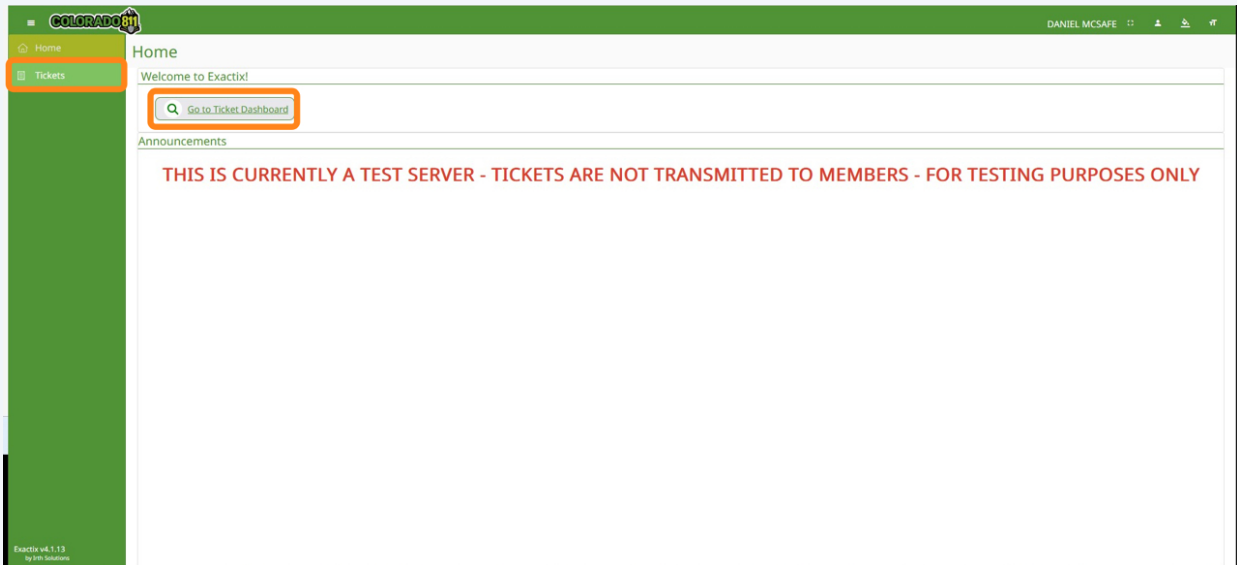# Ticket Search for Members

This guide provides a step-by-step process for efficiently searching and managing tickets within a system, making it an essential resource for users looking to streamline their workflow. By following the outlined steps, users can easily sort, filter, and customize their ticket views, enhancing their ability to track and respond to issues effectively. Whether you're new to the system or seeking to optimize your usage, this guide will help you navigate the ticketing process with confidence.
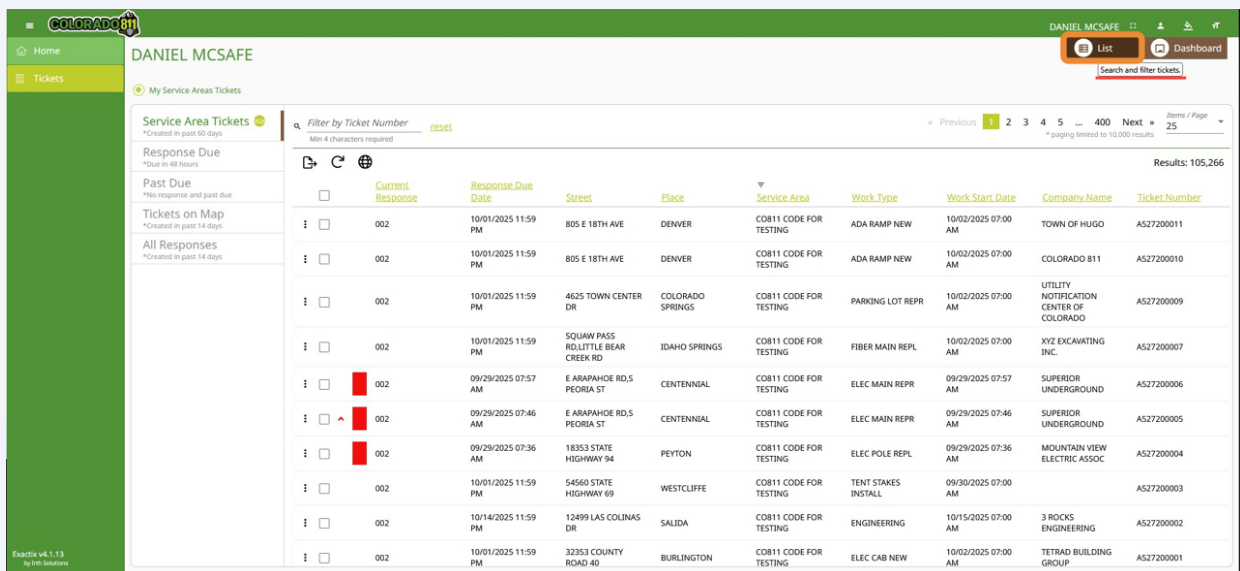
**1**

TICKET SEARCH

**2** The Ticket Search List within Exactix can be found from the Ticket Dashboard.

From the Home screen, click on "Tickets" or "Go to Ticket Dashboard" to open the Ticket Dashboard.



**3** From your Ticket Dashboard, click on "List" in the top right corner of the screen to open the Ticket Search List.

**4**

"Ticket Search" will be shown at the top of the page once you are in the Ticket Search List.

If the ticket number is known, it can be entered into the "Filter by Ticket Number" field.

The number of tickets shown per page will be set to 25 automatically, but can be increased to 50 or 100 if needed.

**5**
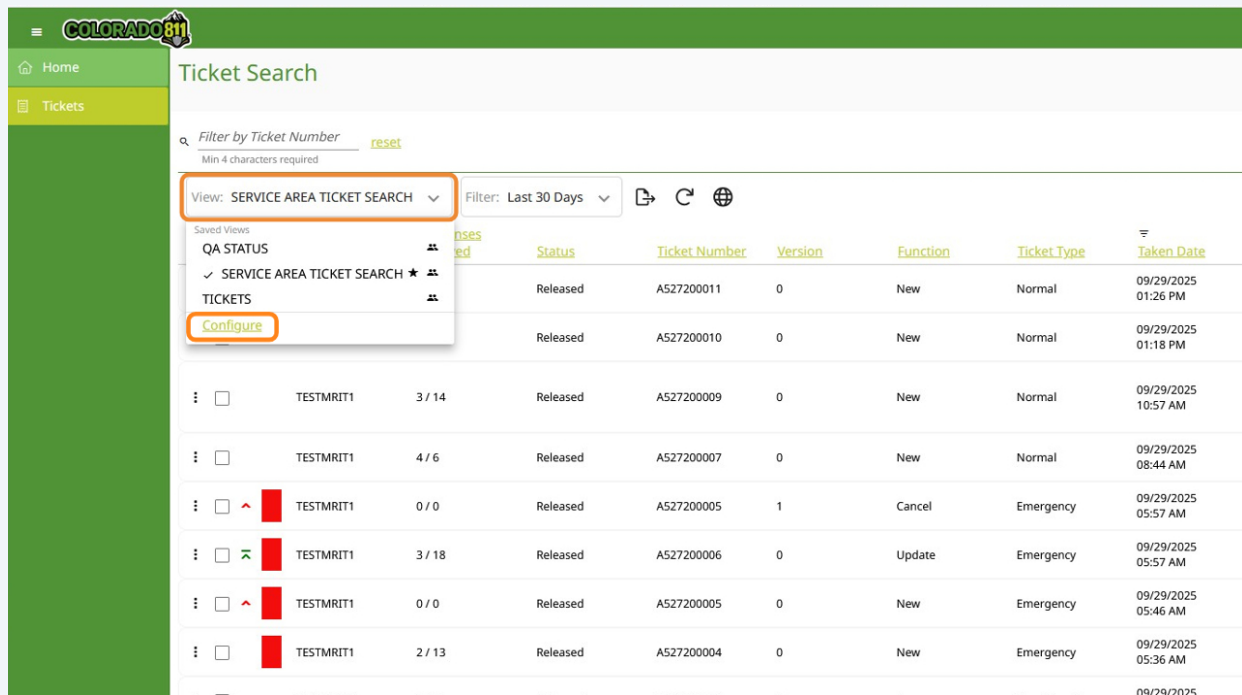
The "Ticket Search" list view will automatically open to "Service Area Ticket Search," which displays the following columns: Service Areas, Responses Received, Status, Ticket Number, Version, Function, Ticket Type, Taken Date, Legal Date, Company Name, Work Done For, and Place.

The "View" of the Ticket Search List can be configured as needed by determining what columns are shown using the "Configure" option under the "View" drop-down. Every column displayed is filterable, so determining what column data is needed to find what you're searching for is crucial.

If you have created and saved previous 'Views', those will also be listed under the "View" drop-down for selection.
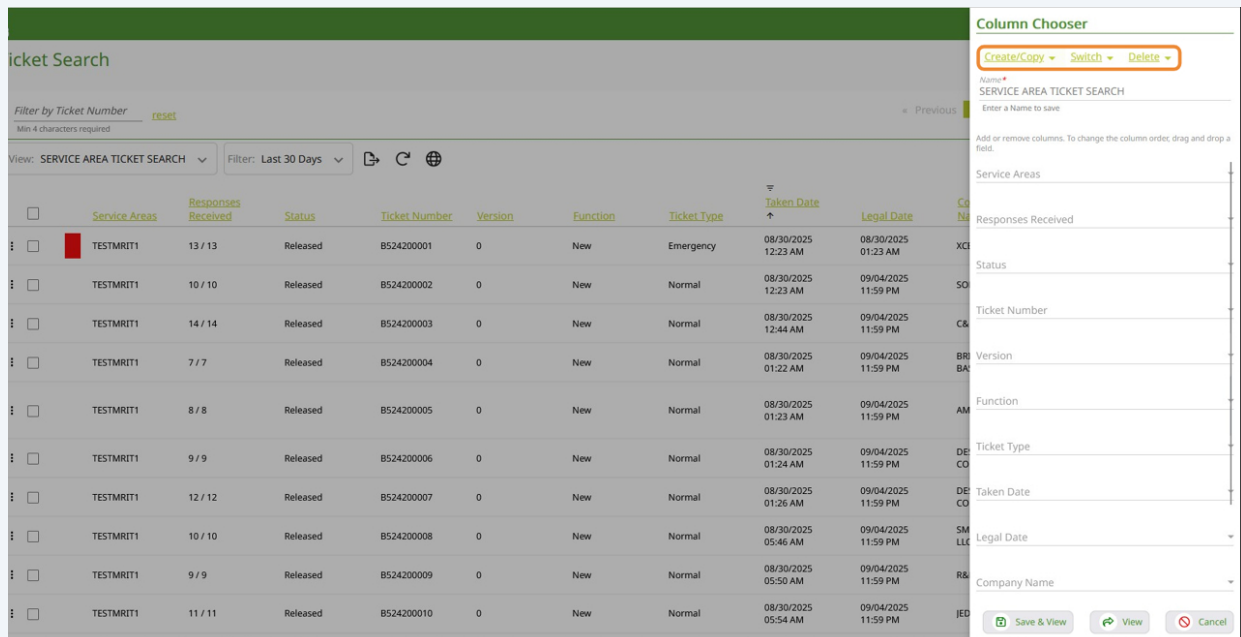
**6**

When "Configure" is selected from the "View" drop-down, the "Column Chooser" configuration window appears on the right side of the screen.

The "Column Chooser" gives you the option to "Create/Copy" new views, to "Switch" between saved views for editing, or to "Delete" a saved view.
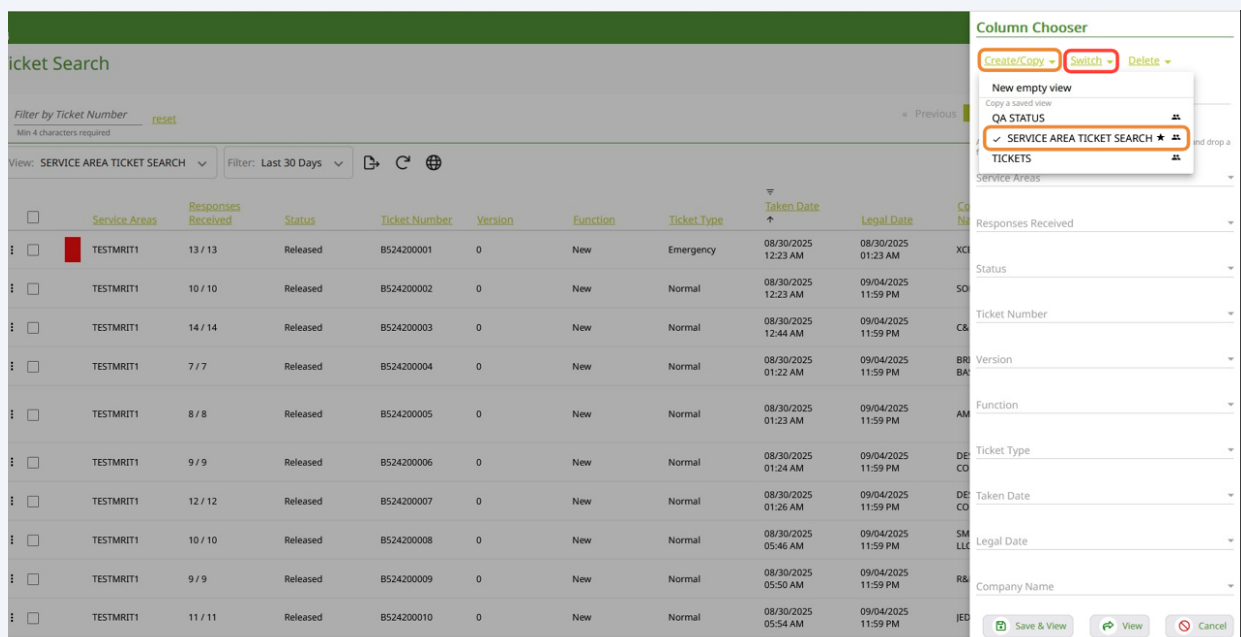


# Edit or Copy an Existing Ticket Search List View

**7**

To copy and edit an existing "View" to create a new view, select the "Create/Copy" drop-down and choose the "View" that you want to edit. To edit an existing "View," select "Switch" and choose the "View" you wish to edit.

**8** Editing an existing view allows you to adjust the current column order for the columns displayed, change what columns are shown, add new columns to be shown, and delete columns. The column arrangement from top to bottom on the configure list is how they will be displayed left to right on the Ticket Search View.

To move a column in the order, click and hold the "Move" icon that is on the left side of the column name and drag it to the preferred placement.

To delete a column from the list, click on the "Trashcan" icon on the right side of the column name.

**9**  To change an existing column, click on the drop-down arrow on the right side of the column name and select the column data that you want to be shown instead.

**10** To add a new column to the view, click "Add a column" at the bottom of the Column Chooser configuration window. Then use the drop-down arrow on the new blank column field to choose the column data that you would like added.

After the new column has been added, it can then be moved up or down to the preferred placement in the column list. The column arrangement from top to bottom on the configure list is how they will be displayed left to right on the Ticket Search View.

When finished with the edits, the new configuration can be "Saved and Viewed," which will save the new view under the "View" drop-down for future use, or the new configuration can just be "Viewed" without being saved for future use using the button options at the bottom of the Column Chooser configuration window.

The edits can also be canceled, and the original Ticket Search View will be unchanged.



# Create a New Ticket Search List View

**11**

# CREATE A NEW TICKET SEARCH LIST VIEW

**12** To create a new Ticket Search "View", select the "Create/Copy" drop-down and choose the "New Empty View".

**13** Name your new Ticket Search View and then click on "Add a Column" to start choosing the column(s) that you want displayed in the new View.

**14** Then use the drop-down arrow on the new blank column field to choose the column data that you would like added. Repeat clicking on "Add New Column" until all the new columns wanted have been added.

After the new columns have been added, they can then be moved up or down to the preferred placement in the column list. The column arrangement from top to bottom on the configure list is how they will be displayed left to right on the Ticket Search View.

When finished adding all columns wanted, the new View can be "Saved and Viewed," which will save the new view under the "View" drop-down for future use, or the new configuration can just be "Viewed" without being saved for future use using the button options at the bottom of the Column Chooser configuration window.

The new View creation can also be canceled.

| Status | Ticket Number | Version | Function | Ticket Type | Taken Date ↑ | Legal Date | Co Na |
|--------|--------------|---------|----------|-------------|--------------|-----------|-------|
| Released | B524200001 | 0 | New | Emergency | 08/30/2025 12:23 AM | 08/30/2025 01:23 AM | XC |
| Released | B524200002 | 0 | New | Normal | 08/30/2025 12:23 AM | 09/04/2025 11:59 PM | SO |
| Released | B524200003 | 0 | New | Normal | 08/30/2025 12:44 AM | 09/04/2025 11:59 PM | C&D ELECTRIC |
| Released | B524200004 | 0 | New | Normal | 08/30/2025 01:22 AM | 09/04/2025 11:59 PM | BRIGHTER BASEMENTS INC |
| Released | B524200005 | 0 | New | Normal | 08/30/2025 01:23 AM | 09/04/2025 11:59 PM | AMY BEERS |
| Released | B524200006 | 0 | New | Normal | 08/30/2025 01:24 AM | 09/04/2025 11:59 PM | DESIGNSCAPES COLORADO |
| Released | B524200007 | 0 | New | Normal | 08/30/2025 01:26 AM | 09/04/2025 11:59 PM | DESIGNSCAPES COLORADO |
| Released | B524200008 | 0 | New | Normal | 08/30/2025 05:46 AM | 09/04/2025 11:59 PM | SMR SERVICES LLC |

**Column Chooser**

Create/Copy ▾    Switch ▾    Delete ▾

*Name* *
MY VIEW
Enter a Name to save

Add or remove columns. To change the column order, drag and drop a field.

::: Service Areas
:::
+ Add a column

⚠ This item has been changed but not saved

Save & View    View    Cancel

# Setting the Ticket Search List Main Filter

**15**

**SETTING THE TICKET
SEARCH LIST MAIN FILTER**

**16** The Ticket Search List will automatically open with the Main "Filter" set to the filter applied last time the Ticket Search List was opened. The filters "Todays Tickets" and "Last 30 Days" are shared system filters that will be available for use.

The Main "Filter" of the Ticket Search List can be configured as needed by determining what filters to set on each of the Ticket Search List columns shown using the "Configure" option under the "Filter" drop-down. Every column on the Ticket Search List is filterable, and the Main "Filter" allows you to save a filtered view without needing to set the filters on each column individually.

If you have created and saved previous "Filters," those will also be listed under the "Filter" drop-down for selection.



# Copy/Edit an Existing Ticket Search List Main Filter

**17** To copy and edit an existing "Filter" to create a new filter, select the "Create/Copy" drop-down and choose the "Filter" that you want to edit. To edit an existing "Filter", select "Switch" and choose the "Filter" you wish to edit.

**18** Editing an existing filter enables you to adjust any current filters applied to columns. Both of the system filters, "Last 30 Days" and "Todays Tickets", set a filter on the "Taken Date" column, which is the date the ticket was taken into the system. Columns that have an active filter will display a menu icon above them.

A new column can be added to the current filter by choosing the column to be filtered from the "Select column to add to filter" field drop-down in the "Filter Builder" window.

The current filter parameters can also be modified by clicking the "Gear" icon on the right side of the current filter in the "Filter Builder" window, located under "Filters".

**19**

When a new column is selected to be added to the filter, a separate pop-up window will appear, allowing you to choose or set the filter options for that column.

Once a selection is made in the column filter's pop-up, the "Accept" button becomes clickable. Clicking it adds the new filter parameter to the filters shown under the "Filters" section in the "Filter Builder" window.

The new column filter selection can be canceled if needed.

**20** The new filter parameter added to the shown filters under the "Filters" section in the "Filter Builder" window can be modified by clicking on the "Gear" icon, or it can be deleted by clicking on the "Trashcan" icon, both of which are on the right side of the new filter addition.

When finished adding all column filters wanted for this filter, the new Filter can be "Saved and Viewed," which will save the new filter under the "Filter" drop-down for future use, or the new configuration can just be "Viewed" without being saved for future use using the button options at the bottom of the Filter Builder configuration window.

The filter copy/edits can also be canceled if needed.



# Creating a New Ticket Search List Main Filter

**21**



# CREATING A NEW TICKET
# SEARCH LIST MAIN FILTER

**22** To create a new Ticket Search Main "Filter", select the "Create/Copy" drop-down and choose the "New Empty Filter".

**23** Name your new Ticket Search Filter and then select a column to be filtered from the "Select column to add to filter" field drop-down in the "Filter Builder" window.

**24** When a new column is selected to be added to the filter, a separate pop-up window will appear, allowing you to select or set the filter options for that column.

Once a selection is made in the column filter's pop-up, the "Accept" button becomes clickable. Clicking it adds the new filter parameter to the filters shown under the "Filters" section in the "Filter Builder" window.

The new column filter selection can be canceled if needed.

**25** The new filter parameter added to the shown filters under the "Filters" section in the "Filter Builder" window can be modified by clicking on the "Gear" icon, or it can be deleted by clicking on the "Trashcan" icon, both of which are on the right side of the new filter addition.

When finished adding all column filters wanted for this new filter, the Filter can be "Saved and Viewed," which will save the new filter under the "Filter" drop-down for future use, or the new configuration can just be "Viewed" without being saved for future use using the button options at the bottom of the Filter Builder configuration window.

The filter copy/edits can also be canceled if needed.

**26** When viewing the new Filter, columns with an active filter will display a "carrot" menu icon above them.

| | Service Areas | Responses Received | Status | Ticket Number | Version | Function | Ticket Type | Taken Date ↓ | Legal Date | Company Name | Work For |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | TESTMRIT1 | 8 / 8 | Released | B524300059 | 0 | New | Emergency | 08/31/2025 07:57 PM | 08/31/2025 08:57 PM | XCEL ENERGY | XCEL EN |
| | TESTMRIT1 | 15 / 15 | Released | B524300041 | 0 | New | Emergency | 08/31/2025 05:47 PM | 08/31/2025 06:46 PM | STURGEON ELECTRIC | XCEL EN |
| | TESTMRIT1 | 10 / 10 | Released | B524300039 | 0 | New | Emergency | 08/31/2025 05:28 PM | 08/31/2025 06:28 PM | STURGEON ELECTRIC | STURGE |
| | TESTMRIT1 | 10 / 10 | Released | B524300037 | 0 | New | Emergency | 08/31/2025 04:58 PM | 08/31/2025 05:58 PM | CITY OF AURORA | CITY OF WATER |
| | TESTMRIT1 | 5 / 5 | Released | B524300036 | 0 | New | Emergency | 08/31/2025 04:43 PM | 08/31/2025 05:43 PM | POUDRE VALLEY REA | POUDRE REA |
| | TESTMRIT1 | 10 / 10 | Released | B524300027 | 0 | New | Emergency | 08/31/2025 04:06 PM | 08/31/2025 05:06 PM | COLORADO SPRINGS UTILITIES | COLORA SPRINGS UTILITIE |
| | TESTMRIT1 | 14 / 14 | Released | A524300126 | 0 | New | Emergency | 08/31/2025 04:05 PM | 08/31/2025 05:05 PM | MASTEC | COMCAS |
| | TESTMRIT1 | 8 / 8 | Released | A524300120 | 1 | Excavator Renotification | Emergency | 08/31/2025 03:35 PM | 08/31/2025 04:35 PM | TRENCH RIGHT | H/O |
| | TESTMRIT1 | 9 / 9 | Released | A524300125 | 0 | New | Emergency | 08/31/2025 03:30 PM | 08/31/2025 04:30 PM | CITY OF THORNTON | CITY OF THORNT |
| | TESTMRIT1 | 8 / 8 | Released | A524300120 | 0 | New | Emergency | 08/31/2025 02:19 PM | 08/31/2025 03:19 PM | TRENCH RIGHT | H/O |

**27** Clicking on the "carrot" menu icon above the filtered column will open a separate pop-up window displaying the filter options for that column. This allows for quick filter adjustments as needed.

If you happen to clear the filter parameters the Main Filter will have to be reconfigured.

**Legal Date**

☐ Sort Ascending          clear
☐ Sort Descending

Limit by...
◯ All Dates
◯ Today
◯ Yesterday
◯ Last Week (last Sunday to last Saturday)
◉ Last Month

◯ Days before (and including) today: *Days* ✱
                                   Max 124

◯ Hours before current time: *Hours* ✱
                             Max 240

◯ Single Date: *Date* ✱
              (mm/dd/yyyy)

◯ Date Range: *Start Date* ✱      *End Date* ✱
             (mm/dd/yyyy)         (mm/dd/yyyy)

◯ Tomorrow

◯ Days after (and including) today: *Days* ✱
                                   Max 124

◯ Hours after current time: *Hours* ✱
                            Max 240

**28** If the filter parameters in the Main "Filter" view need to be reconfigured, the filter view will display a red exclamation point to make it noticeable.

To fix, click the drop-down on the Main Filter tab and select "Configure".

**29** Follow the previous steps to use the Filter Builder to select columns to be filtered and set the filter parameters for those columns, using the "Modify" gear icon if needed. When finished adding all column filters wanted for this filter reconfiguration, the Filter can be "Saved and Viewed," which will re-save the new filter under the "Filter" drop-down for future use, or the new configuration can just be "Viewed" without being saved for future use using the button options at the bottom of the Filter Builder configuration window.

The reconfiguration can also be canceled.



# Setting Ticket Search Column Filters

**30**

## SETTING TICKET SEARCH COLUMN FILTERS

**31** All of the columns, at any time - in any view, can be filtered by clicking on any of the column headers. Clicking on a column header, such as "Function," opens a pop-up displaying the available filter configurations for that column.

Make the wanted filter selections in the pop-up, then click anywhere outside of the pop-up to close it and apply the selected filter.

**32**

Once the filter has been applied, the column(s) with an active filter will display a "carrot" menu icon above them.

To clear or edit the filters, click on the green column header again to reopen the column filter pop-up.