profile), the ticket option will not be available for them.



How to Open a Ticket

1. Go to **Call Center → Ticket**.
2. Enter the caller's **mobile number** to search for their client profile.
3. Select the correct client from the results.
4. Fill in the ticket details:

Field	Description
Communication Method	How the client contacted us (e.g., phone call).
Call Date	Date of the call.
Delivery Judgement Date	Expected or relevant delivery date, if applicable.
Ticket Content	Description of the client's request or complaint.
Ticket Type	Category of the ticket (e.g., complaint, inquiry, request).
Tag	Tag to label the ticket for filtering.
Branches	The branch this ticket is associated with.
Type	If the client has a purchased unit, select the project and unit to link the ticket to it.

5. Click **Add** — the ticket is sent to the **Customer Service** module.

Key Things to Know

- Tickets are handled by the **CS team** — the call center only creates them.
- The call center agent's job ends after submitting the ticket.
- If the mobile number search returns no client profile (only a lead), a ticket **cannot** be created — the caller must first have a completed client profile.
- Use the **Type** field to link the ticket to a specific unit if the client has a purchased property.

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