SedonaSchedule Functionality

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About This Document

This document is provided to explain the basic functionality of SedonaSchedule. This document will cover creating new tickets, scheduling, dispatching, managing tickets, etc.

Prior to reading this document and using SedonaSchedule, it is important to first read the SedonaSchedule Basics reference guide. This document provides information on the layout of the application, terminology that is specific to SedonaSchedule and general navigation within the application.

Topics covered in this document include:

- Creating and Processing Tickets
- Attaching Documents (add-on module SedonaDocs required)
- Scheduling Technician Appointments
- Adding Parts to a Ticket
- Ordering Parts for a Ticket
- Dispatching Technician Appointments
- Adding Notes to a Ticket
- Reviewing Ticket Charges
- Invoicing Ticket
- Closing Ticket
- Vendor Tickets (Service & Inspections) – Creating and Managing
- Inspection Tickets
- Inspection Setup
- Inspection Ticket Creation
- Special Features
- Miscellaneous Appointments
- “Firm” Appointments
- Appointment Clock-out & Clock-in
- Copy & Paste Appointments
- Group Tickets
- Open Jobs List
- Scheduling & Managing Job Appointments

This document may be updated periodically, be sure to check our website at learn.boldgroup.com for the most current version.

SedonaSchedule Overview

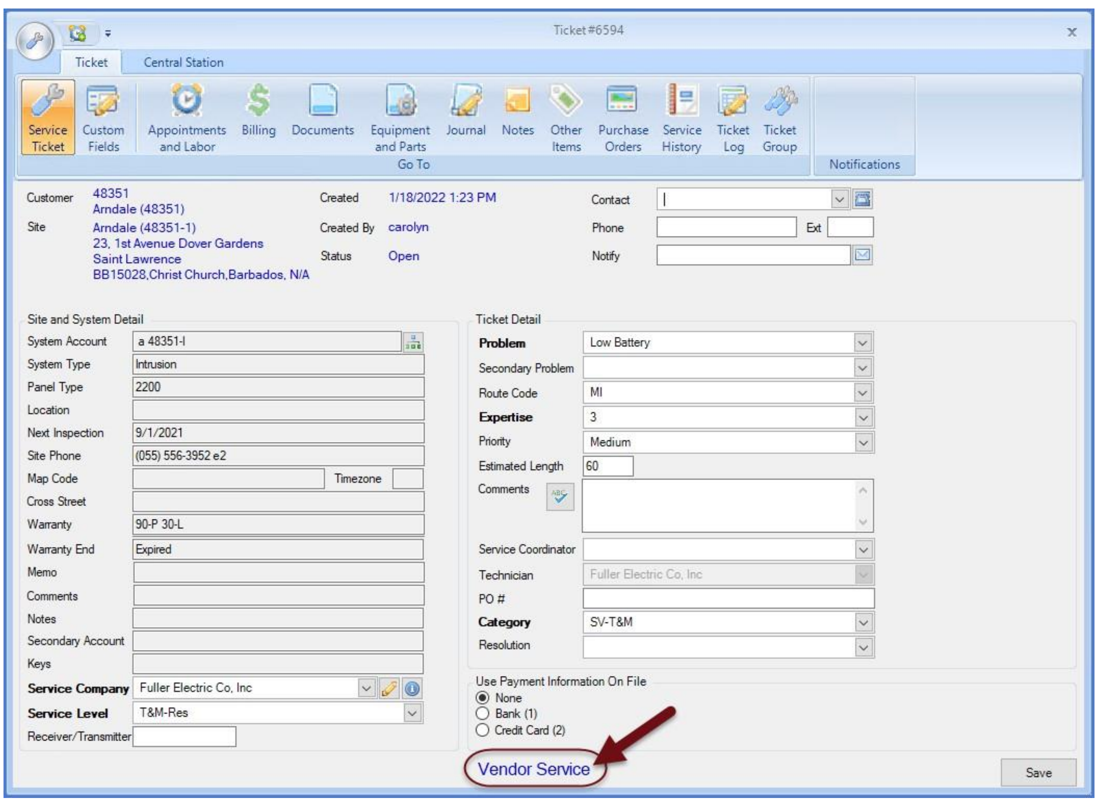
SedonaSchedule is an application designed for creating and managing Service and Inspection Tickets and for scheduling Job appointments. SedonaSchedule is accessed from the main SedonaOffice application and runs as a separate application.

All functions related to Service Tickets and Inspection Tickets are performed within SedonaSchedule - from creation of the ticket through to invoicing and closing.

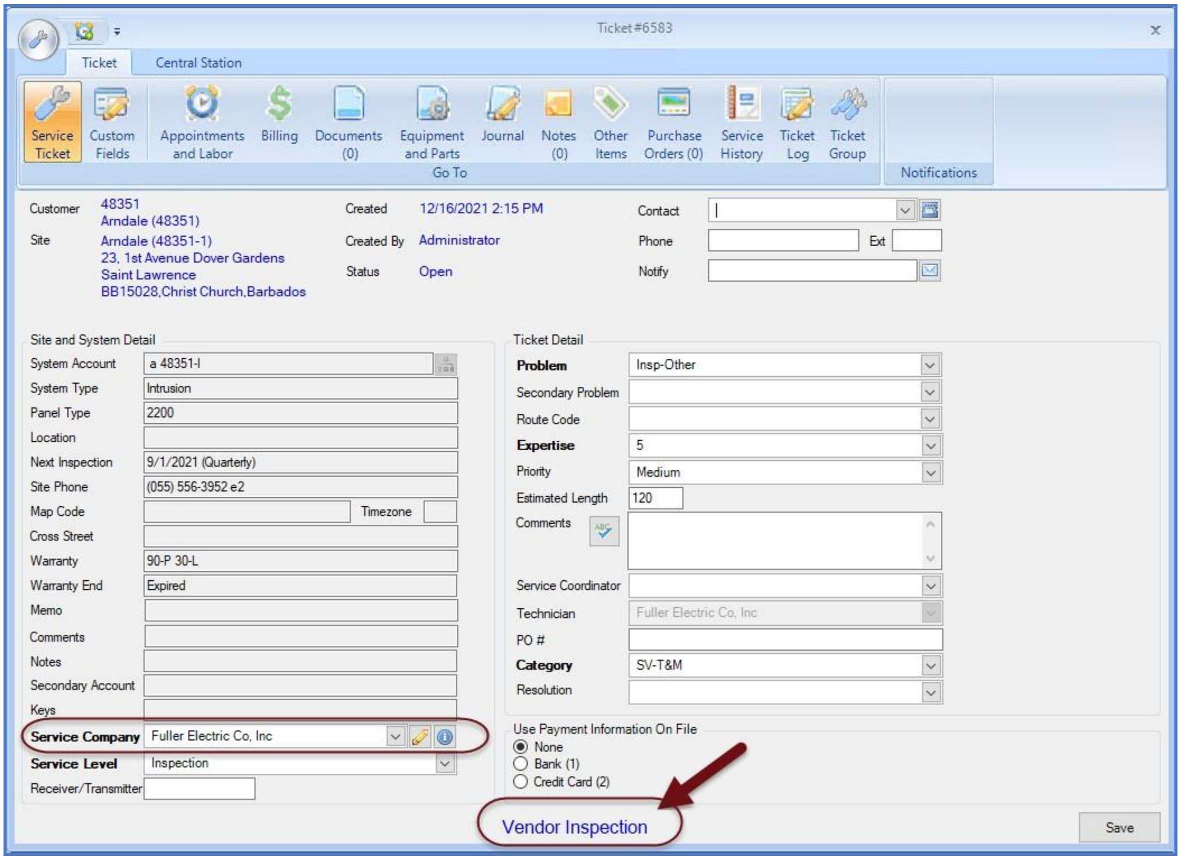
Ticket Types

There are four types of Tickets that may be created and managed within SedonaSchedule:

- **Service Tickets –** Service calls performed by company Technicians or in-house troubleshooting tickets.
- **Inspection Tickets –** Tickets created from the Inspection function (in batch mode) within SedonaSchedule and work is performed by company Technicians. Tickets are generated periodically based on information setup on the System record of a customer's Site.
- **Vendor Service Tickets –** Service calls performed by a Service Provider (subcontractor) on behalf of your company. If the Service Company on a ticket is a Service Provider, at the bottom of the ticket, the words "Vendor Service" will be displayed in a bright blue font.



- **Vendor Inspection Tickets –** Inspections performed by a Service Provider (subcontractor) on behalf of your company. Tickets are generated periodically using the Inspection function within SedonaSchedule based on information setup on the System record of a customer's Site. If the Inspection Ticket was created through the Inspections program, and the Service Company on the ticket is a Service Provider, at the bottom of the ticket, the words "Vendor Inspection" will be displayed in a bright blue font.



Scheduling - Appointment Types

Technician and Installer appointments are created and displayed on the Schedule Board within SedonaSchedule. Below are the various types of appointments that may be created:

- **Technician Ticket Appointments –** for both Regular Tickets and Inspection Tickets.
- **Vendor Ticket Appointments –** for Vendor Tickets and Vendor Inspection Tickets.
- **Unassigned Appointments –** Tickets (all types) and Jobs may be scheduled with the "Unassigned Technician" and then re-assigned to the appropriate individual once that has been determined by the staff member responsible for scheduling.
- **Miscellaneous Appointments –** Appointments used for blocking out time on the Schedule Board when Technicians/Installers are not available to work on tickets or jobs.

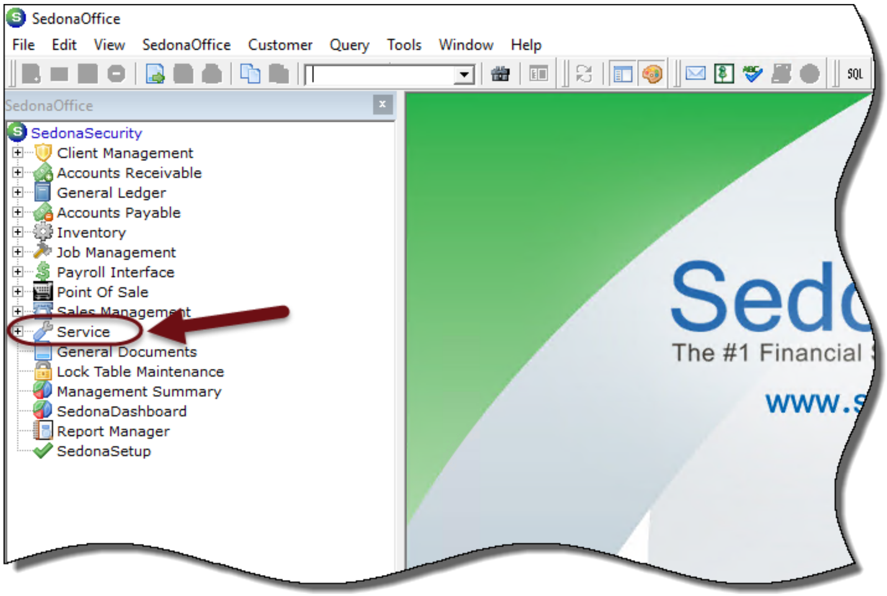
Purchase Orders

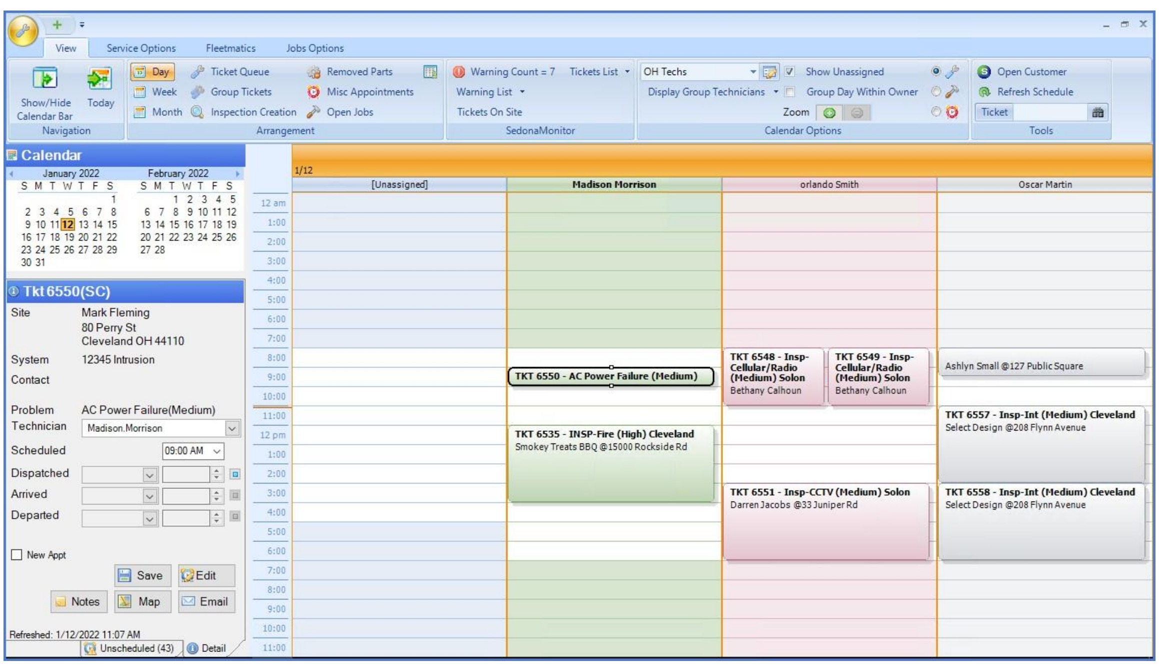
Purchase Orders may be created directly from a Ticket. A purchase order may be created for Parts or for Vendor type tickets, a Purchase Order may be created for the services to be performed by the Service Provider.

Launching SedonaSchedule

SedonaSchedule is launched from the main SedonaOffice application. From the main application menu, click on the Service menu option. In a few seconds, the SedonaSchedule application will be displayed.

The SedonaSchedule application will open displaying the view last displayed when exiting the application. When opening SedonaSchedule for the first time, the Schedule Board will be displayed.

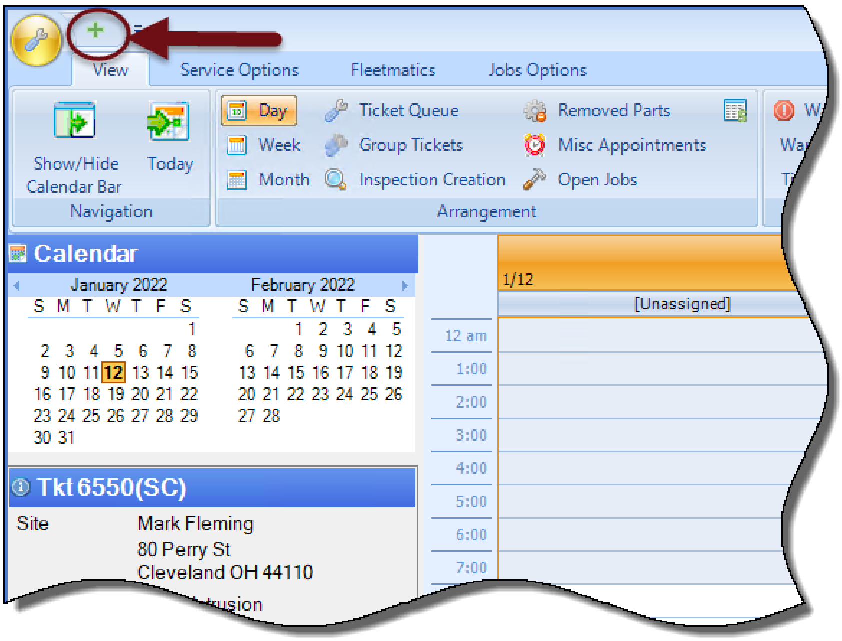


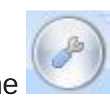


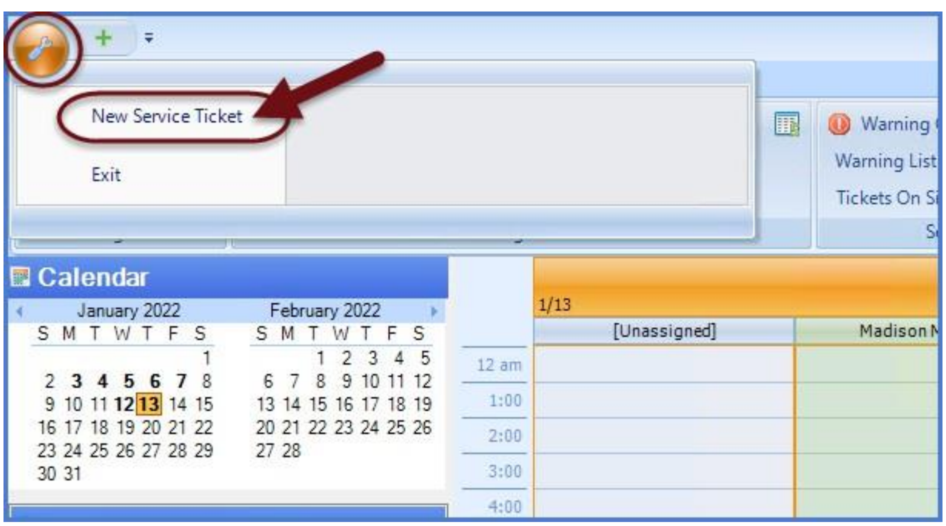
Where to Start a New Ticket

There are three different locations within SedonaSchedule where you may begin the creation of a Ticket.

1. To create a Ticket but not schedule an appointment at this time, click on the  icon located at the upper left of the application. The Customer Search form will be displayed to locate the account for which the Ticket will be created.



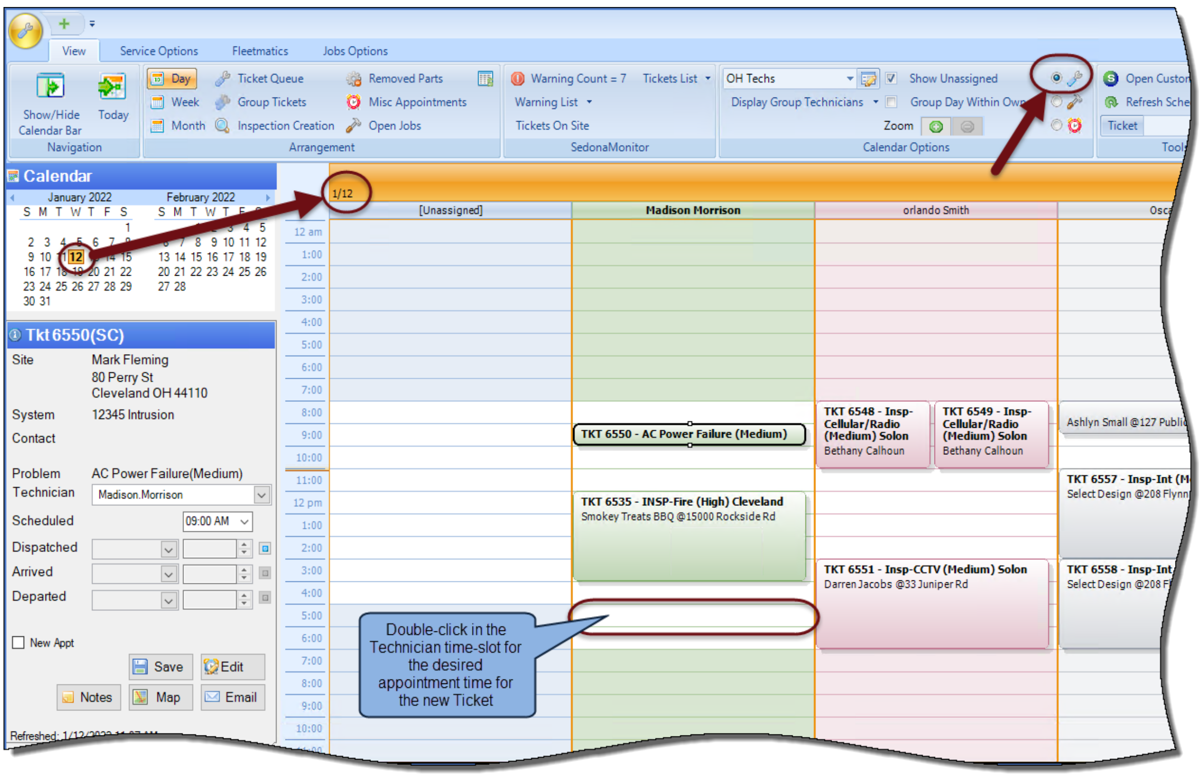
2. To create a Ticket but not schedule an appointment at this time, click on the  icon, then select the New Service Ticket option. The Customer Search form will be displayed to locate the account for which the Ticket will be created.



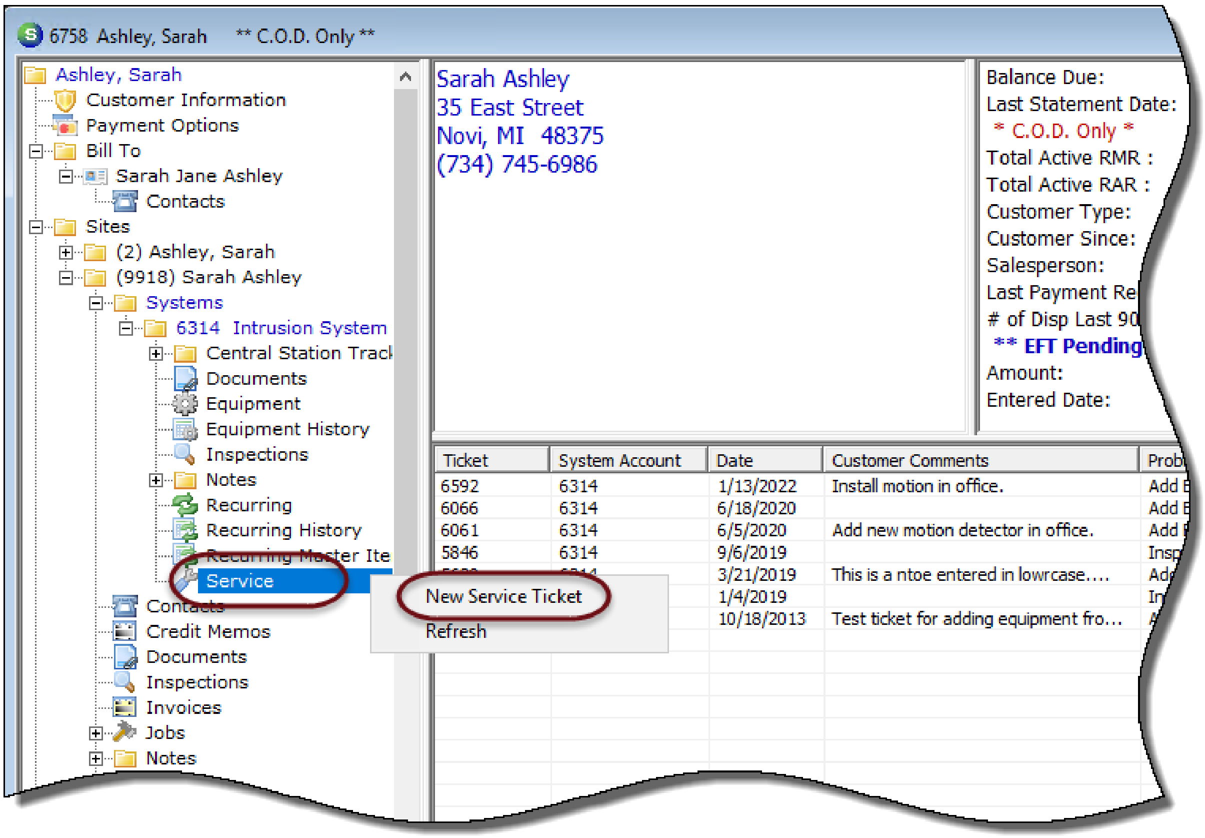
3. To create a Ticket and schedule a Technician for a particular date and time, you would use the “Double-Click to Add” method. First, make certain the button to the left of Wrench Icon in the Calendar Options Ribbon group is selected.

   On the Calendar, click on the date of when the Technician Appointment will be scheduled.

   Within the Schedule Board, locate the Technician and time-slot for the Ticket and double-click. The Customer Search form will be displayed for locating the account for which the Ticket and Appointment will be created.



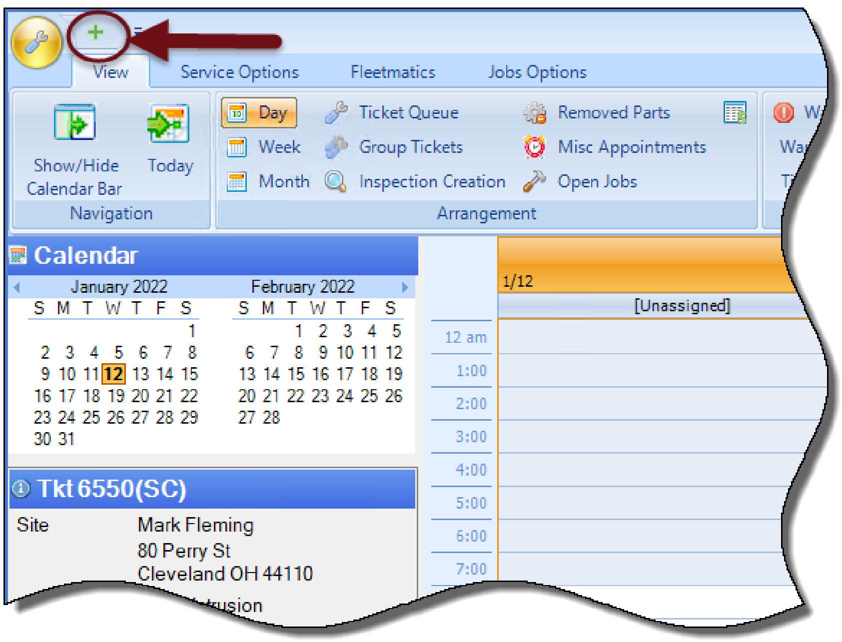
A Ticket may also be started while working in a Customer Explorer record in the main SedonaOffice application. Within the System area of the Customer Tree, highlight the Service menu option, right-click and select the New Service Ticket option. The software will re-direct you to the SedonaSchedule application and a blank Ticket form will be displayed to continue processing.



Creating a New Ticket from SedonaSchedule

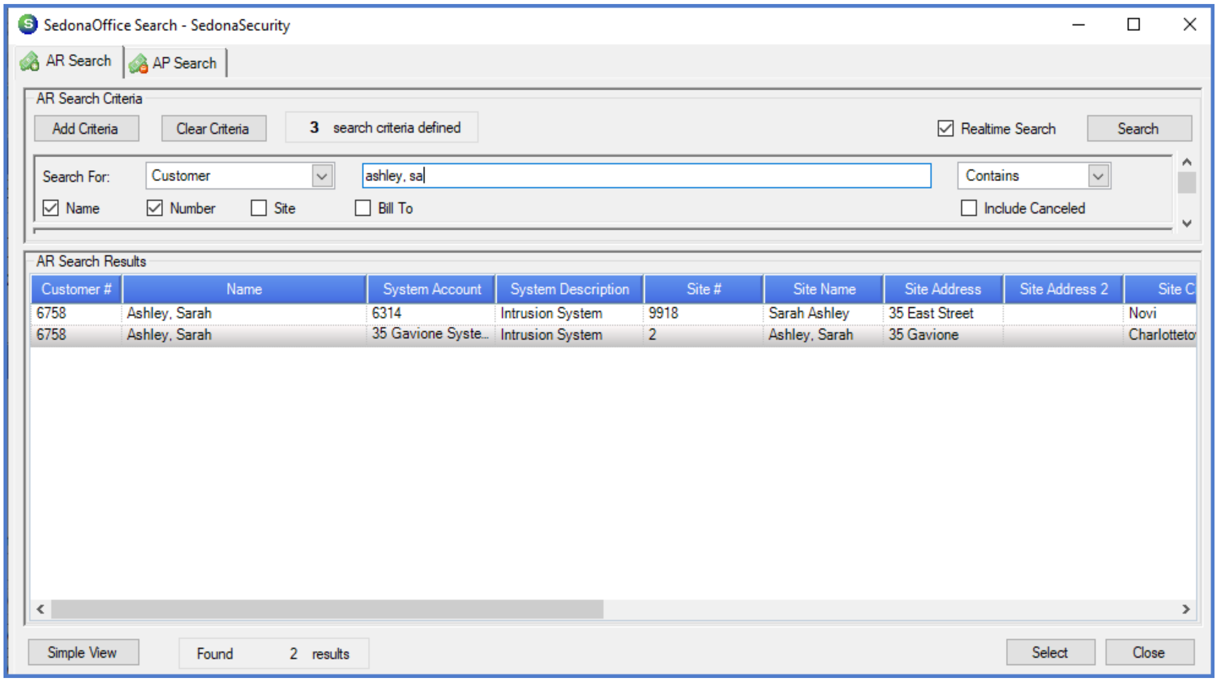
This section will describe how to create a new Ticket (but not schedule an appointment) in SedonaSchedule.

1. To create a Ticket but not schedule an appointment at this time, click on the  icon located at the upper left of the application. The Customer Search form will be displayed to located the account for which the Ticket will be created.

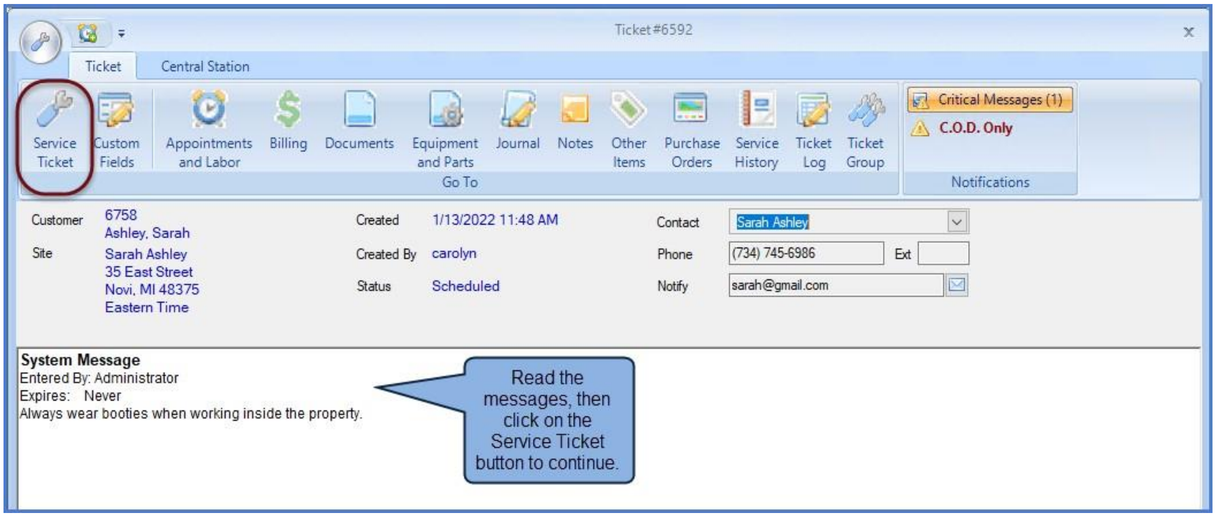


2. The Customer Search form will be displayed to located the account for which the Ticket will be created. Enter the search criteria; once the correct customer system is located within the list, double-click on the row to open the Ticket form or highlight the correct row and then click on the Select button located at the lower right of the form.

   Note: If the customer has multiple Sites and Systems, make certain to select the correct Site and System for the new ticket.



3. Typically the first data entry form will be displayed is the Service Ticket form, however, if any “Critical Messages” have been setup for the Customer, the System or the default Service Company associated with the System, the Notifications page will first be displayed. Once the messages have been read, click on the Service Ticket button on the Ribbon in the header area of the Ticket.

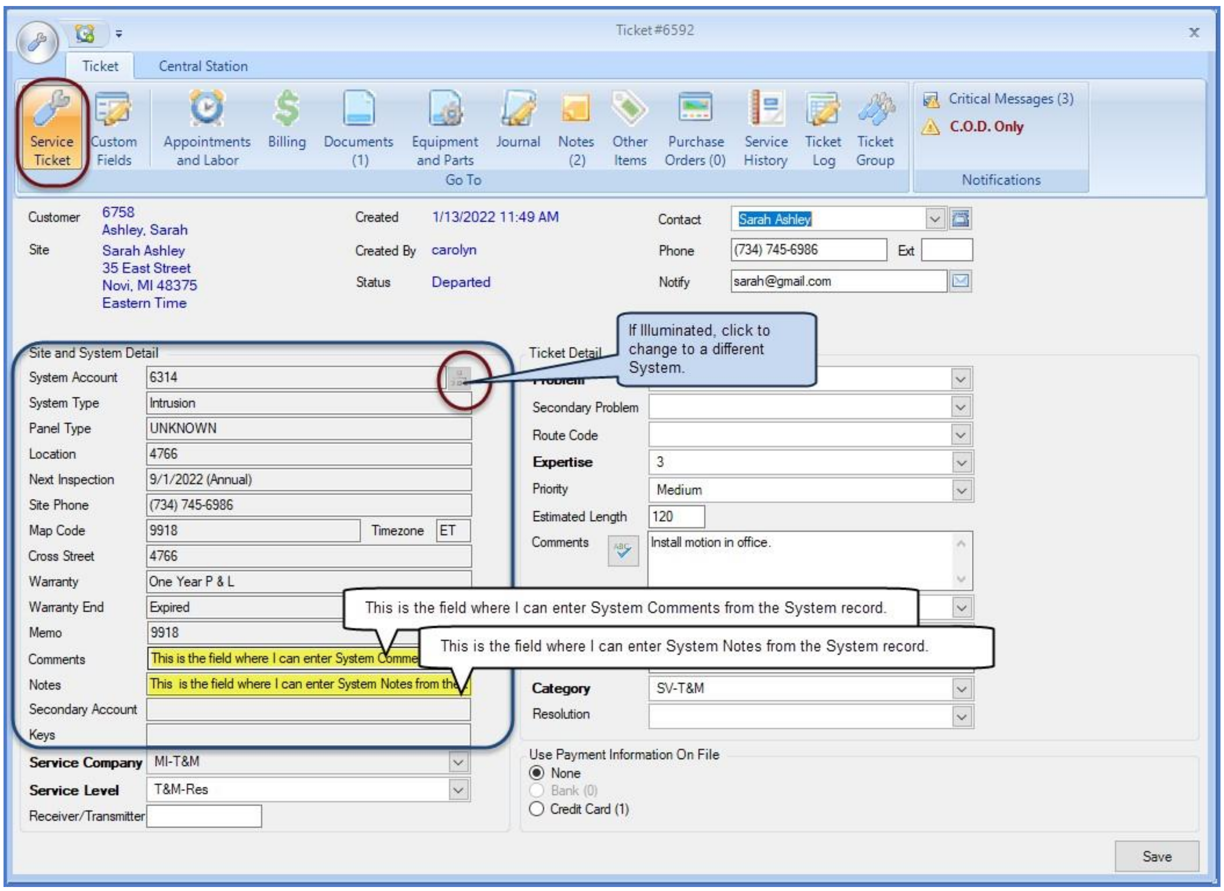


Ticket Form Display Fields

The left side of the Service Ticket form is mainly designed for display-only information related to the System.

In the **System Account** field, if the button to the right of this field is illuminated, this indicates there is more than one System linked to the Site selected on the Ticket. If the user selected the wrong system when creating the ticket, they are able to click on this button and change the System linked to the Ticket. The system can only be changed if no appointments have been scheduled, and/or no general ledger activity has occurred on the ticket.

In the **Comments or Notes** fields, hovering over each of these fields will display an information bubble with the complete text entered into these fields. Comments and Notes are entered and maintained on the System record. Since the text may be up to 256 characters, without hovering on the field, you would not be able to read the entire text. The number of characters displayed in these fields is approximately 56 characters.

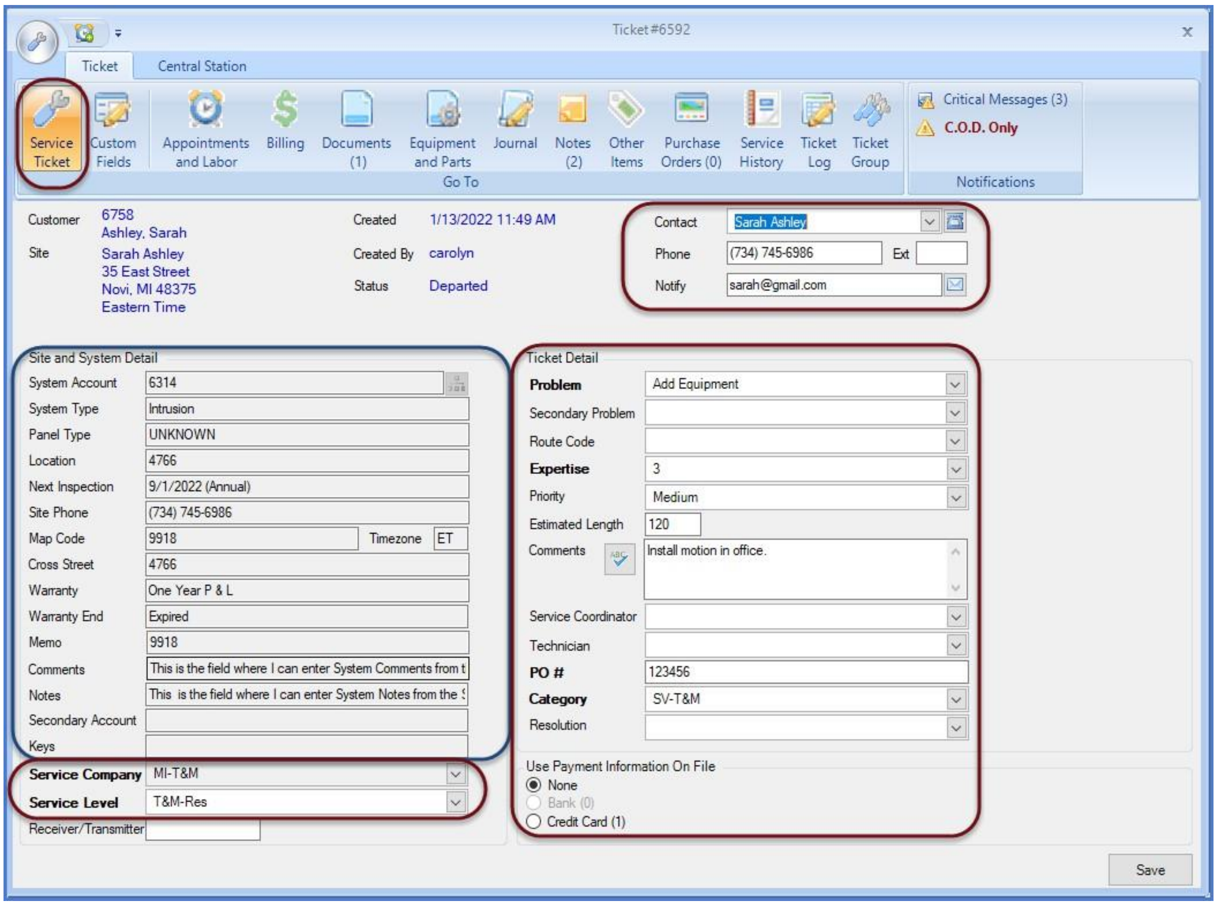


4. **Filling in the Service Ticket Form** - The left side of the Service Ticket form is mainly for display-only information related to the System. The Service Company and the Service Level fields located at the lower left side of the form, automatically fill with the values setup on the System record. Both of these fields may be overridden if necessary*.

   The right side of the form is where most of the data entry is performed. Each data entry field will be explained on the following pages.

   When finished filling in the Service Ticket form, click on the Save button located at the lower right of the form to continue processing.

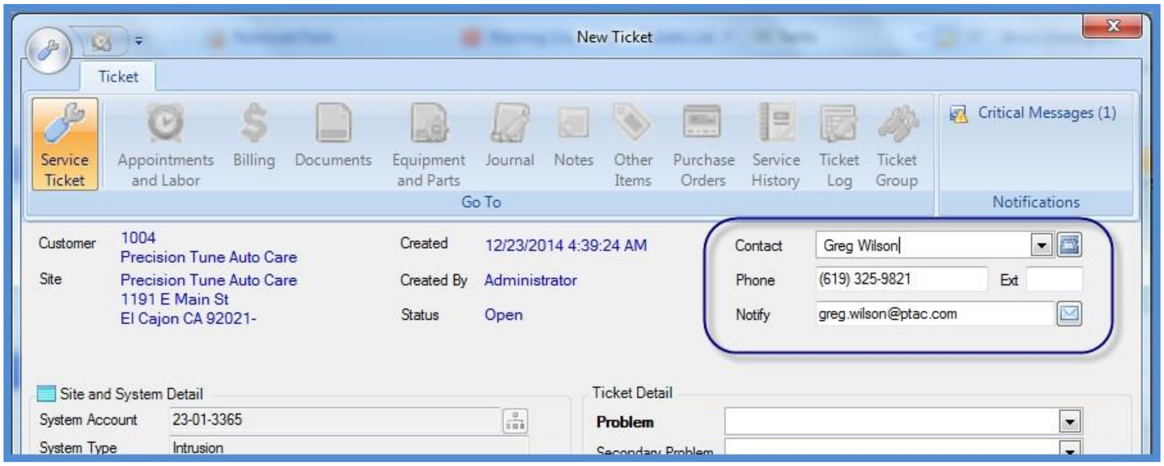
   Note: *Permissions are required to be able to change the default Service Company on the ticket. Refer to SedonaSetup/User Groups/ Application Access SV area, “Override Ticket Service Company”.



Service Ticket Form-Data Entry Fields

Contact Information - In the Contact field, click on the drop-down arrow to the right of the field to select from Site Contacts on file. If no Contacts appear on the drop-down list, you may create a Contact record on the fly by clicking on the telephone icon to the right of the Contact field and fill out the information. This contact will be saved to the Site Contact list for future use and fill in on the current Ticket.

If you do not want to select an existing contact or create a contact record, you may manually type in the Contact Name, phone number, and in the Notify field, you may enter the contact's email address. The contact name and phone number will print on a Ticket and be displayed to Technicians using the FSU (field service unit) or Sedona-X Mobile.



Problem Code – <u>This is a required field</u>. Make a selection from the drop-down list that best describes the purpose of the ticket being created.

Secondary Problem – If there are choices available when clicking on the drop-down list, make the appropriate selection according to your company's policies and procedures.

Route Code - If there are choices available when clicking on the drop-down list, make the appropriate selection according to your company's policies and procedures.

Expertise Level, Priority and Estimated Length – These three fields will automatically be filled in based on the Problem Code selected. Each of these field choices may be overridden. The Estimated Length value is used when scheduling a Technician appointment – this is the amount of time (in minutes) required to complete the ticket (including drive time to the site).

Comments – This field is used to enter a brief note as to the purpose of the ticket. For companies using the FSU or SedonaX Mobile, the Technician is able to view this information. After saving the ticket, any information entered into this field will create the first Ticket Note, which is viewable from the Notes button on the Ticket. If a comment is not entered into this field prior to the initial save of the Ticket, but information is later entered into this field, the information will not be saved to the Ticket Notes. A maximum of 256 characters are allowed in the Comments field.

> **Note:** Once ticket information has been entered and saved, if changes need to be made to this field, permissions are required - refer to SedonaSetup/User Groups/ Application Access SV area, "Edit Customer Comments". If the user does not have this permission granted, they will not be able to edit the Comments field once saved.

Service Coordinator – The staff member responsible for managing this ticket. If your company is using this field, make the appropriate selection from the drop-down list. When clicking on the drop-down list, all active Employees will be listed.

Technician – You may make a selection from the drop-down list if you have a preferred Technician for the Ticket. This will not create or schedule an appointment – just a reminder to the person scheduling appointments.

PO# - If your customer has provided a purchase order number to be used when invoicing the Ticket, enter that value into this field. If the PO# field label is displayed with a bold font, this indicates a PO# is required for the Ticket; the ticket may not be saved without entering information into this field. The requirement for a PO# is enabled by checking the box "Require PO" on the System record.

Category – This field typically should not be changed – this is for accounting purposes and the default is coming from setup options.

> **Note:** User permissions are required to be able to change the ticket Category - refer to SedonaSetup/User Groups/ Application Access SV area, "Change Ticket Category".

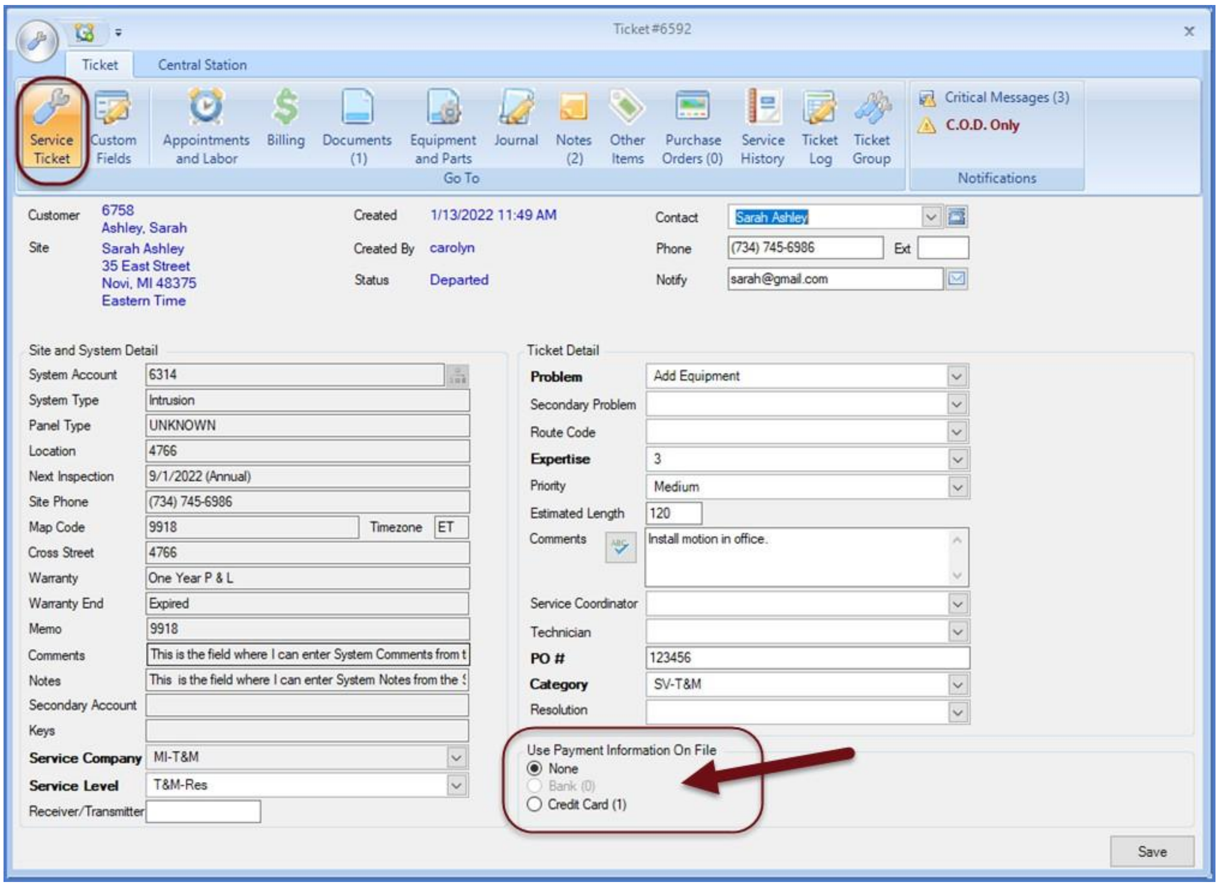
Resolution – A User will make a selection in this field once the work has been completed. The choices in the drop-down list define how the Ticket was Resolved. Typically, you will by-pass this field when creating a new ticket.

Use Payment Information on File – Provides the ability to tag a bank account or credit card on file to be used when invoicing for charges on the ticket.

When creating the ticket, in there is a number in parenthesis for either a Bank or Credit Card, this indicates there is a bank account(s) and/or credit card(s) on file for the customer. Users should be proactive in asking the customer if your company can use a bank or credit card on file to invoice for any charges incurred on the ticket.

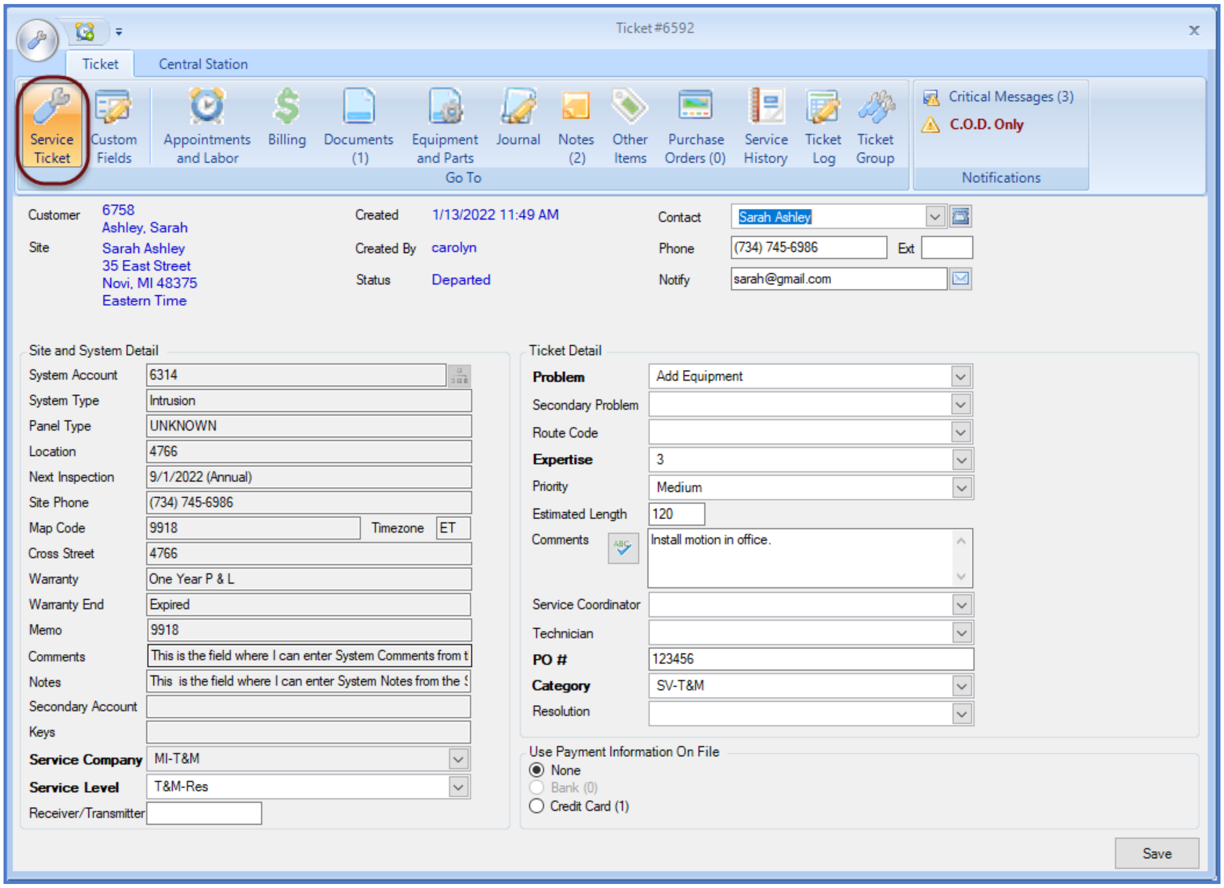
If the customer consents to using a payment method on file, click either the bank or credit card radio button and select the approved payment method on file.

For SedonaOffice customers subscribing to EFT Processing with Forte (our merchant bank partner), once the ticket invoice has been created, a transaction will automatically flow into Forte for funding the invoice charges.



When finished filling in the Service Ticket form, click on the Save button located at the lower right of the form to continue processing.

Completed Ticket Form



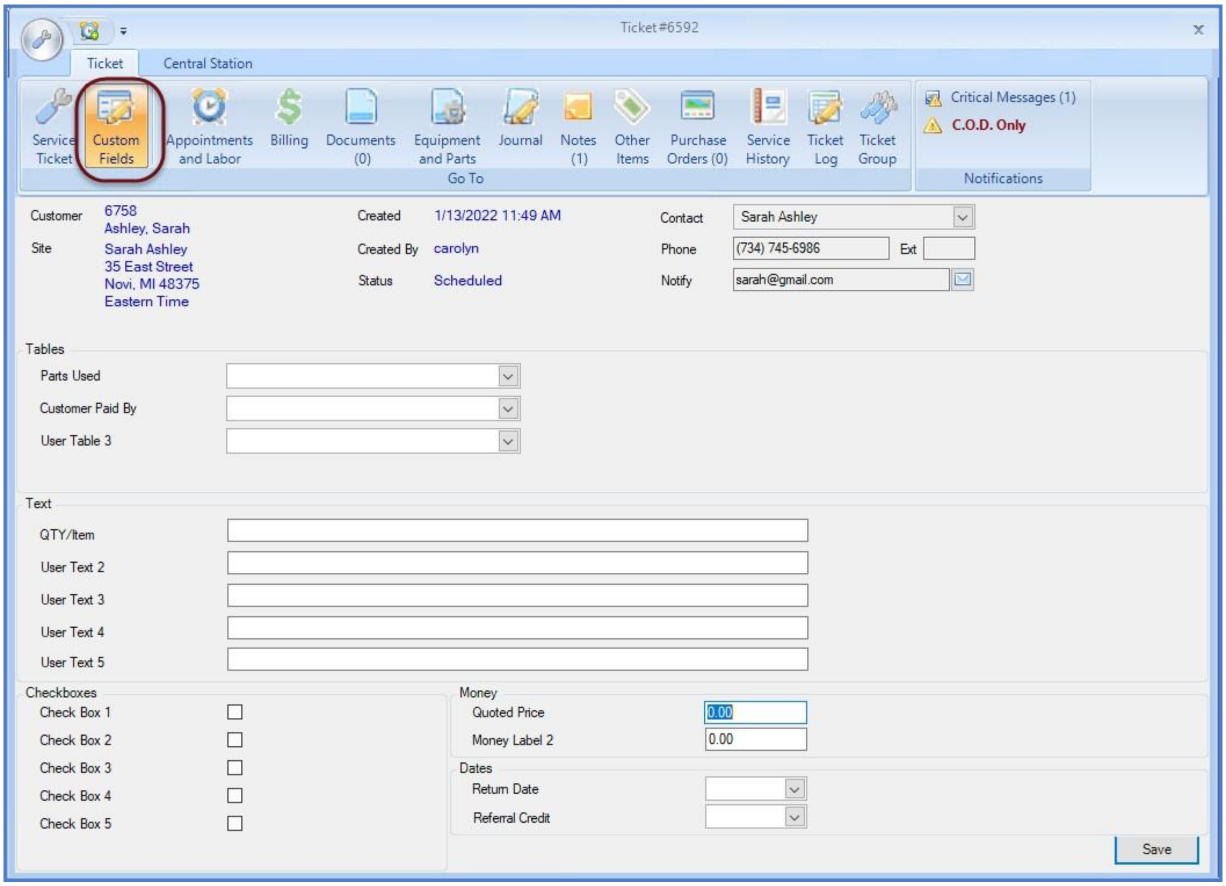
Custom Fields

Once the Service Ticket form has been saved, the next form to open will be the Custom Fields form. Fill in the fields according your company's policies and procedures. If the Custom Fields form is not displayed, your company is not using this form.

If any of the field names on this form appear with a bold black font, this indicates the field is required. If the user clicks on the Save button without populating any required fields, the application will not allow the user to leave this form without filling in the required field(s).

If any fields on this form are required and the user does not make any selections, and does not click the Save button, they will be able to navigate away from this form.

Note: When trying to close a ticket, if any required fields have not been populated, the user will receive a message that Custom Field entries are required.



The preliminary data entry is now complete. The Ticket will be displayed in the list of un-scheduled tickets on the Schedule Board, and appear in the Ticket Queue.

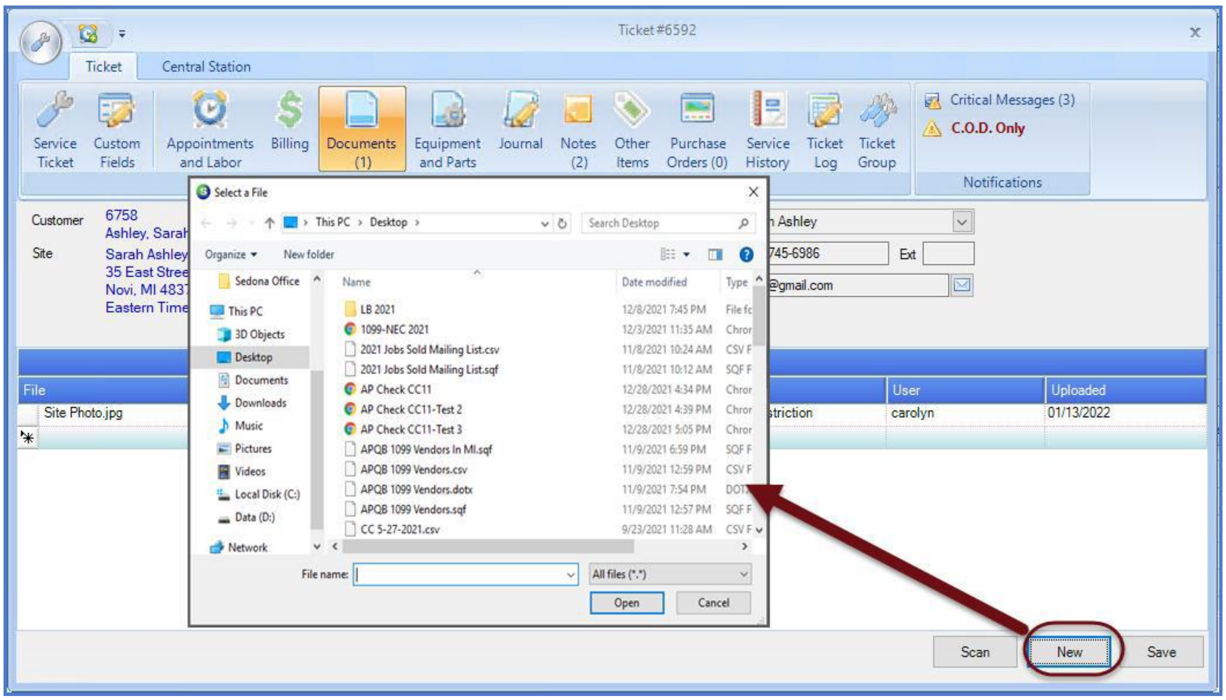
Documents

If your company has purchased the add-on module SedonaDocs, Users are able to scan in or attach previously saved documents to Tickets.

Add an Existing Document to a Ticket

To add an existing document to a Ticket, open the desired ticket and click on the Documents button from the ribbon. Click on the New button located at the lower right of the form.

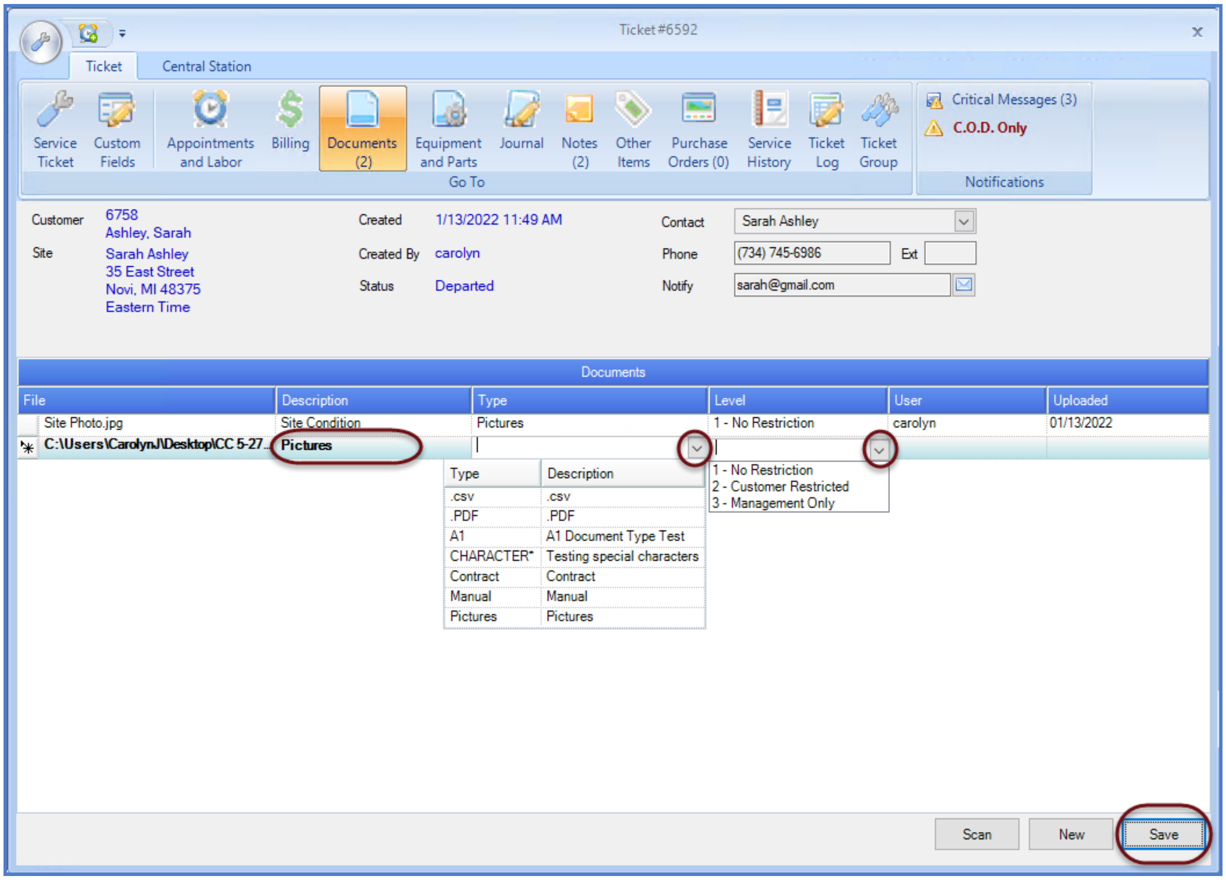
The Select a File window (windows file explorer) will be displayed. Locate the document to be attached to the ticket, then click the Open button at the lower right of the Select a File window.



A row will open in the Documents list area. The File name will fill in (with the name of the document selected from the windows file explorer).

- Type in a Description for the Document (required)
- Select a Document Type from the drop-down list(required)
- Select a Security Level from the drop-down list (required)

Click the Save button when finished. The User's name and Uploaded fields will automatically be populated when clicking on the Save button. Follow the same steps to attach additional documents to the ticket.



Removing a Document from a Ticket

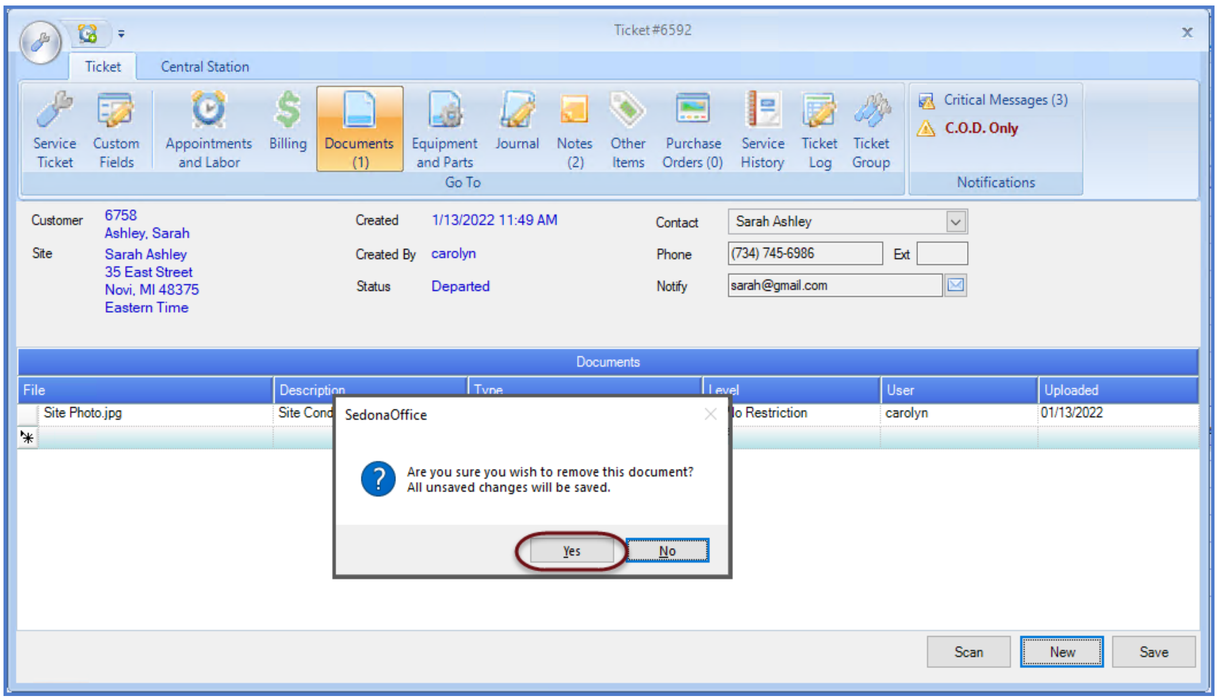
If a document was attached to a Ticket in error, you may delete the document from the Ticket.

Open the desired ticket and click on the Documents button from the ribbon.

Select the document to be deleted by clicking once on the right arrow on the document to be deleted. Press the Delete key on your keyboard. A confirmation message will be displayed asking if you are sure you want to remove this document from the ticket - click the Yes button to confirm.

Make certain this is what you want to do – once a document has been deleted, it is permanently removed from the SedonaDocs database!

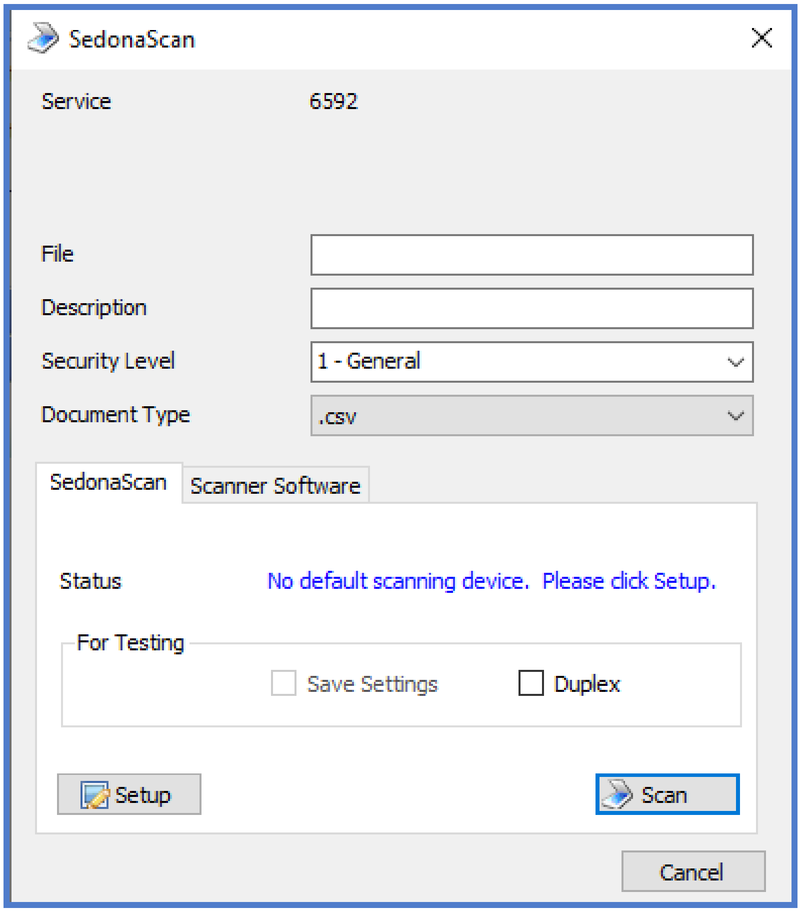
Note: User Group Permissions are required to be able to delete a document. - refer to SedonaSetup/User Groups/ Application Access DX area, "Allow Document Delete (All Documents)". If the user does not have this permission granted, they will not be able to delete a document.



Scanning a Document to a Ticket

To Scan in a document to a Ticket, open the desired ticket and click on the Documents button from the ribbon. Click on the Scan button located at the lower right of the Documents form.

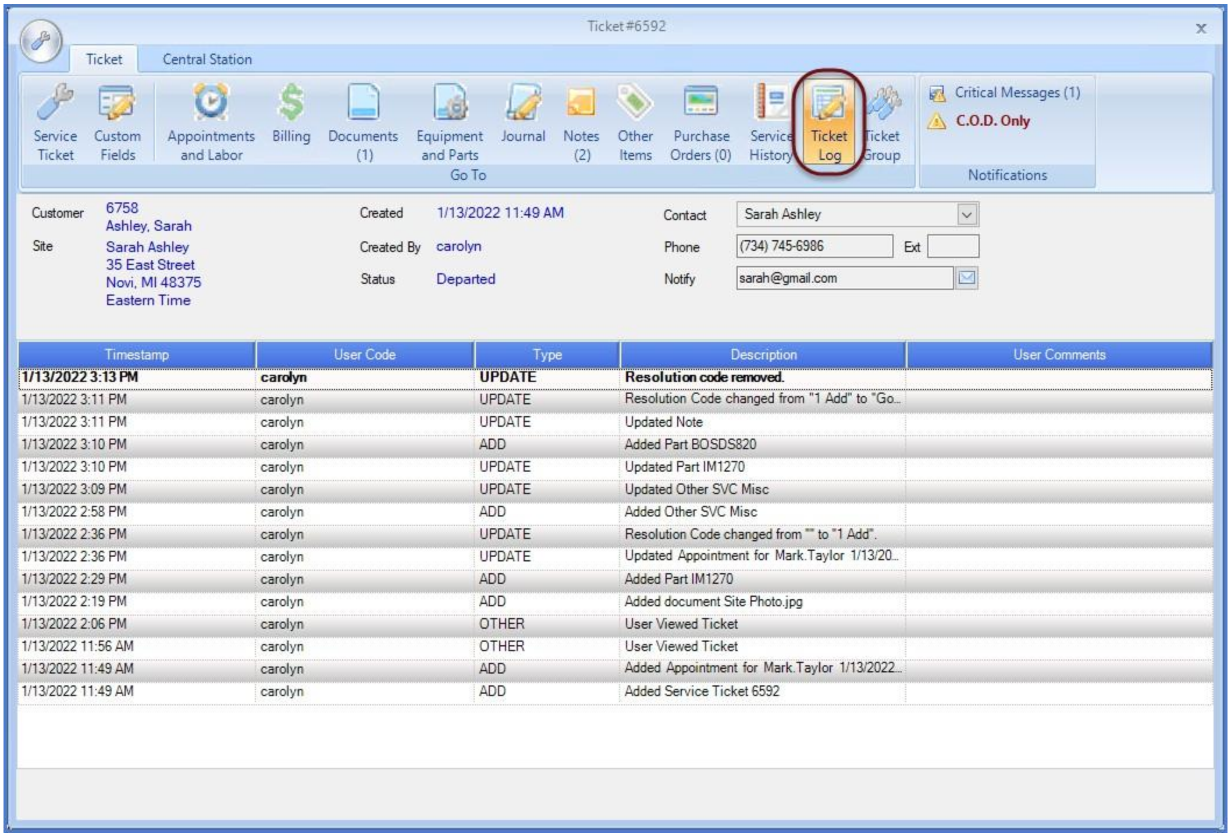
The SedonaScan interface form will be displayed. Type in a name for the file that will be created as a result of the scan. Type in a Description for the scan file. Select a Security Level and Document Type from the drop-down lists. Click on the Scan button. Once the Scan has finished, click on the Save button located at the lower right of the Ticket Documents form.



Ticket Log

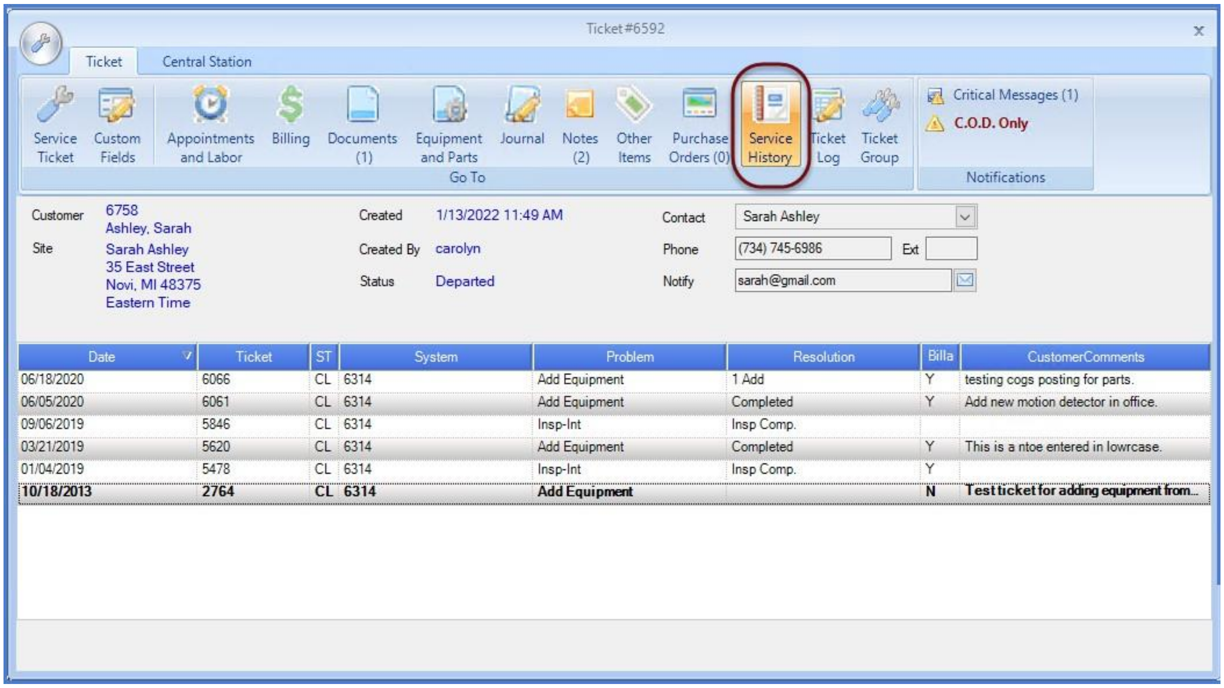
The Ticket Log is used to view actions and activities performed on a Ticket. Not every possible activity is recorded to the Ticket Log, but major events that are helpful when researching who did what and when.

This information may not be modified – view only.



Service History

The Service History will display a list of all Tickets (both open and closed) created for all Systems associated with the Site. You may double-click on any Ticket in the list to open and review the information.



Scheduling Ticket Appointments

Technician appointments for tickets may be created using one of three methods:

- From the Ticket by clicking on the New Appointment button
- By dragging and dropping the ticket from the Un-scheduled Ticket List onto the Schedule Board
- Double-clicking in a Technician appointment slot within the Schedule Board, which will create and schedule the Ticket in one step.

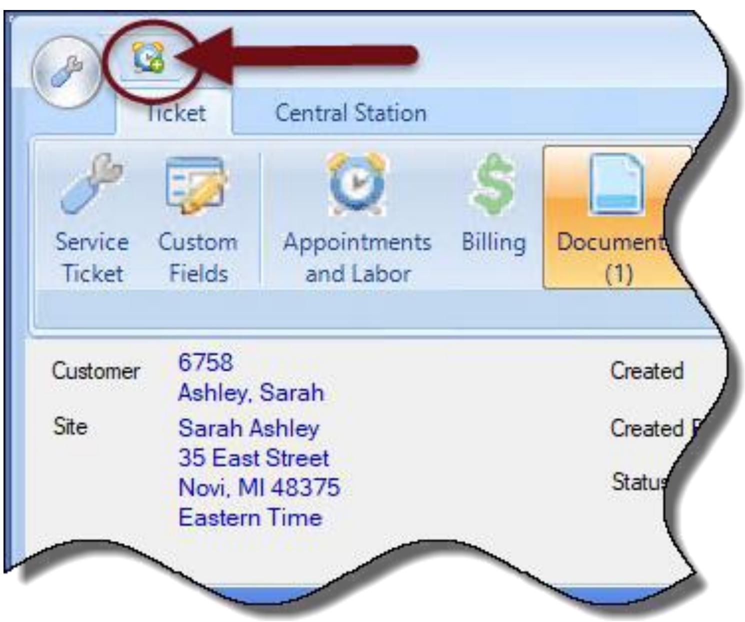
If more than one Technician appointment is needed for the Ticket (a different Technician or the same Technician on another day), repeat the steps below for each appointment needed. You may also use the Copy and Paste to copy an appointment to the same or another Technician.

These scheduling methods may be used for any type of Ticket.

Scheduling a Technician Appointment from a Ticket

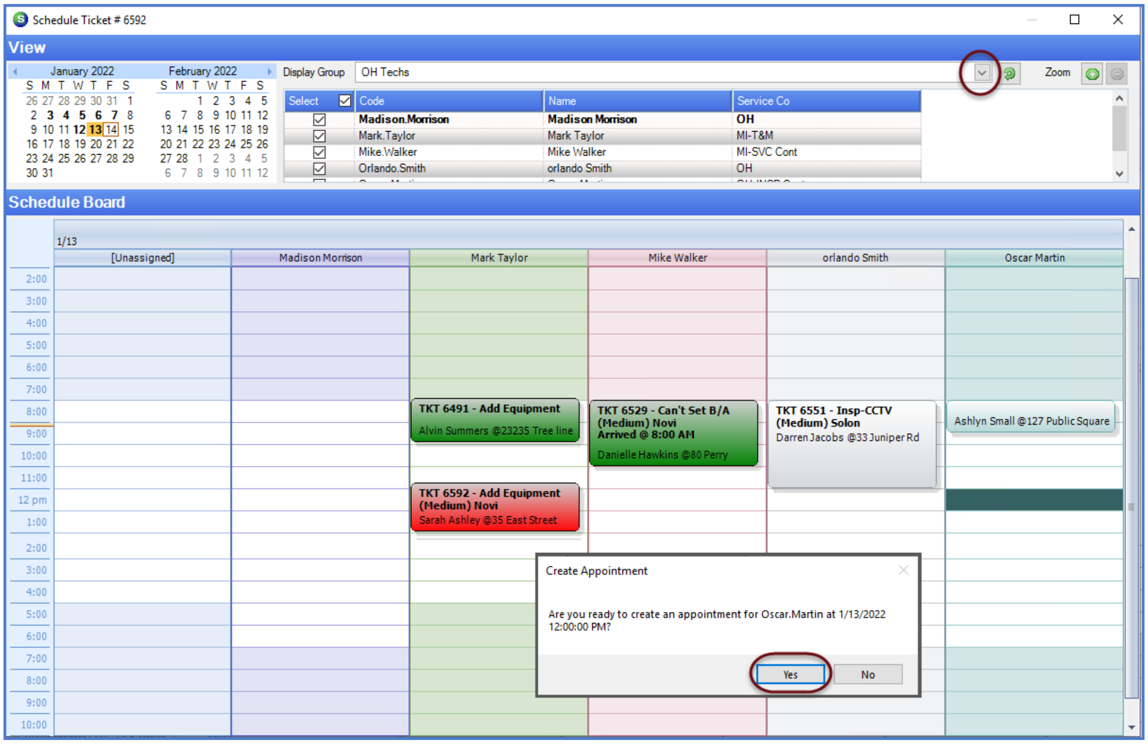
To schedule a technician appointment from a Ticket, you must first open the desired Ticket.

Click on the New Appointment  icon located above the Ticket ribbon.



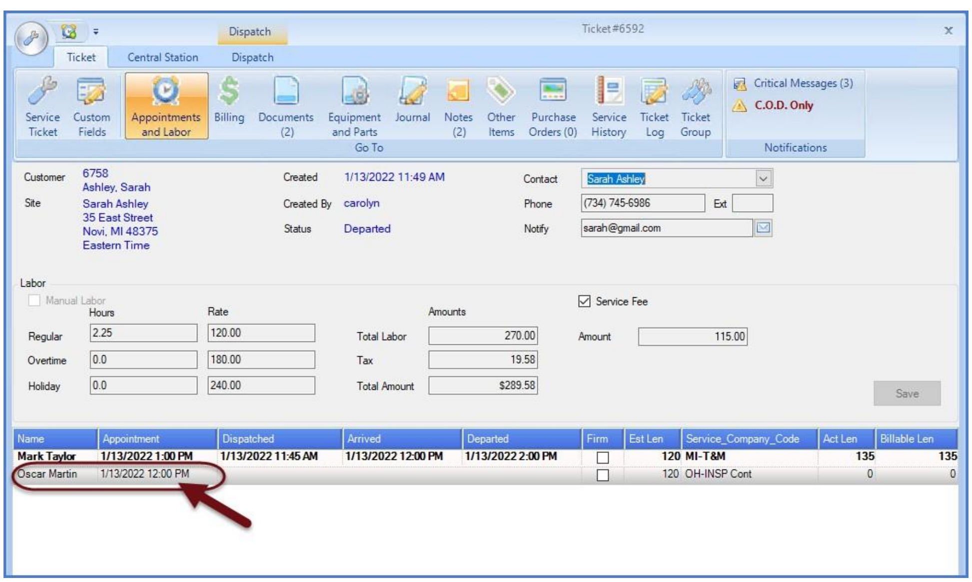
The Schedule Ticket form will be displayed. The Schedule Board will default to today's date. If the appointment is being scheduled for a future date, click the desired date on the Calendar.

Once you have determined which Technician and the time for the appointment, double-click on the desired timeslot in the column for the desired Technician.

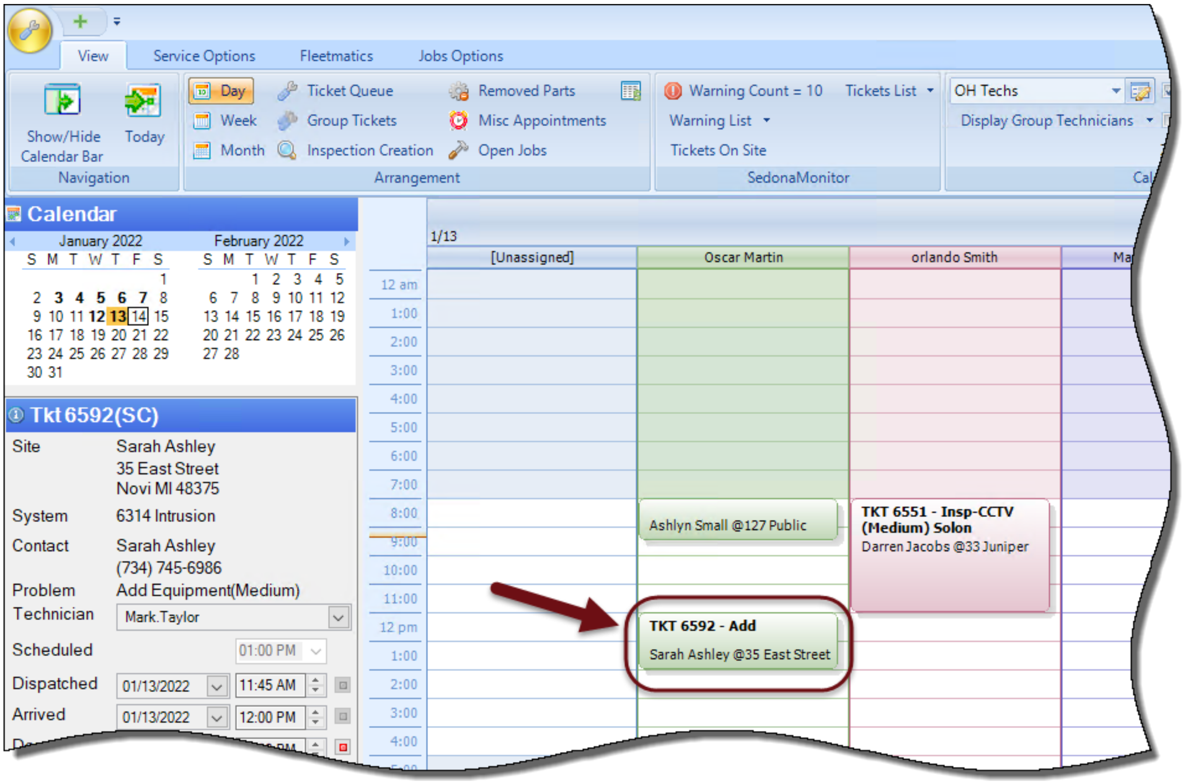


A confirmation message will be displayed with your selections for the Technician Appointment. If this is correct click on the Yes button.

The Appointment will now be displayed on the Ticket Appointments and Labor form and on the main Schedule Board for the date selected.



The Appointment will now be displayed on the Ticket Appointments and Labor form and on the main Schedule Board for the date selected.



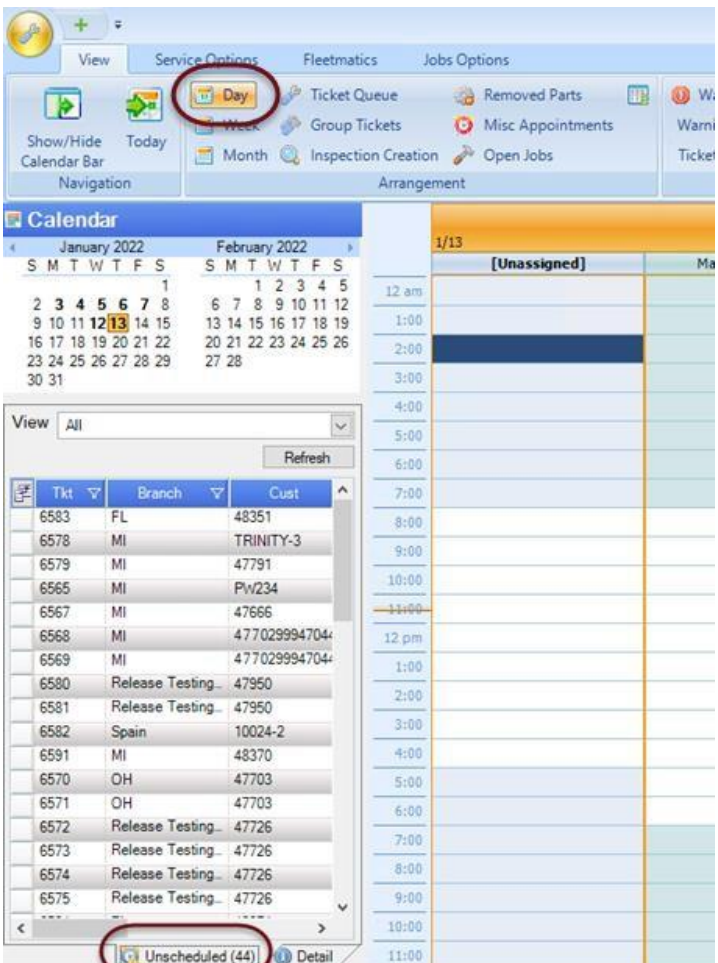
Scheduling a Technician Appointment from the Schedule Board

Technician appointments may be scheduled from the Schedule Board by using the drag and drop method from the list of Unscheduled Tickets list.

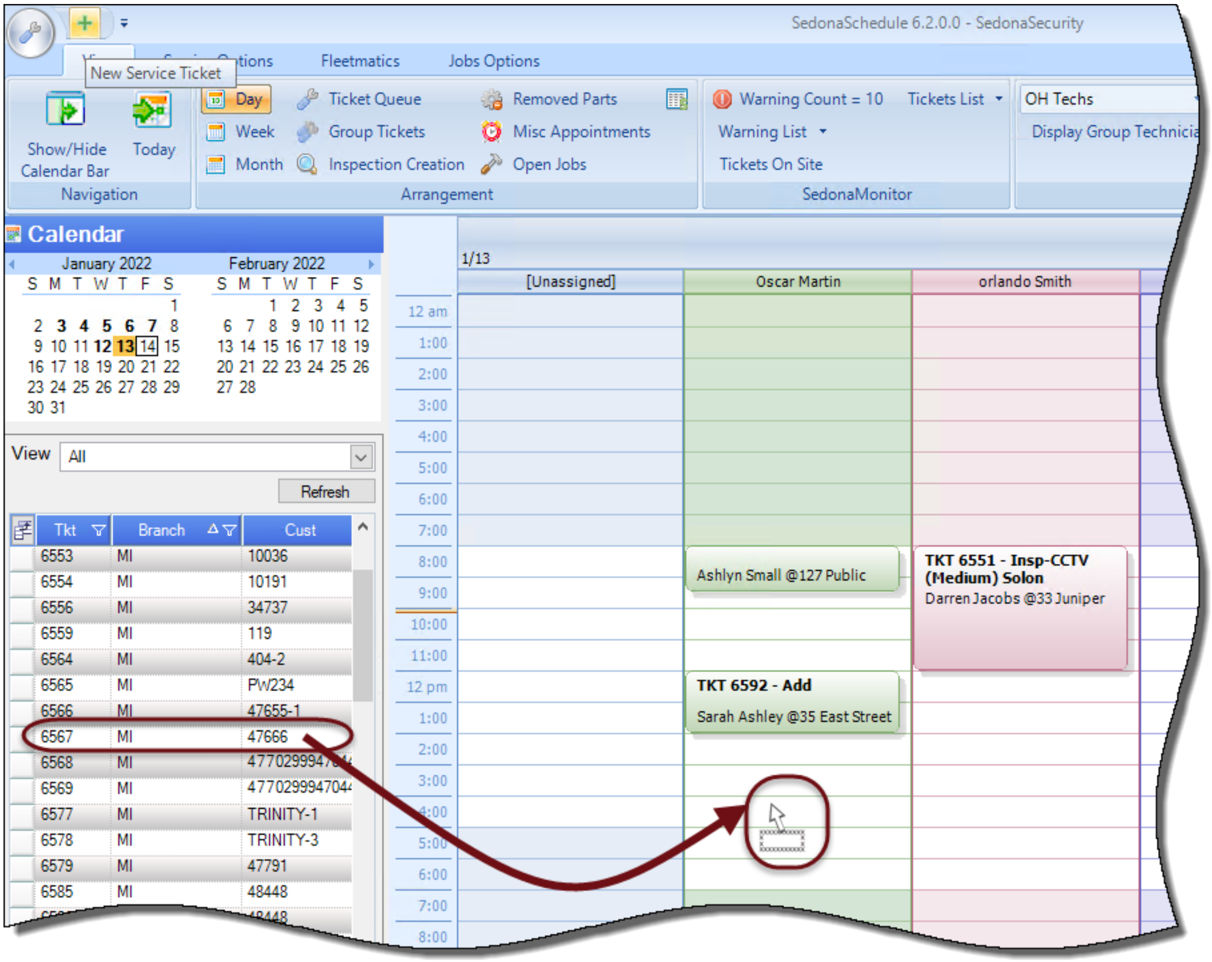
You must have the Day view selected from the Ribbon to be able to drag and drop a ticket onto the Schedule Board.

Determine which date will be scheduled; click on the date in the calendar to view available Technicians for the date. Next hold the left mouse button down while on a ticket in the Unscheduled List then drag the ticket to the desired Technician column and time slot, then release the mouse.

When releasing the mouse, a message will be displayed confirming you want to schedule the appointment with the technician on the date and time where you are dropping the ticket; click the Yes button to continue.



Dragging a Ticket to the Schedule Board



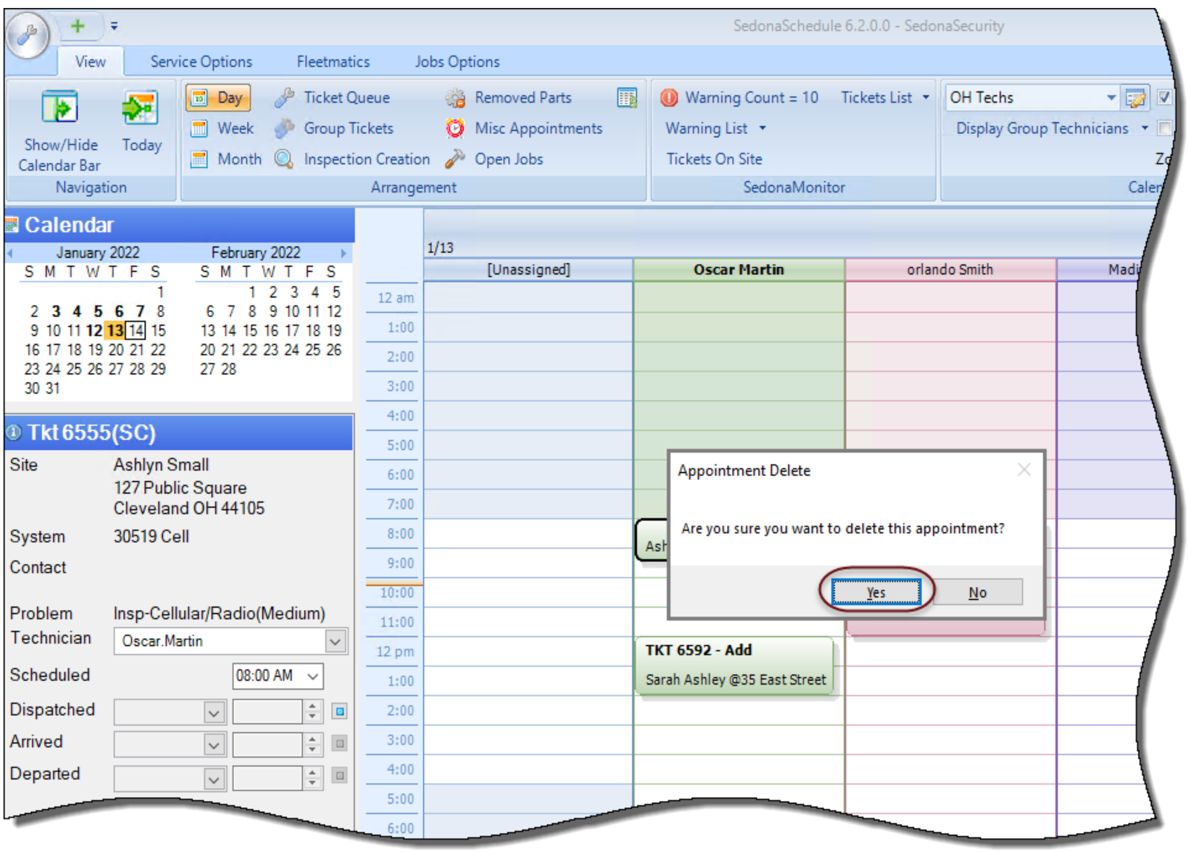
Delete a Technician Appointment

If an appointment needs to be deleted, this may be accomplished from the Schedule Board or from the Appointments and Labor form of the Ticket. Both methods are described below.

Delete an Appointment from the Schedule Board

From the Schedule Board, click once on the appointment to delete, and then press the Delete key on your keyboard. A confirmation message will be displayed asking you if you are sure you want to delete the appointment - click on the Yes button to confirm.

The Ticket Appointment will be removed from the Schedule Board and will appear in the list of Unscheduled Tickets if no other appointments exist for the Ticket.

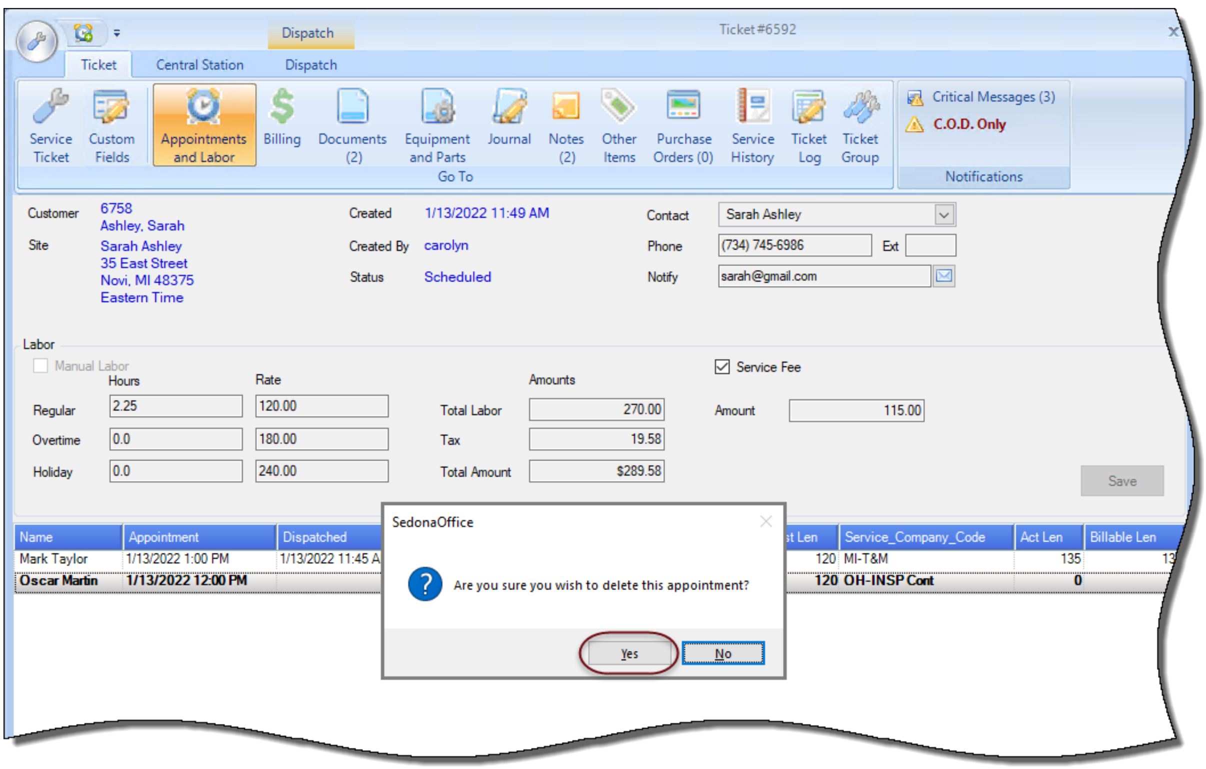


Delete an Appointment from a Ticket

Open the desired Ticket and click on the Appointments and Labor button on the ribbon. In the grid area of the form, click on the appointment you wish to delete. Press the Delete key on your keyboard. A confirmation message will be displayed asking you if you are sure you want to delete the appointment - click the Yes button to confirm.

The Ticket will be removed from the Schedule Board and will appear in the list of Unscheduled tickets only if there are no other appointments scheduled for the Ticket.

Note: If the appointment has already been dispatched, it may not be deleted. You must first open the Dispatch form and clear out the dispatch times and save, and then will be able to delete the appointment.



Re-Schedule an Appointment

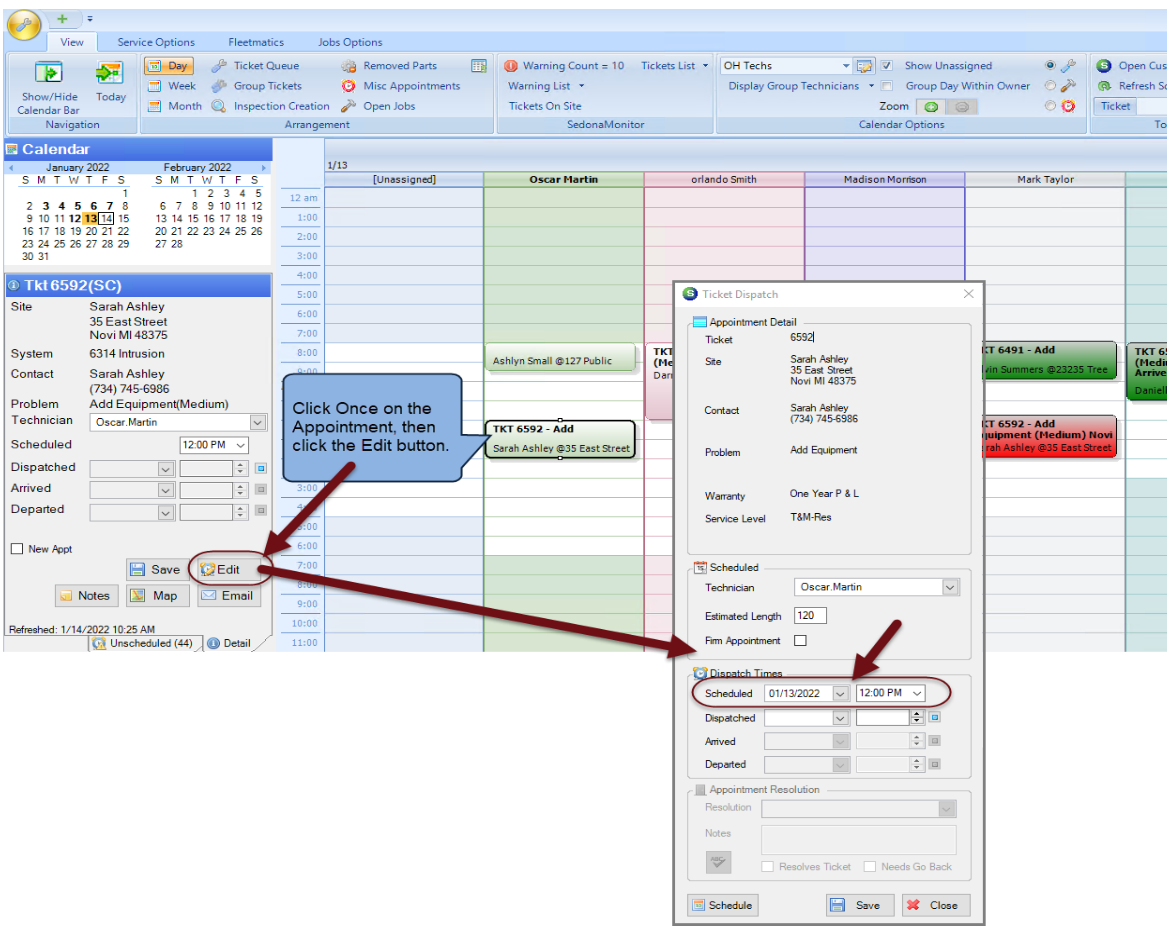
If an appointment needs to be re-scheduled, this may be accomplished from the Schedule Board or from the Appointments and Labor form of the Ticket. Both methods are described below.

Re-Schedule an Appointment from the Schedule Board

If you are re-scheduling the appointment for the same day, simply drag the appointment to another time slot for the same Technician or drag to a different Technician on the Schedule Board.

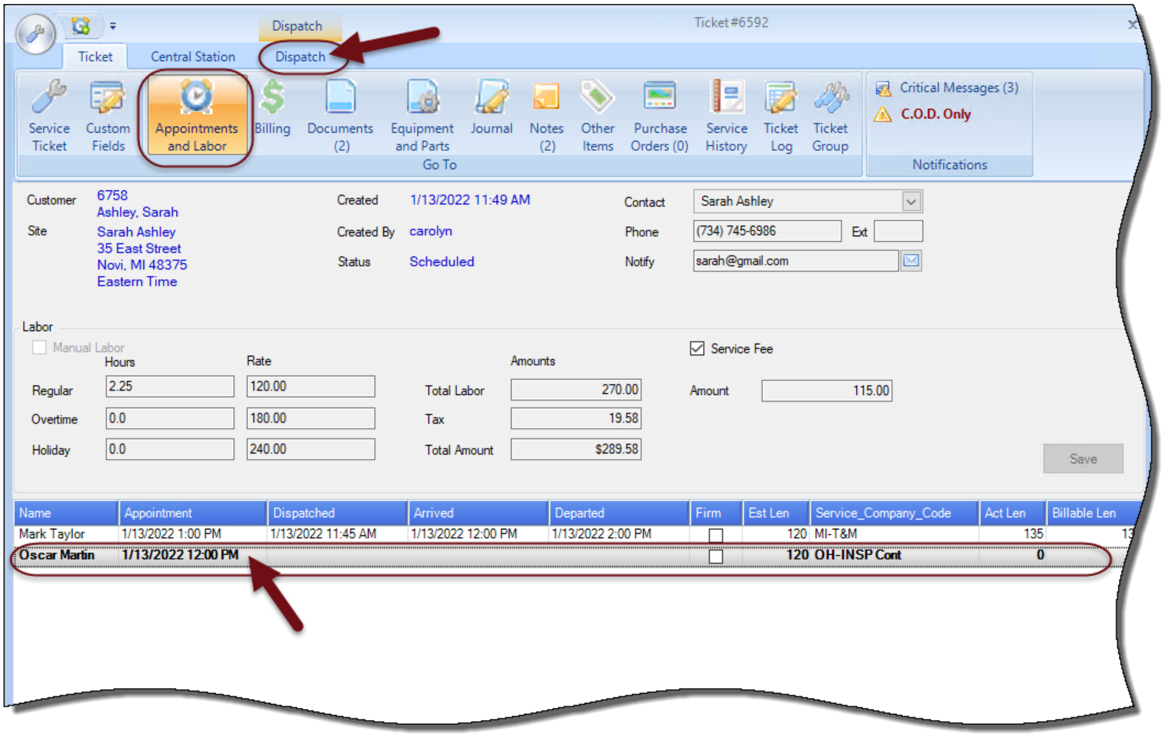
If the appointment needs to be re-scheduled for a different date, click once on the appointment within the Schedule Board, then click the Edit button at the lower right of the Ticket Detail Viewer (below the calendar).

The Ticket Dispatch form will be displayed. You may change the date/time for the current Technician or select a different Technician from the drop-down list and select a new appointment date/time. When finished, click the Save button at the bottom of the Ticket Dispatch form.



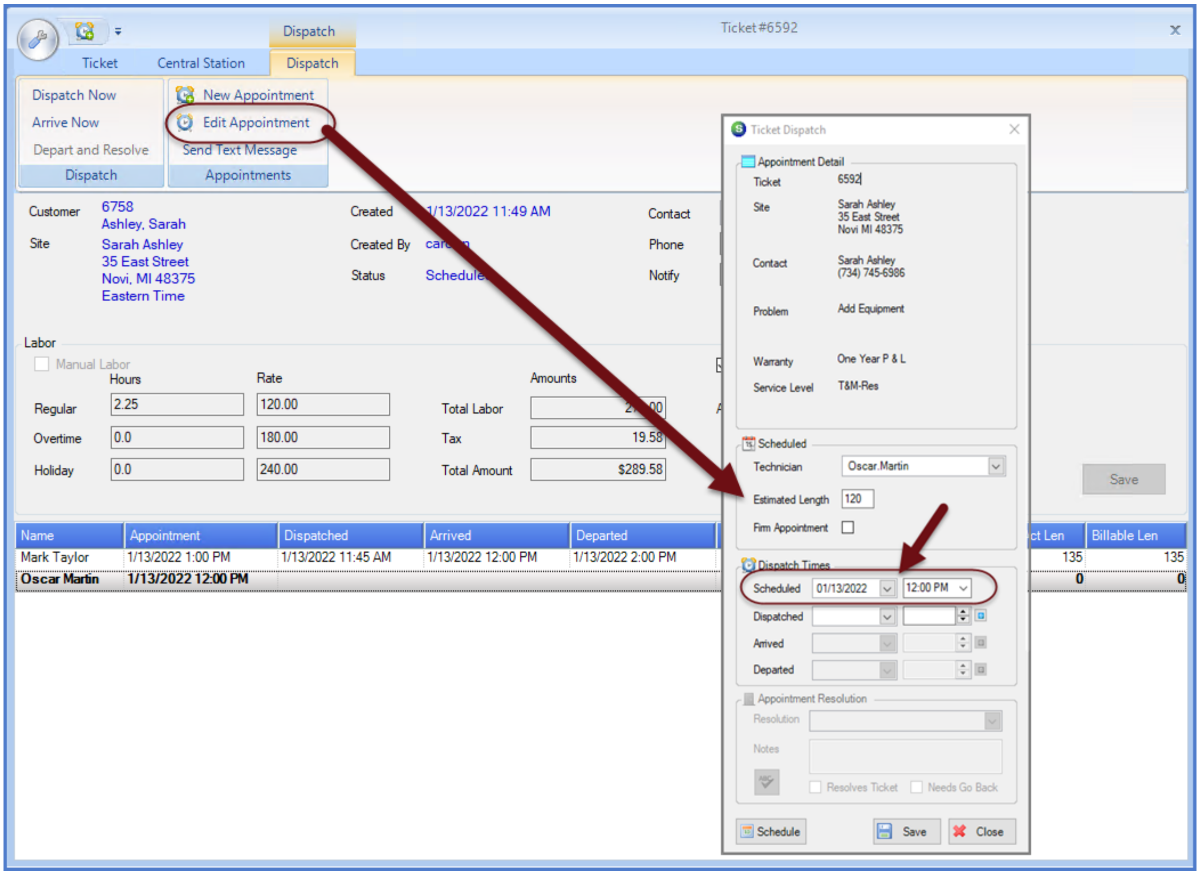
Re-Schedule an Appointment from a Ticket

Open the desired Ticket and click on the Appointments and Labor button on the ribbon. In the grid area of the form, click on the appointment you wish to re-schedule. Click on the Dispatch context menu above the ribbon.



Click on the Edit Appointment button from the Appointments ribbon group.

The Ticket Dispatch form will be displayed. You may change the date/time for the current Technician or select a different Technician from the drop-down list and select a new appointment date/time. When finished, click the Save button at the bottom of the Ticket Dispatch form.



Dispatching

Technician appointments may be dispatched from the Schedule Board or from the Appointments and Labor form of the Ticket. Each method will be described in this section.

Dispatch a Technician from the Schedule Board

There are two dispatch methods: Live Dispatching and Manual Dispatching.

If Technicians call in as they are arriving and departing from appointments, you may record the exact date/time when the Technician calls in; this is Live Dispatching. If your Technicians are using the SedonaFSU or SedonaX Mobile, when the technician enters their dispatch times on the ticket, this also considered Live Dispatching.

If arrival and departure times are not provided on a real-time basis, the dispatch date/times will be entered manually at a later time - this is Manual Dispatching.

Both Dispatch methods from the Schedule Board will be covered on the following pages.

When entering dispatch times, there are three date/times that must be entered:

- **Dispatch Time** - the time the Technician is on the way to the appointment.
- **Arrival Time –** the time the Technician arrives on site.
- **Departure Time –** the time at which the appointment is completed.

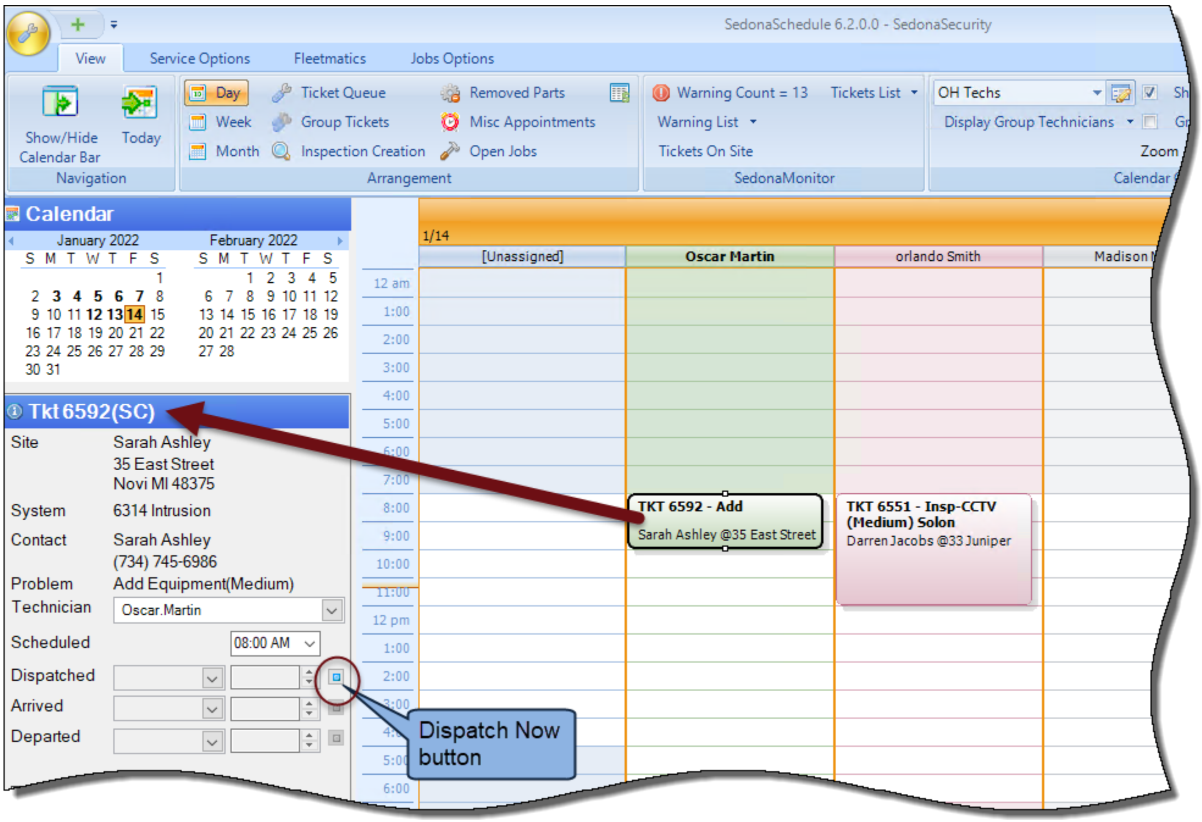
A Note on Billable Labor

Billable Labor is determined by the Service Level assigned to the Ticket. The Service Level contains the billing rules as to:

- Is Labor is Billable
- How is billable labor calculated - from Dispatch time to Departure time or Arrival time to Departure time
- Labor billing increments
- Labor hourly rates

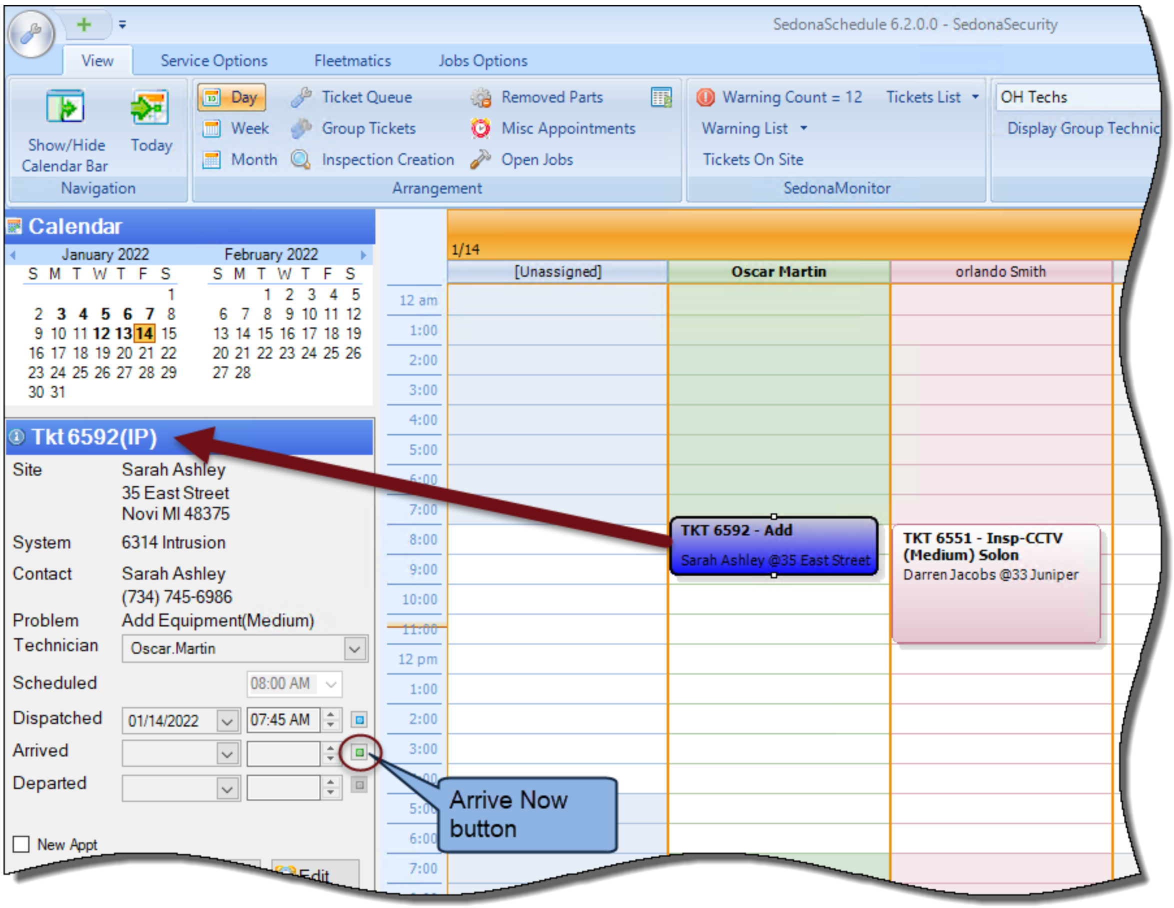
Live Dispatching - Dispatched

From the Schedule Board, click once on the Ticket to be dispatched. In the Ticket Detail Viewer click on the blue "Dispatch"  button. The Dispatch date and time will automatically fill in with today's date and the current time. On the Schedule Board, the background color of the Ticket will change to Blue when a dispatch date/time is entered.



Live Dispatching - Arrived

Once the Technician has arrived on site, click once on the appointment in the Schedule Board, and then click on the green “Arrived” button from the Ticket Detail Viewer. The Arrived date and time will automatically fill in with the current date and time. On the Schedule Board, the background color of the Ticket will change to Green when an arrival date/time is entered.



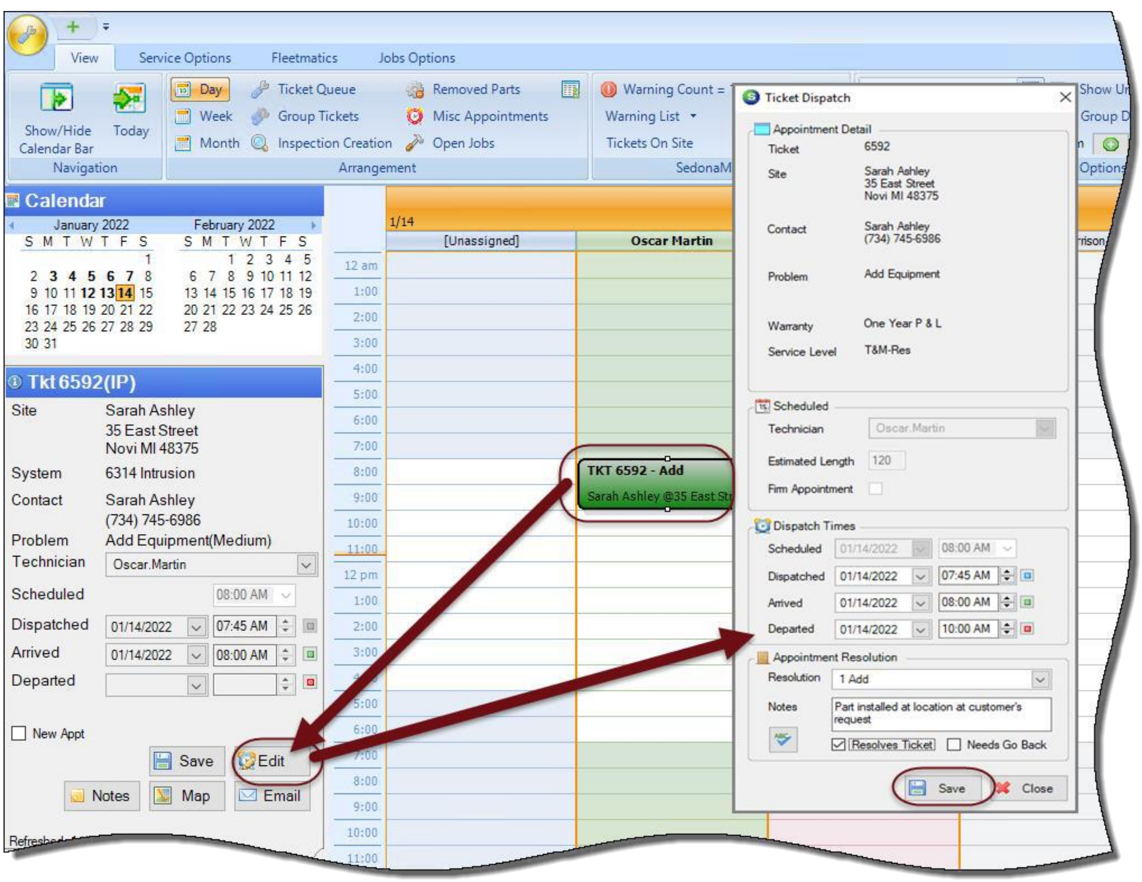
Live Dispatching - Departed

Once the Technician has completed the call and is ready to depart, click once on the appointment in the Schedule Board, and then click on the Edit button from the Ticket Detail Viewer. The Ticket Dispatch form will be displayed. In the Departed time field, type in the departure time for the appointment (you do not need to enter the date, this will automatically fill in).

Select a Resolution code from the drop-down list. If the Technician is providing resolution notes, type this information into the Notes field (below the resolution code field). If resolution notes are not entered at the time of departing the appointment, they may be entered at a later time.

If the Ticket is complete and ready to review for invoicing, check the "Resolves Ticket" checkbox. If a return appointment is needed and you want to keep the Ticket open for a return appointment, check the "Needs Bo Back" checkbox. Click the Save button on the Ticket Dispatch form when finished.

On the Schedule Board, the background color of the appointment will change to gray if the "Resolves Ticket" option was selected. If the Ticket was marked for "Go Back", the background color will change to gold.



Manual Dispatching

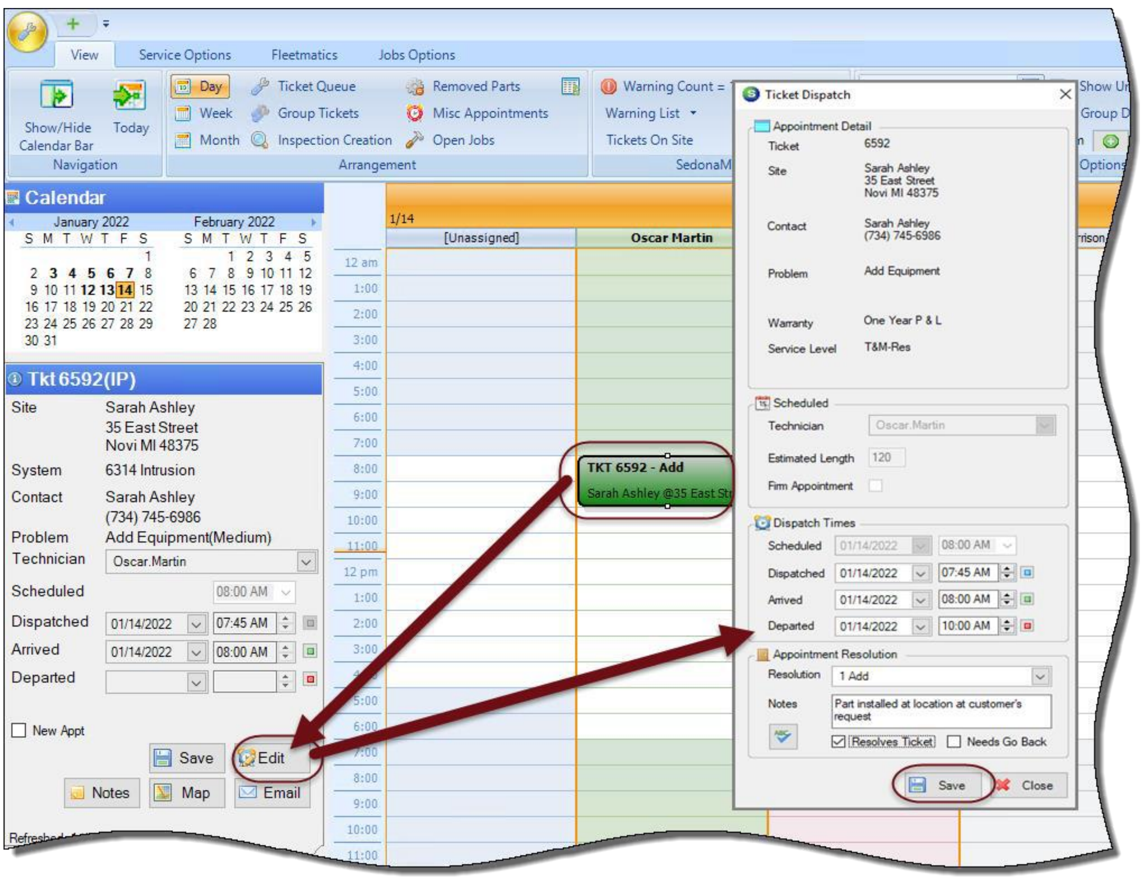
From the Schedule Board, click once on the Ticket to be dispatched. In the Ticket Detail Viewer click on the Edit button. The Ticket Dispatch form will be displayed - enter the times into the Dispatched, Arrived and Departed fields. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a Resolution code from the drop-down list.

Enter any resolution notes provided by the Technician into the Notes field.

If the Ticket is complete and ready to review for invoicing, check the Resolves Ticket checkbox. If a return appointment is needed, check the Needs Go Back checkbox.

Click the Save button on the Ticket Dispatch form when finished.



Dispatch a Technician from a Ticket

There are two dispatch methods: Live Dispatching and Manual Dispatching.

If your Technicians call in as they are arriving and departing from appointments, you may record the exact date/time when the Technician calls in; this is Live Dispatching. If your Technicians are using the SedonaFSU or SedonaX Mobile, when the technician enters their dispatch times on the ticket, this also considered Live Dispatching.

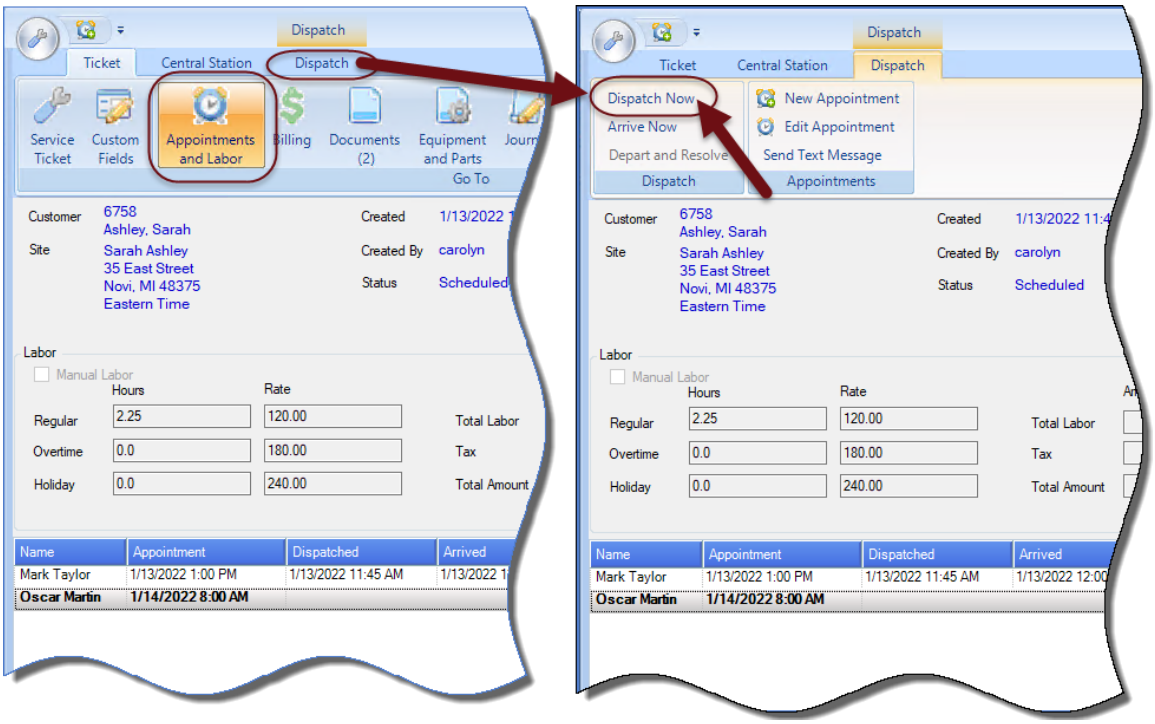
If arrival and departure times are not provided on a real-time basis, the dispatch date/times will be entered manually later time - this is Manual Dispatching.

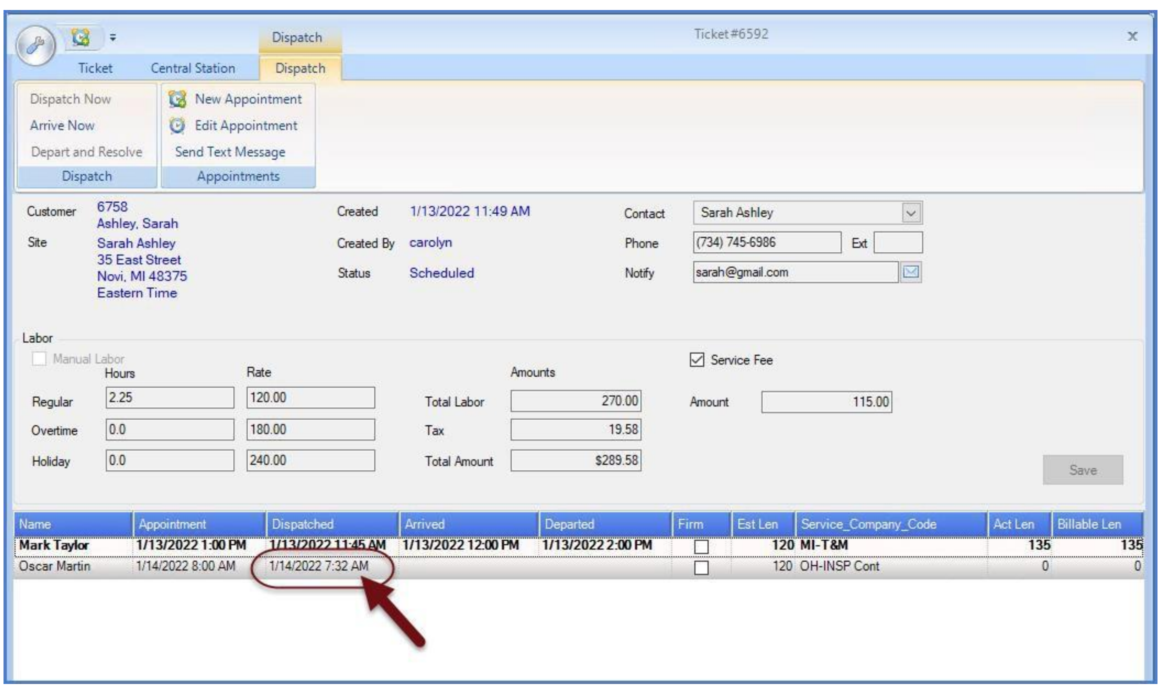
Both Dispatch methods from the Ticket will be covered on the following pages.

Live Dispatching - Dispatched

Open the Ticket for the appointment to be dispatched. Click on the Appointments and Labor button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the Dispatch context menu above the ribbon.

From the Dispatch ribbon group, click on the Dispatch Now button. You may close out of the Ticket when finished.

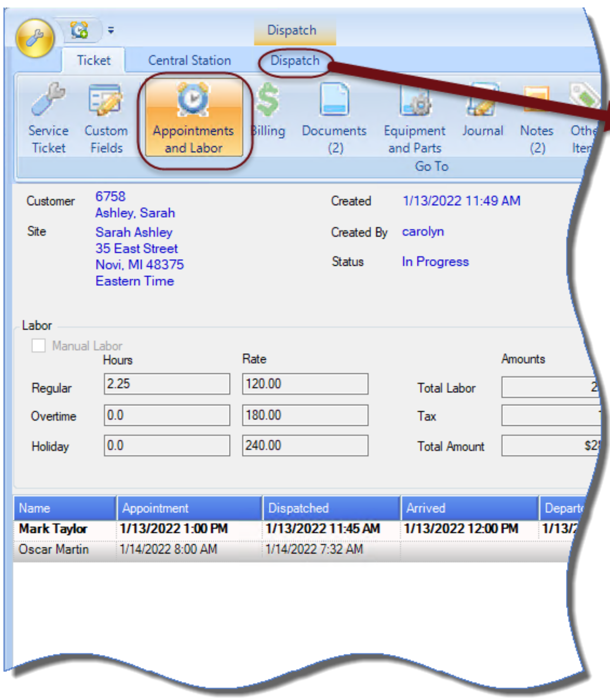


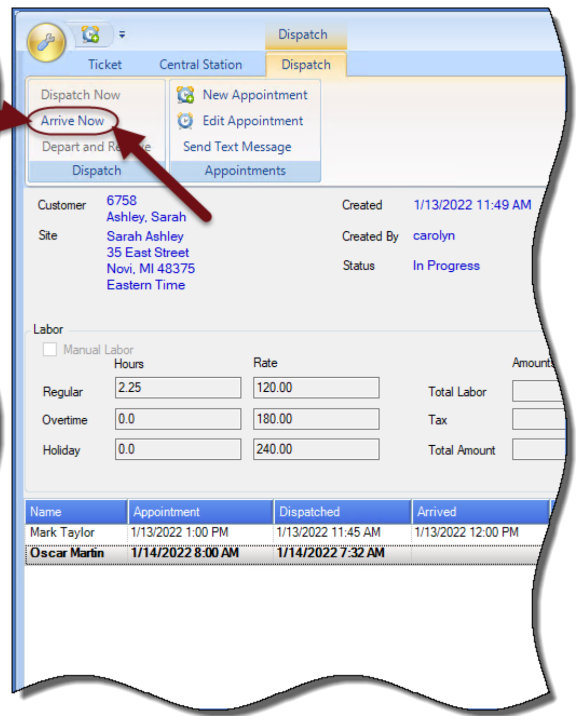


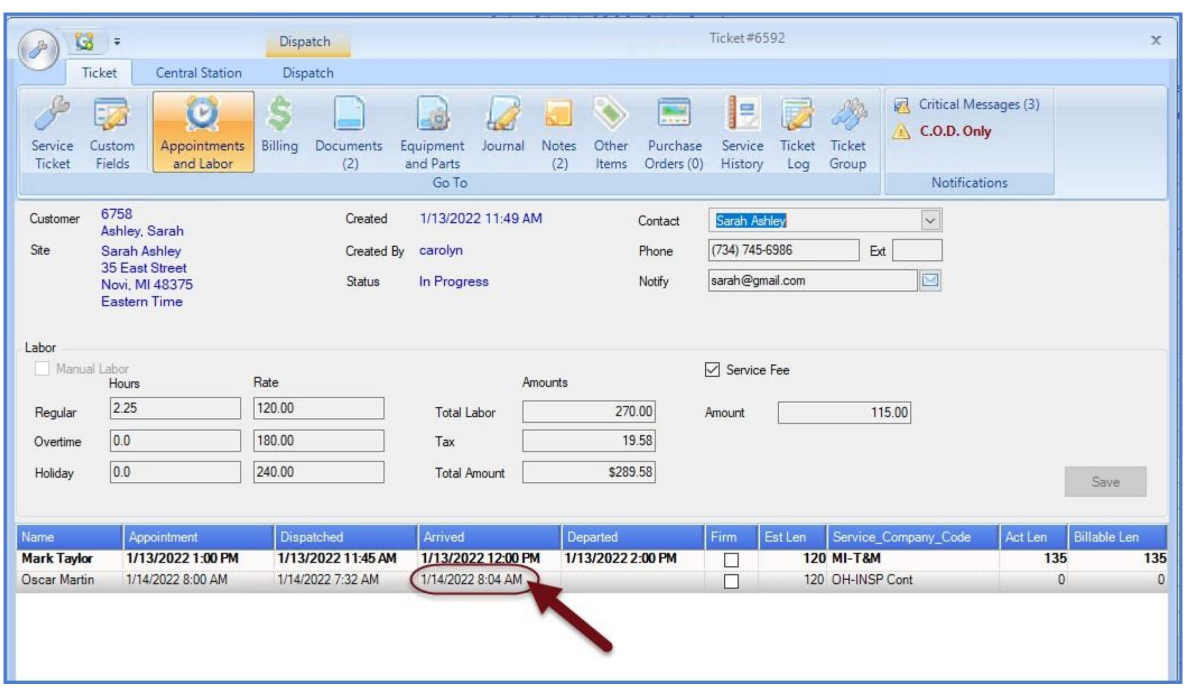
Live Dispatching - Arrived

Open the Ticket for the appointment to be dispatched. Click on the Appointments and Labor button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the Dispatch context menu above the ribbon.

From the Dispatch ribbon group, click on the Arrive Now button. You may close out of the Ticket when finished.





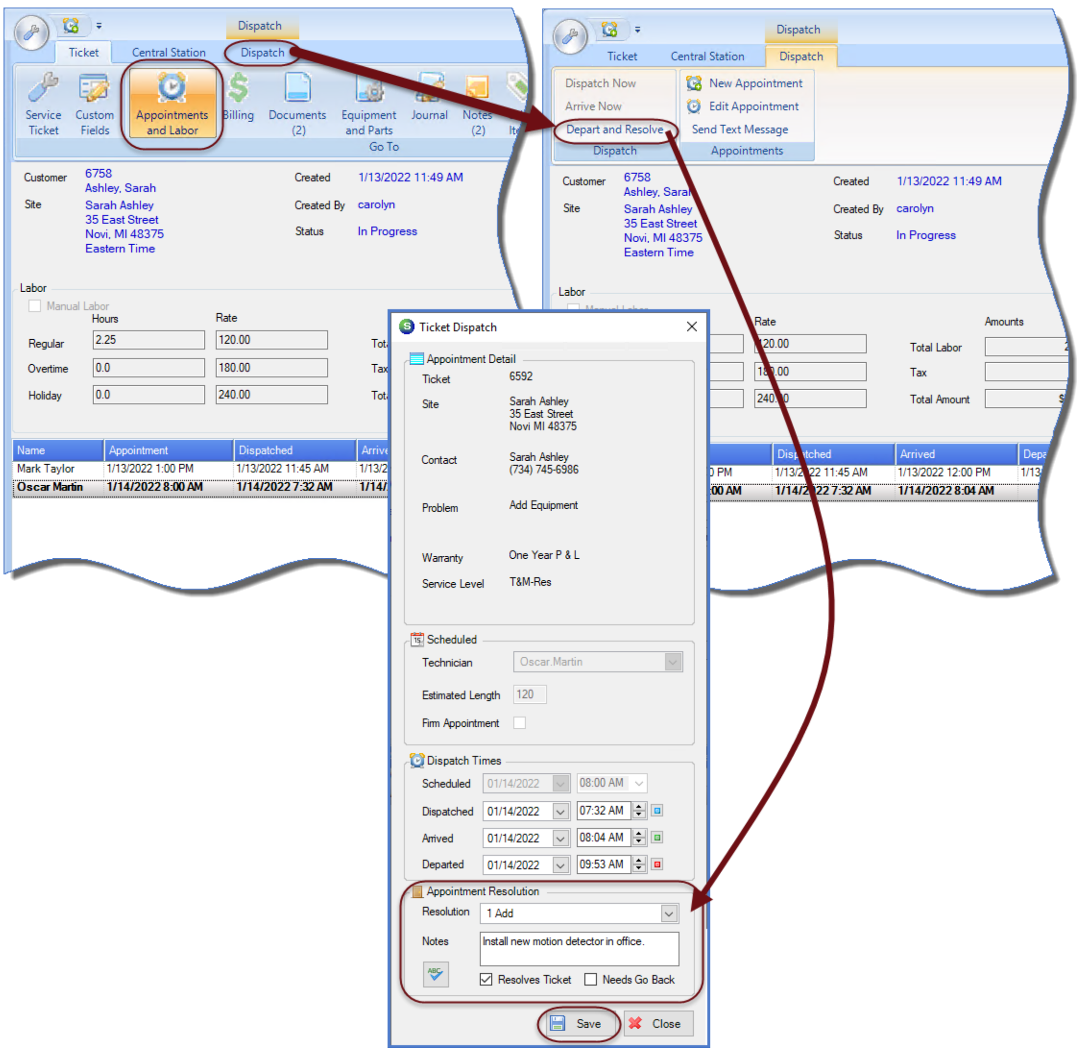


Live Dispatching - Departed

Open the Ticket for the appointment to be dispatched. Click on the Appointments and Labor button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the Dispatch context menu above the ribbon.

From the Dispatch ribbon group, click on the Depart and Resolve button. The Ticket Dispatch form will be displayed - enter the time into the Departed time field. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a Resolution code from the drop-down list. Enter any resolution notes provided by the Technician into the Notes field. If the Ticket is complete and ready to review for invoicing, check the Resolves Ticket checkbox. If a return appointment is needed, check the Needs Go Back checkbox. Click the Save button on the Ticket Dispatch form when finished.



Manual Dispatching

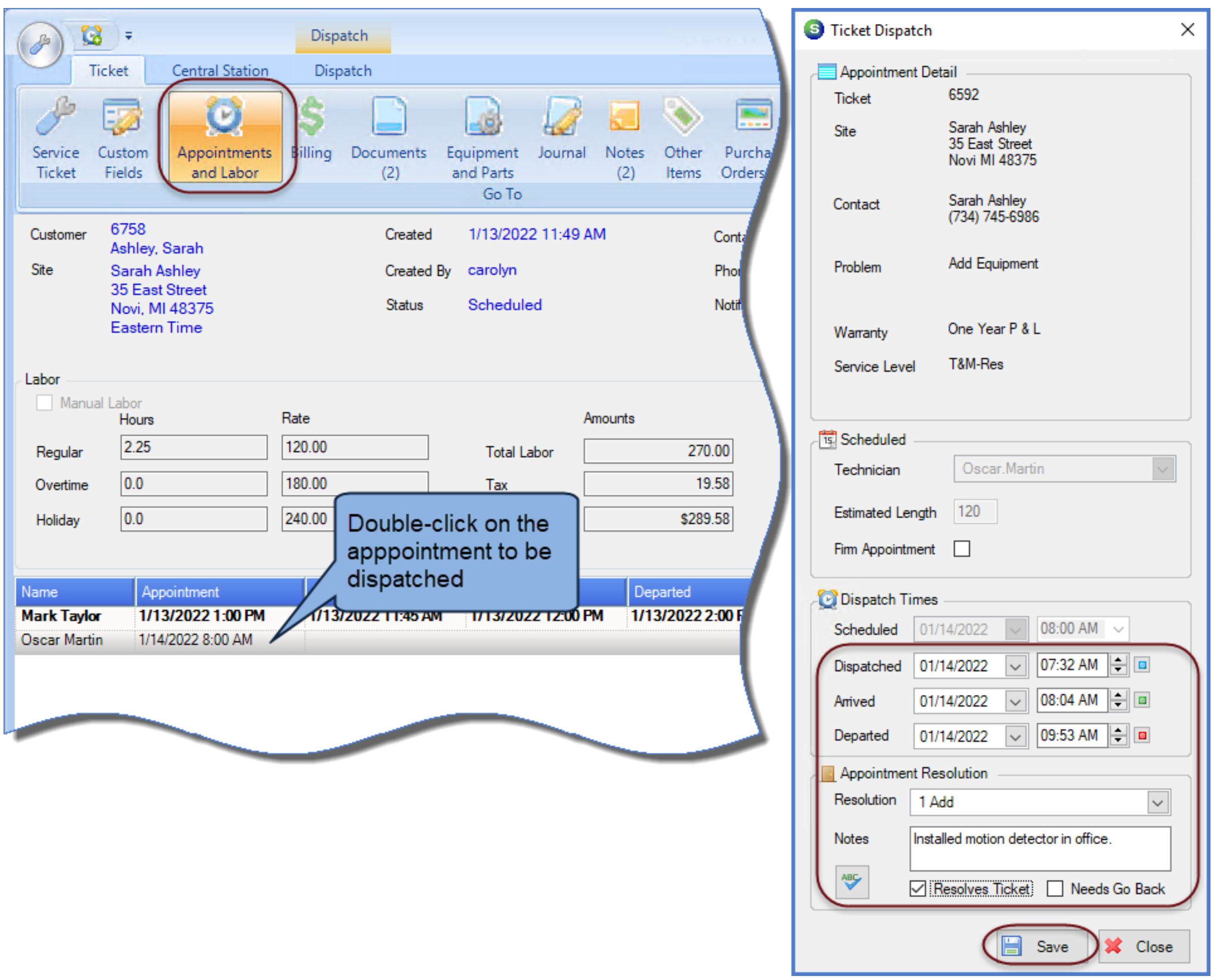
Open the Ticket for the appointment to be dispatched. Click on the Appointments and Labor button on the ribbon.

In the grid area, double-click on the appointment to be dispatched. The Ticket Dispatch form will be displayed. Enter the times in the Dispatched, Arrived and Departed fields. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a Resolution code from the drop-down list. Enter any resolution notes provided by the Technician into the Notes field.

If the Ticket is complete and ready to review for invoicing, check the Resolves Ticket checkbox. If a return appointment is needed, check the Needs Go Back checkbox.

Click the Save button on the Ticket Dispatch form when finished.



Parts

If a Technician used parts on a ticket, these are entered on the Equipment and Parts form of the ticket. If the part being installed is replacing an existing part on the System Equipment List, this is handled on the same form.

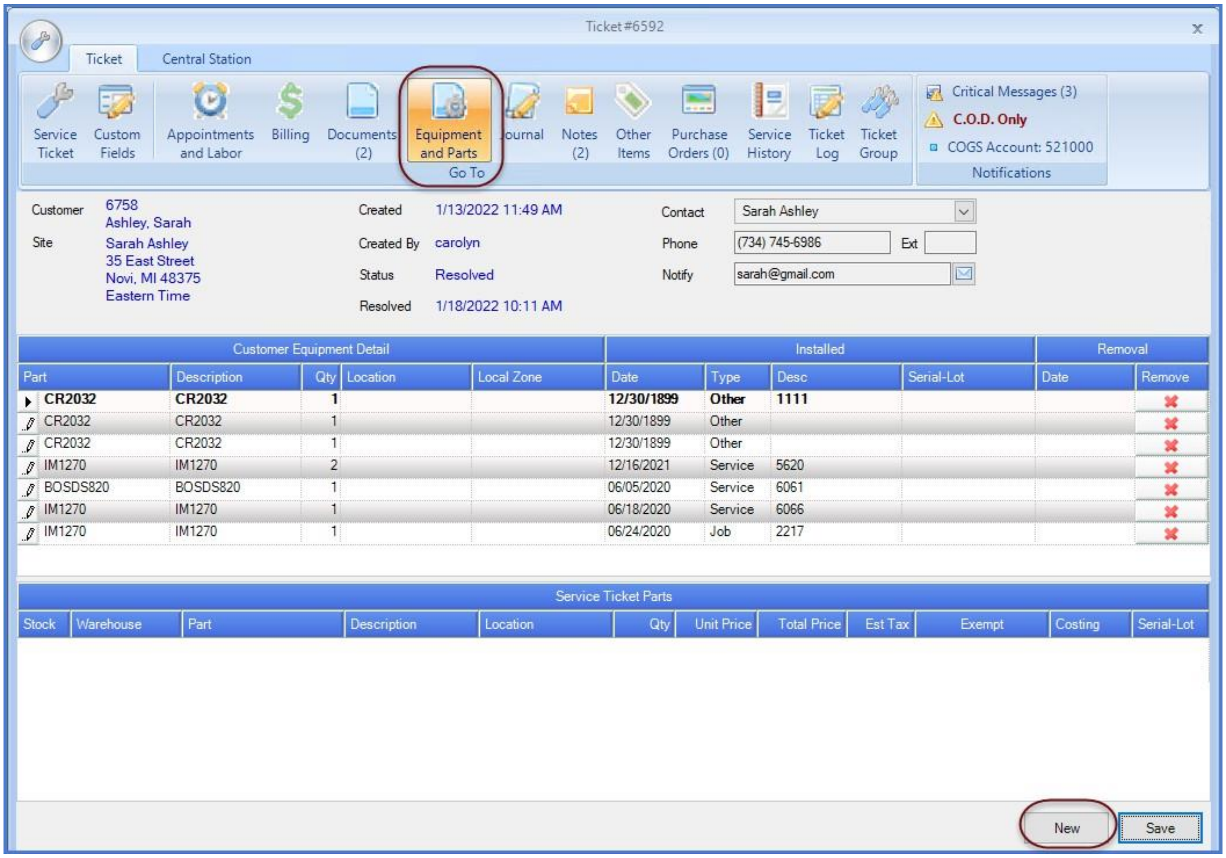
Parts Warehouse

When Parts are entered on a Ticket, if a Technician Appointment has been scheduled, it is assumed the parts will be removed from the Warehouse linked to the Technician. If the parts are to be removed from a different Warehouse, the User has the option of selecting a different Warehouse on the part line.

Adding Parts to a Ticket

Open the Ticket to which parts will be added. Click on the Equipment and Parts button on the ribbon.

The Equipment and Parts form is divided into two tiers; the upper tier, which is labeled Customer Equipment Detail, will display any existing parts on the System Equipment List. The lower tier, labeled Service Ticket Parts, is used to add new parts that were used on the ticket. To add a part, click the New button located at the lower right of the form.



A row will open in the Service Ticket Parts grid. The Warehouse will default to the warehouse linked to the Technician scheduled to the ticket. The User may override the warehouse if necessary.

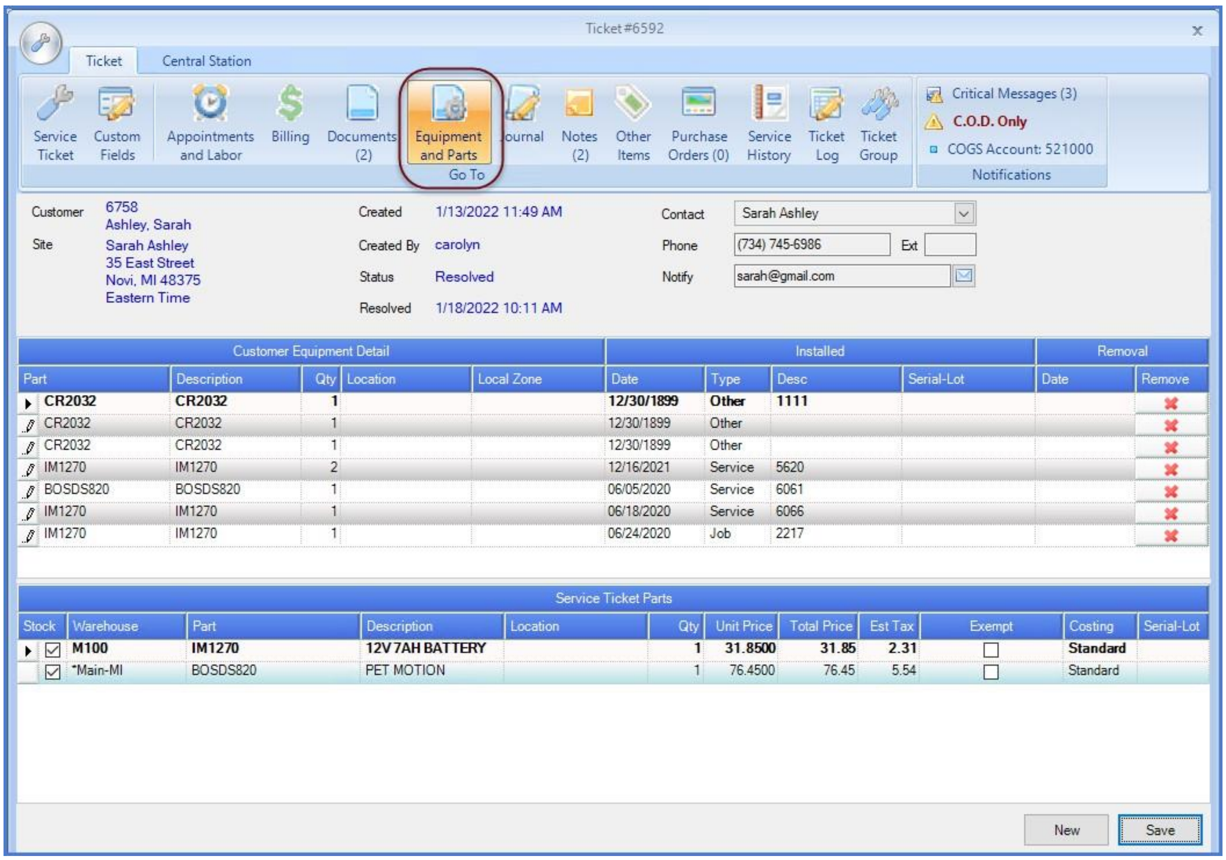
In the Part field, the User may type in the exact part number or click on the lookup button to the right of this field to search for the part number within the warehouse that is currently selected.

Once a part has been selected, the unit price and tax will automatically fill in; the quantity of 1 will default. The User has the option of changing the unit price if the part is being sold at a price other than the default price.

Click the Save button after completing the data entry on a part line. Click the New button to add additional parts.

If your company is tracking the installed location of parts, type in the location in the Location field. If more than one of the same part was used and you are tracking locations, enter multiples lines for the part.

If any of the parts used are replacing a part on the existing equipment list, continue on to the next page for instructions.



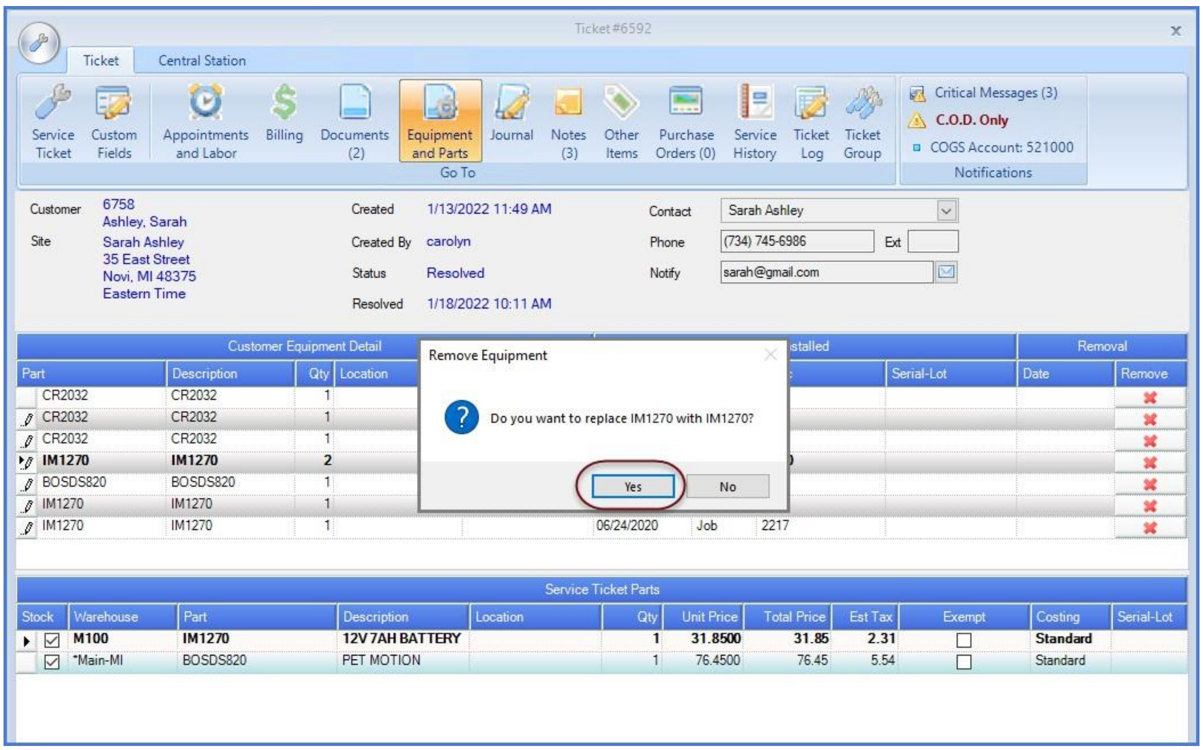
Replacing a Part

To replace a part, in the upper tier (Customer Equipment Detail), click once on the part that is being replaced; the font of the part information will become bold. Hold the left mouse button down and drag the part to the lower tier. Once the white pointer arrow is on the row of the part to be replaced, release the mouse.

You will receive a confirmation message that you are replacing the part. Click the Yes button on the confirmation if you have selected the correct part replacement.

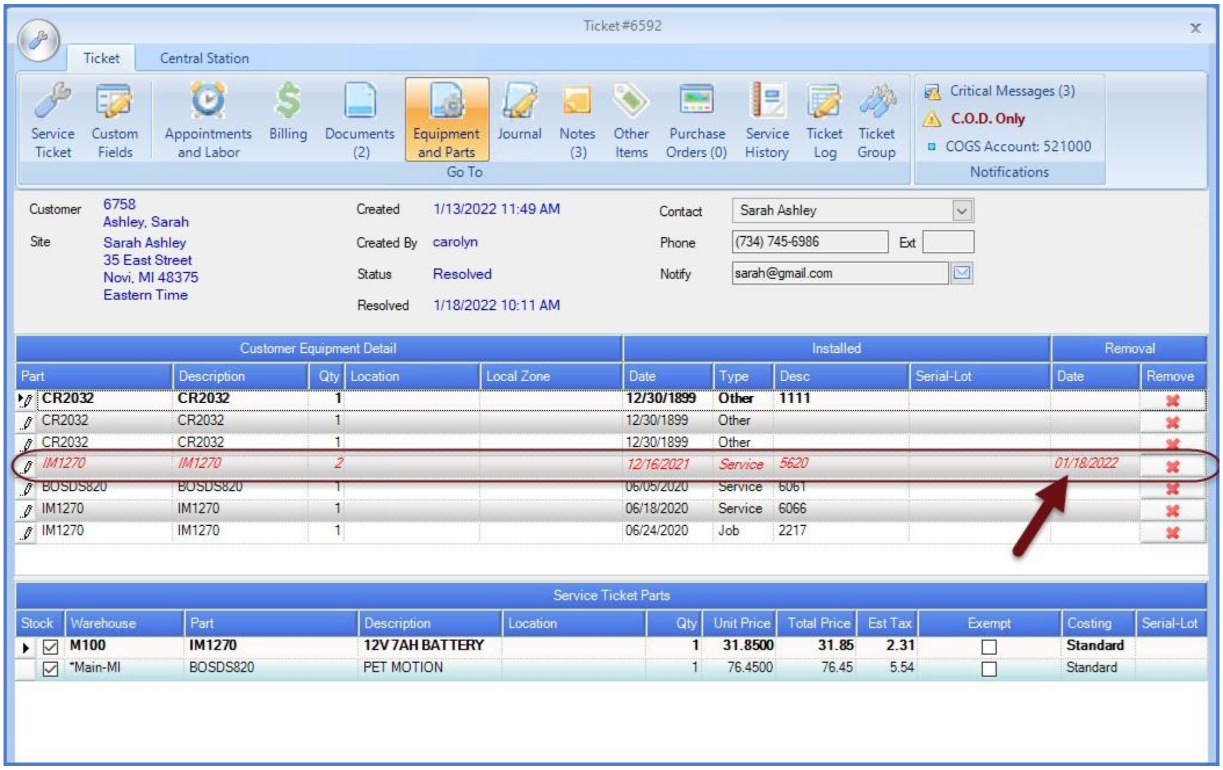
Repeat the same process for any other parts being replaced.

Part Replacement Pointer Icon: 



Once you have confirmed the part replacement, the font color of the part being replaced in the upper tier (Customer Equipment List) will turn red and today's date will display in the Removal Date column.

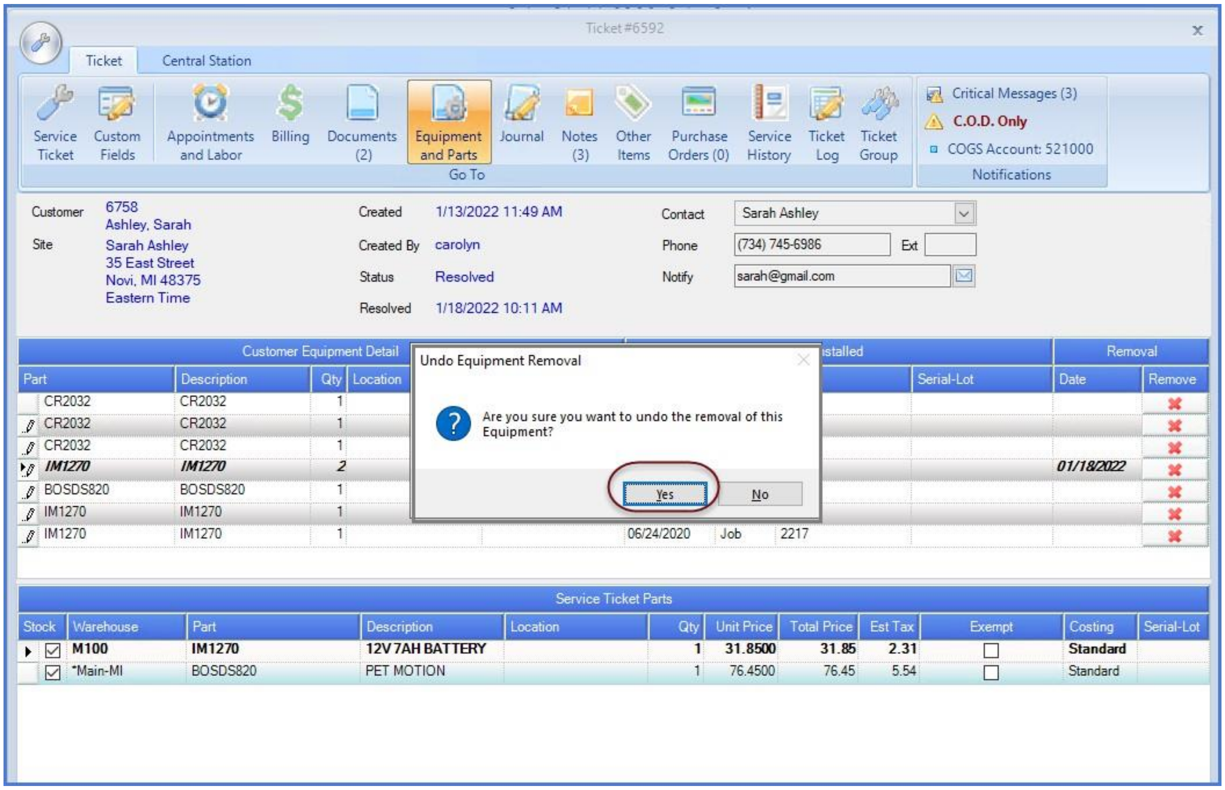
Part replacements are viewable from the main SedonaOffice application by opening a customer record and expanding the customer tree for a System and clicking on the Equipment History menu option.



Deleting a Part Replacement

If an error was made in selecting the part being replaced, you are able to correct this from the Equipment and Parts form.

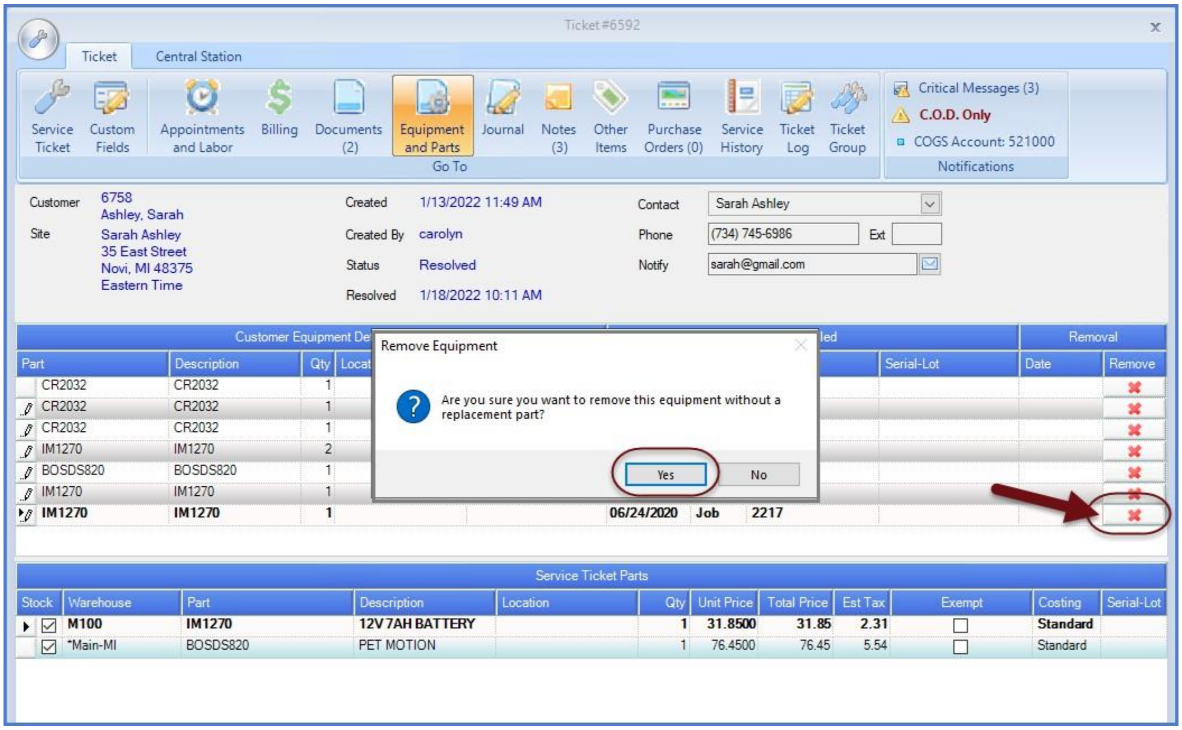
Double-click on the part in the Customer Equipment Detail section (upper tier) that was incorrectly selected for replacement (the part text will be bolded in a black font), and then press the Delete key on your keyboard. A confirmation message will be displayed asking if you want to undo the removal; click the Yes button to confirm.



Remove a Part from Equipment List

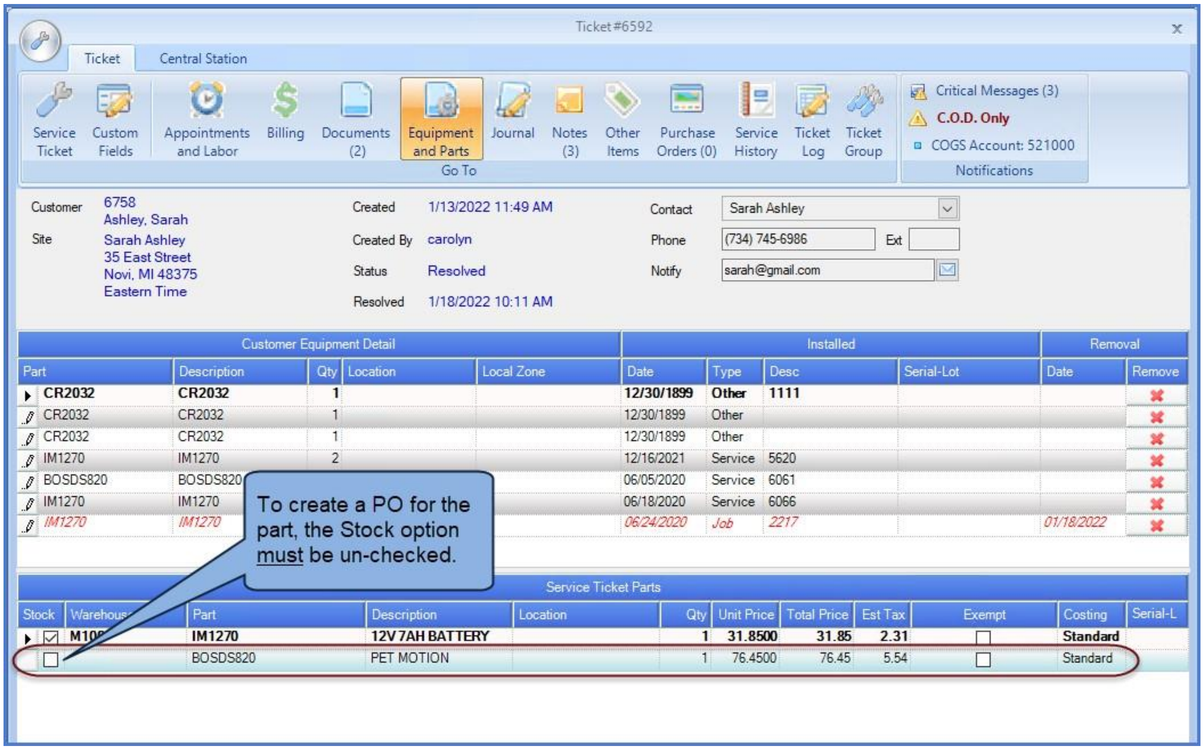
If a part was removed and is not being replaced, this is handled from the Equipment and Parts form of the ticket.

In the Customer Equipment Detail section (upper tier), click once on the part to be removed, and then click the red "X" button in the Remove column. A confirmation message will be displayed; click the Yes button if you are certain you want to remove the part without a replacement.



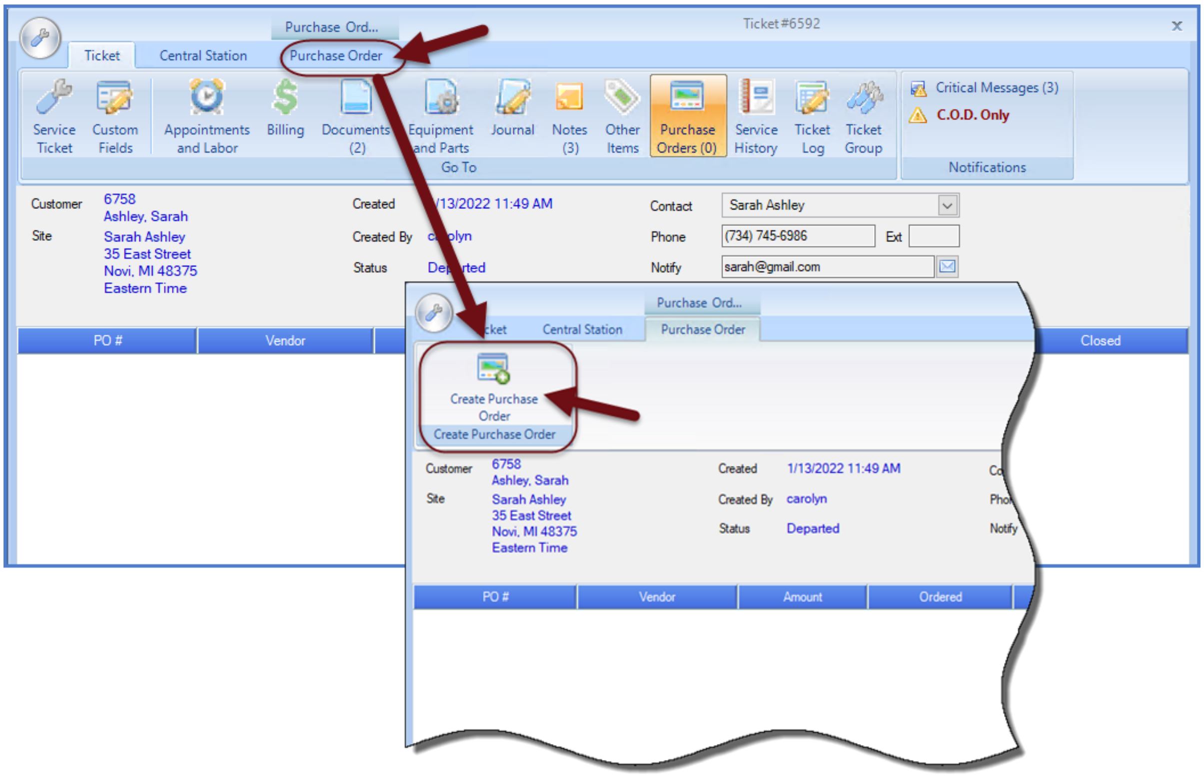
Ordering Parts for a Ticket

If Purchase Order for Parts needs to be created, this can be accomplished directly from the ticket. Before being able to create the PO within the Ticket, you must first add the Part(s) to be ordered to the Service Ticket Parts List on the Equipment and Parts form of the Ticket. You must also un-check the “Stock” option to the left of each part that will be ordered on a PO.

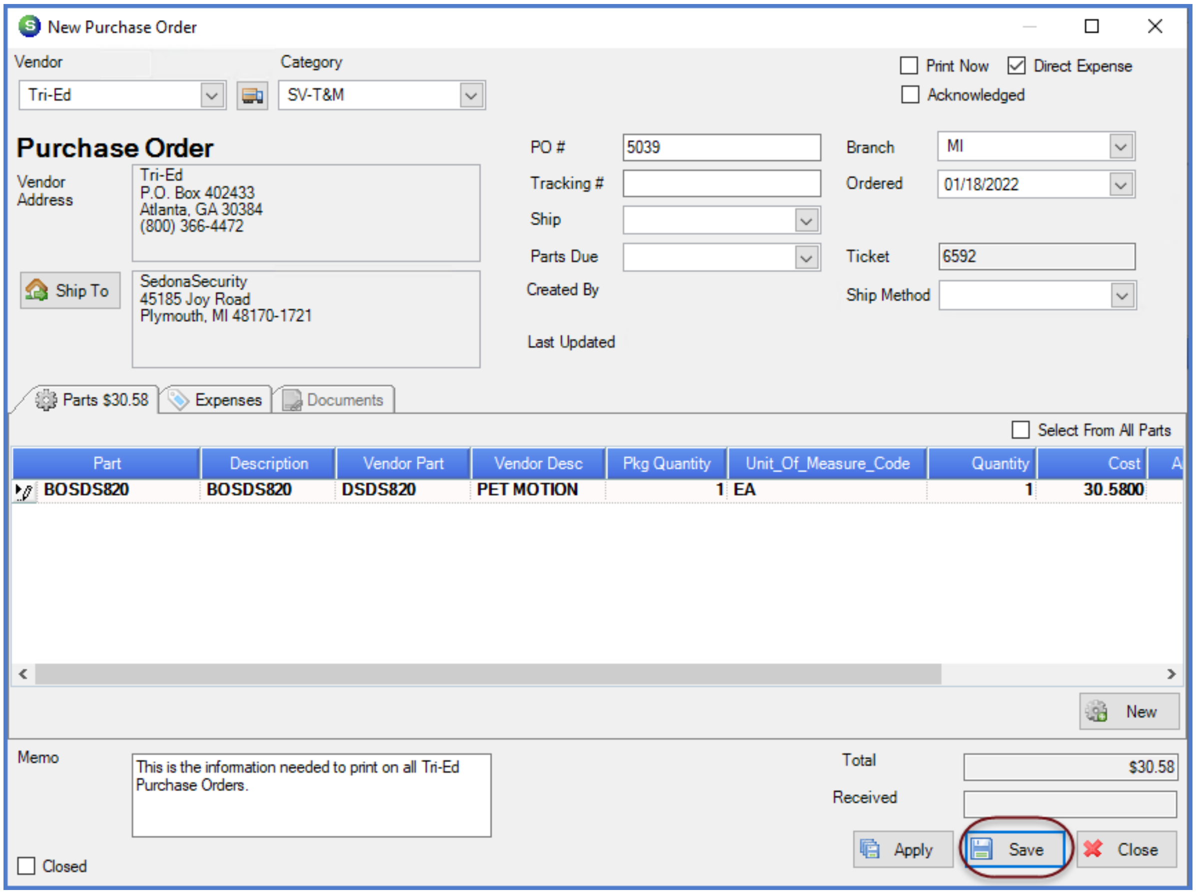


With the ticket open, click on the Purchase Orders button on the ribbon, and then click on the Purchase Order context menu above the ribbon.

A new ribbon, Create Purchase Order, will be displayed. Click on the Create Purchase Order button.



Most of the Purchase Order fields will automatically be populated - fill in the remaining fields on the Purchase Order according to your company's policies and procedures. Click the Save button when finished.



Notes

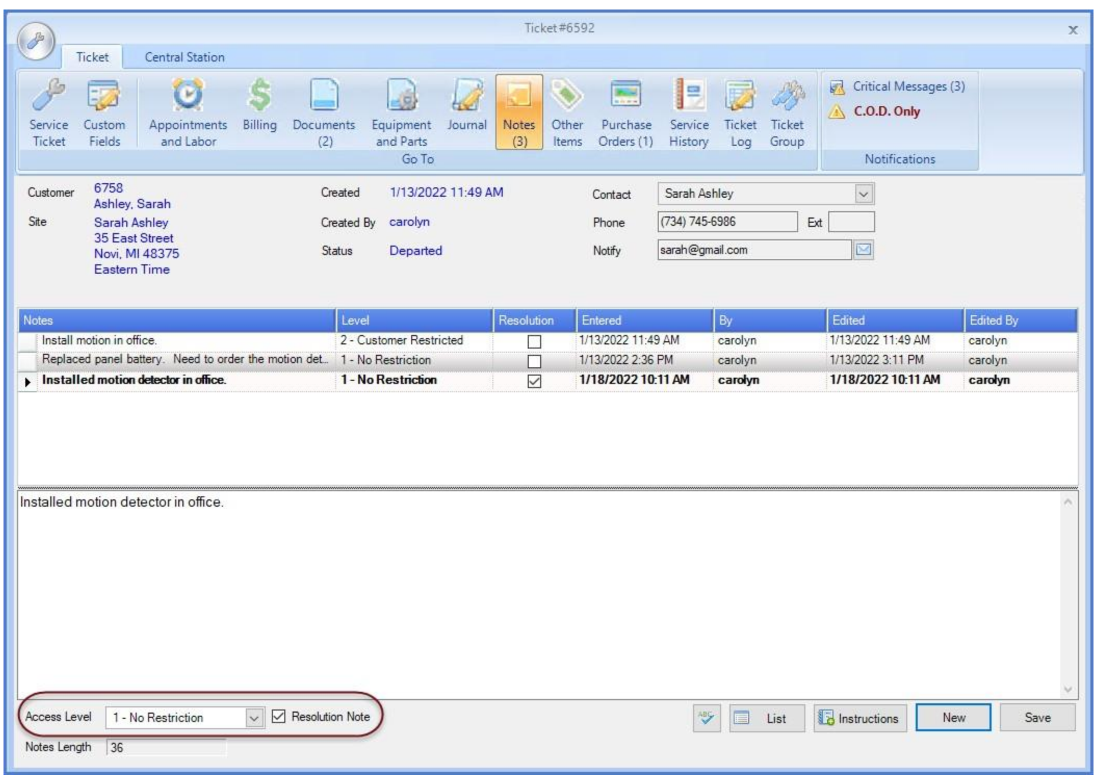
Notes may be added to a ticket at any time - even for closed tickets. To enter a note, open the ticket and click on Notes on the ribbon.

The Notes form is divided into two tiers. Previously saved notes display in the upper tier and the lower tier is used to enter new notes or edit existing notes.

To enter a new note, click on the New button located at the lower right of the Notes form. Type the note into the text box within the lower tier. Select an Access Level for the note then click on the Save button when finished. Once saved, the note entered will move to the upper tier of the form.

Access Levels

- **Level 1** – the note entered may be viewed by all Users and may be printed on the Service Ticket if printing ticket notes is selected by the user printing the ticket. If your company is using SedonaWeb, your Customers will be able to see Level 1 notes. Notes flagged as the Resolution Note must be saved as a Level 1 so they may be printed on the invoice.
- **Level 2** – the note entered may only be viewed by Users with Level 2 or Level 3 User Group access. Level 2 notes may be printed on Service Tickets.
- **Level 3** – the note entered may only be viewed by Users with a Level 3 User Group access. Level 3 notes will not be printed on Service Tickets.

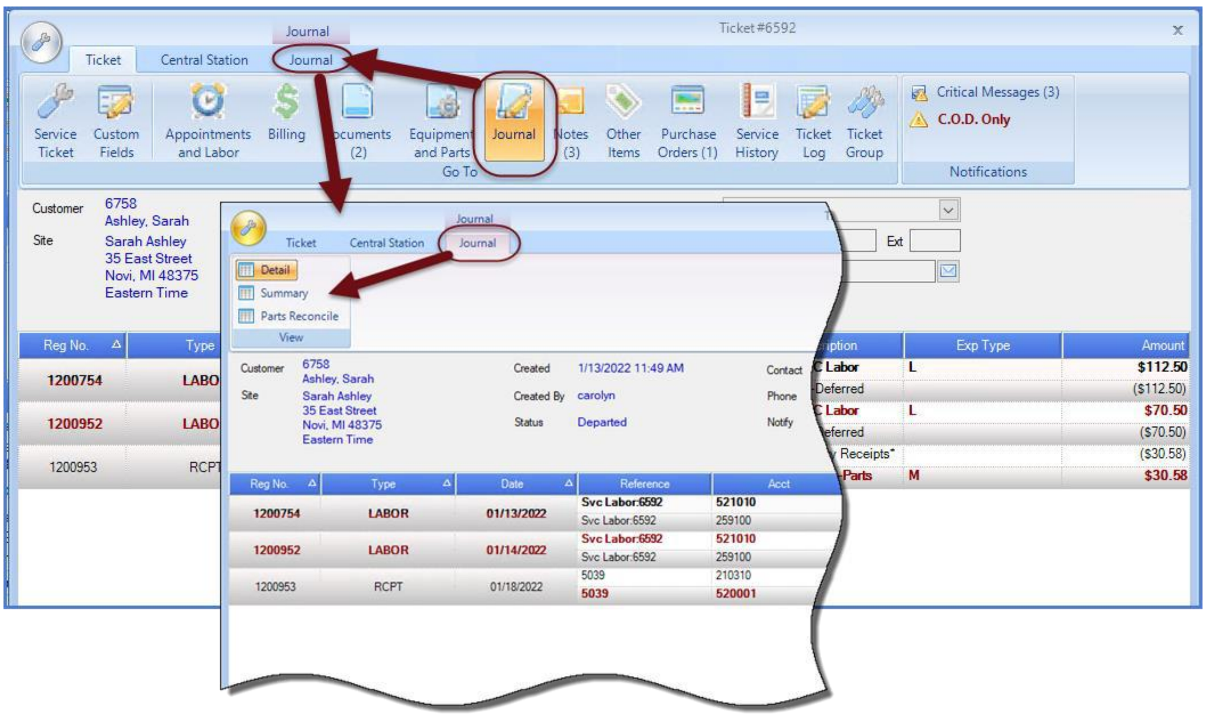


Journal

The Ticket Journal is comprised of two main elements:

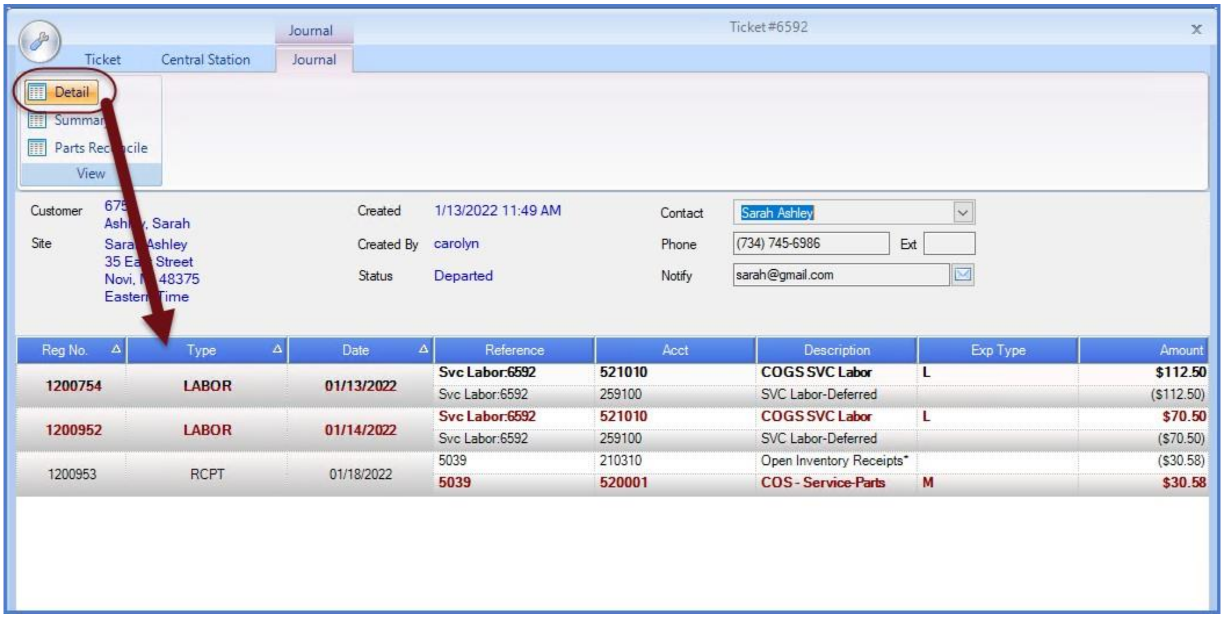
- Financial Information which displays all Income and Expense transactions recorded to the Ticket - there are two views available – Detail and Summary.
- The Parts Reconcile displays a list of parts assigned to the Ticket and whether the issue transaction has been completed for each part. Unless the User closing the Ticket has appropriate permissions, a Ticket may not be closed if all parts have not been issued/direct expensed to the Ticket. Refer to SedonaSetup/User Groups/ Application Access SV area, "Override Parts Reconcile".

When reviewing a Ticket for Invoicing, the User will most likely review the Journal information as a part of the process.



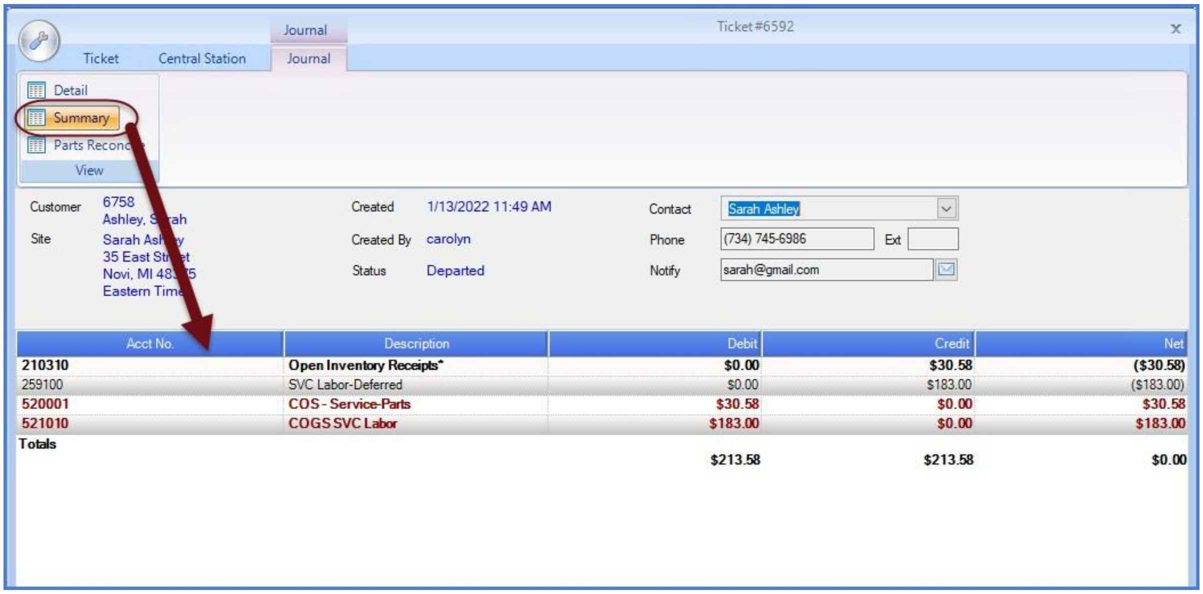
Journal Detail

When clicking on the Journal Detail button, a list of all financial transactions applied to the Ticket will be displayed. Both the debit and credit side of the transaction is viewable.



Journal Summary

When clicking on the Journal Summary button, a list of all financial transactions applied to the Ticket will be displayed – totals for each unique G/L Account affected.

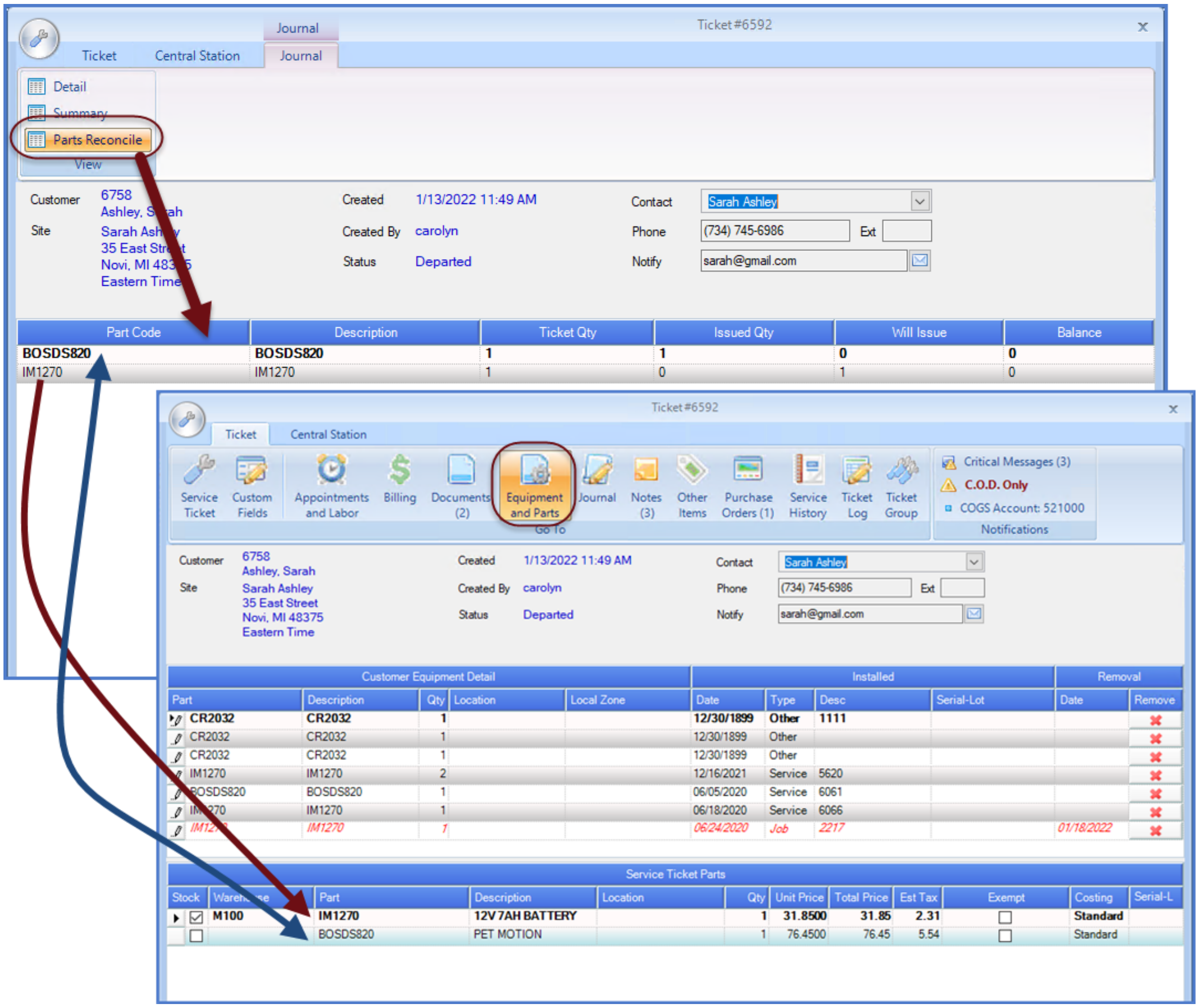


Parts Reconcile

When clicking on the Journal Parts Reconcile button, a list of all Parts entered in the Service Ticket Parts section of the Equipment and Parts form [of the ticket] will be displayed.

For Parts that were ordered on a Purchase Order and have been received [direct expense], the Issued Quantity on the Parts Reconcile list will be updated with the received quantity.

For Parts that will be issued from the Technician's Warehouse, the part Issue transaction will occur [depending on your company settings in SedonaSetup] when the invoice is created or when the Ticket is closed.



Preparing a Ticket for Invoicing

Once a Ticket has been Resolved (a resolution code has been selected on the Service Ticket form), it is ready to be reviewed and prepared for invoicing. This section will cover reviewing, modifying charges and creating the invoice for all types of Tickets.

There are three forms within the Ticket that may contain billable charges, and may be included on the customer invoice:

- **Labor Charges** – viewable and editable from the Appointments and Labor form
- **Part Charges** - viewable and editable from the Equipment and Parts form
- **Other Charges** - viewable and editable from the Other form

Each of the above three charge types will be covered in this section.

Note: User Group Permissions are required to create an invoice, to be able to modify labor charges and override the warranty and/or service level automatic charges. Refer to SedonaSetup/User Groups/ Application Access AR area, “Invoicing”.

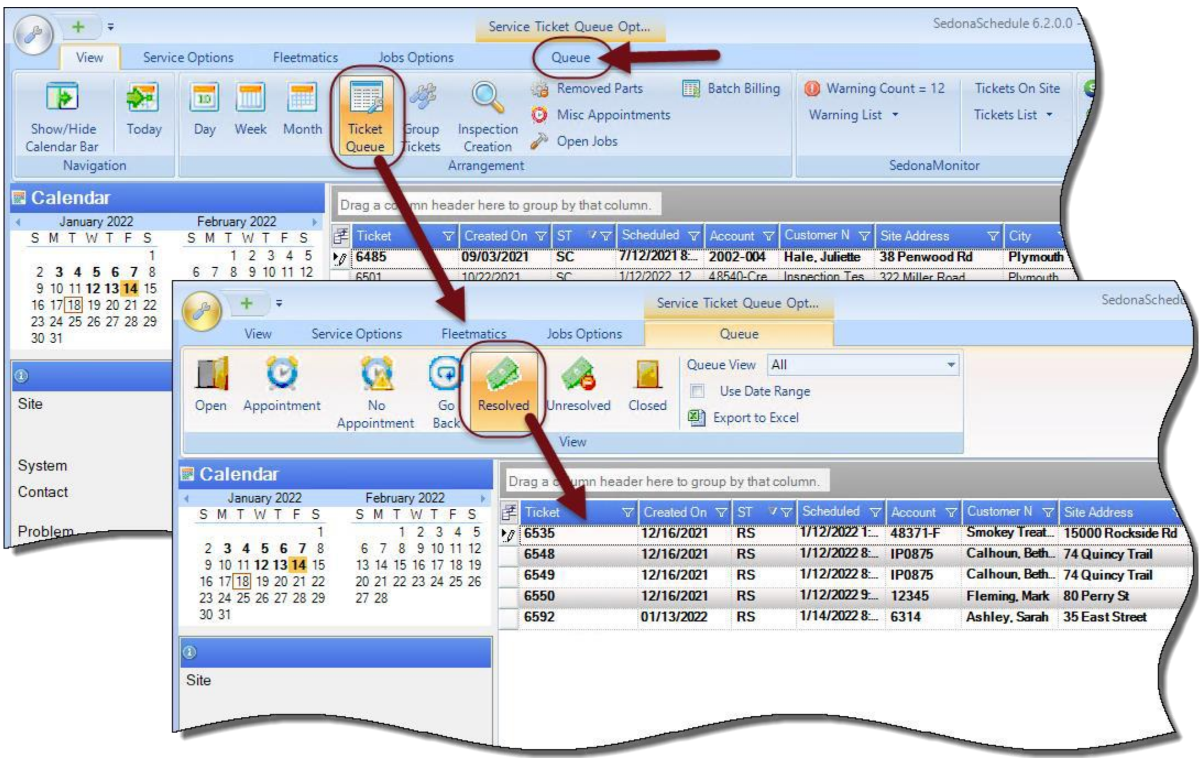
Permission is also required to be able to close a Ticket. Refer to SedonaSetup/User Groups/ Application Access SV area, “Close Tickets”.

Review Ticket Charges

The list of Tickets ready to be reviewed for invoicing is accessed from the Ticket Queue. To view a list of all “Resolved” tickets ready to review, click on the Queue context menu located above the main ribbon.

Click on the Resolved button from the Ribbon. A List of all Resolved tickets will be displayed. Tickets are reviewed, invoiced and closed individually. As the User works through the list; and Tickets are invoiced and closed, they will drop off the Resolved list.

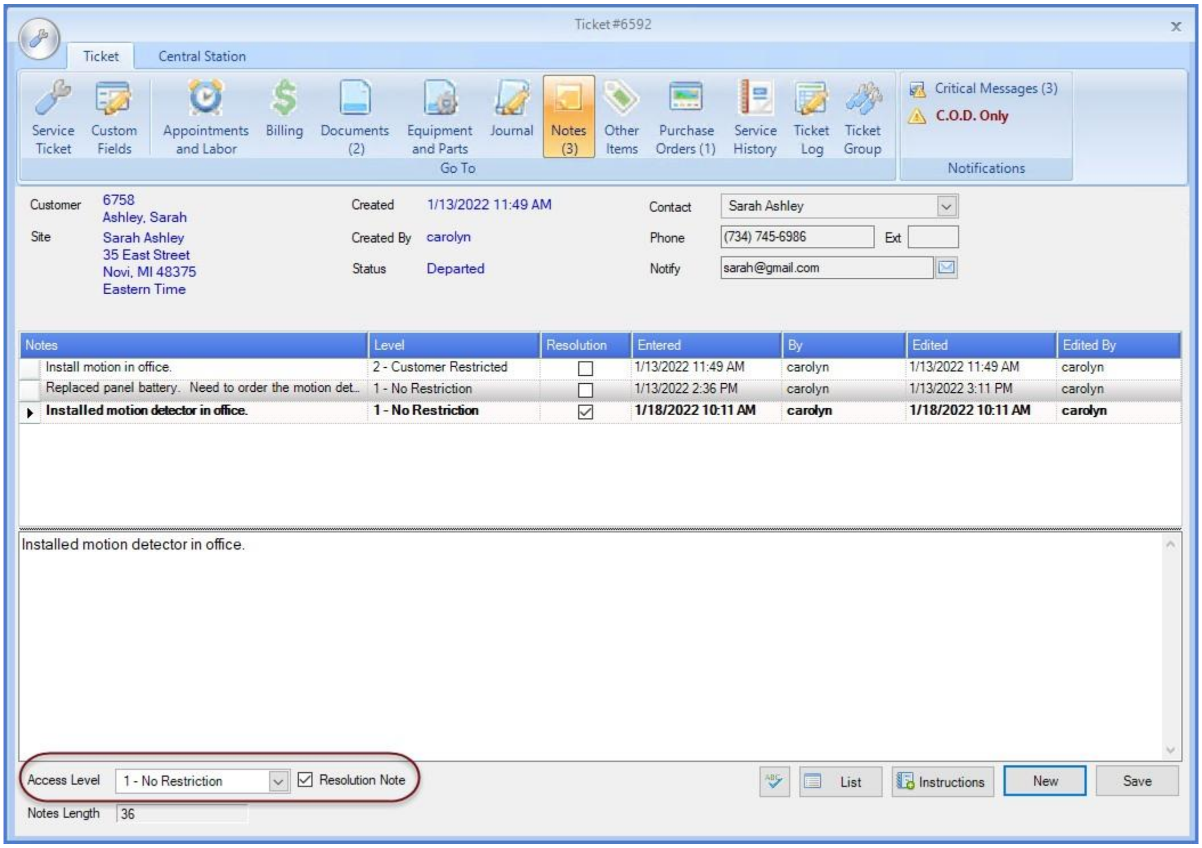
Within the Resolved Ticket list, double-click on the Ticket to open and review.



Review Ticket Notes

Once the Ticket is open, click on the Notes button on the Ticket ribbon to review any notes entered by staff or Technicians (if using the FSU or SedonaX Mobile). If the notes indicate parts were used, review the Equipment and Parts form to make certain the parts are listed.

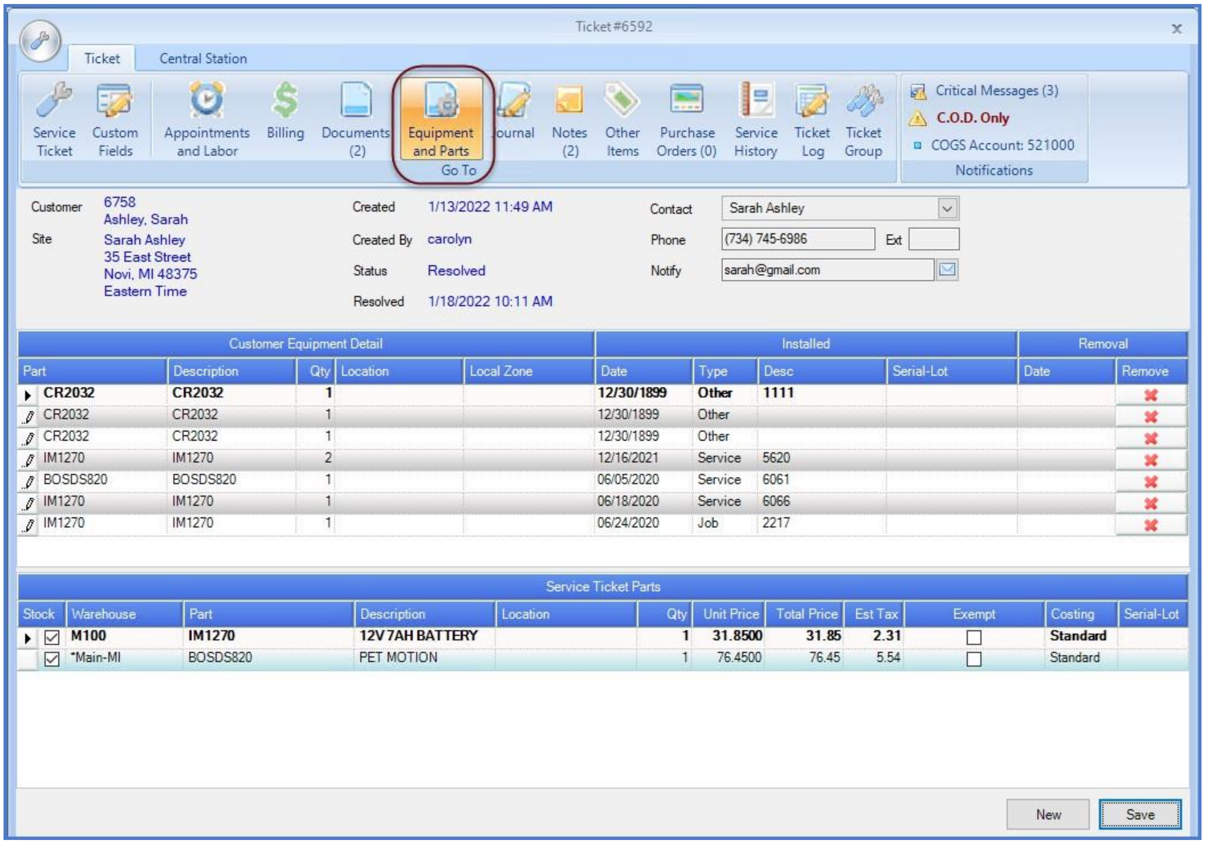
If after reviewing the notes you need to enter a new resolution note that is suitable for printing on the invoice, click the New button located at the lower right of the form. Enter the note and make certain to select the Access Level of 1 and check the Resolution Note checkbox. When finished, click the Save button.



Review Parts

Click on the Equipment and Parts button on the Ticket ribbon to review or add parts to the ticket.

Review any parts/charges listed in the lower tier (Service Ticket Parts) of the form. If parts were used but have not yet been entered on the ticket, click the New button at the lower right of the form to add parts (make certain the appropriate Warehouse is selected).



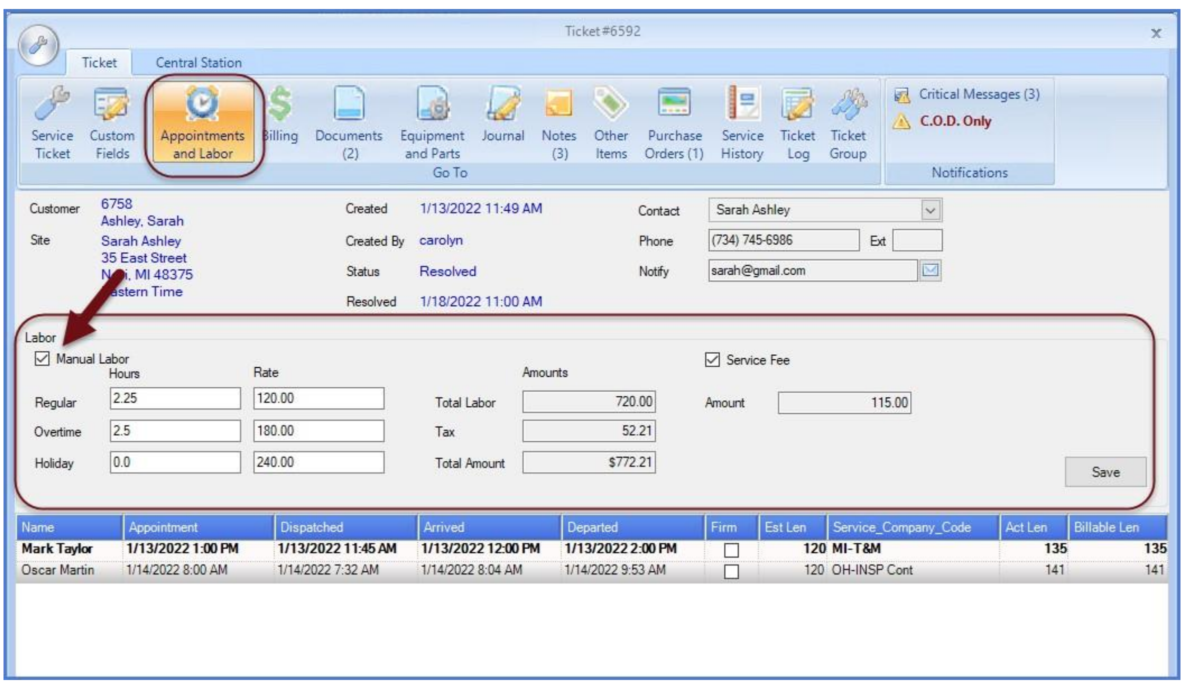
Review Labor

Click on the Appointments and Labor button on the Ticket ribbon to review labor charges and service fee (trip charge). If any changes need to be made to the number of labor hours or the labor rate being charged, check the Manual Labor checkbox. This will open up the labor hours and rates fields for you to make manual changes. When finished, click on the Save button to retain any changes.

Labor Charges and Service Fees (trip charge) are automatically calculated based on whether the System is still covered by the initial Warranty and the Service Level assigned to the Ticket.

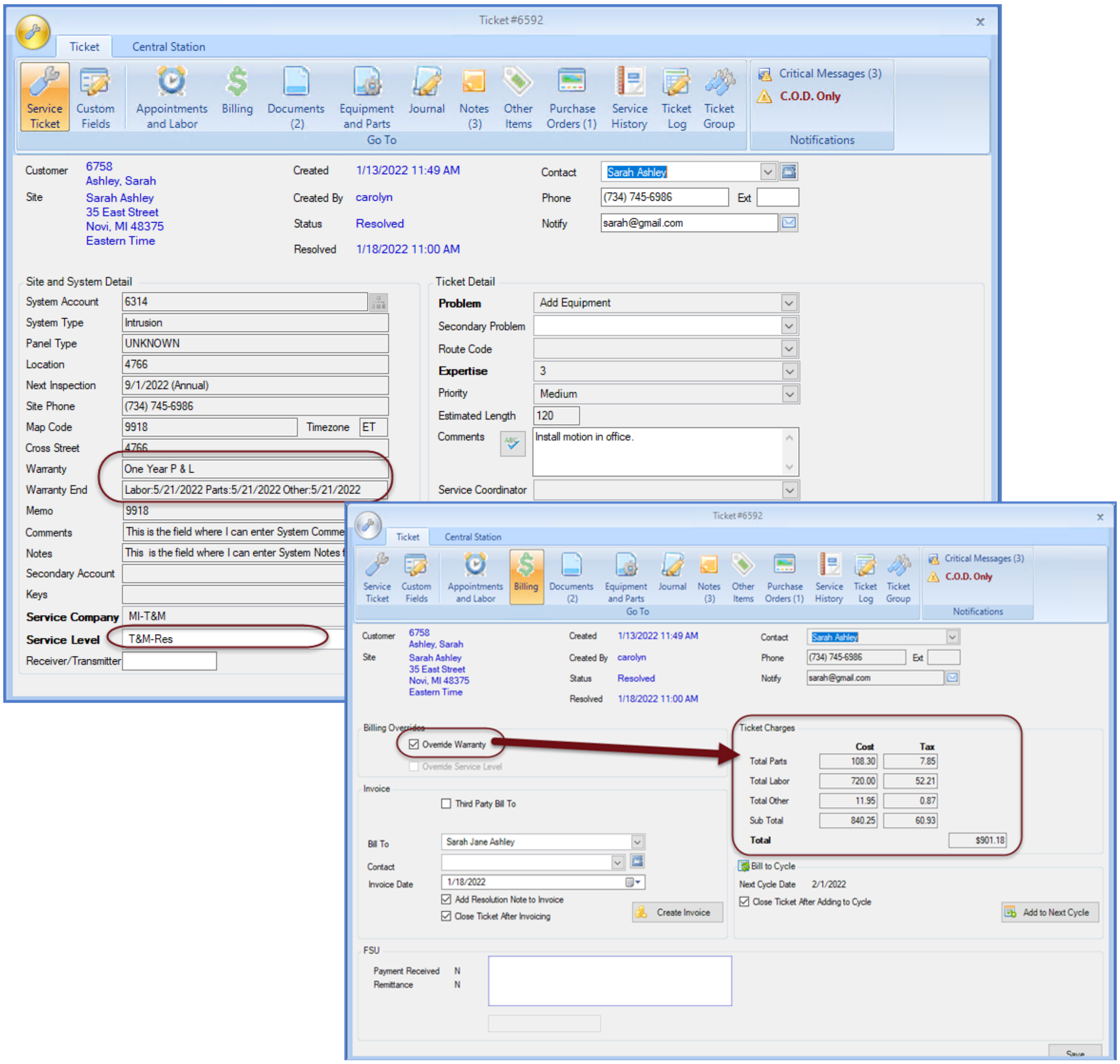
- If a System is still under warranty, billable labor charges are automatically calculated using the rules of the Warranty code for the system.
- If the System is out of warranty, billable labor charges are automatically calculated using the rules of the Service Level selected on the Service Ticket form.
- If a System is still under warranty, and the User selects the Override Warranty option on the Billing form, charges are automatically calculated using the rules of the Service Level selected on the Service Ticket form.

Note: Even though you are able to manually change the number of hours and/or the hourly rate, if you are discounting or waiving any of the labor charges, we recommend that you enter a negative charge on the Other tab. This is to preserve the actual number of hours spent on the ticket for labor reporting purposes.



Override Warranty

If the System is still covered by the initial Warranty yet you want to invoice the customer for charges (some or all), you would need to select the “Override Warranty” option on the Billing form. When selecting to Override the Warranty, the application then looks to the Service Level of the Ticket to determine billable charges. The Ticket Charges area of the Billing form will be updated based on the rules of the Service Level. Any amounts for Parts, Labor, Service Fee or “Other” charges may be manually modified as needed.

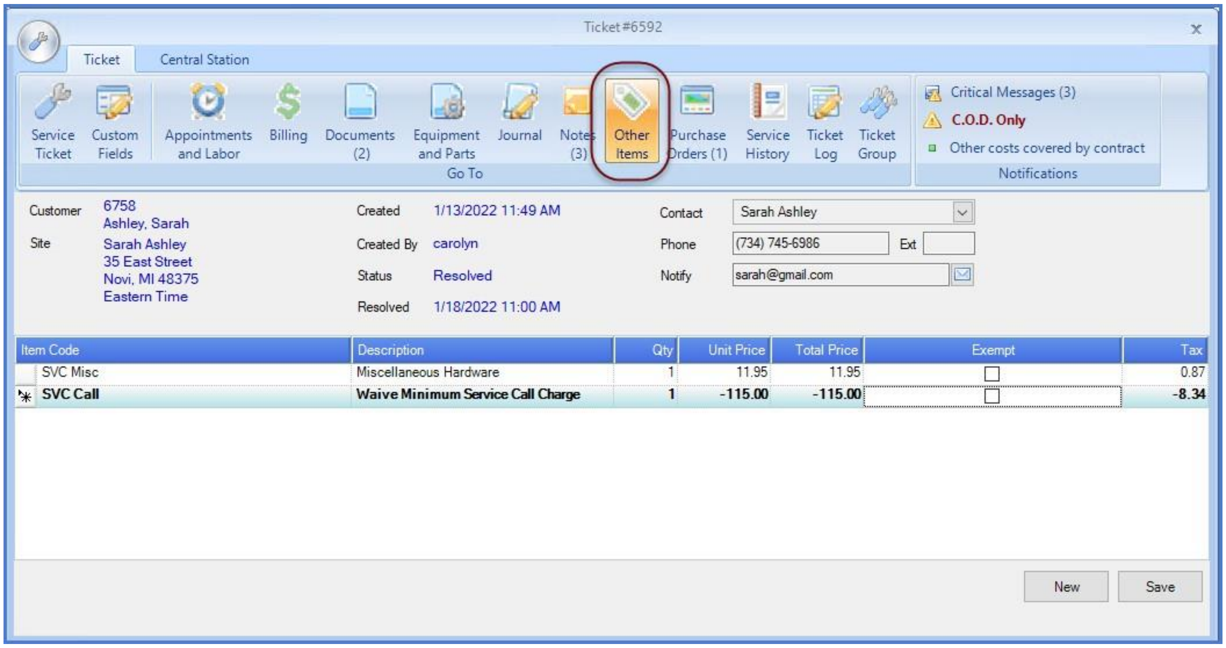


Review Other Items

Click on the Other Items button on the Ticket ribbon to review or add miscellaneous charges to be included on the invoice.

Review any Items already listed. If additional Items need to be added, click the New button located at the lower right of the form. When selecting an Invoice Item code, the description will default to the setup for that item. The user may change the description if desired. The Description will print on the customer's invoice.

Click on the Save button when finished.

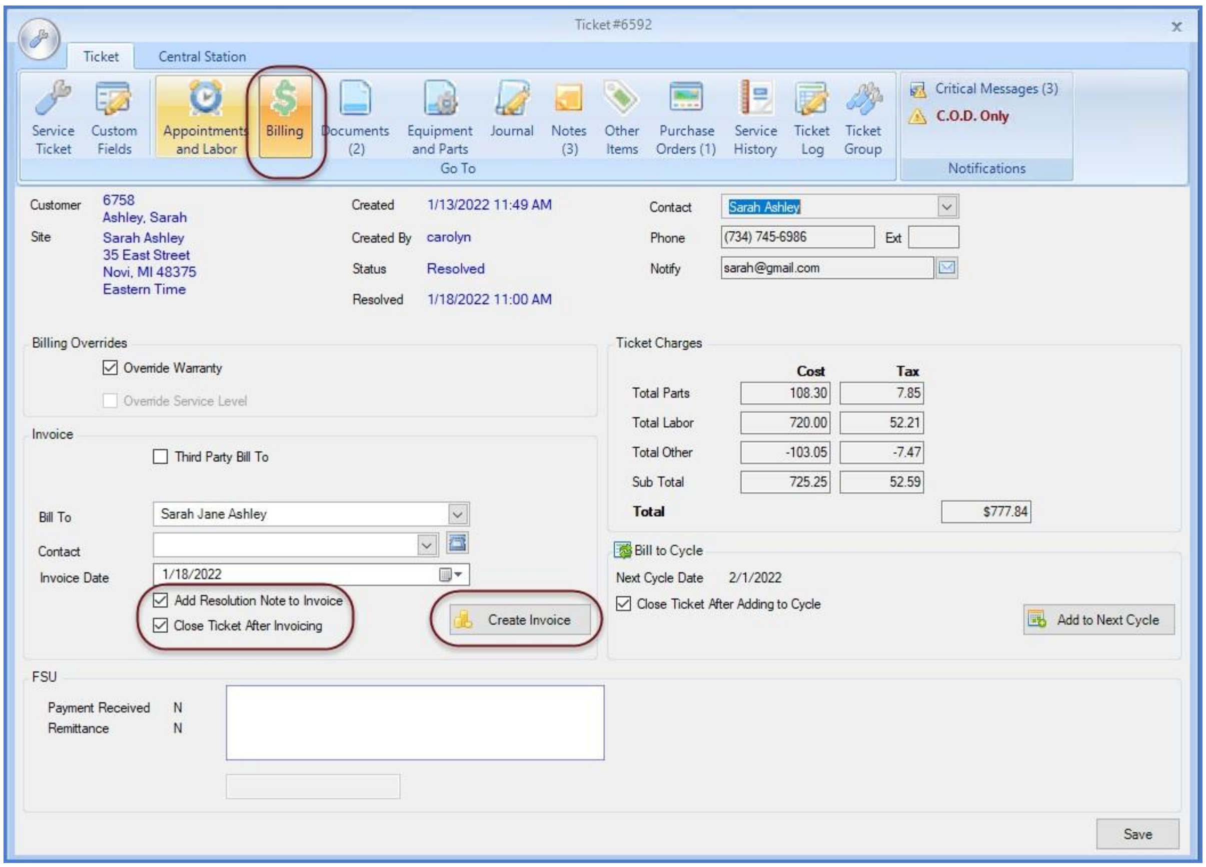


Review Billing – Create an Invoice

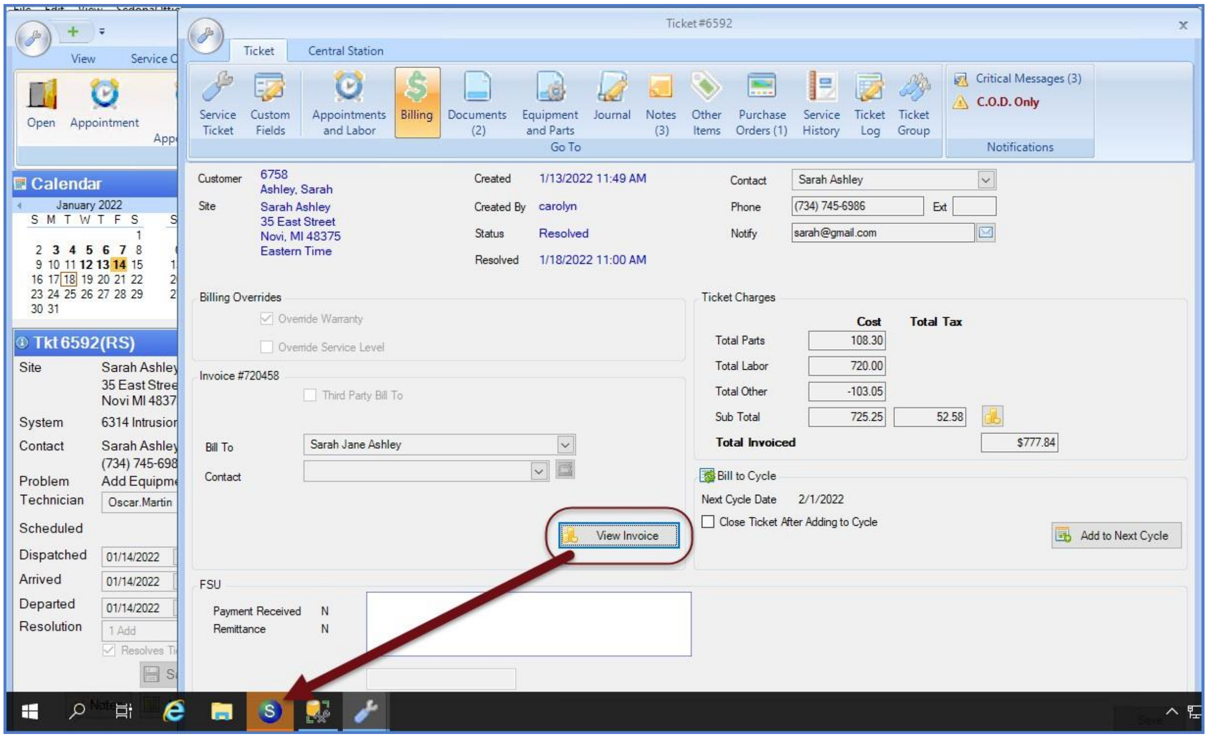
Once all charges have been reviewed, and you are ready to create the invoice, click on the Billing button from the Ticket ribbon. Review all charges displayed. If you are satisfied with the charges, and are ready to create the invoice, you have two options from which to select prior to creating the invoice.

- **Add Resolution Note to Invoice** – if a resolution note was entered on the ticket and you want that note to print in the memo field of the invoice, select this option.
- **Close Ticket After Invoicing** – if you wish to automatically close the ticket once the invoice is created, select this option.

Once options have been selected, click on the Create Invoice button.

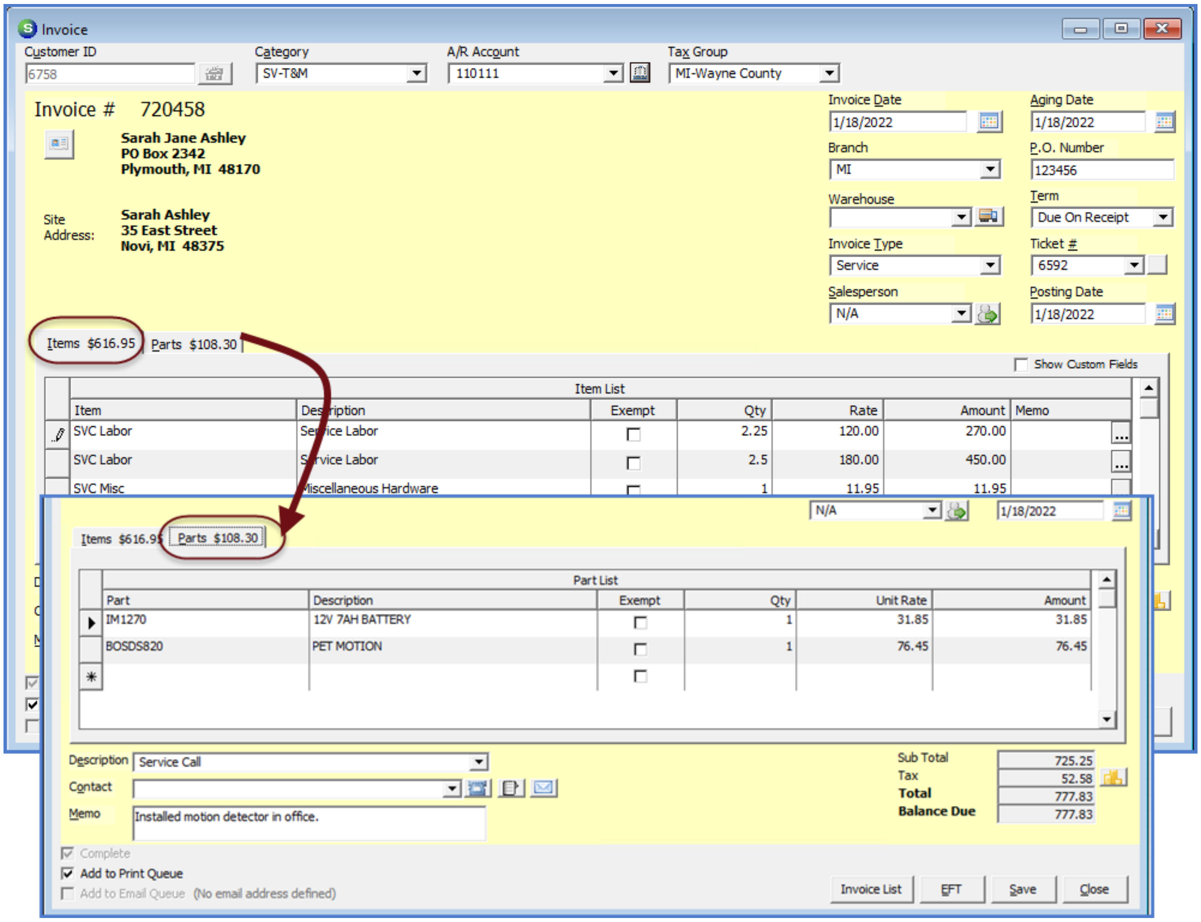


If the Close Ticket After Invoicing option was not selected prior to creating the invoice, you may click on the View Invoice button to review the charges contained on the invoice. Once the View Invoice button has been clicked, the main SedonaOffice application icon will begin to blink on the workstation taskbar. Click on the SedonaOffice icon to view the invoice.



Once an Invoice has been created, it may not be modified from Ticket. If changes need to be made to the Invoice, it may be opened within the Customer Explorer record for editing. User permissions are required to be able to make changes to an Invoice. Refer to SedonaSetup/User Groups/ Application Access AR area, “Edit Existing Transactions”.

Note: If a payment was automatically applied to the invoice during the posting of the invoice, and you need to make changes to the invoice, you must first un-apply any payment applications.



Item	Description	Exempt	Qty	Rate	Amount	Memo
SVC Labor	Service Labor		2.25	120.00	270.00	
SVC Labor	Service Labor		2.5	180.00	450.00	
SVC Misc	Miscellaneous Hardware		1	11.95	11.95	

Part	Description	Exempt	Qty	Unit Rate	Amount
IM1270	12V 7AH BATTERY		1	31.85	31.85
BOSDS820	PET MOTION		1	76.45	76.45

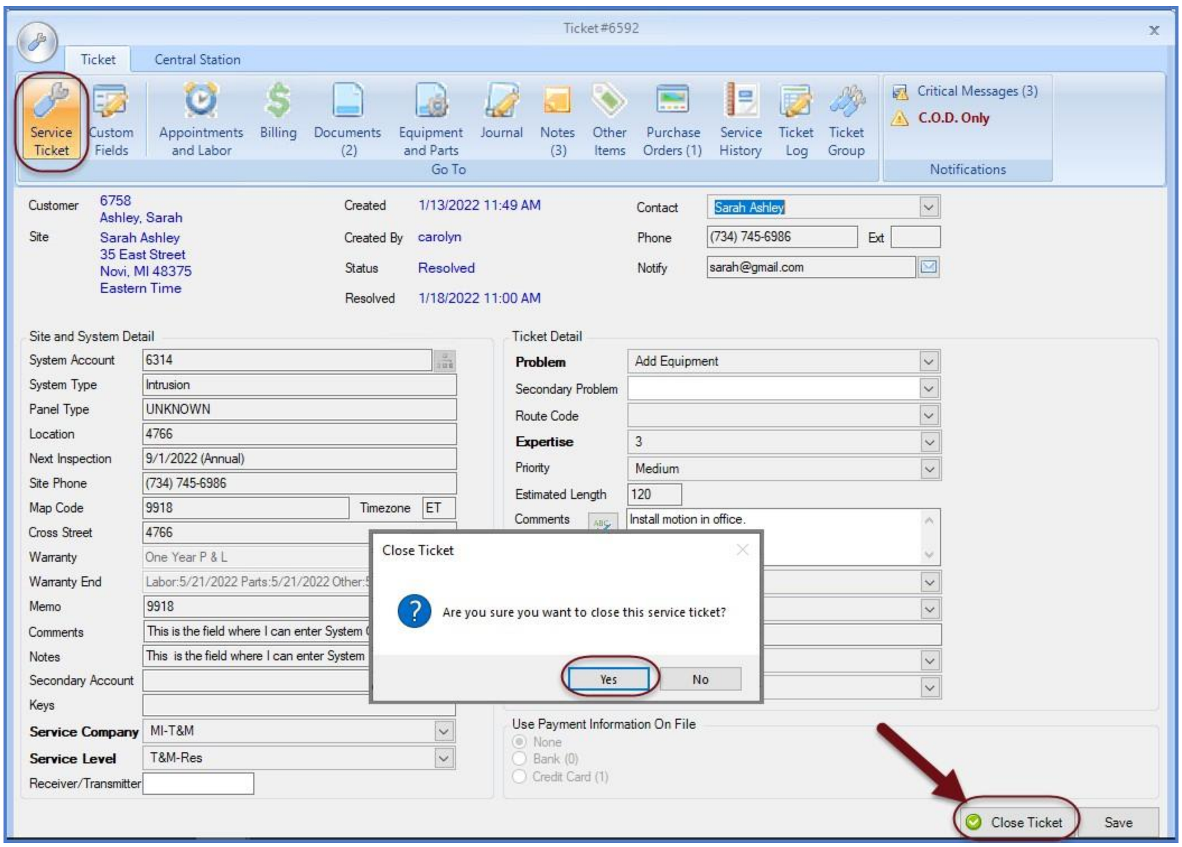
Closing a Ticket

If the Close Ticket After Invoicing option was not selected on the Billing form prior to creating the invoice, you will need to manually close the ticket. This same process below is also used when closing a non-billable Ticket.

Click on the Service Ticket button from the Ticket ribbon. At the lower right is a button labeled Close Ticket; check this box then click on the Save button located at the lower right of the form.

A confirmation message will be displayed asking you if you are sure you want to close the ticket - click the Yes button to proceed with the ticket closing.

Note: If any Parts were put on the Ticket and there is an existing Equipment List for the Ticket System and no part replacement was done, as message will be displayed to the User asking if you want to Replace Equipment now. If selecting Yes to this prompt, the Equipment & Parts form will be displayed to perform the replacement. When finished, return to the Service Ticket form and click on the Close Ticket button.



Batch Billing Overview

Service and inspection tickets which are not part of Group Tickets are now eligible to be automatically billed in bulk through Batch Billing. All resolved tickets that have an amount to be invoiced greater than $0.00 will be displayed in the Batch Billing queue. Tickets may not be opened in the batch billing queue to view their contents.

The review process prior to billing (including selection of a credit card if the customer designated one to be used) must be accomplished in the service or inspection queues. Only one user may batch bill at any one time. Users working outside of batch billing will be prevented from viewing any tickets in which there is a checkmark indicating that the ticket is ready to be billed [in the Batch Billing list].

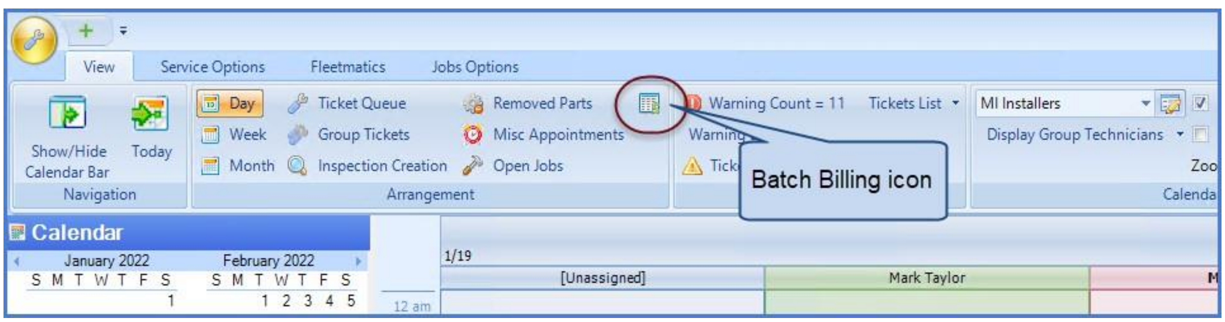
Usergroup Permissions

Users must be granted permissions to be able to use the Batch Billing feature. Refer to SedonaSetup/User Groups / Application Access – SV area, “Batch Billing”.

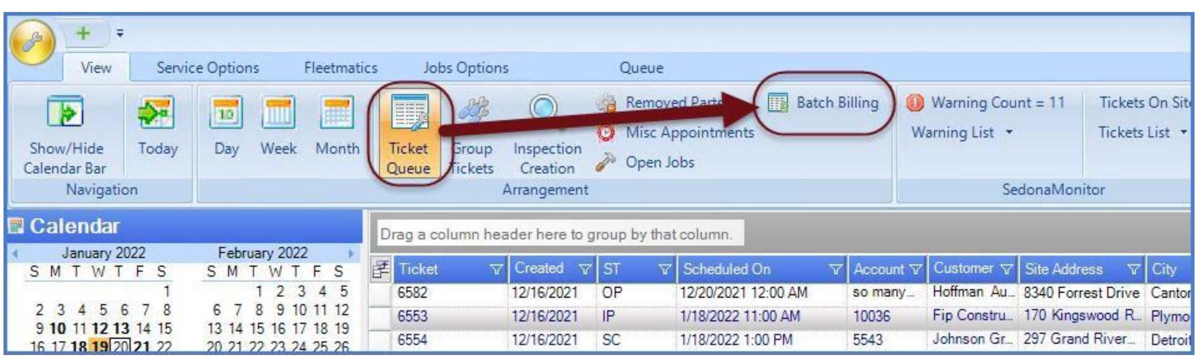
Batch Billing Queue

The Batch Billing queue may be accessed in two ways.

While viewing the Schedule Board, click on the Batch Billing icon located in the Arrangement Ribbon group.

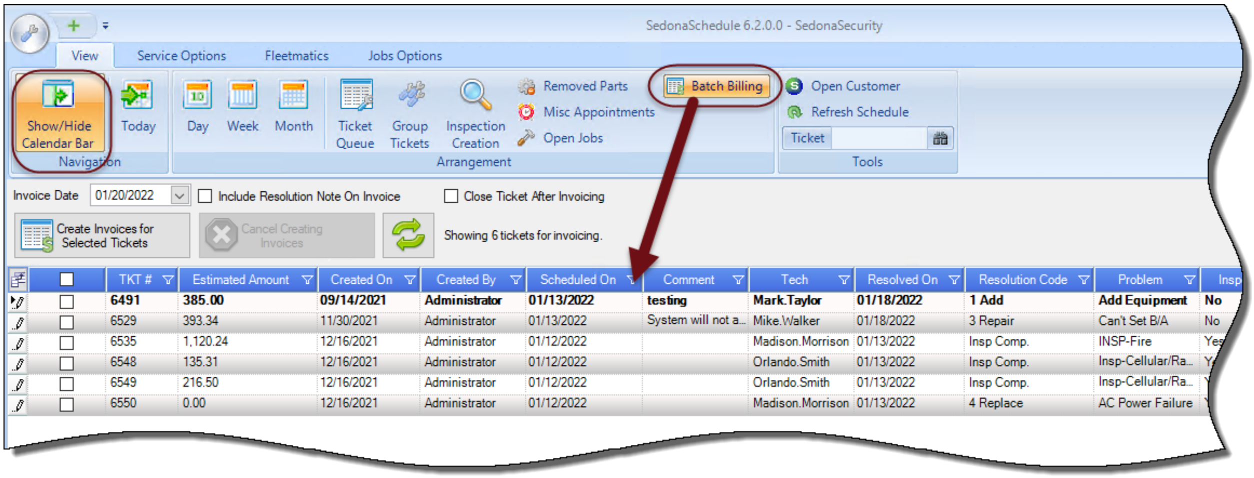


While viewing a Ticket Queue, click on the Batch Billing option located in the Arrangement Ribbon group.



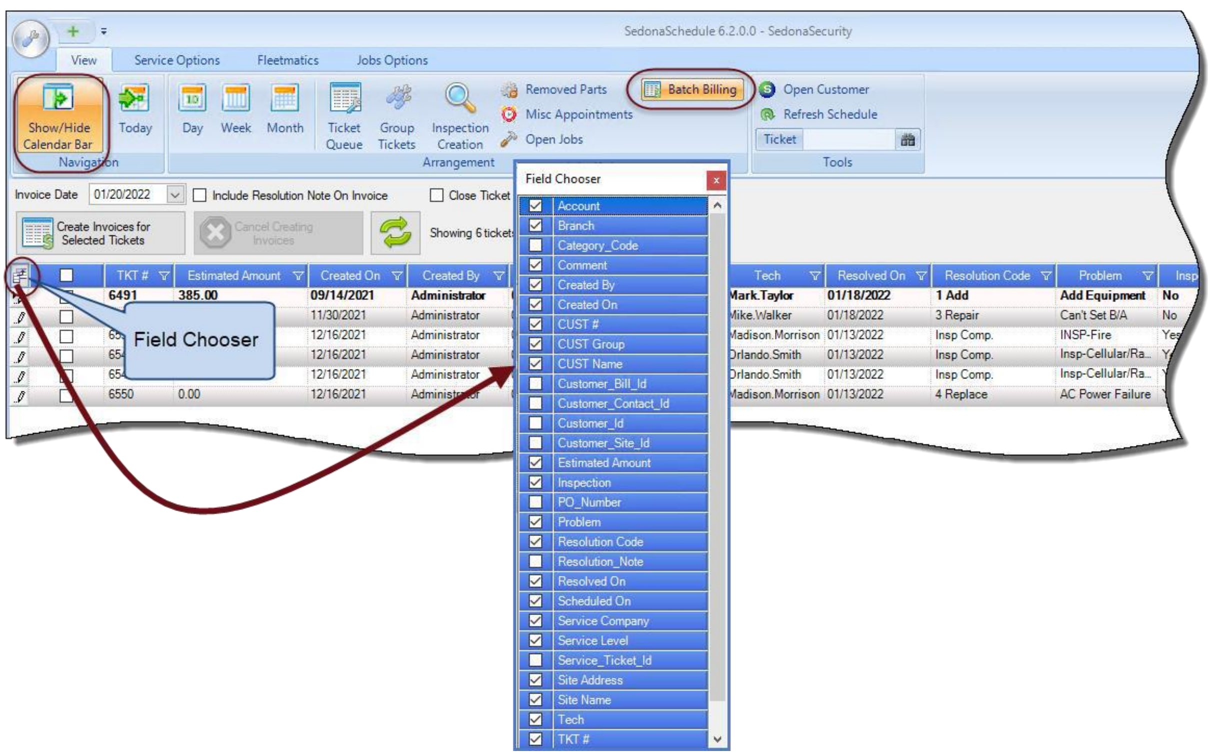
Once you have access the Batch Billing Queue, a list of all Resolved tickets with an amount to invoice greater than $0.00 will be listed.

To be able to view more columns of information within the Batch Billing list, click on the Show/Hide Calendar Bar button on the Navigation ribbon.



Field Chooser

Individual Users are able to select which fields to display in the Batch Billing list. Please note, some of these fields are different from the ones used in the standard ticket queues. The user preferences from the service ticket queues will not automatically flow into batch billing. The user will need to define which fields are to be viewed in the Batch Billing queue.



To select which fields to display in the Batch Billing queue, click on the Field Chooser button located in the upper left hand corner of the Batch Billing screen.

The field chooser will be displayed. This is a listing of all of the available fields from which the user may select. All fields are checked by default. If certain fields are not needed, un-check the box to the left of the fields which do not need to be displayed. Use the scroll bar on the right hand side of the field chooser to view more panes of fields. When finished, click the “x” in the upper right hand corner of the field chooser to close the list.

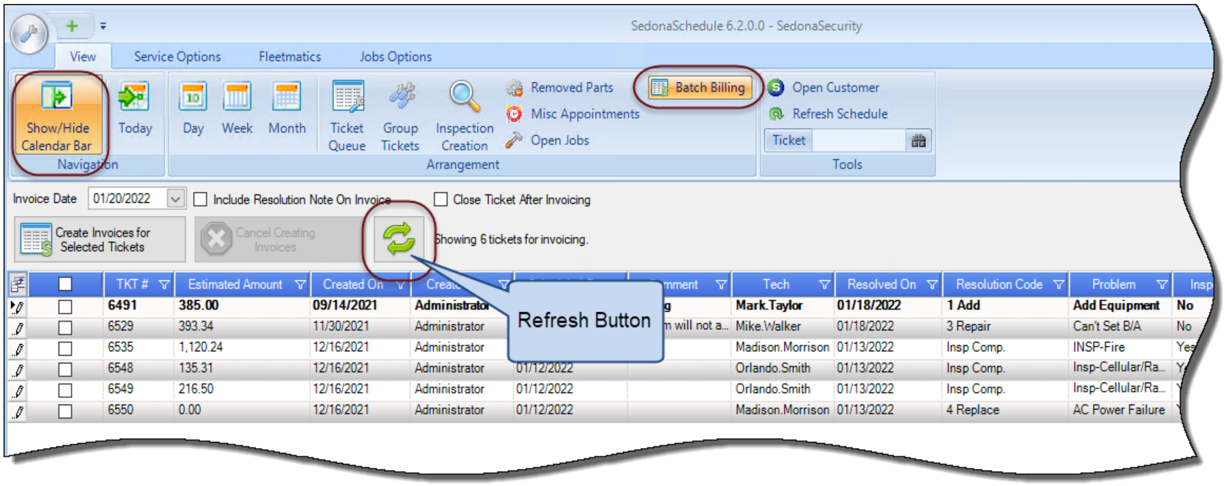
Fields may be arranged in any order desired and follow the same procedures as is currently done in the standard ticket queues.

Note: At this time, field re-arrangement will not be saved as part of user preferences. The fields will remain re-arranged for the current session only.

The procedures for sorting, filtering, and grouping the items in the Batch Billing Queue is the same as are currently in place in the standard ticket queues.

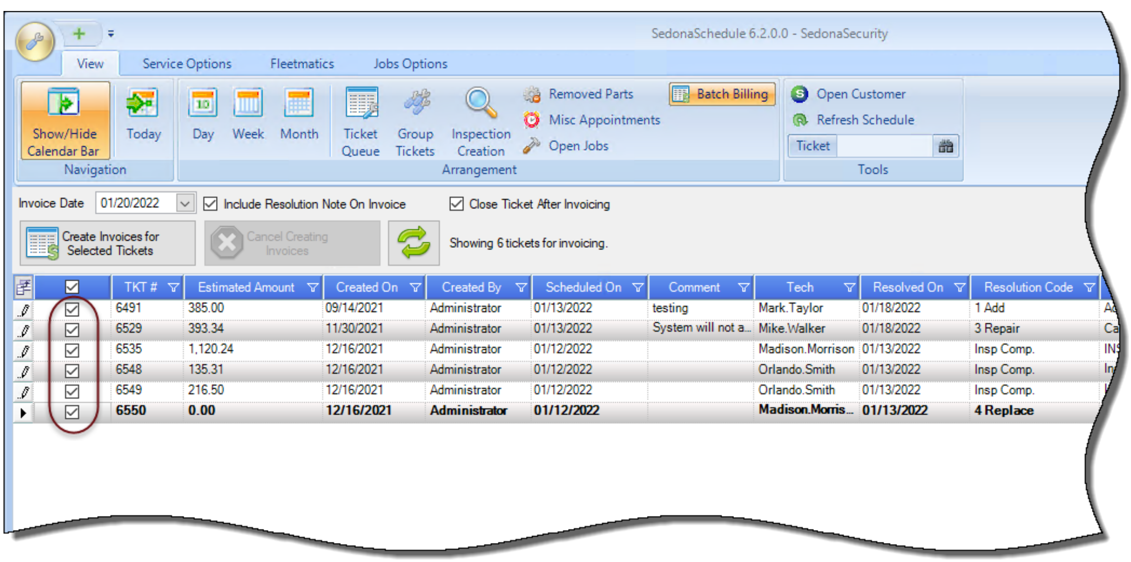
Refresh Button

A refresh button has been provided to ensure that all tickets are brought into the ticket for billing. If a ticket has just been marked for billing, but is not appearing on the screen because batch billing is taking place, click the Refresh button to include the ticket in this set of batch bills.



Select Tickets for Invoicing

Within the Batch Billing list, place a checkmark next to each ticket that is ready to be billed. This will lock out the ticket from viewing by all users until invoicing has been completed.



Invoice Date, Resolution Notes, and Ticket Closure

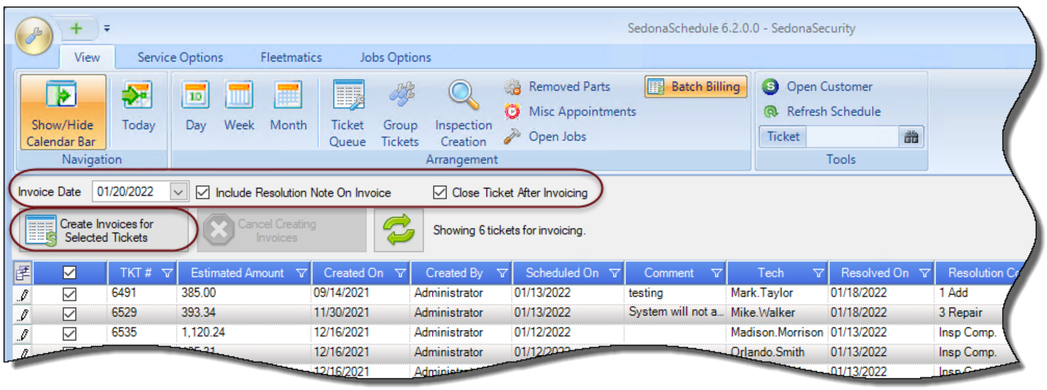
The invoice date will default to today's date. This date may be changed to any date in an open accounting period.

If the resolution note on the ticket should be included on the memo of the invoice, check the box labeled "Include Resolution Note On Invoice".

If the ticket should be closed after invoicing takes place, check in the box labeled "Close Ticket After Invoicing."

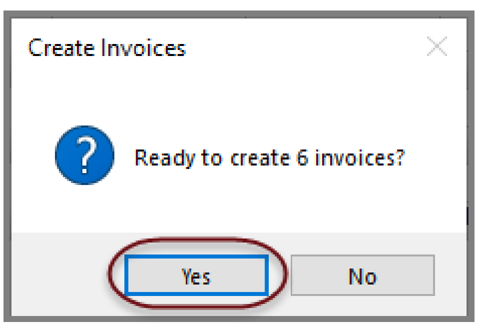
When the correct invoice selections have been made, click the button "Create Invoices For the Selected Tickets".

Note: Depending on the number of tickets being invoiced, this may take a few seconds or a few minutes. While invoices are being created, do not navigate away from the Batch Billing form – wait, and be patient.



After clicking the "Create Invoices For the Selected Tickets" button, a confirmation message will be displayed indicating the number of invoices to be created.

To proceed with the creation of invoices, click the Yes button.



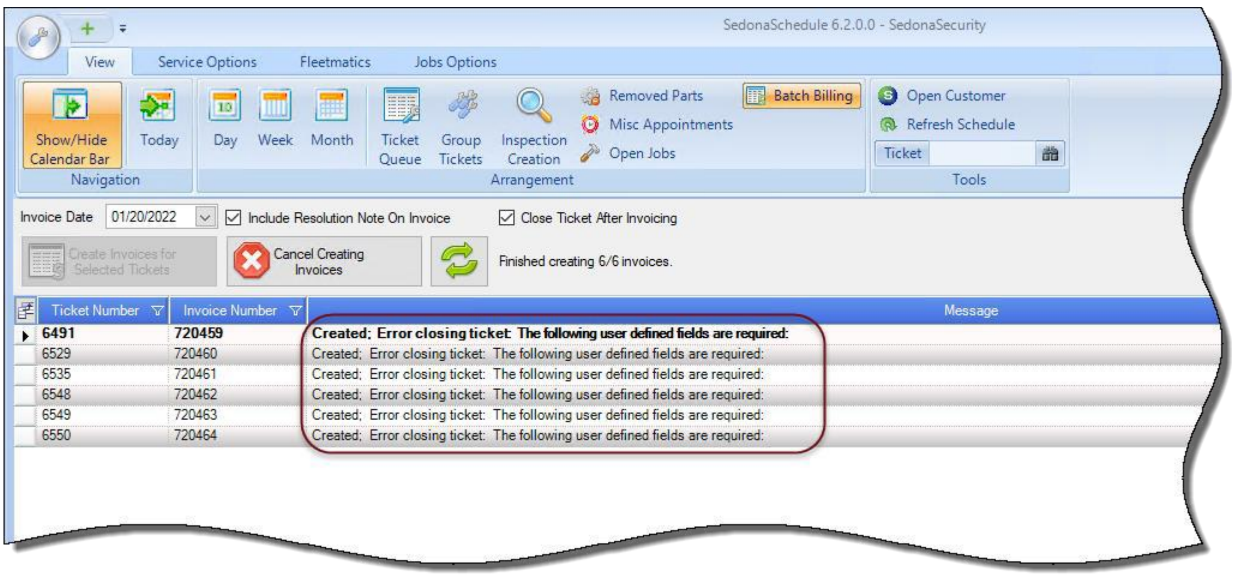
Messages

The system will record how many invoices were created as well as any problems that were encountered.

The Messages list cannot be printed. Users should use either Snipit (provided by Microsoft on every Windows installation) or use CTRL-Print Screen to record all errors encountered into a word processing document. Once the batch billing screen has been exited, it will not be possible to bring these messages back again.

In our example below, invoices were created for all six tickets, however the software could not close the tickets because a required custom field had not been populated on any of these tickets.

You will need to open each ticket, make the necessary selections on the Custom Fields form, and then manually close the ticket.



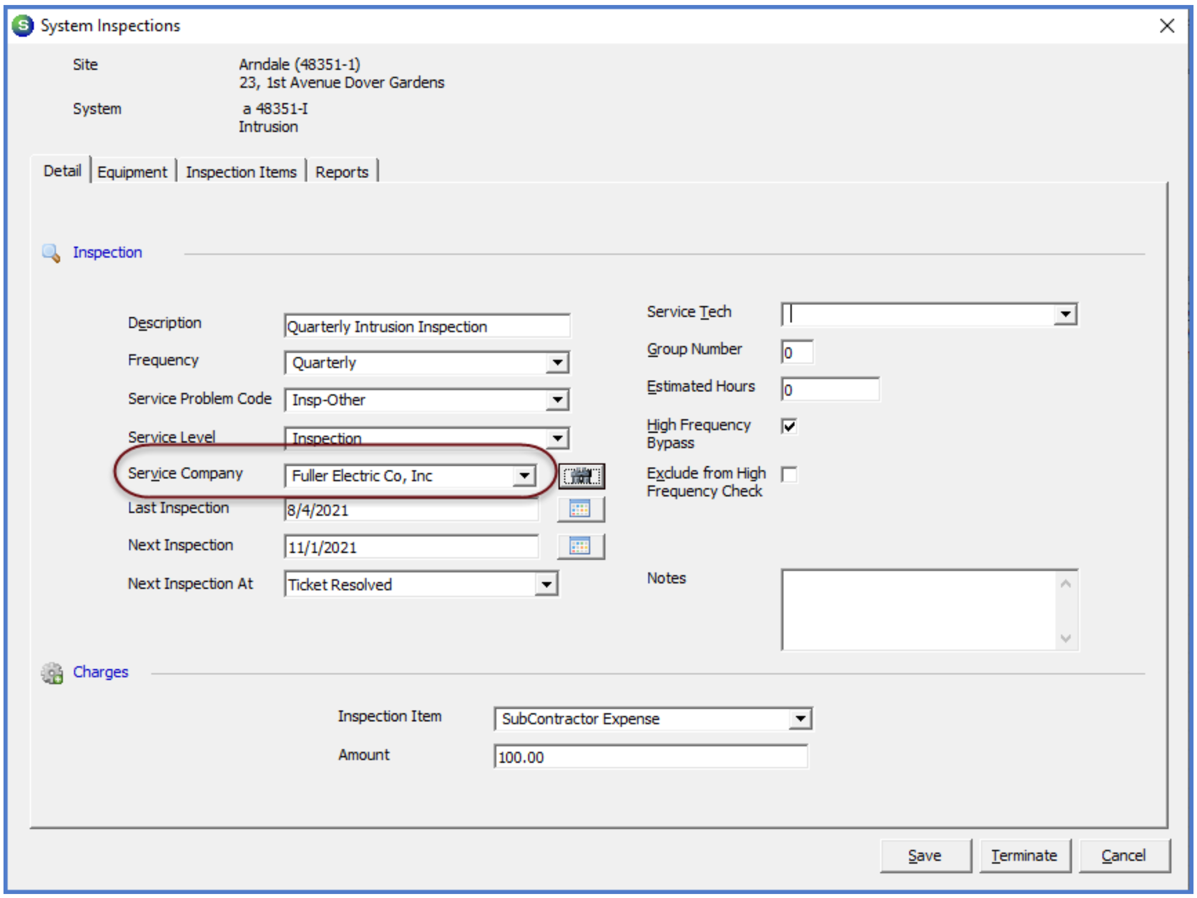
Print Queue

The invoices just created through Batch Billing will be visible in the Accounts Receivable / Print Invoices Queue as well as on the customer record.

Vendor Tickets

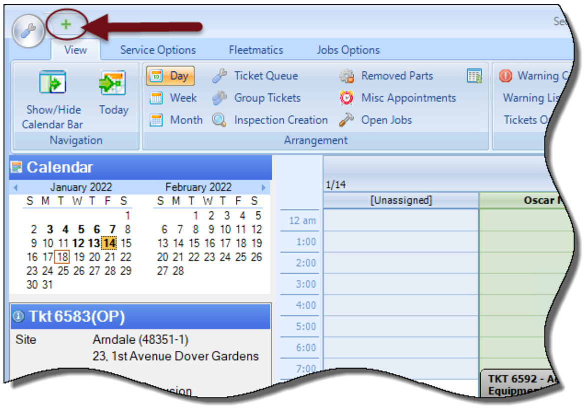
A Vendor Ticket is used when a service call or an inspection is performed by a Service Provider (subcontractor) on behalf of your company. What distinguishes a regular Service Ticket from a Vendor Ticket is the Service Company selected on the Service Ticket form. If the Service Company selected is a Service Provider, the Ticket will automatically be saved as a Vendor Ticket.

For Inspections, a Service Provider may be setup as the default Service Company if it is typical the Inspection is performed by a Service Provider. The Inspection Record for the System contains the setup where the service company is selected.

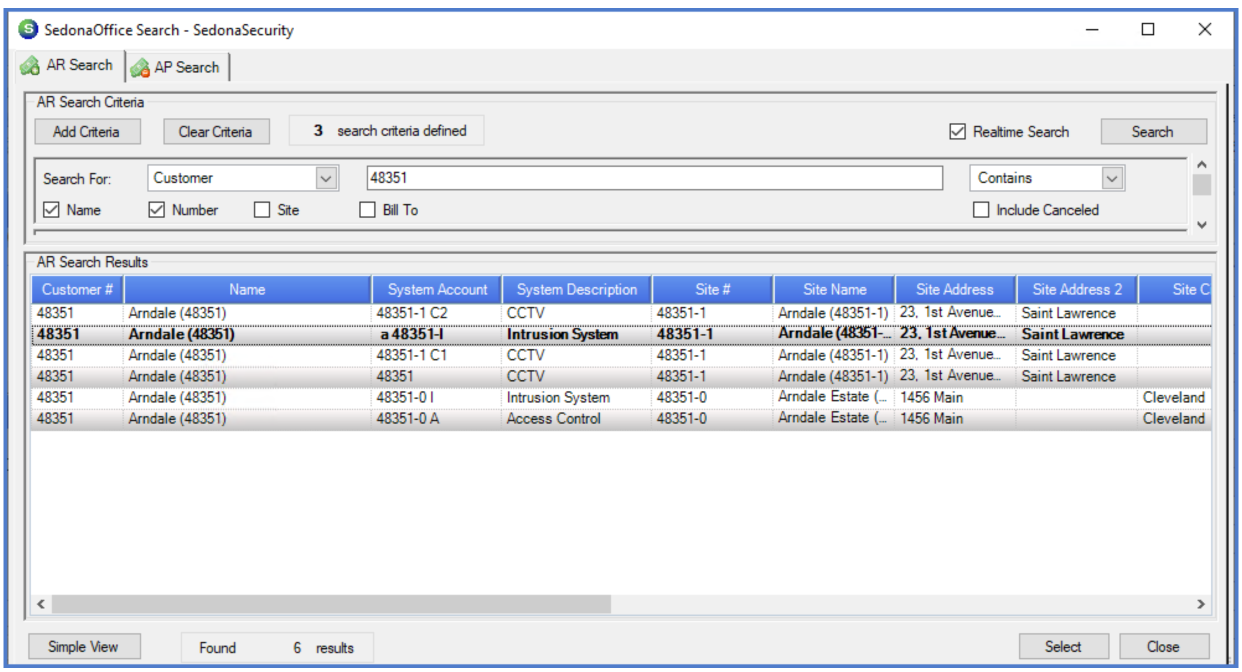


Creating a Vendor Ticket

Click on the New Service Ticket button located at the upper left of the SedonaSchedule application.



The Customer Search form will be displayed for locating the Customer/Site/System for which a ticket will be created. Select a Search Criteria option, then enter a search value in the search text box, then click Search button. Double-click on the row in the search results area for which you want to create the ticket.



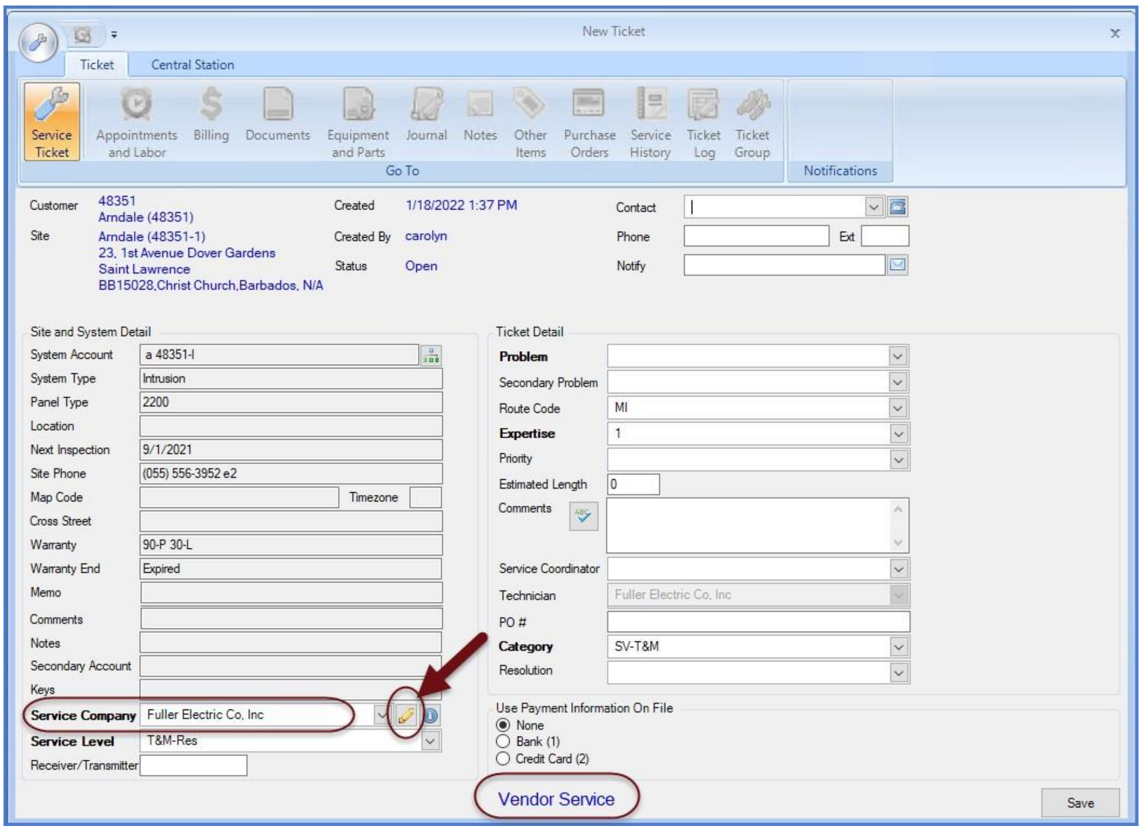
A new Service Ticket will be displayed. There are five required fields that must be populated to be able to save the Ticket. The field label to the left of a required field is displayed with a bold font. The only required field that is not automatically populated is the Problem code.

Note: If the label of the PO # field is bolded, this indicates this field is also required.

In the Service Company field, if the default company displayed is Service Provider, then the words Vendor Service will be displayed at the bottom of the ticket, and the ticket will automatically be saved as a Vendor Service Ticket.

If the default Service Company displayed is your company or a company branch service company, you may click on the pencil icon to right of the service company field to display a list of all available service companies and Service Providers from which to select. If you select a Service Provider from the list and save the ticket, the ticket will be treated as a Vendor Service Ticket.

Once all required fields have been populated and the customer Comments has been entered, click the Save button located at the lower right of the form.

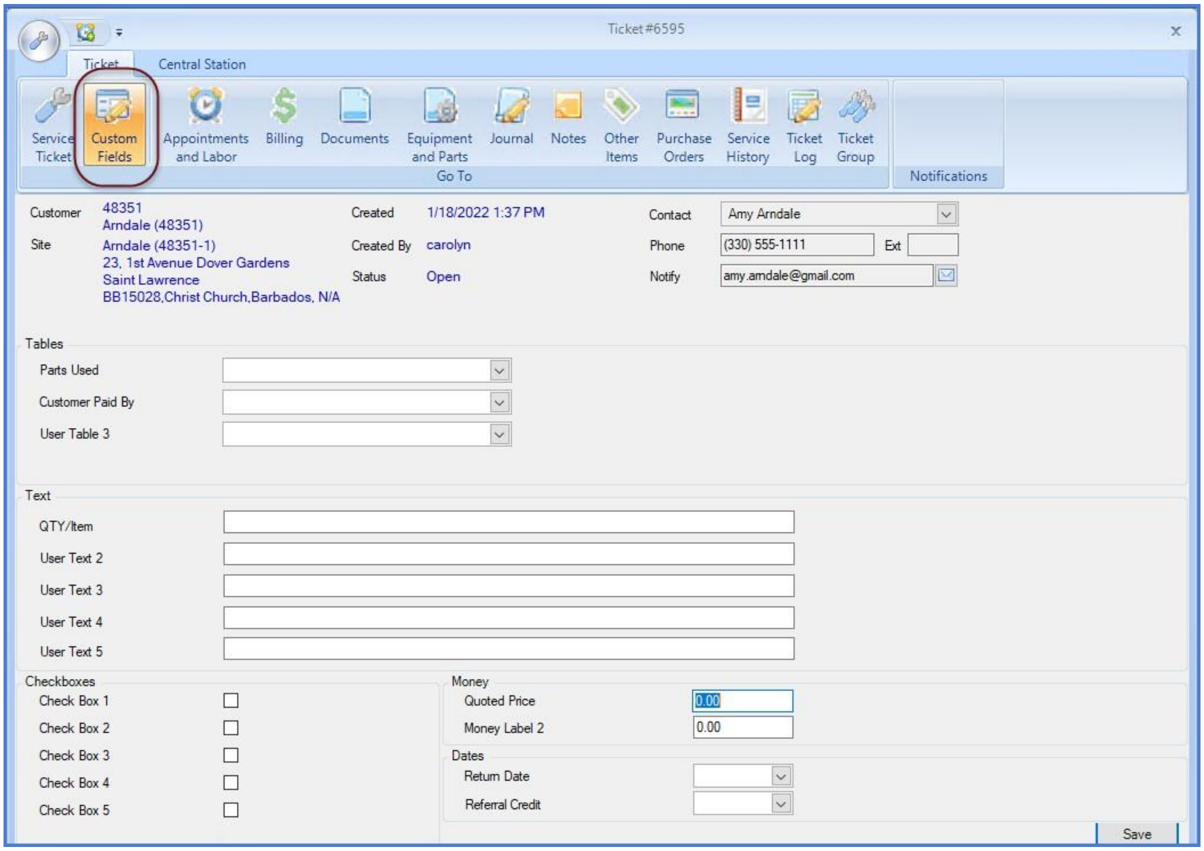


Note: Once the Service Ticket form is saved, a ticket Note will automatically be created with any information entered into the [customer] Comment field. This automatic Note creation will only occur if information was entered into the Comment field prior to the initial Save of the ticket. If a comment is entered at a later time, an automatic note will not be created.

Custom Fields

Once the Ticket has been saved, the Custom Fields form of the Ticket will be displayed. If your company is using any of the Custom Fields, fill in this form according to your company policy and procedures. After populating any of the custom fields, click the Save button located at the lower right of the form to save the selections/entries.

Note: If a Custom Field has been marked as required, the field label to the left of a required field is displayed with a bold font.

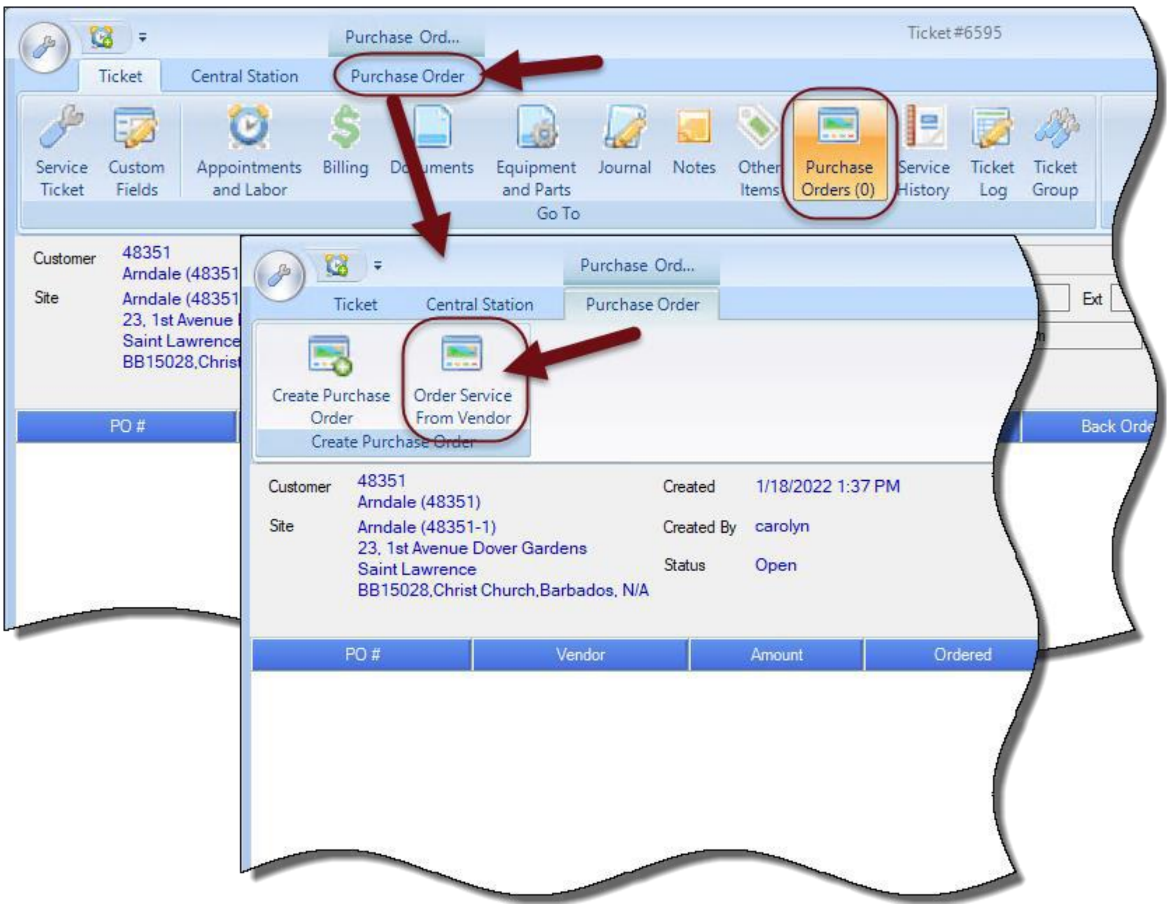


Creating a Purchase Order for Vendor Service

If your company issues a Purchase Order to a Service Provider (Vendor) for services provided on a Vendor Ticket, the Purchase Order may be created directly from the ticket.

With the Vendor Ticket open, click on the Purchase Order button on the ribbon, and then click on the Purchase Order context menu.

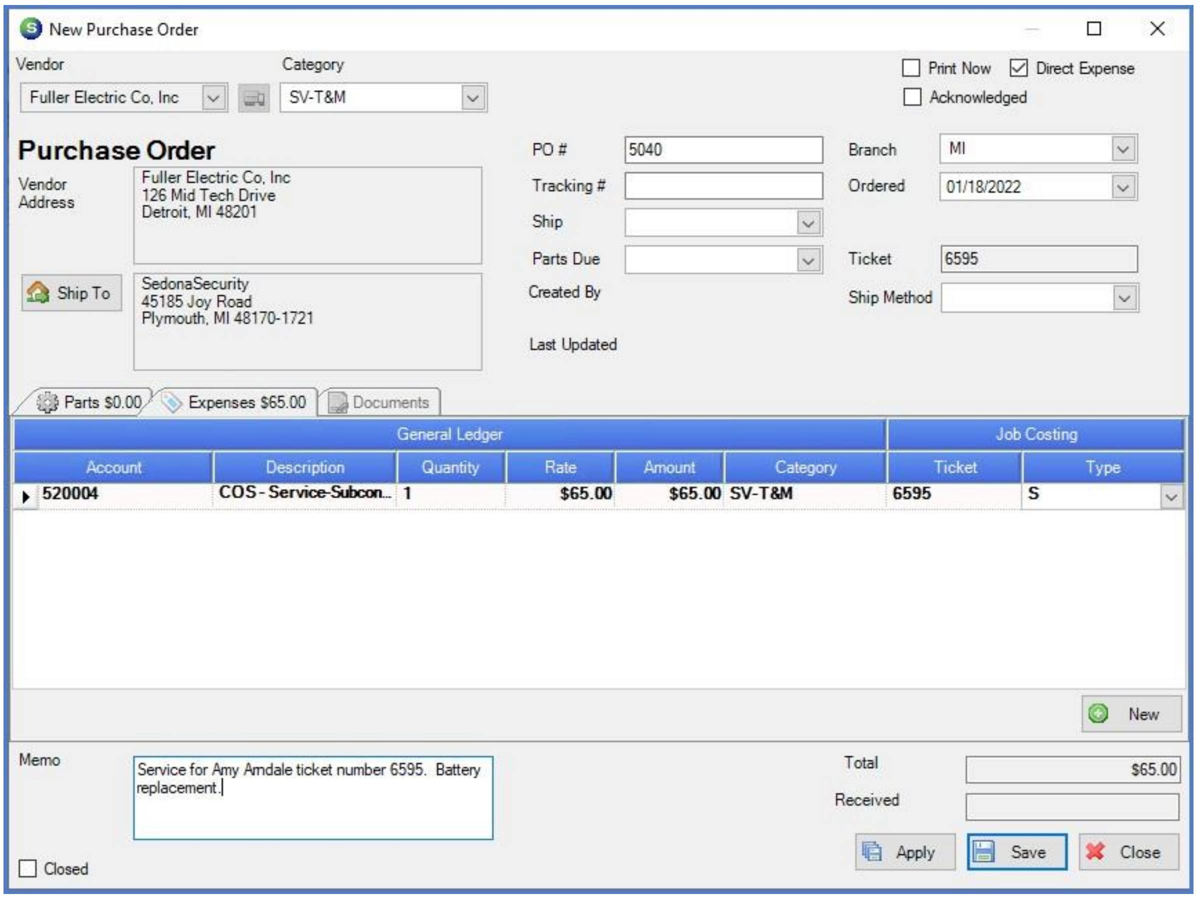
A new ribbon, Create Purchase Order, will be displayed. Click on the Order Service From Vendor button.



The New Purchase Order form will be displayed.

- The Vendor name is automatically filled in.
- Select the appropriate Branch in the header area of the form.
- Click on the Expenses tab and enter or lookup the G/L Account number for the expense.
- Enter the amount and select the appropriate Job Costing Expense Type. If you do not know the exact amount at this time, you may leave the rate field as 0.00. Prior to receiving the PO, you will need to edit the PO and enter the correct rate.
- You may override the Description field that is automatically filled in.
- Enter any additional information into the memo field.

When finished, click on the Save button located at the lower right of the form.



Scheduling Vendor Tickets

Appointments for Vendor Tickets may be created using one of three methods:

- From the ticket by clicking on the New Appointment shortcut button.
- From the Schedule Board using the double-click to create the ticket and schedule the appointment.
- By dragging and dropping the ticket onto the Schedule Board. The “Double-click to Add” method is not available for Vendor Inspection Tickets generated by the Inspection program.

If you need to schedule one of your company Technicians to accompany the Service Provider, these may be scheduled from the Ticket, or by using the Copy and Paste function on the Schedule Board – copy the Service Provider appointment and paste into the Schedule Board for a company Technician timeslot.

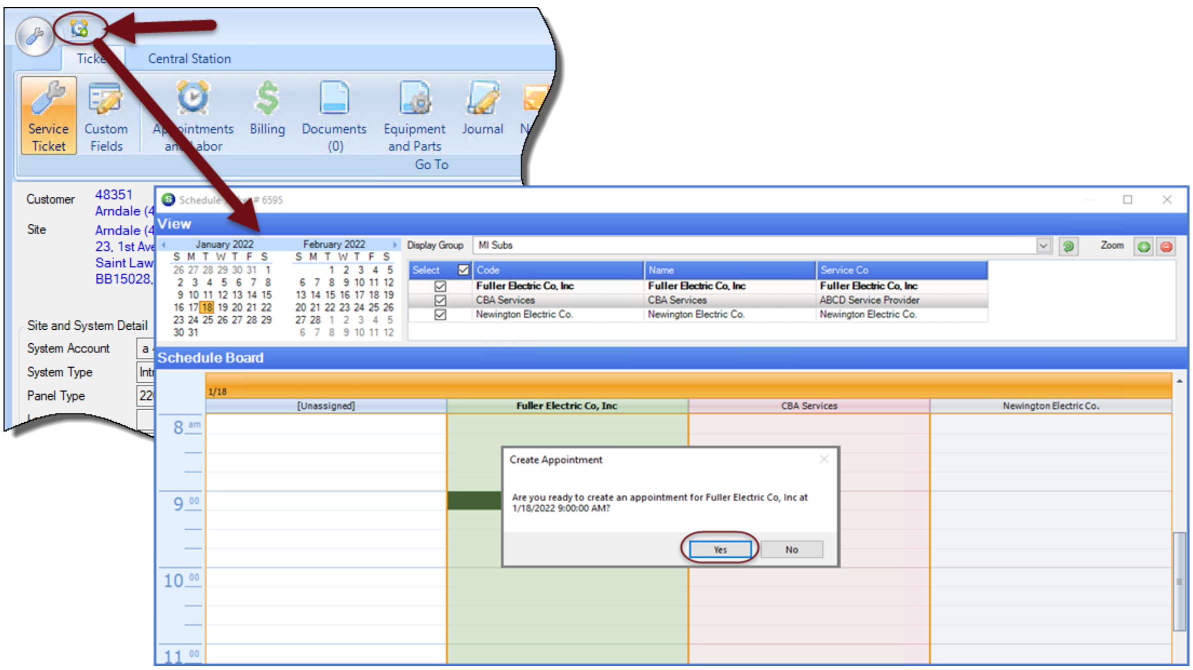
Each method will be described in this section.

Scheduling an Appointment from a Vendor Ticket

To schedule a Service Provider (Vendor) appointment from the ticket, open the Ticket for which you want to schedule the appointment. Click on the New Appointment button at the upper left of the Ticket.

The Schedule Ticket form will be displayed. At the top of the form, change the Display Group to a Service Provider Group – the schedule board will populate with all Service Providers assigned to the Display Group. Select the appointment date on the calendar then double-click on the Service Provider/time-slot to be scheduled.

A message will be displayed confirming the appointment you want to create – click on the Yes button to accept.



Scheduling a Service Provider Appointment from the Schedule Board

Drag & Drop Method

Service Provider (Vendor) appointments may be scheduled from the Schedule Board by using the drag and drop method from the list of Unscheduled Tickets displayed below the Calendar.

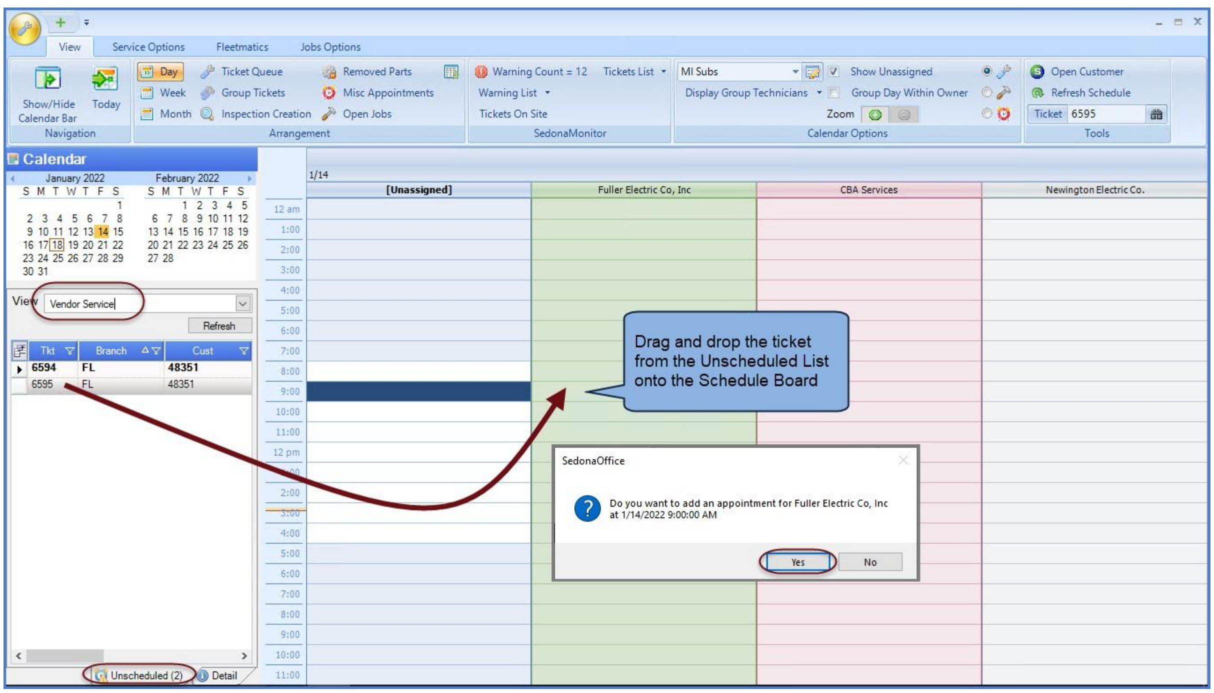
You must have the Day view selected from the Ribbon to be able to drag and drop a Vendor Ticket onto the Schedule Board.

Select the appropriate Display Group which contains your Service Providers.

On the Unscheduled Tickets list, click on the Vendors option at the top of the form.

Determine which date the will be scheduled; click on the date in the calendar to view available Service Providers for the date. Next hold the left mouse button down while on a ticket in the Unscheduled List then drag the ticket to the desired Service Provider column and time-slot, then release the mouse.

When releasing the mouse, a message will be displayed confirming you want to schedule the appointment with the Service Provider on the date and time where you are dropping the ticket; click the Yes button to continue.



Double-Click to Add Method

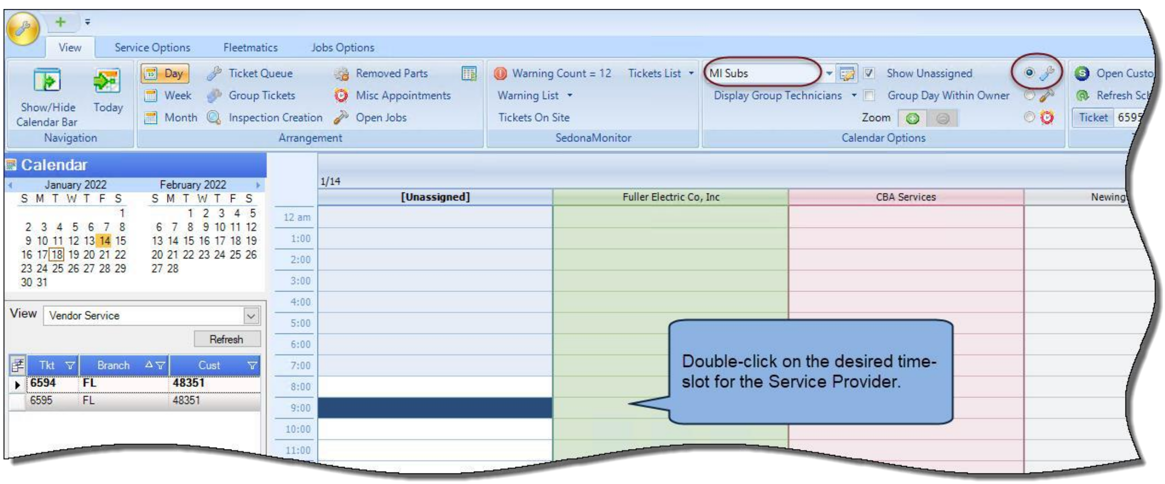
Vendor Tickets may be created and scheduled from the Schedule Board by using the “Double-Click to Add” method, the same as regular Service Tickets.

From the Schedule Board make certain to:

- Click on the Day view from the Ribbon
- Select a Display Group that contains your company’s Service Providers
- On the Calendar click on the date for the appointment to be scheduled
- The Wrench Icon  is selected for the “double-click to add” option

Determine which Service Provider and time-slot will be used for the appointment, and then double-click at that location on the Schedule Board. The Customer Search form will be displayed for locating the account for which the Ticket/Appointment will be created.

Locate the Customer/Site/System for the Ticket and double-click on the row within the search results grid.



The new Ticket form will be displayed. Fill out the data entry fields on the Ticket according to your company’s policies and procedures. Click the Save button when finished. The Ticket is created and saved as a Vendor Ticket and will appear on the Schedule Board.

Processing Vendor Tickets

The Dispatching, Re-Scheduling and Deleting of Vendor Appointments is accomplished in the same manner as a regular service ticket. The same applies to adding parts, ordering parts, reviewing for invoicing and ticket closing. Please refer to these topics earlier in this document for detailed information.

Inspections

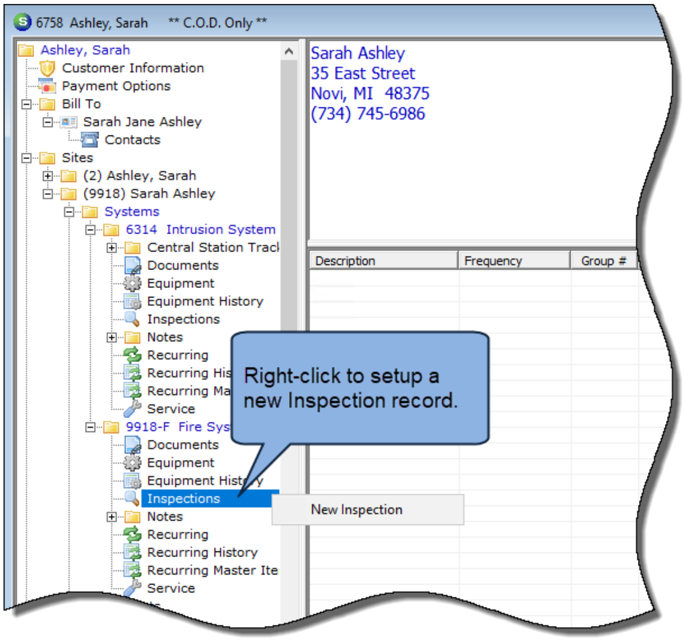
This section is designed to provide information on how to generate bulk Inspection Tickets. This section includes the following topics:

- Setup of Inspection records
- Viewing List of upcoming Inspections
- Creating Inspection Tickets

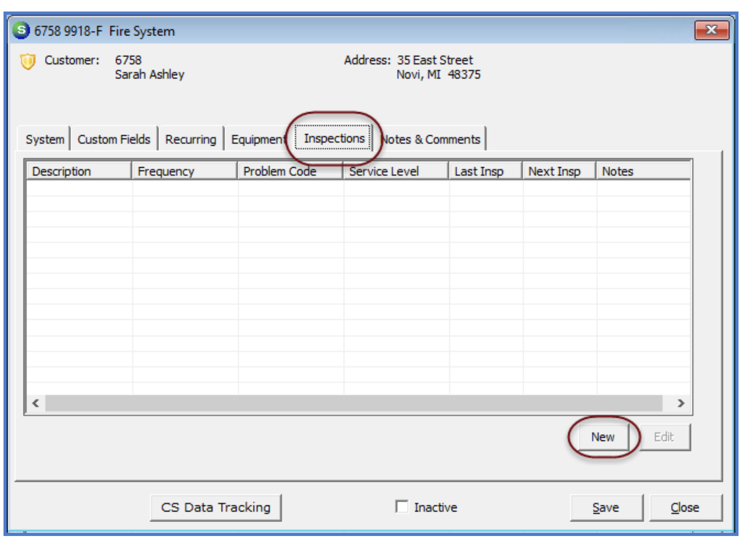
Inspection Setup

The Inspection Ticket generation program within SedonaSchedule creates tickets in bulk based upon the information contained in the Inspection Setup records that are attached to a Customer's System record. It is important to understand how to setup and maintain Inspection information as it will have a direct effect on what information is used to create the Inspection Tickets.

New Inspection records may be setup by right clicking on the Inspections option on the Customer Tree at the System level.



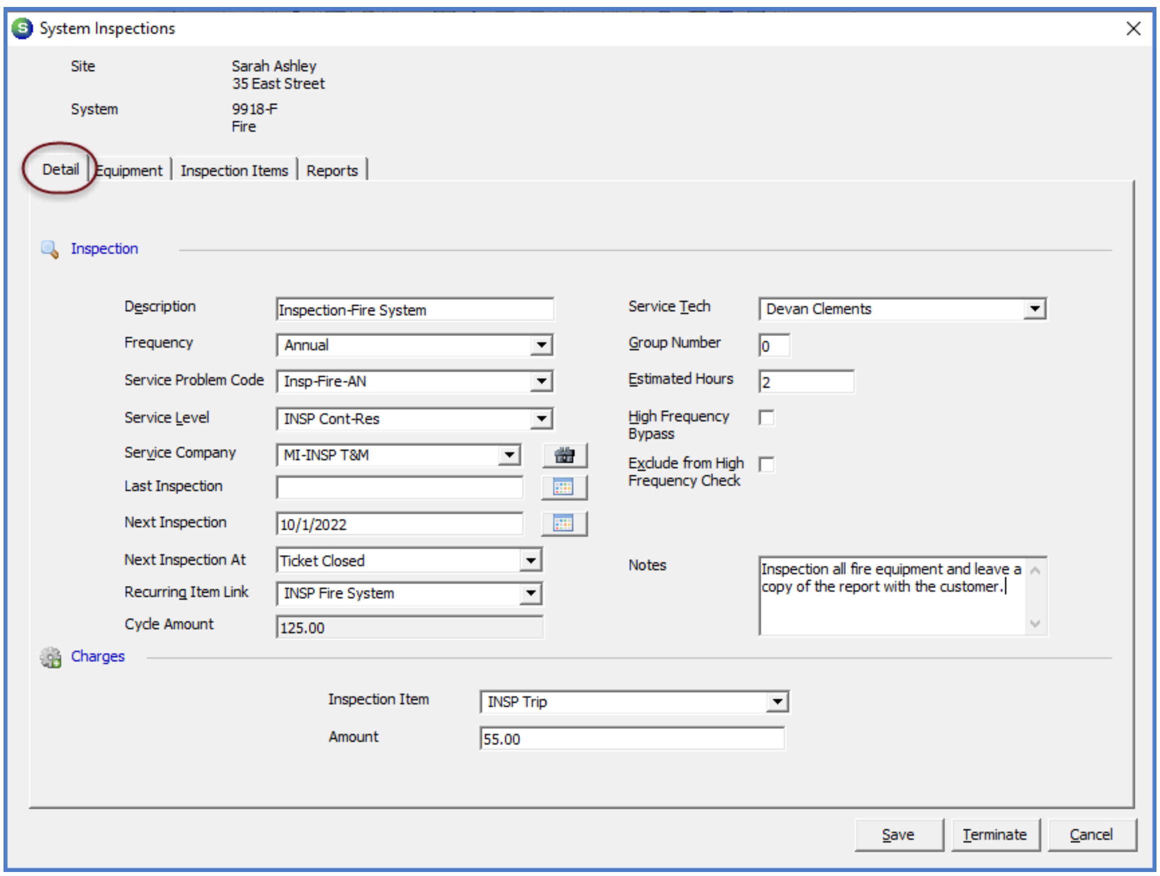
The New Inspection setup form may also be accessed by opening a System record in edit mode, navigating to the Inspections tab [of the system record], and then click on the New button at the lower right of the form.



The System Inspections form is comprised of four tabs: Detail, Equipment, Inspection Items, and Reports.

- **Detail tab** - Information on the Detail tab is required – this is the information used to generate the Inspection Ticket.
- **Equipment tab** – in prior versions of SedonaOffice, this form was used to select parts from the System Equipment that should be inspected. This information would display and print on the Inspection Ticket form. The Inspection Ticket printing has been changed to print all of the parts on the System Equipment List, so this form is no longer needed.
- **Inspection Items tab** – This form is used to list devices and quantities to be inspected. This information is not linked to the System Equipment List.
- **Reports tab** – This form is used to create a list of reports that will be attached to the Inspection Ticket.

The following pages will describe each data entry field (and its purpose) on the Detail form.



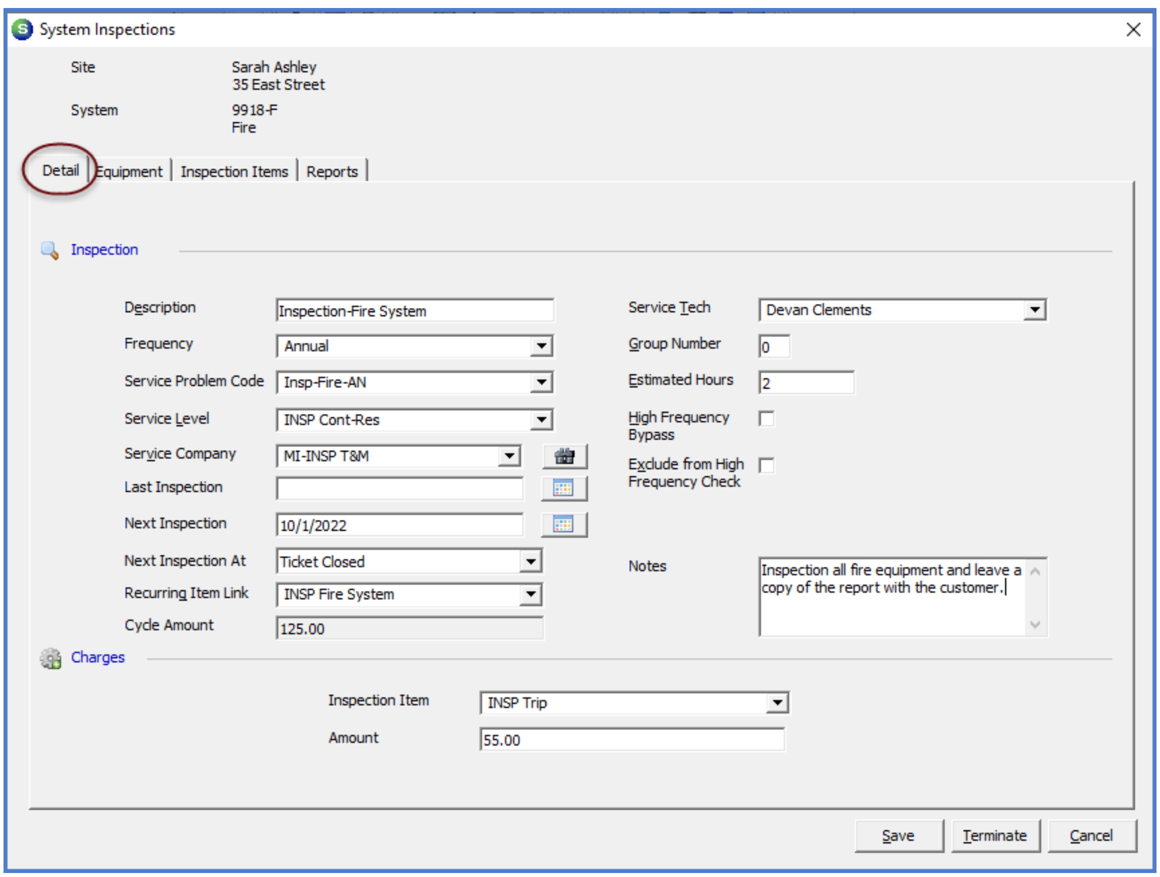
Inspection Setup – Detail form

On the left side of the Inspection Detail form are seven data entry fields – six of these are required; fields which are bolded below are required.

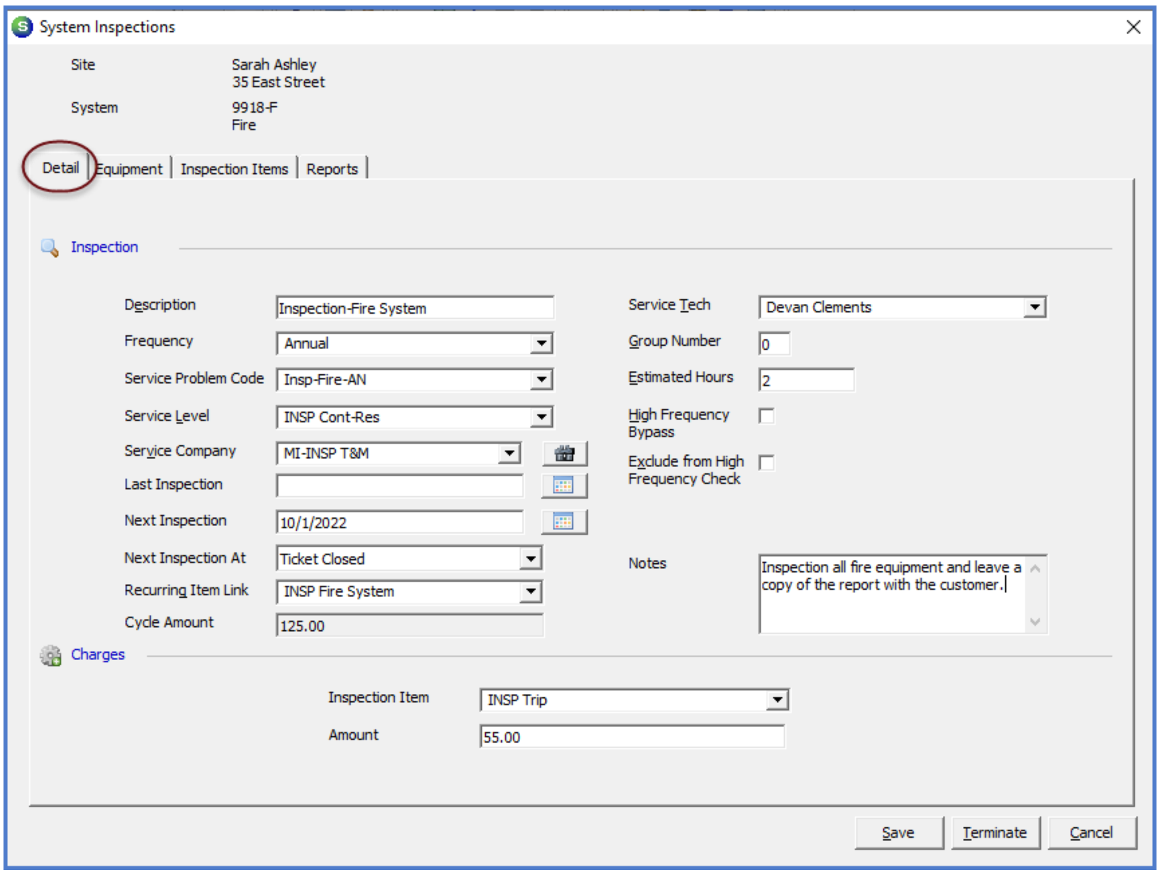
- **Description** – This is a free-form text field to enter information about the inspection – 50-character limit.
- **Frequency** – How often Inspection Tickets should be generated (drop-down list choices controlled by SedonaOffice).
- **Service Problem Code** – Problem Code to be used on the Inspection Ticket.
- **Service Level*** - The Service Level to use on the Inspection Ticket. This determines the billing rules for the Inspection.

  *If the Service Level selected from the drop-down list has been setup to link to a recurring line, two new fields will be displayed below the Next Inspection date field: <u>Recurring Item Link</u> and <u>Cycle Amount</u>; these fields must be populated.

- **Service Company** – The Service Company that will be assigned to the Inspection Ticket. If a Service Provider is selected, once the Inspection Ticket is generated, it will automatically be created as a Vendor Inspection type ticket.
- **Last Inspection** – If the date of the last Inspection is known, that date may be entered here for informational purposes. This is not a required field.



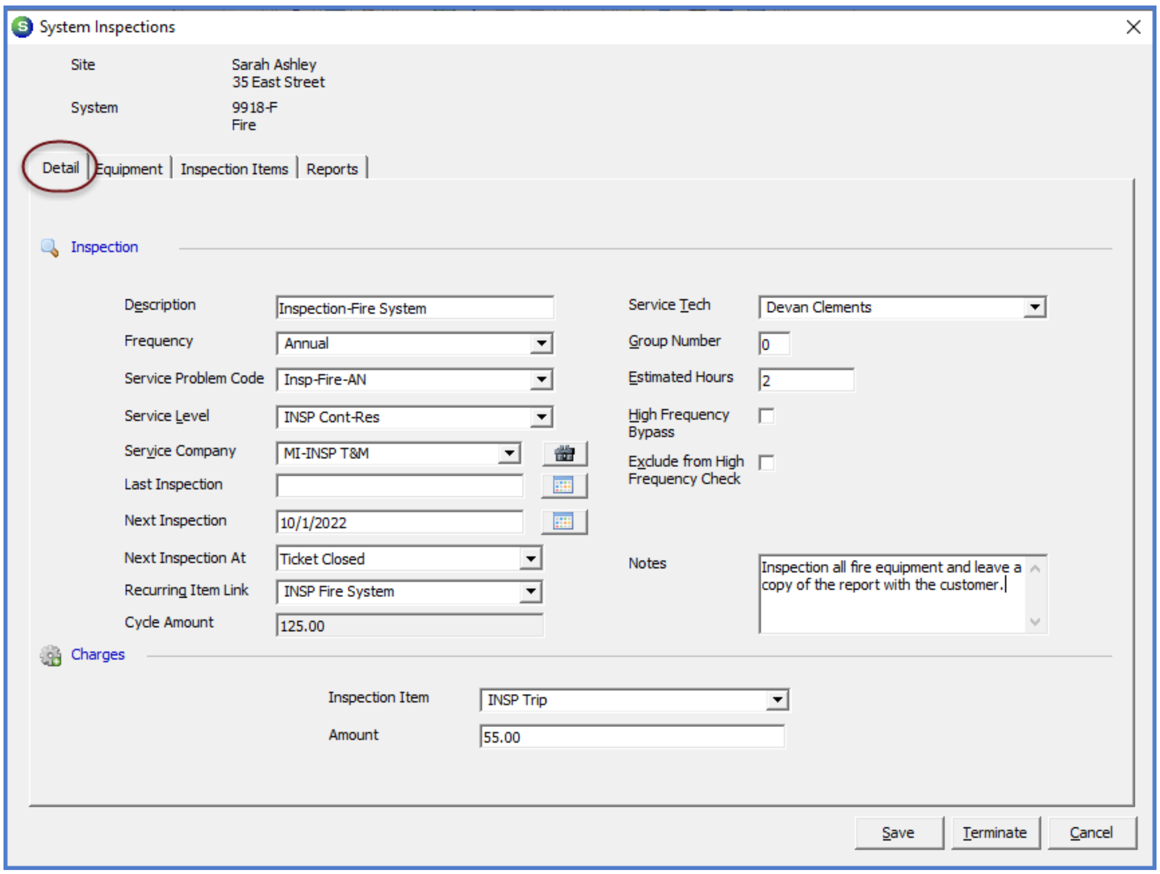
- **Next Inspection –** Enter the date on which the Next Inspection Ticket is due.
- **Next Inspection At** – This field determines at what point the next inspection date should advance on the inspection record.
- **Recurring Item Link –** If the Service Level selected on this form requires the user to link this inspection record to a recurring line, you must make a selection from the drop-down list. If the Service Level does not require linking to a recurring line, this field will not be visible.
- **Service Tech** – A preferred Technician may be selected. When the Inspection Ticket is created, the Technician field on the Ticket form will be automatically filled with this name.
- **Group Number, Estimated Hours, High Frequency Bypass, Exclude from High Frequency Check –** these fields are only used if your company has activated and is using the Group Tickets feature. For more information about Group Tickets, please refer to the Group Tickets topic later in this document.



The Inspection Item and Amount fields are only used if you have a pre-negotiated amount that you will charge the Customer each time the Inspection is performed.

These fields would not be used if you are invoicing the customer for the Inspection through the Cycle Billing process or if you will be billing the customer on a time and material basis.

- **Inspection Item** – If a set fee is to be charged to the Customer each time the Inspection is completed, select the Invoice Item to be used for invoicing the Customer.
- **Amount** – Enter the amount to invoice the customer for the Inspection service.
- **Notes** – Any information entered into this field will automatically create a Note on the Ticket every time an Inspection Ticket is generated. Typically, this is used for special instructions for the Inspector – 1,024-character limit.

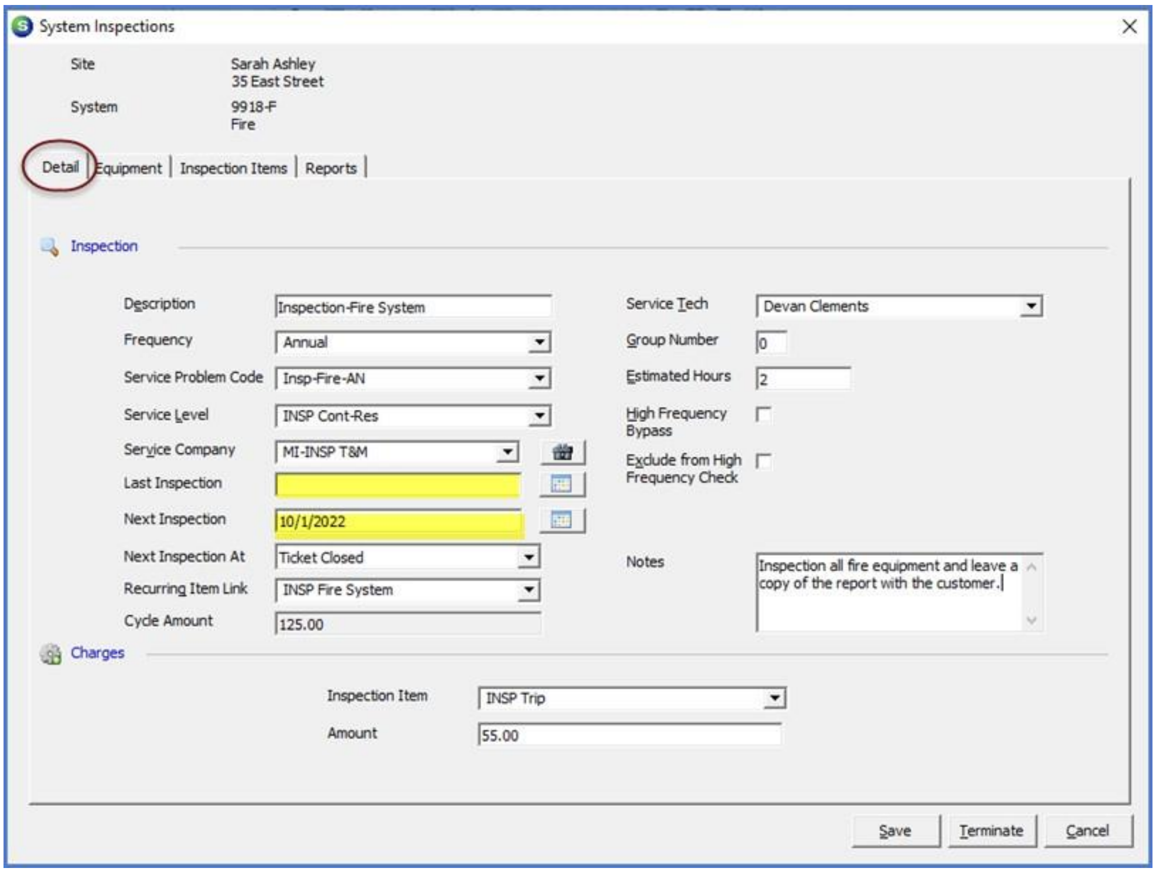


Modifying an Inspection Record

Most of the fields on an Inspection record may be modified if needed. If there are currently any open Inspection Tickets for this inspection record, any changes to this setup will not affect current tickets – only future generated tickets.

Once at least one Inspection Ticket has been generated by the Inspections Program, **never** modify the Last Inspection or Next Inspection date fields. Changing these dates will confuse the software and may stop the generation of future inspection tickets.

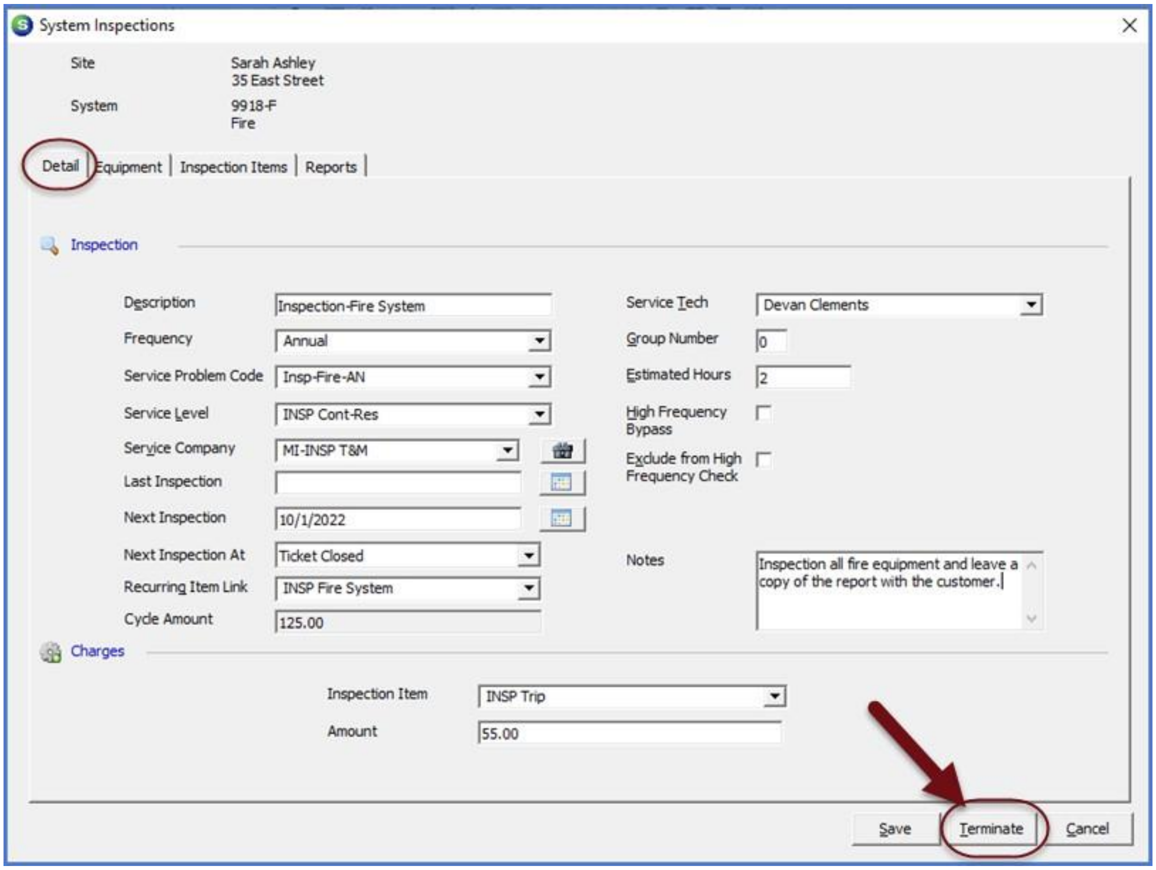
If your company is behind in performing inspections, write down the current inspection setup information, and then terminate this inspection record. You may then create a new inspection record to replace the terminated record.



Terminating an Inspection Record

If a customer no longer wants your company to perform inspections, open the Inspection record and click on the Terminate button. The termination will become effective immediately.

If there are open inspection tickets for this inspection record that you will not be completing, you may close those tickets with a Void resolution code.



Creating Inspection Tickets

From the Arrangement Ribbon Group, click on the Inspection Creation button.

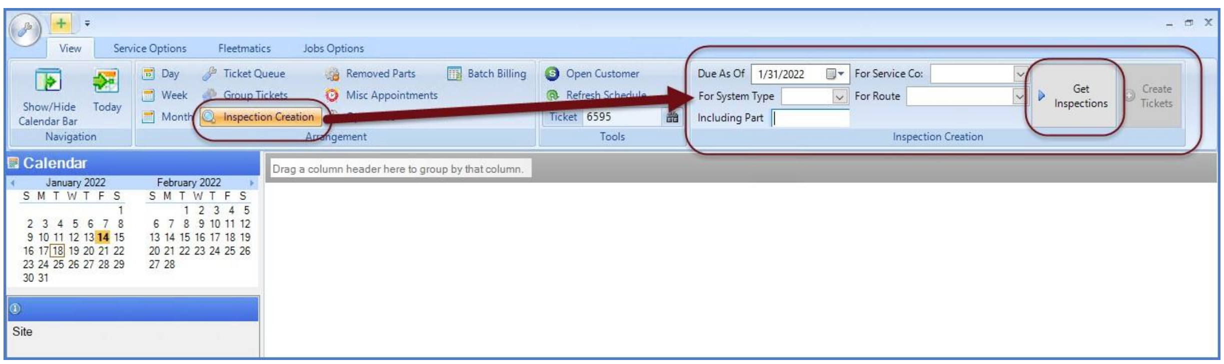
A new Ribbon Group, labeled “Inspection Creation” will be displayed. The fields on this Ribbon Group are used to select which Inspection Tickets will be created.

In the Due As Of field, enter the date through which Inspections Tickets will be created. The “Next Inspection Date” on the System Inspection setup record is used to determine which Inspection Tickets need to be created.

Many companies generated Inspection Tickets 30 days in advance to allow for planning the necessary resources.

If your company operates under multiple branches, and you have created unique Service Companies for each branch, each branch office may generate their own inspection tickets by making a selection in the For Service Co field. If a Service Company is not specified, inspection tickets will be generated for the entire company.

After selecting the Due As Of date, click on the Get Inspections button. This will display a list of all Inspections due by this date. This will not create the Inspection Tickets yet – just provides a list for review prior to creating the Tickets.

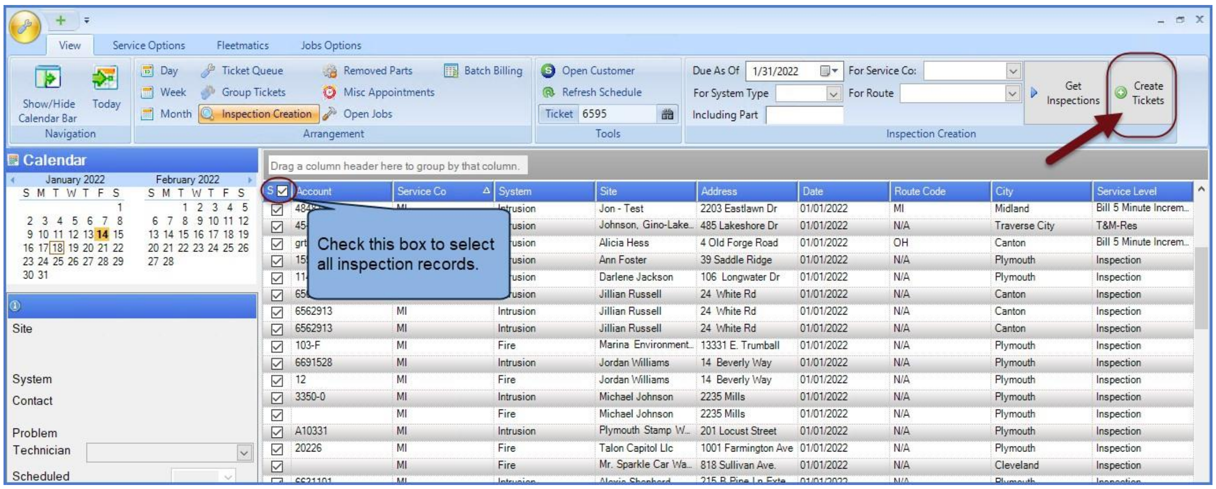


A list of all Inspections that meet the criteria selected will display in the list. By default, none of the Inspection records is selected for ticket creation. To select all Inspections in the list, select the checkbox in the upper left of the header row. If certain Inspection records are to be excluded from ticket creation, un-check the box to the left of those records.

Once you have made the desired selections from the Inspection viewing list, click on the Create Tickets button.

Depending on the number of Inspection records selected for ticket creation, the process may take a few seconds to a few minutes – be patient.

You will know when the Inspection Ticket creation process is complete when the list of Inspections is empty (if all inspection records were selected) or the list of un-selected Inspections is all that is shown remaining in the Inspection List.



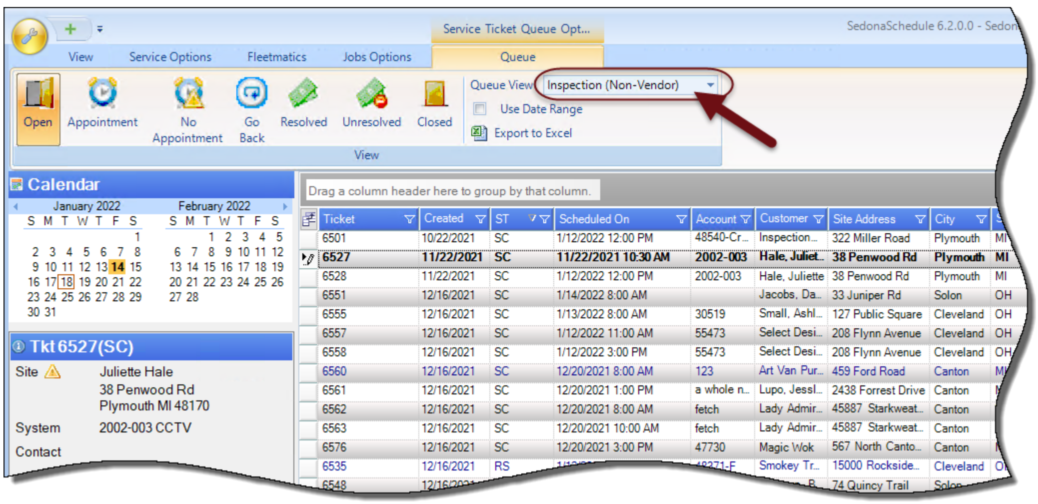
Once the Inspection Tickets have been created, they are viewable from the Ticket Queue(s).

As previously mentioned, Inspection Tickets are processed in the same manner as regular Service Tickets.

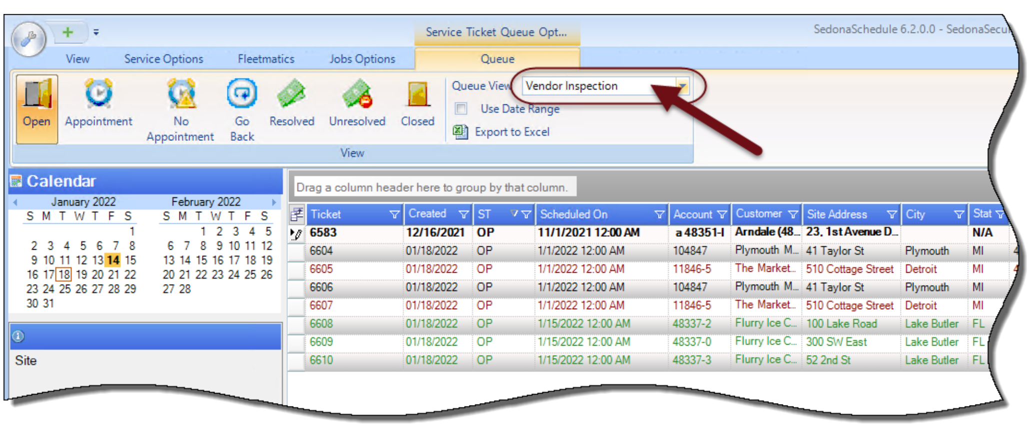
Note: Within the Ticket Queue, the Schedule On date field will display the date on which the Inspection is due to be completed. This does not schedule an appointment for the Inspection Ticket - it is just a reminder to the staff member who schedules the Inspections, when the Inspection Tickets need to be completed. Once an Appointment is scheduled, this field will update with the Scheduled Appointment Date/Time.

⚠ **Important Note:** If the Inspection Ticket is not completed and closed on a timely basis, the next Inspection Ticket may not be created when needed. For example, if Inspections are due quarterly, if the current Inspection Ticket is not completed and Closed prior to the next due date, a quarter will be missed.

Ticket Queue - Company Inspection Tickets



Ticket Queue - Vendor Inspection Tickets



Additional Features

This section is designed to provide information on additional features available within SedonaSchedule. Topics in this section include:

- Miscellaneous Appointments
- “Firm” Appointments
- Clock-out and Clock-in
- Copy and Paste Technician Appointments

Miscellaneous Appointments

A feature of SedonaSchedule is Miscellaneous Appointments. A miscellaneous appointment may be scheduled to block out time on the Schedule Board to indicate the Technician is not available to be scheduled for tickets or jobs.

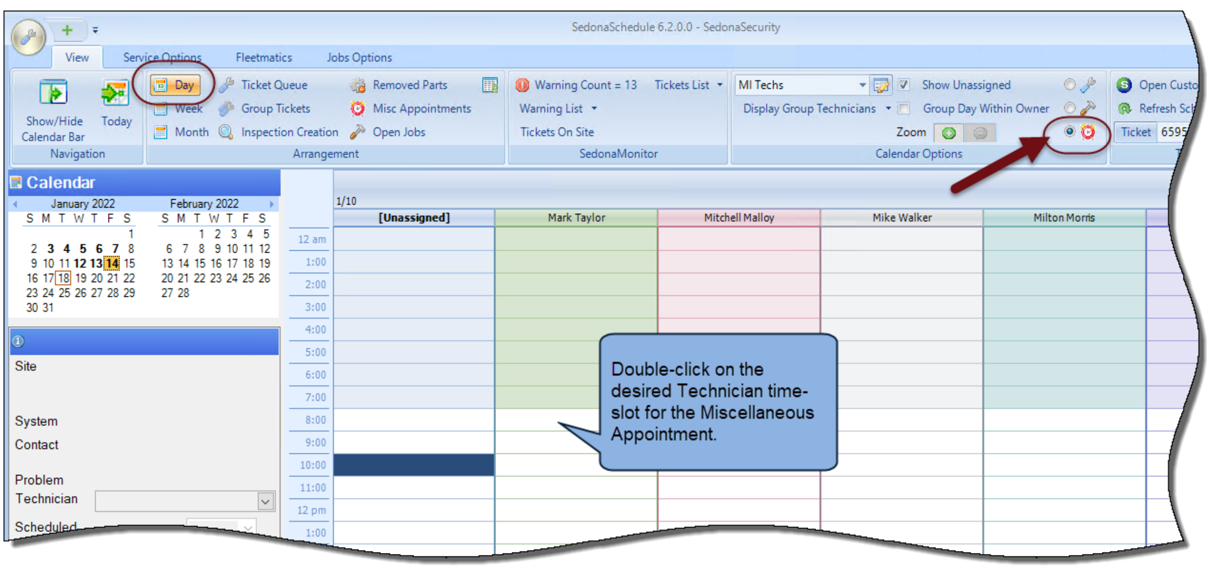
You may schedule a miscellaneous appointment for one or multiple Technicians at the same time. These appointments may be for a single day, a portion of a day or several consecutive days. For example, if several Technicians will be attending a meeting on the same date and time, you may setup all of these appointments at one time.

To schedule a miscellaneous appointment, follow the instructions below and on the following pages.

Creating a Miscellaneous Appointment

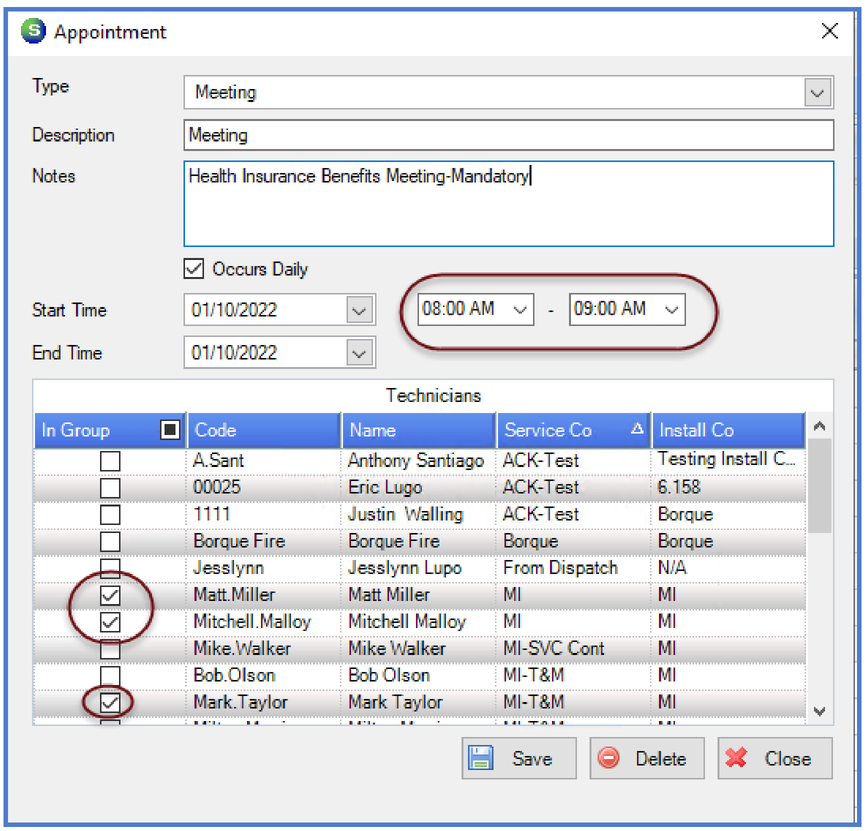
From the Calendar Options Ribbon Group, click on the Miscellaneous Appointment radio button. Click on the Date within the Calendar for which the appointment will be created. Make certain that you have selected the Day view from the Arrangement Ribbon Group. Miscellaneous Appointments may not be created from the Week or Month view.

Within the Schedule Board double-click on the begin time within the column of the Technician to be scheduled for a Miscellaneous Appointment.

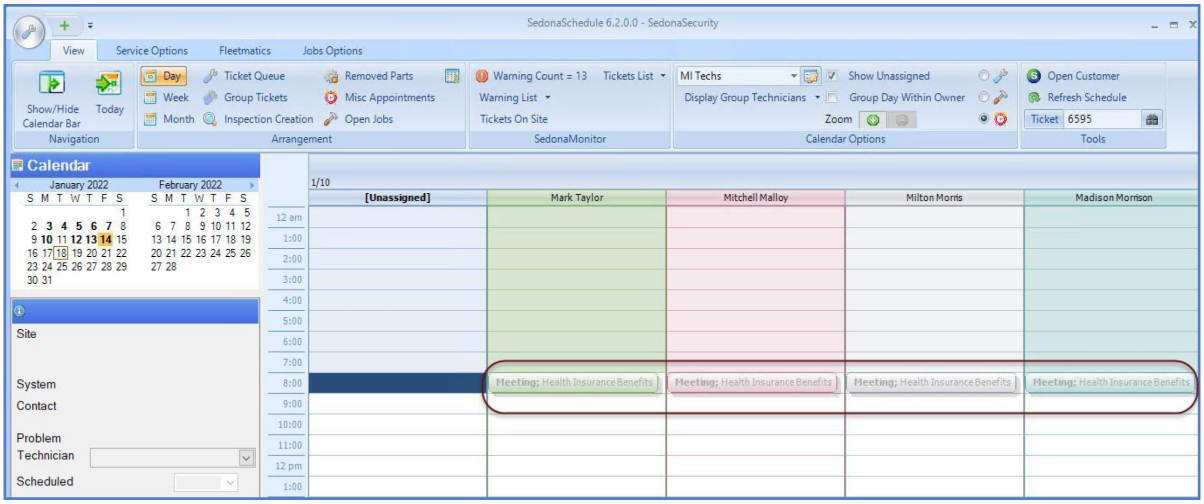


The Appointment form will be displayed. Enter information into the fields as described below. When finished click on the Save button to create the appointment(s).

- **Type** - Select the appointment Type from the drop-down list. The software contains several default appointment types – your company may add more choices to the list. Consult your company system administrator to add selections to the available list.
- **Description** - This field will auto-fill with the description associated with the Type; the User may change this if desired.
- **Notes** - Notes are optional; the User may enter up to 256 characters in this field. Any information entered into the Notes field will be viewable from the Schedule Board when hovering over the Miscellaneous Appointment.
- **Start Time & End Time** – Select the date range for the appointment
- **Time Range** – Enter the beginning and ending time for the appointment
- **Technicians** – If more than one Technician is to be scheduled for the same date/time, check the box to the left of each Technician name to be included.



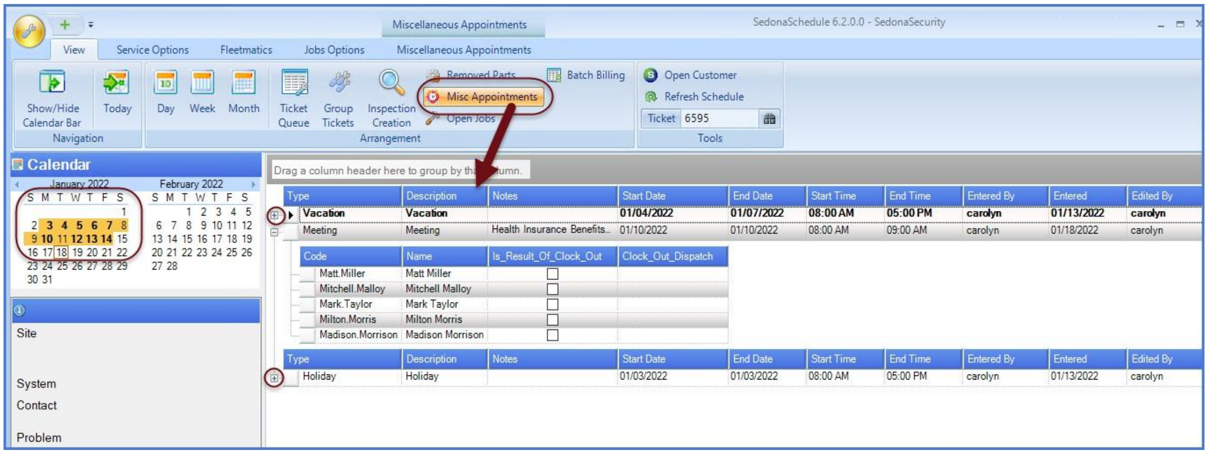
Once the Miscellaneous Appointment(s) has been saved, it will appear on the Schedule Board.



View List of Miscellaneous Appointments

To view a list of all scheduled Miscellaneous Appointments, click on the Miscellaneous Appointments button from the Arrangement Ribbon Group. On the Calendar, highlight the dates you want to include.

Miscellaneous Appointments are listed in groups by Service Company and appointment Type. To expand the group and view the individual appointments, click on the "+" symbol to the left of the group. If you need to make any changes, add notes or just want to view the details of the appointment, double-click on the appointment to open.



Firm Appointments

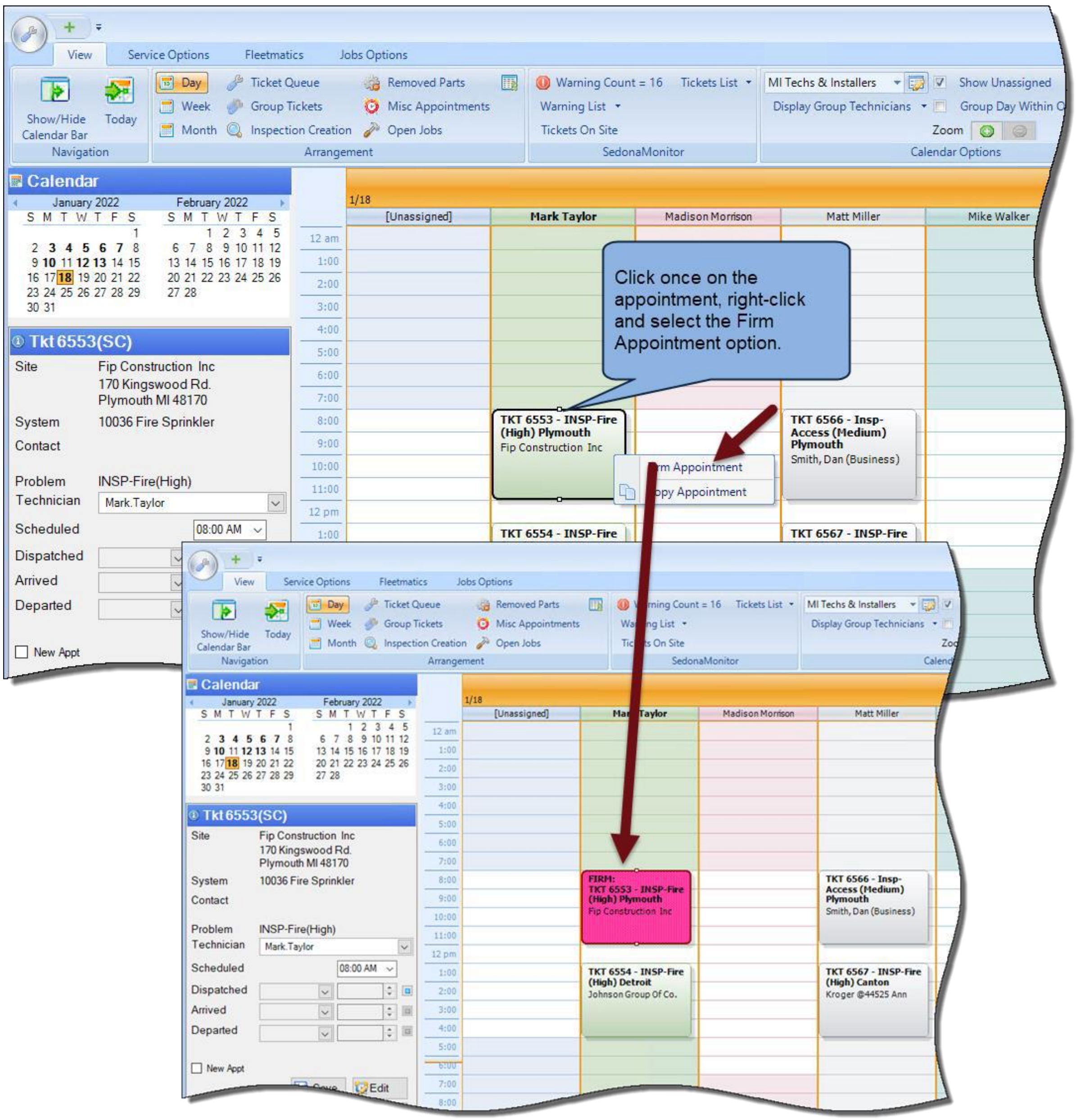
A “Firm Appointment” is one that must be completed on the scheduled date and time and should not be changed. Once an appointment has been marked as “Firm”, it may not be moved or modified within the Schedule Board unless the User removes the “Firm” flag. The Firm Appointment option may be used for Ticket or Job appointments.

Marking an appointment as Firm, locks down the date/time and Technician for the appointment. While that appointment is locked, several restrictions are put into place by the software:

- Users cannot drag-and-drop a firm appointment to a different time-slot or to another Technician on the Schedule Board.
- You cannot “drag-adjust” the length of an appointment on the Schedule Board (i.e. grabbing the top or bottom of an appointment and increasing or decreasing its length).
- Within the Ticket and Job Dispatch Form, a checkbox labeled “Firm Appointment” is displayed. This works identically to the right-click option from the Schedule Board. When an appointment is firm, you cannot change the Technician, estimated length of time, or the scheduled date or time within these forms.

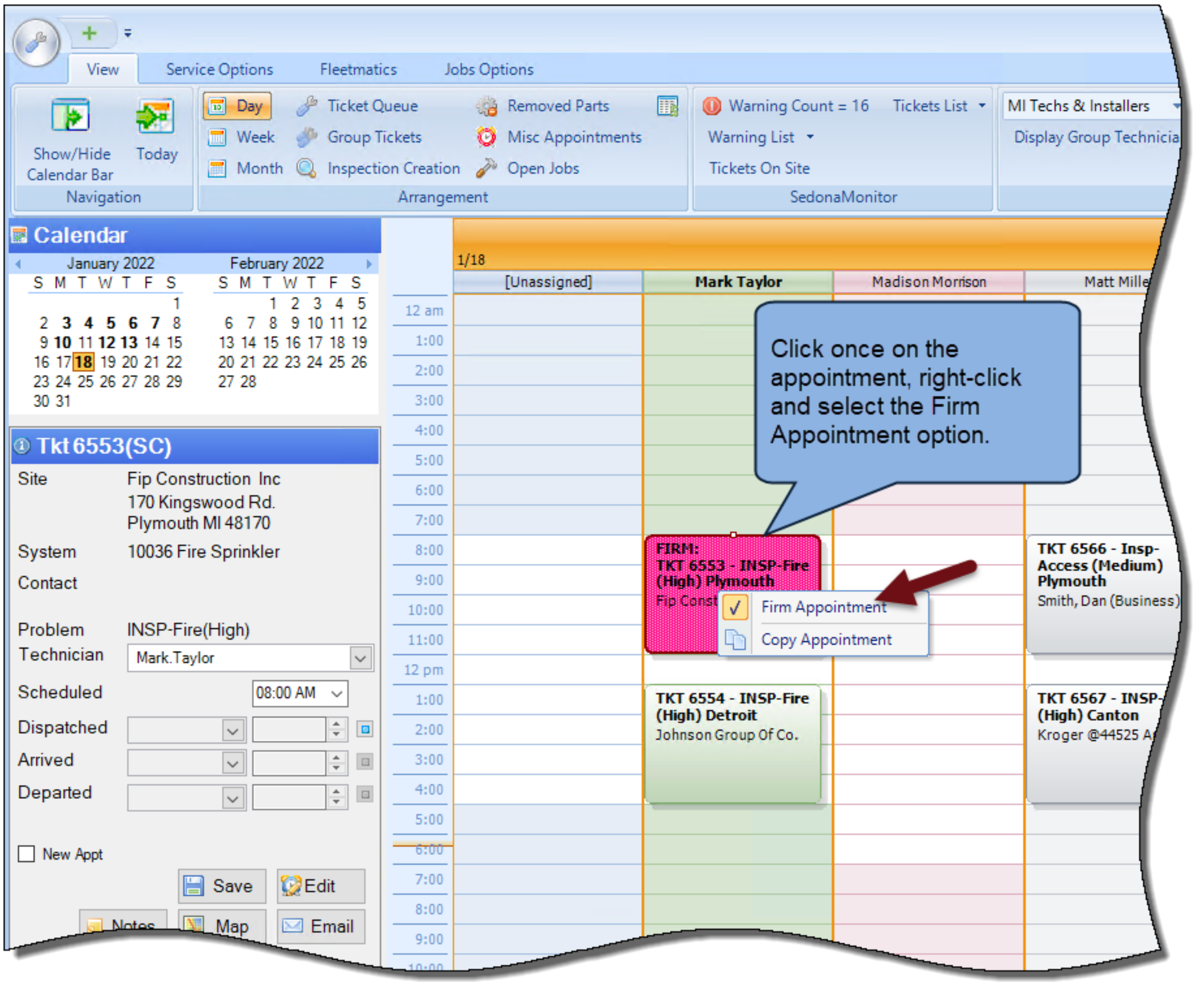
Flag an Appointment as “Firm”

Flagging an appointment as “Firm” is performed from the Schedule Board with the Day view selected. Click once on the appointment, right-click and select the Firm Appointment option. The background color of the appointment will change to bright pink and the word “Firm” will be display above the Ticket or Job Number.



Remove the Firm Flag

If the Firm Flag needs to be removed, click once on the Appointment within the Schedule Board, right-click and select the Firm Appointment option. This will remove the Firm Flag.



Appointment Clock-out & Clock-in

The Clock-In/Clock-Out feature set facilitates managing downtime for Technicians and Installers. The time span allotted for the Ticket or Job remains constant with the transitions from clocked-out to clocked-in, ensuring that a scheduler always knows when an employee is free or busy.

The Clock-out & Clock-in is initiated from the Schedule Board by right clicking on an appointment where the Technician has been marked as "On-Site" (green background color of the appointment).

When Clocking-out on an Appointment, the software automatically creates a Miscellaneous Appointment for the period of time the Technician is "Clocked-out". When a Clock-in is performed, the Miscellaneous Appointment is ended and a new "continuation" Appointment for the Ticket or Job is created for recording time against the Ticket or Job.

Typical uses of the Clock-out & Clock-in feature would be:

- The Technician may take a lunch break during the scheduled Ticket or Job appointment.
- The Technician must leave the Site to pick-up parts, but plans on returning.
- The Technician must leave to assist at another Site, but plans on returning.

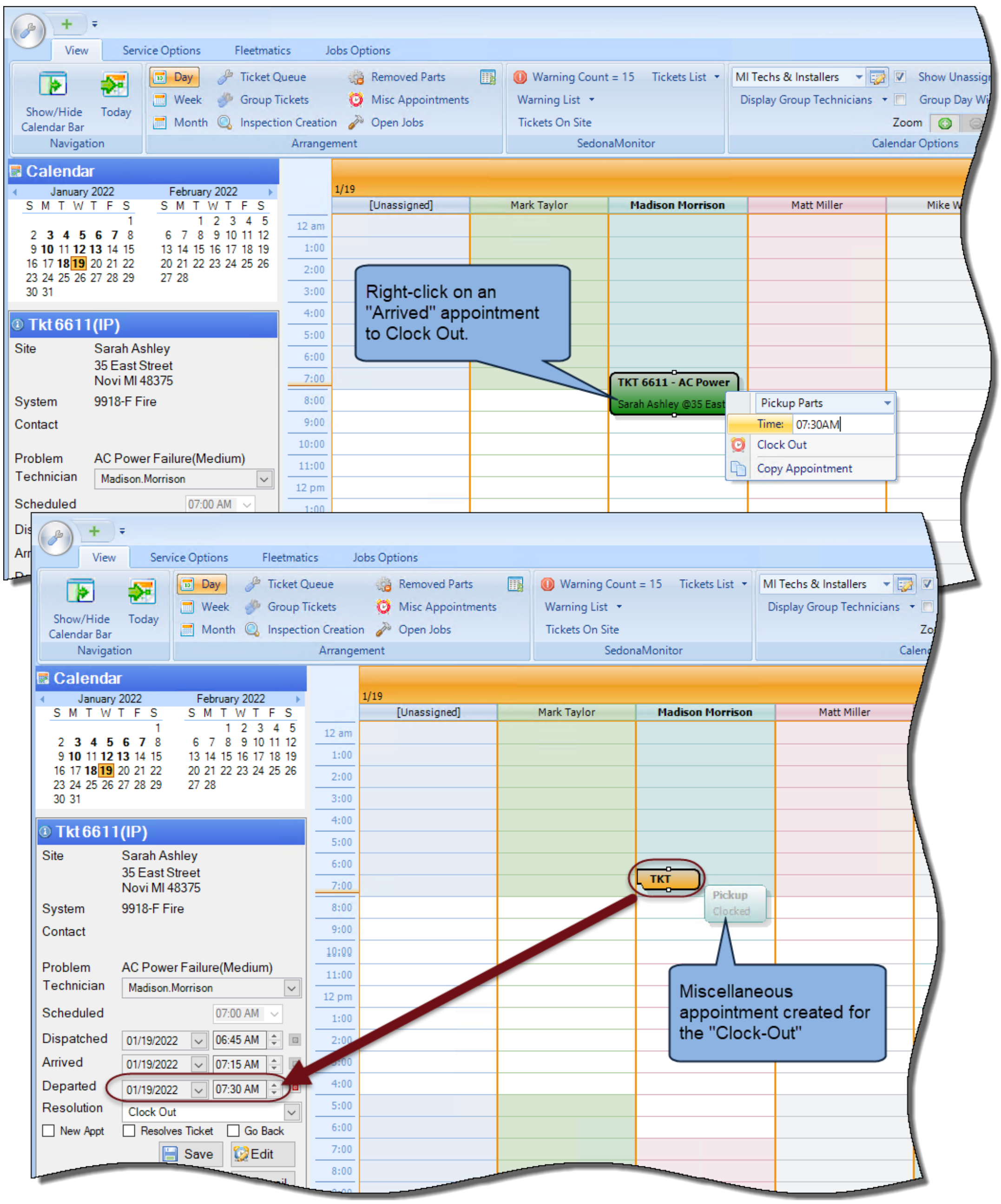
Clocking-out will prevent labor hours and costs from being applied to the Ticket or Job.

There are restraints placed on the times that can be entered for clocking in and clocking out. The time of a clock-out must be later than the dispatch time. Likewise, clocking-in (on a miscellaneous appointment) must have a clock-in time later than the start of the appointment.

Appointment Clock-out

From the Day view of the Schedule Board, click once on the appointment then right-click to open the Clock-Out form. Within the Clock-out form, select the Clock-out type and enter the clock-out time.

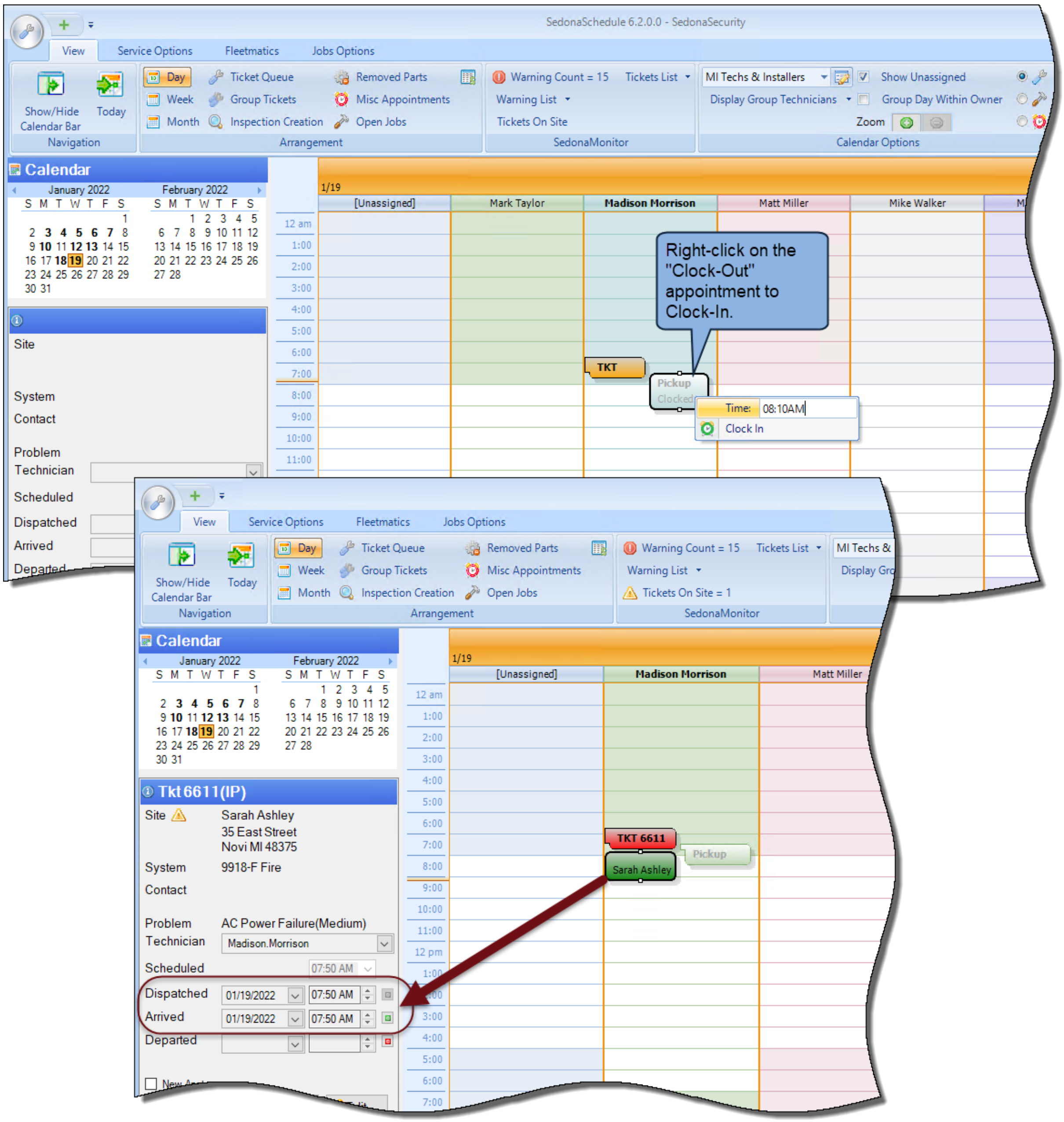
In our example, the original appointment was dispatched at 6:45am and arrived at 7:15am. The clock-out was done at 7:30am. The clock-out action automatically entered a departed time of 7:30am on the original appointment, and then automatically created a Miscellaneous appointment that began at 7:30am.



Appointment Clock-in

When ready to Clock-in to the appointment, click once on the Appointment, right-click to enter the clock-in time and then click on the Clock In button.

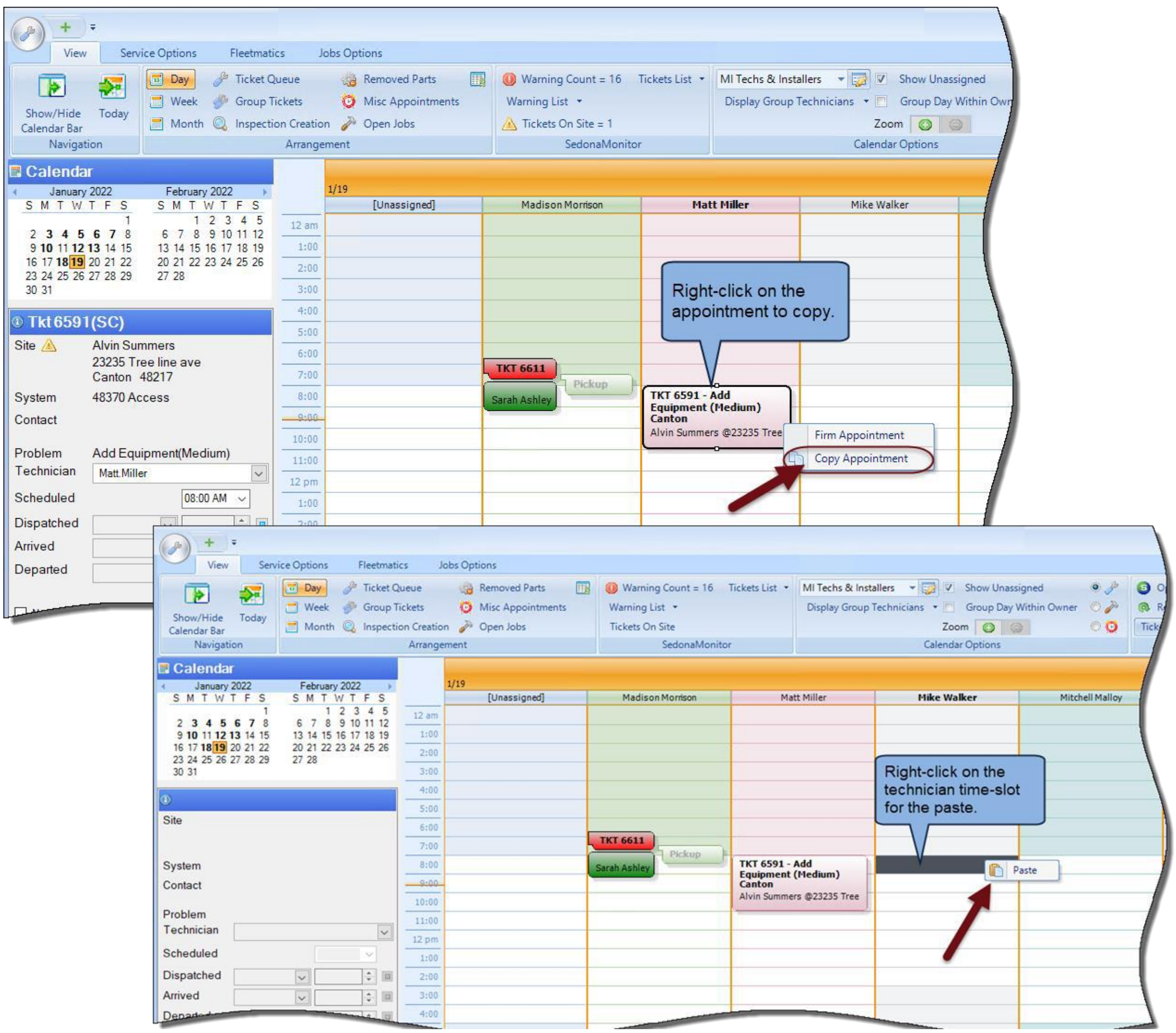
In our example, we clocked-in at 8:10am. The clock-in action automatically entered a departed time of 8:10am on the miscellaneous appointment, and then automatically created a new technician appointment that began at 8:10am.



Appointment Copy & Paste

If more than one appointment needs to be scheduled for a Ticket or a Job, the quickest method is to use the Copy and Paste feature from the Schedule Board. Appointments may be copied and pasted to the same Technician on the same day, a different day or to a different Technician on the same or different day.

To use the Appointment Copy and Paste feature you will begin from the Schedule Board in the Day view. Click once on the Appointment to be copied, right-click and select the Copy Appointment option. Next click on the Technician/time-slot desired for the copied appointment, right-click and select the Paste option.



Delete a Ticket

Users with appropriate permissions are able to delete a Ticket if:

- No financial transactions have been posted to the ticket (the Journal Detail is blank)
- No Purchase Orders have been created for the ticket
- The ticket has not been invoiced
- No parts have been added to the ticket (the Journal Part Reconcile is blank)
- No appointments have been scheduled for the ticket

If a user does have permissions to delete tickets, they may do so as long as none of the five criteria conditions listed above exist for the ticket.

We do not recommend deleting any tickets since this will affect metric reporting for your company. Rather than deleting a ticket, we suggest that you create a resolution code labeled Void, and use that code on tickets that will not be performed. This will preserve your ticket history.

If your company opts to allow certain users to delete tickets, refer to SedonaSetup/User Group / Application Access SV area, "Delete Tickets". If the user does not have this permission granted, they will not be able to delete a ticket.

Note: **Never delete an Inspection type of ticket, as this will affect the correct advancing of the next inspection date.**

Group Tickets Overview

Group Tickets were designed primarily to be used with Inspection Tickets, however may be used with regular Service Tickets as well. The concept for this feature is to provide the ability to group several tickets together and be able to schedule technician appointments for the group of tickets and be able to invoice the customer for work performed on multiple tickets within the group on a single customer invoice.

Additional functionality allows the User to link an Inspection Setup record to a recurring line. Once the Inspection ticket has been completed, this will mark the recurring line to be available for cycle invoicing. Modifications have been made to the cycle invoicing program to allow users to perform cycle invoicing for recurring lines linked to inspection records separately from the non-inspection linked recurring.

The Service Level setup has been modified to indicate whether an Inspection Record must be linked to a recurring line when selecting the particular service level on the inspection setup form.

Note: To activate and use the Group Tickets functionality, you must contact Bold Group Support to turn on this feature for your company.

Group Ticket Concepts

Group Tickets processing was designed primarily for use with Inspections, however this functionality may be used with regular Service Tickets as well. Inspection Ticket Groups are pre-defined within the Inspection Setup records.

When Inspection Group Tickets are created, one Ticket is considered the “Master Ticket”, and to this master ticket, one or many other Tickets are linked.

Group Tickets are designed primarily to invoice a customer for services performed on multiple tickets on one invoice. Appointments may be scheduled and dispatched for the “Ticket Group” utilizing a special scheduling form within the Master Ticket of the group.

Once the Inspection Tickets are generated into their pre-defined groups, a User has the option of either removing one or more tickets from the group or adding one or more tickets to an existing group. Both Regular Service Tickets and Inspection Tickets may be manually added to an existing Ticket Group as long as the Tickets are within the same customer Site.

Regular Service Tickets must be manually grouped if this is desired for the purpose of scheduling, dispatching and invoicing the tickets together as a group.

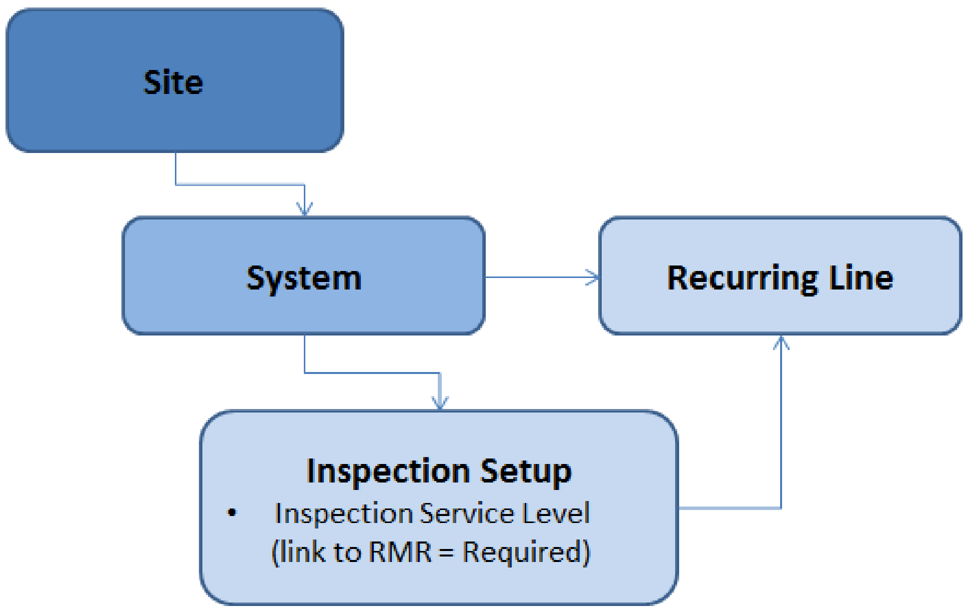
Inspection Linked to Recurring Line

There are two basic options available when determining how to use Group Inspection Tickets:

- Link an Inspection Record to a Recurring Line
- Setup an Inspection without a Link to a Recurring Line

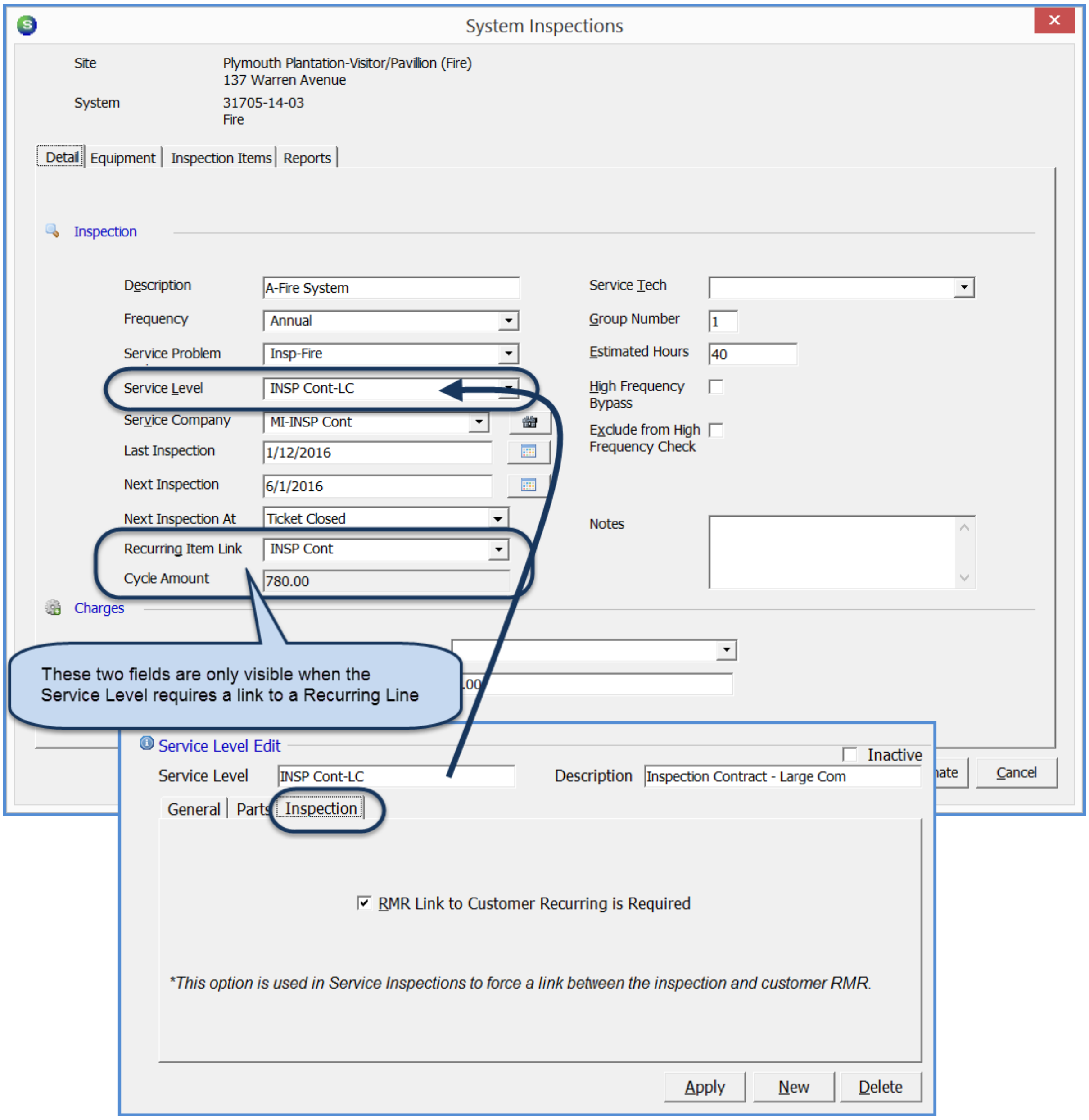
Using the option of linking an Inspection Setup record to a Recurring Line will allow you to cycle bill the inspection services separately from other recurring services if desired. Inspections may only be linked to a recurring line if the Service Level selected on the Inspection setup form has been flagged to require a link to a recurring line.

If an Inspection Setup record is linked to a Recurring Line, when the ticket(s) is closed, the recurring line to which the Inspection Setup record is linked will be flagged as ready to invoice in the cycle invoicing program.



Inspection Groups & Inspection Linked to a Recurring Item

Fields are available on the Inspection Setup and the Service Level Setup forms to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Line.



Inspection Groups & High Frequency Inspections

Inspection Groups are used to group multiple Inspections and invoice the group of inspection tickets on a single invoice for charges that are not billed through the cycle billing process. A new feature, High Frequency Omit, manages Inspection Ticket creation where multiple inspections are performed at different frequencies.

For example, your customer has contracted with your company to inspect their Fire System. This contract requires that your company perform:

- Quarterly visual and physical test of the fire pump monitored points
- Semi-annual test of sprinklers, water flow switches
- Annual test of all equipment including sprinklers and water flow switches.

You would set up each of these as separate inspections and flagged as High Frequency Inspections. If all Inspections were to begin on June 1st, when you generate your inspection tickets for June, the only ticket created will be the annual inspection since it is the least frequent.

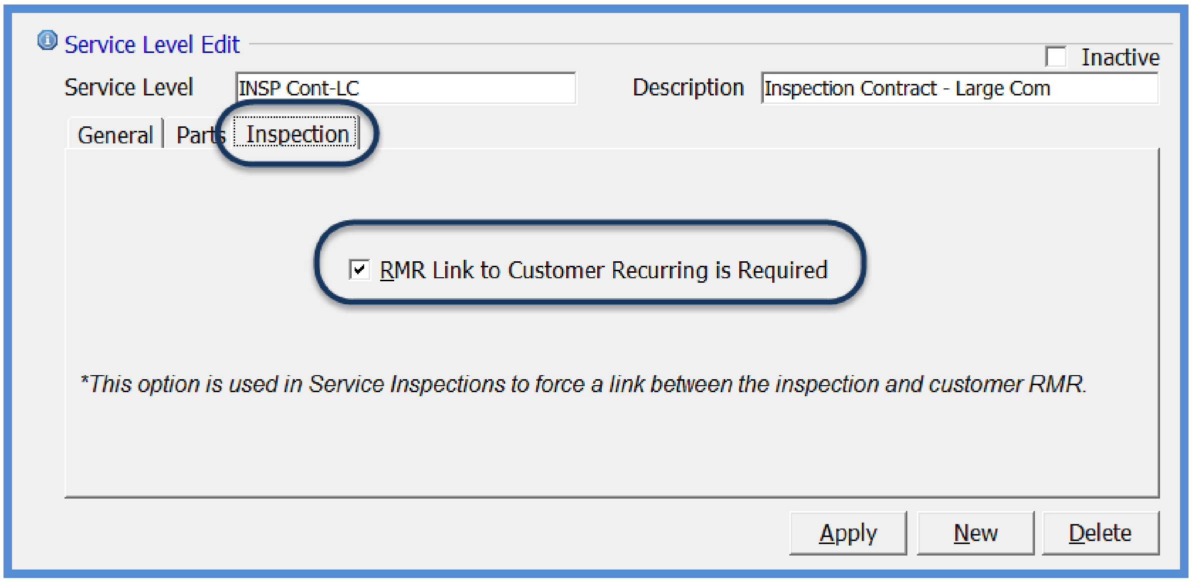
The quarterly and semi-annual inspection records will be advanced to the next logical inspection date. When Inspection Tickets are generated for the month of September, only the quarterly inspection ticket will be created.

Group Tickets Setup

If you will be linking your Inspection records to a recurring line, then you will have to setup at least one Service Level that requires linking.

Service Level Setup

The Service Level setup is maintained within SedonaSetup. A new tab labeled *Inspection* was added to the Service Level setup form. If the checkbox [RMR Link to Customer Recurring is Required] is selected on this form, then any Inspection created selecting this Service Level will require the User to link a recurring item to the Inspection.

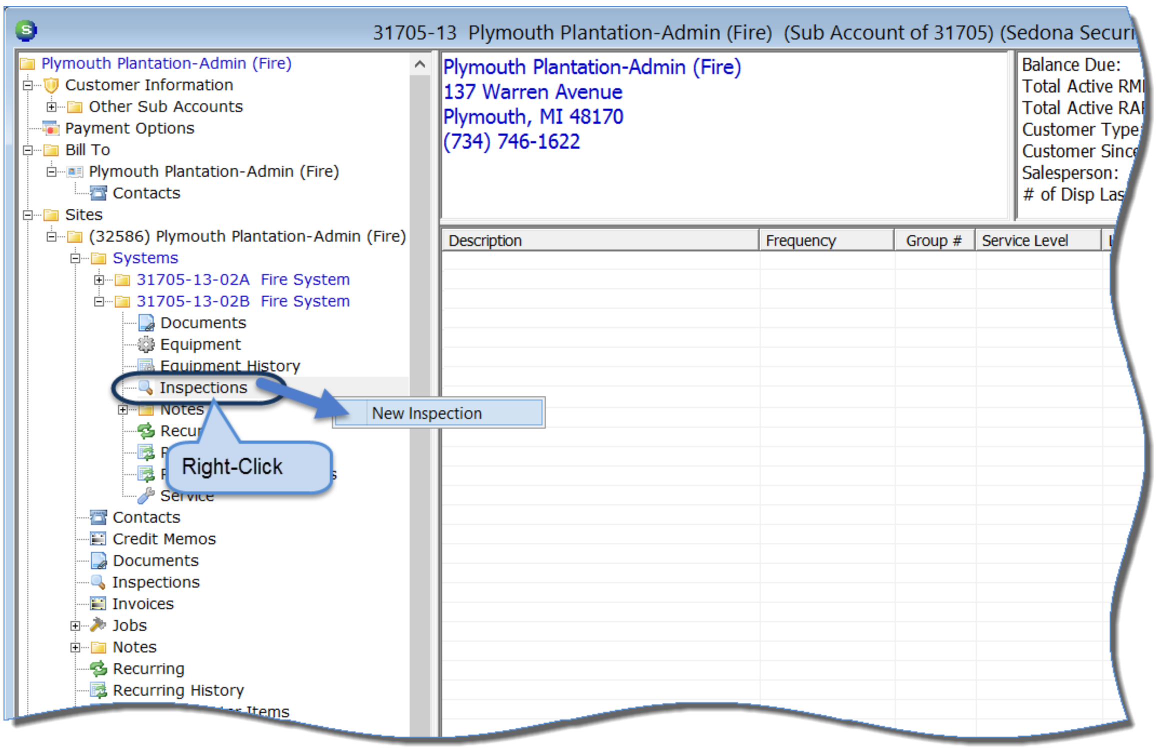


Inspection Record Setup

New Inspections are setup from the Customer Explorer within a System record. Fields are available on the Inspection Setup form to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Item. If you will be linking the Inspection to a Recurring Item, you must first setup the Recurring Line(s).

Creating a New Inspection Record

From a Customer Explorer record, expand the Customer Tree to the System where the Inspection will be created. Highlight the customer tree option Inspections, right-click and select the option New Inspection.

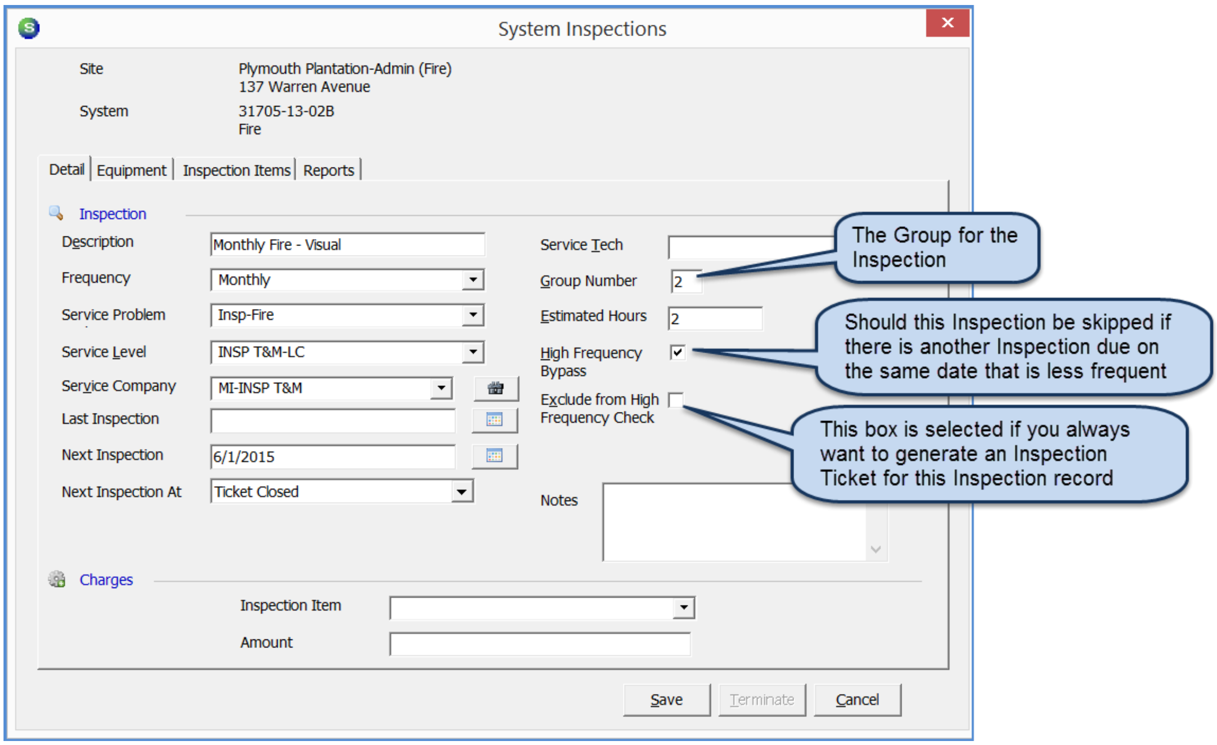


The Inspection Setup Form

There a three key fields on the Inspection Setup form pertaining to the Group Tickets functionality:

- Group Number
- High Frequency Bypass
- Exclude from High Frequency Check

Depending on which inspections need to be generated and when, determine how these fields will be used.



The Group Number assigned to Inspection records tells the software which inspections should become part of a Group Ticket. Below are two scenarios on how to set the Group Number.

Scenario 1:

There is one system to be inspected with three individual Inspection records setup. A monthly visual inspection and two annual inspections (one for fire sprinklers and the other for water flow test). We always want to generate an Inspection Ticket for both the annual inspections, however, do not generate the monthly inspection ticket when it falls on the same month for the annual inspections.

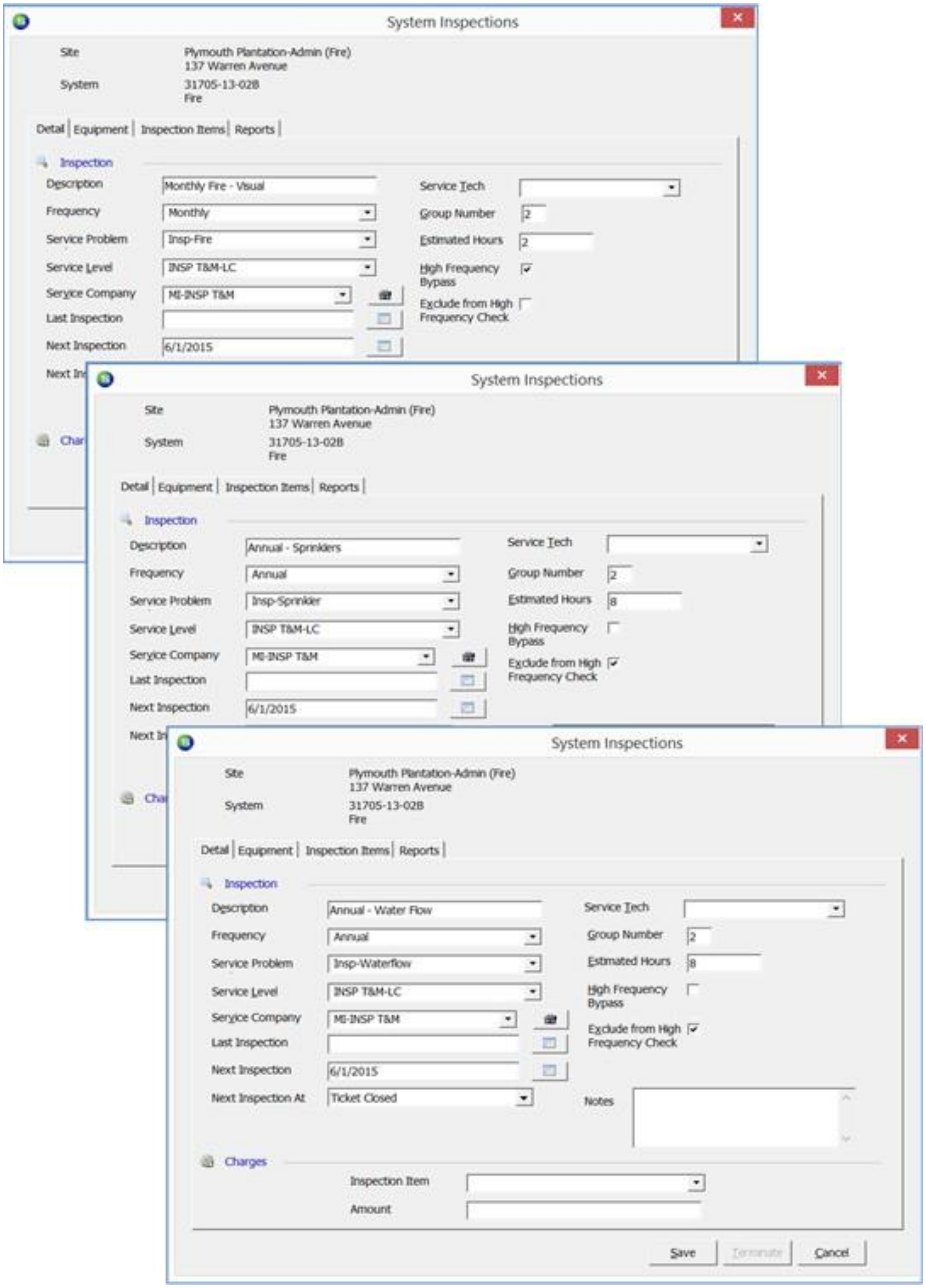
Type of Inspection	**Group #**	**High Frequency Bypass**	**Exclude from High Frequency Check**
Monthly Visual	1	√	
Annual Sprinklers	1		√
Annual Water Flow	1		√

Scenario 2:

There are two systems to be inspected at the same site, with three individual Inspection records setup for each system. A monthly visual inspection and two annual inspections (one for fire sprinklers and the other for water flow test). We always want to generate an Inspection Ticket for both the annual inspections, however, do not generate the monthly inspection ticket when it falls on the same month for the annual inspections. We also want to generate an inspection ticket(s) for each unique system.

Type of Inspection	**Group #**	**High Frequency Bypass**	**Exclude from High Frequency Check**
System A - Monthly Visual	1	√	
System A - Annual Sprinklers	1		√
System A - Annual Water Flow	1		√
System B – Monthly Visual	2	√	
System B – Annual Sprinklers	2		√
System B – Annual Water Flow	2		√

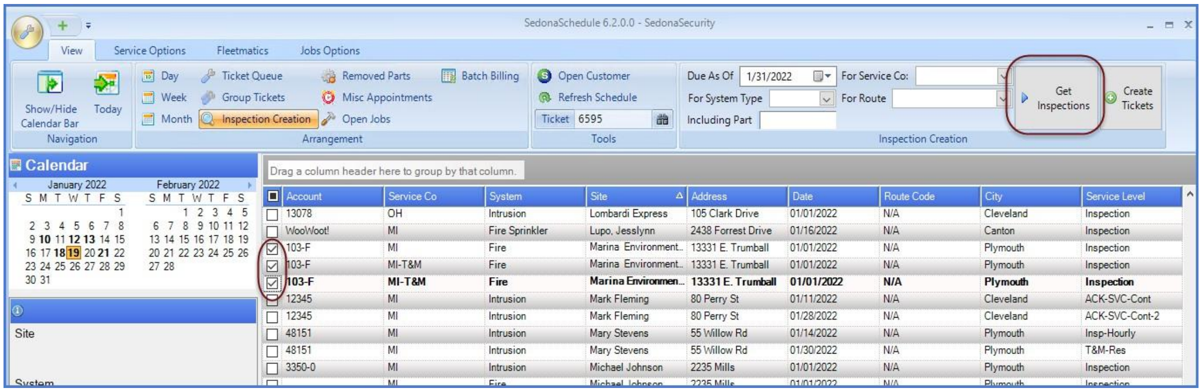
Below would be the Inspection Setup records for Scenario 1 on the previous page.



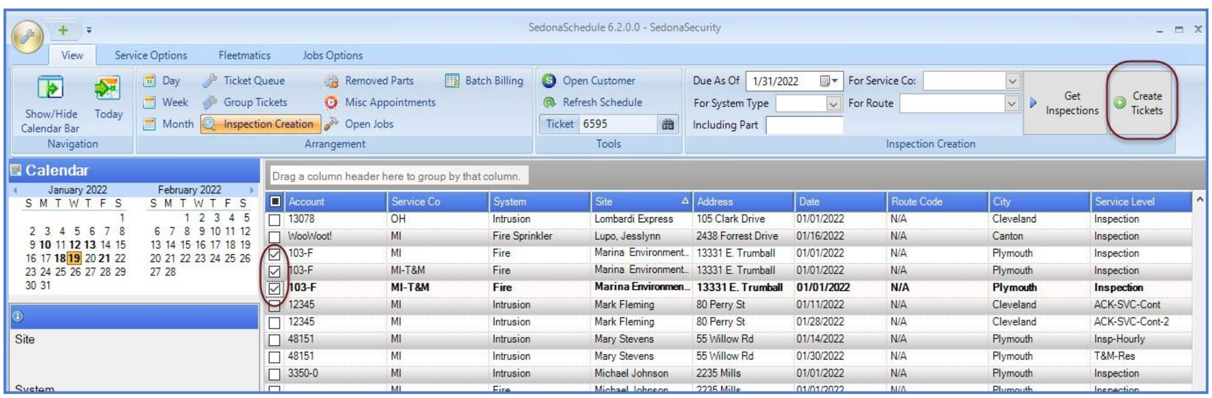
Generating the Group Tickets

Generating Group Tickets occurs at the same time regular Inspection Tickets are created.

Once the Due As Of date has been selected and you click the Get Inspections button, the grid will fill in with all of the inspections due by the date selected. Check the box to the left of the inspection that you want to generate or check the box in the header above the inspection checkbox selection to select all inspection records.

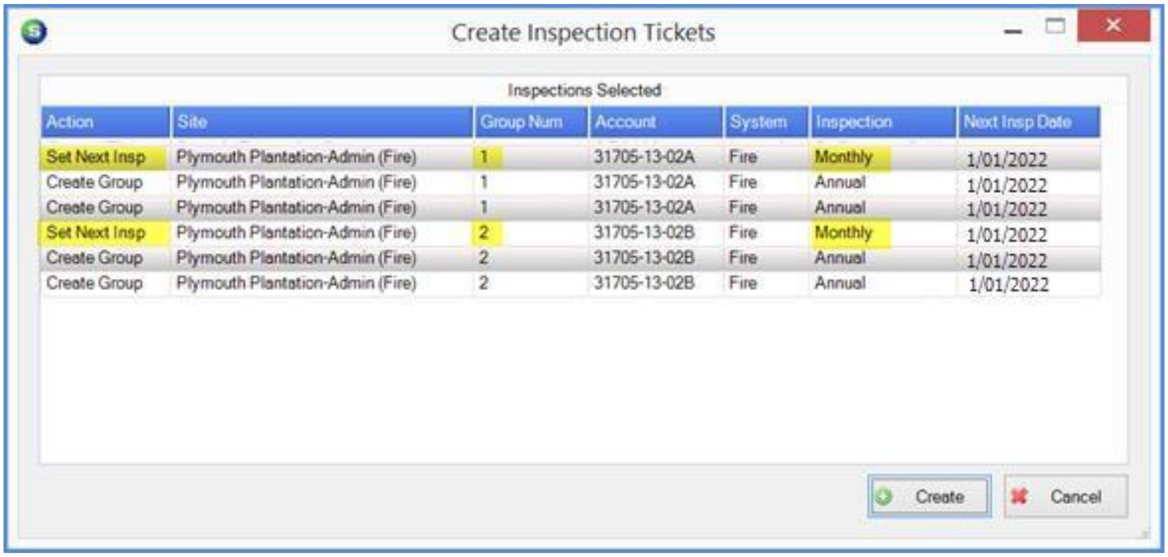


Next, click the Create Tickets button.



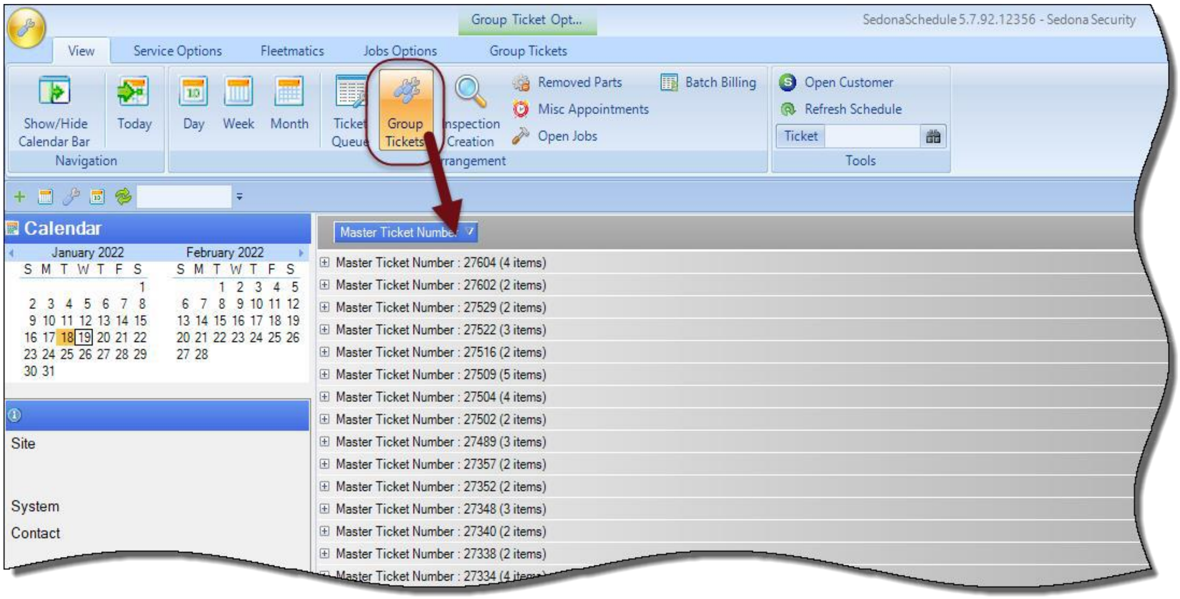
A list of "proposed tickets" will be displayed in a grid. In the example below, two ticket groups will be created. Each ticket group will have two tickets as a part of the group. The Action column in the grid tells us what the software will do when clicking on the Create button.

In the example below, there are two inspections with a monthly frequency that will not have inspection tickets created because an annual inspection is due on the same date for the same group. For the monthly inspections, the software will automatically advance the next inspection date by one month.



Working in the Group Tickets Queue

Once Group Tickets have been created, they are viewable in both the Group Ticket Queue and the Regular Ticket Queue.



Scheduling Group Ticket Appointments

One of the features of Group Tickets allows you to create technician appointments from the Ticket Group tab of the group ticket. If you opt to use this method, appointments created from the Group Ticket Dispatch Appointment Scheduler are dispatched from that same location. See the topic Dispatching Group Ticket Appointments later in this document.

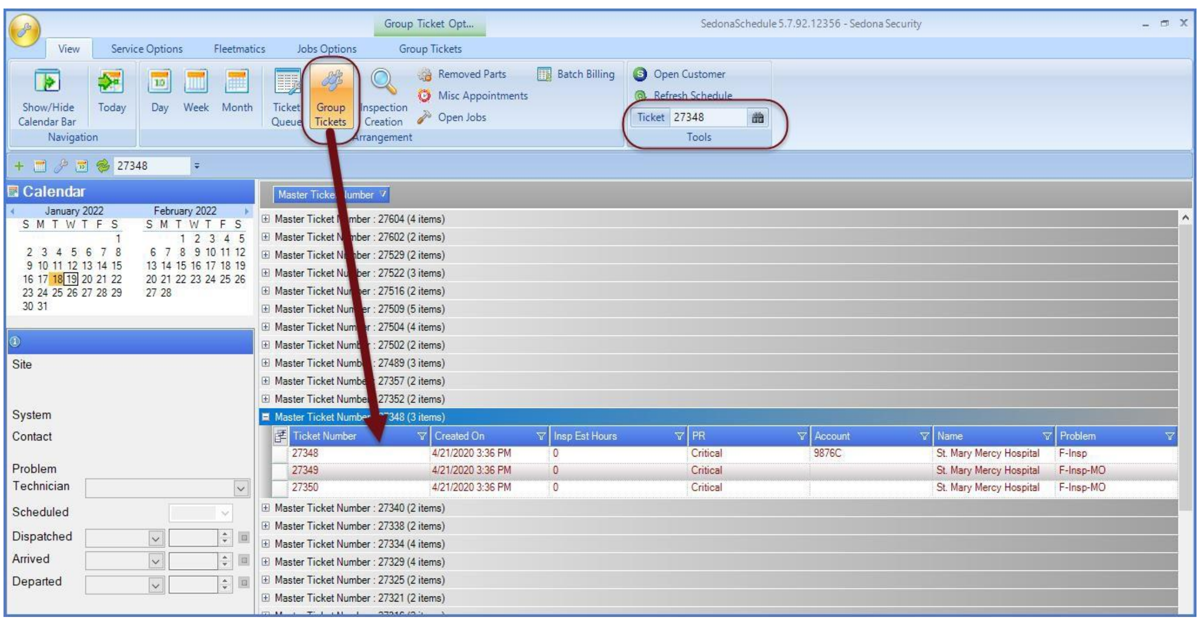
Note: If appointments are created from the Group Ticket, these are not available on the FSU or on SedonaX Mobile. They can only be dispatched from the office. If you want tickets to be dispatched from the FSU or SedonaX Mobile, then appointments will need to be scheduled for each individual ticket – the same as a regular service or inspection ticket.

Tickets appointments may be created from within each Ticket, by dragging and dropping on the Schedule Board. Appointments created for individual tickets are dispatched the same as regular tickets, and are available on the FSU and SedonaX Mobile.

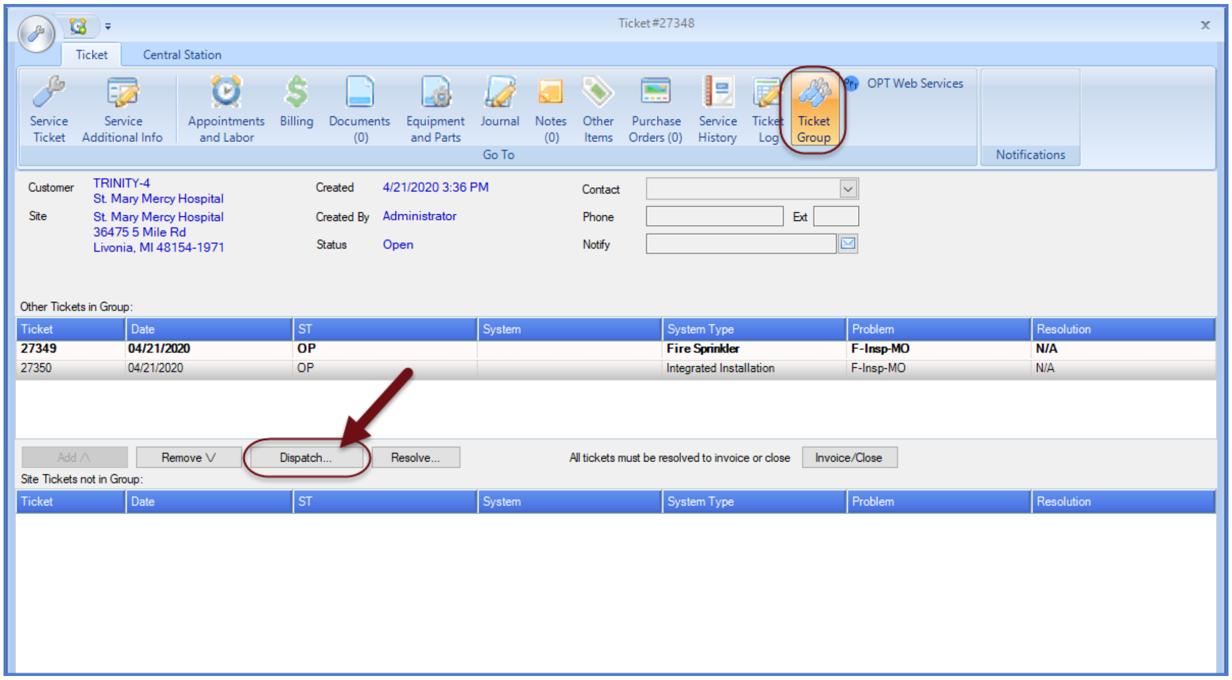
Scheduling "Group" Appointments

To schedule appointments for Group Tickets, follow the instructions below and on the following pages.

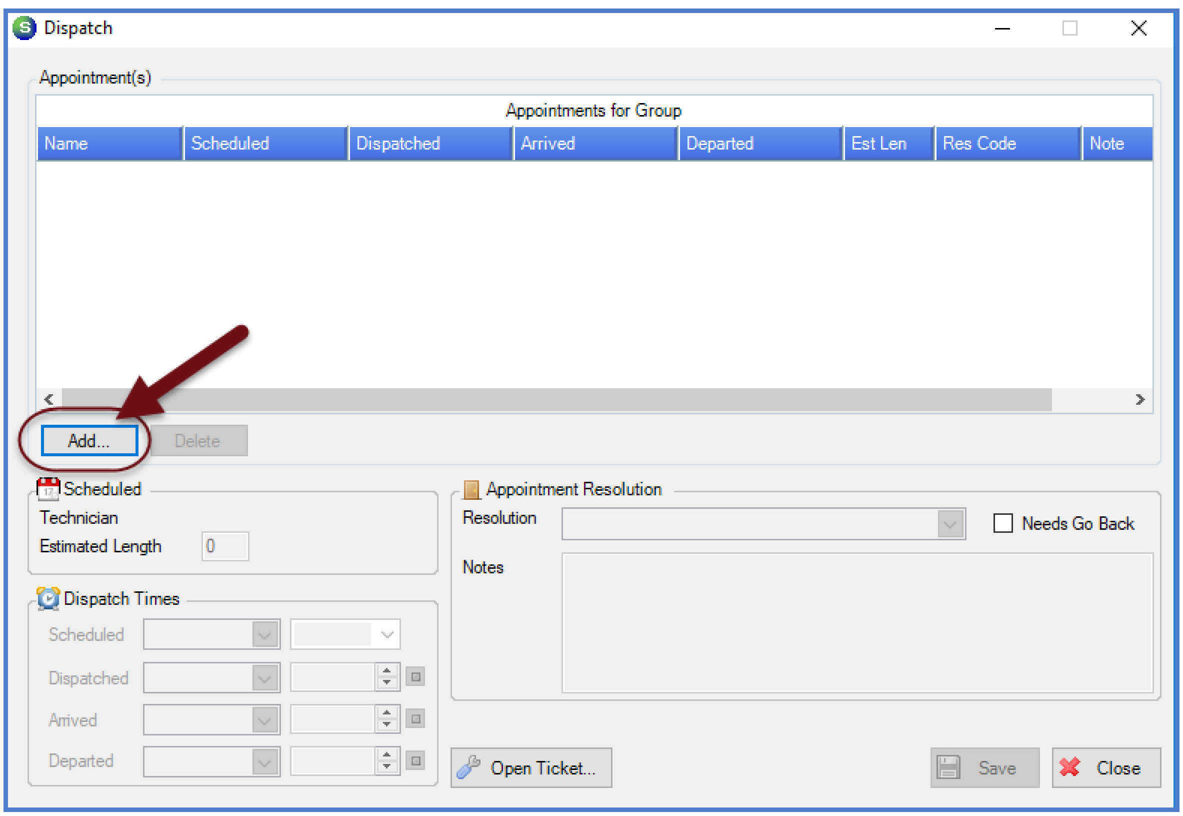
1. Open the master "Group Ticket" number from the Group Tickets option on the main ribbon, or in the ticket [search] field on the main ribbon, type in the master group ticket number.



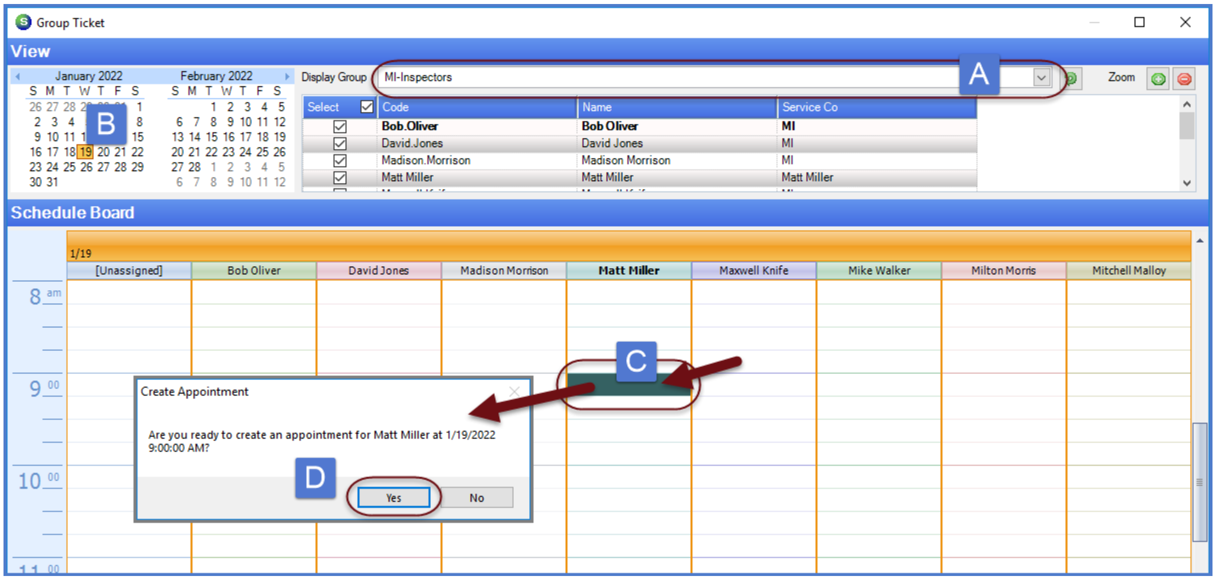
2. Once the master group ticket is displayed, click on the Ticket Group button from the main ribbon, and then click on the Dispatch button in the lower tier of the form.

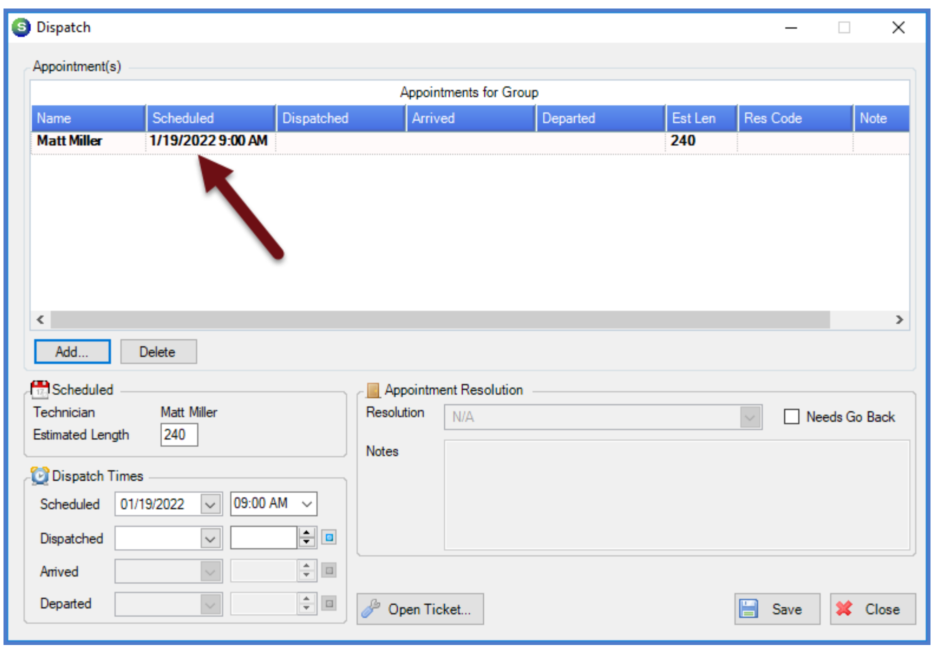


3. The Group Ticket "Dispatch" form will be displayed – click on the Add button as shown in the illustration below.



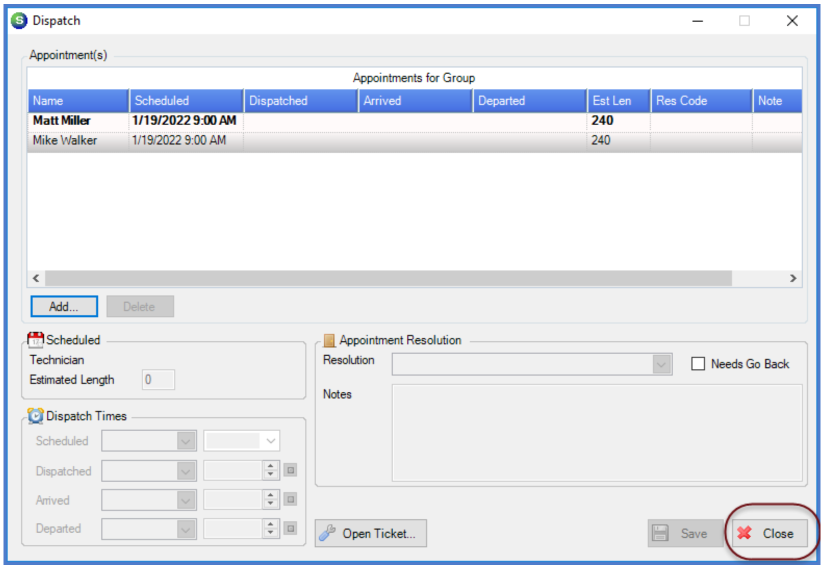
4. The Group Ticket calendar will be displayed. Make the appropriate selections:
   A. Select the desired Display Group from the drop-down list.
   B. On the Calendar, click on the date for the appointment.
   C. On the Schedule Board, double-click on the Technician and starting time for which you want to schedule an appointment.
   D. A confirmation message will be displayed – if the date, time and technician are correct, click the Yes button to save the appointment.



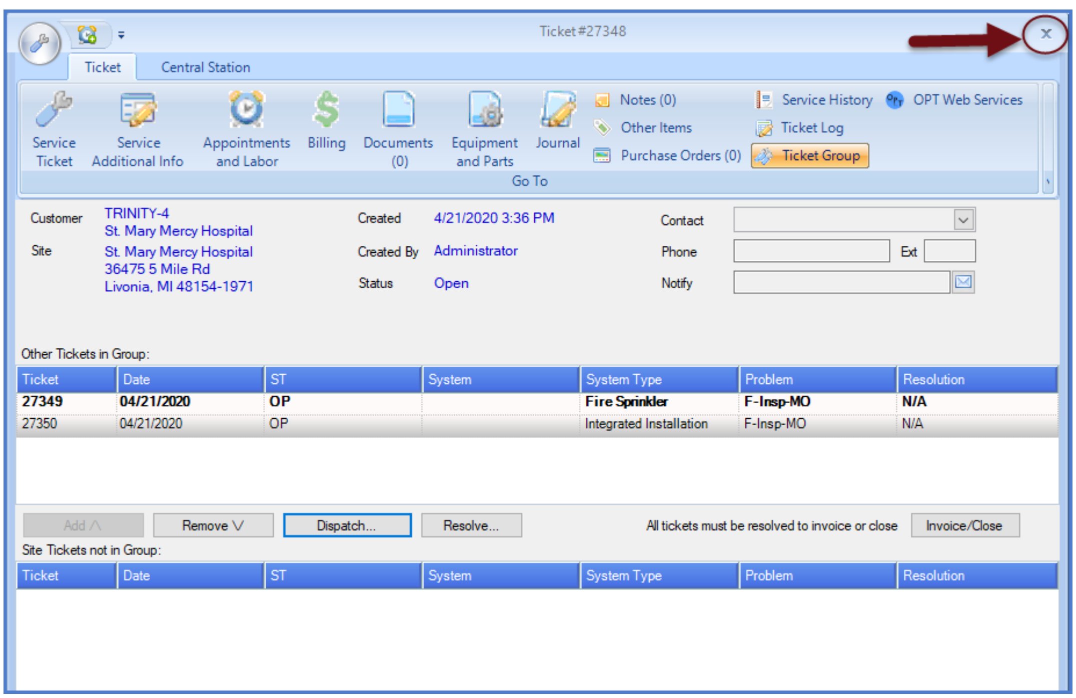


5. Once the appointment has been saved, you will be returned to the Dispatch form. If additional appointments need to be scheduled for the same Technician or a different Technician, repeat steps 3 and 4 above until all appointments have been saved.

When finished scheduling appointments for the group ticket, click the Close button located at the lower right of the Dispatch form.



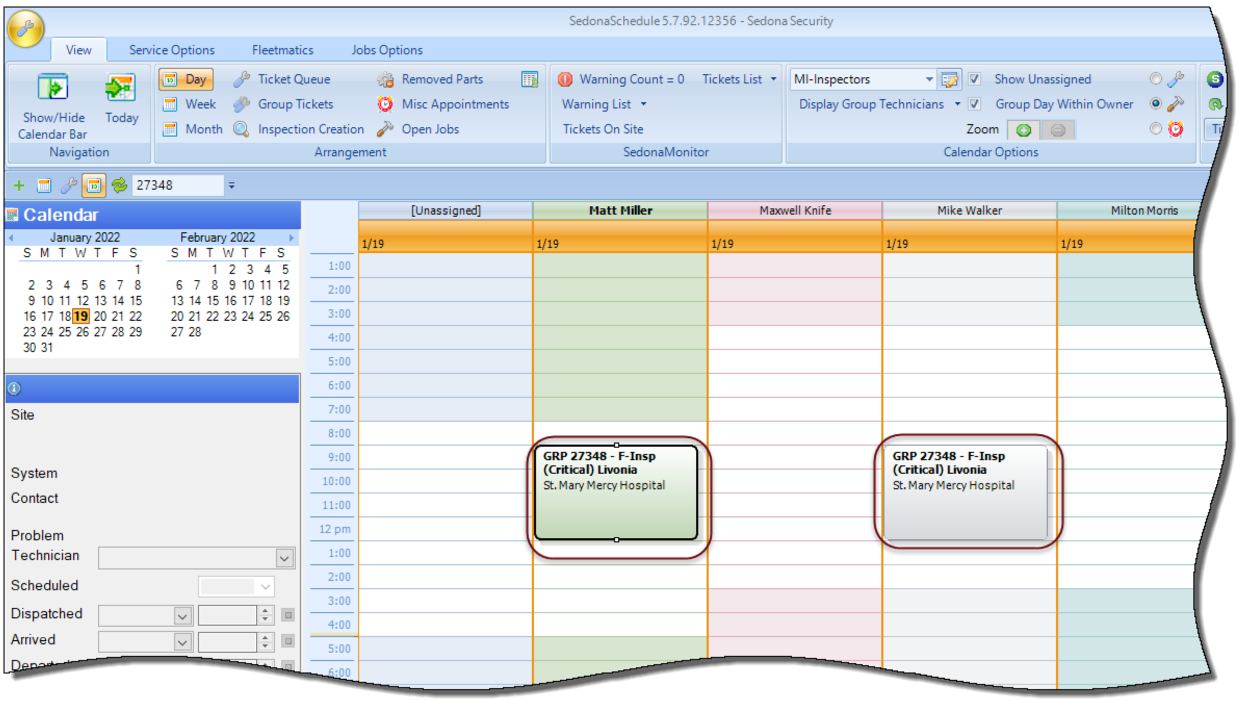
6. You will be returned to the Ticket Group form for the master ticket. You may close out of the ticket by clicking the “X” at the upper right of the ticket form.



7. The appointments created from the master group ticket will appear on the Schedule Board.

Note: When viewing the Schedule Board, appointments scheduled as “Group Appointments”, will display the first line of ticket information as “GRP [master ticket number]”, followed by the problem code assigned to the ticket.

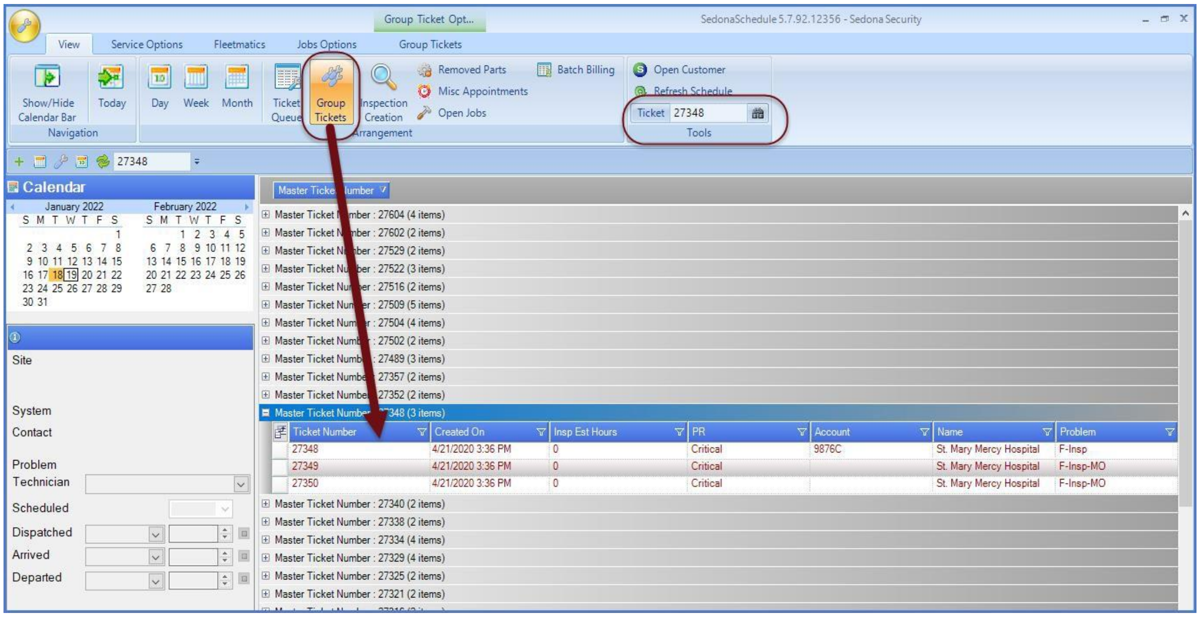
Note: When double-clicking on an appointment within the Schedule Board where the appointment was scheduled through the Group Tickets, the Group Tickets [Scheduling form] will be displayed. You cannot enter dispatch times via the Scheduling Board for appointments that were created via Group Tickets. These appointments can only be dispatched from the Group Tickets Scheduling form.



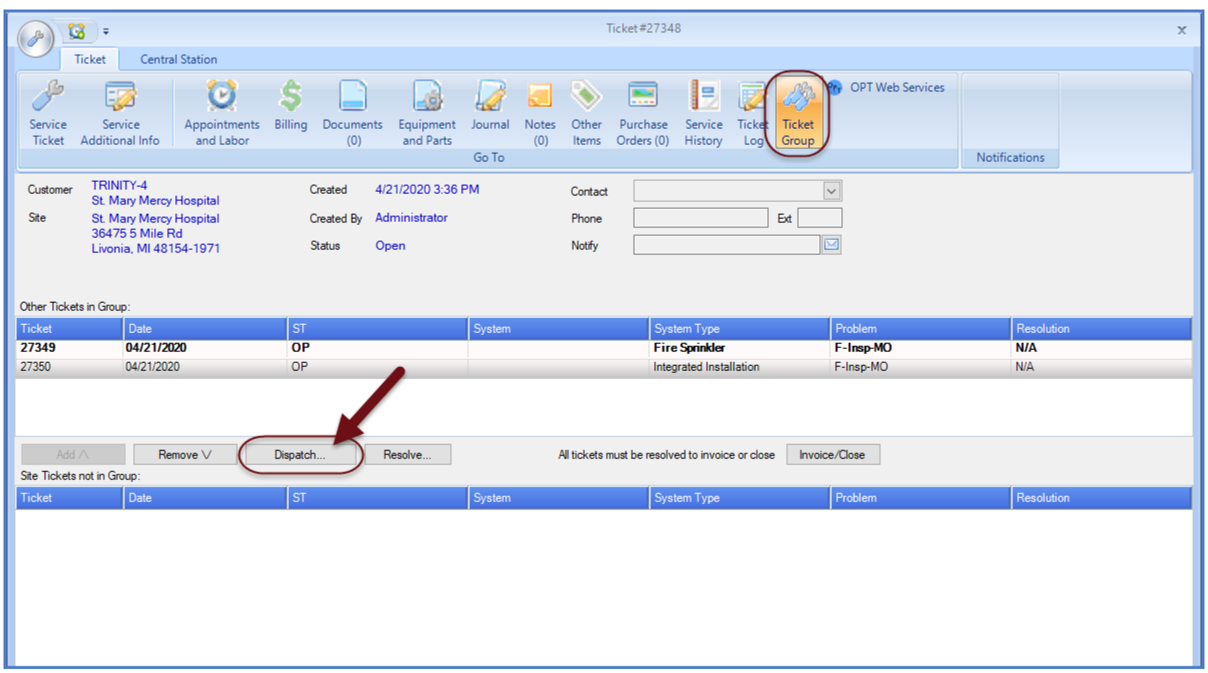
Dispatching Group Ticket Appointments

To enter dispatch times for appointments created from the Group Ticket Dispatch form, follow the instructions below and on the following pages.

1. Open the master "Group Ticket" number from the Group Tickets option on the main ribbon, or in the ticket [search] field on the main ribbon, type in the master group ticket number.



2. Once the master group ticket is displayed, click on the Ticket Group button from the main ribbon, and then click on the Dispatch button in the center of the form.

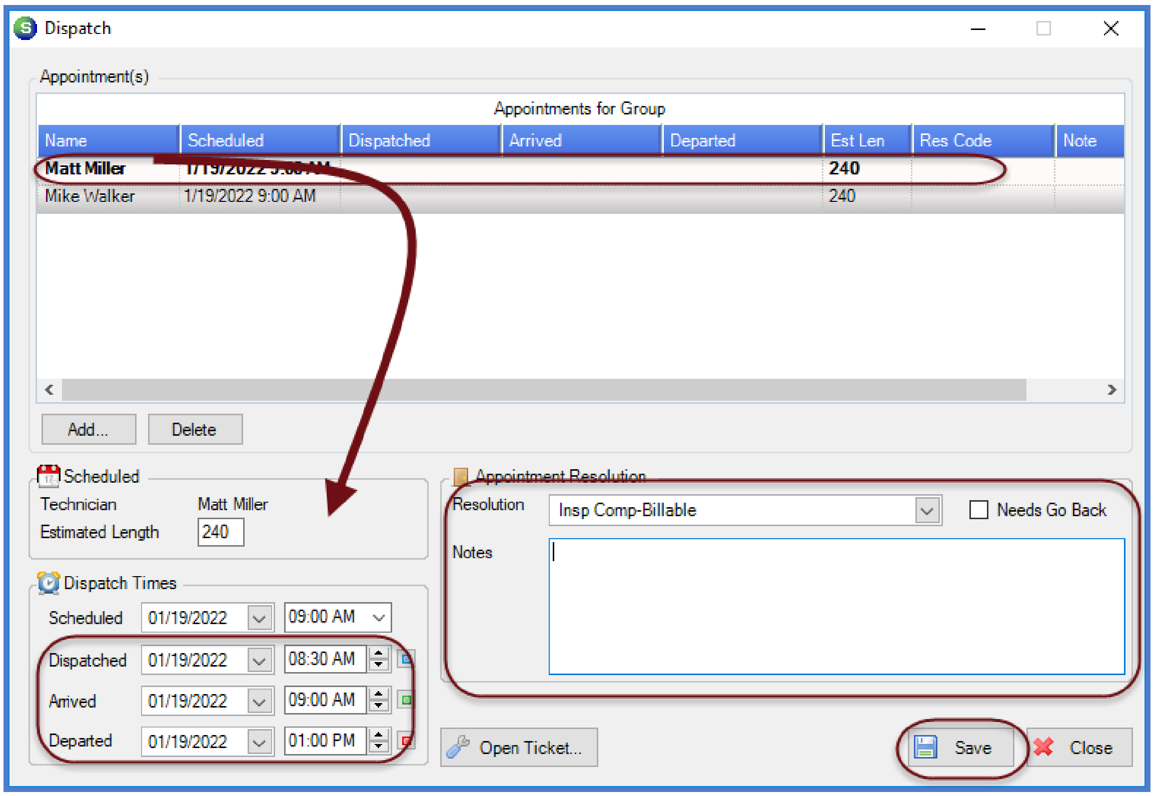


3. The Group Ticket “Dispatch” form will be displayed. In the upper tier of the form, click once on the technician appointment you want to dispatch. The technician name, estimated length of the appointment and the scheduled date and time for the appointment will auto-fill into the lower tier of the form.

   Enter the Dispatched, Arrived, and Departed times. Select a Resolution code, and enter any pertinent information into the Notes field.

   When finished, click the Save button located at the lower right of the form.

   Repeat the same process for any other appointments that need to be dispatched.



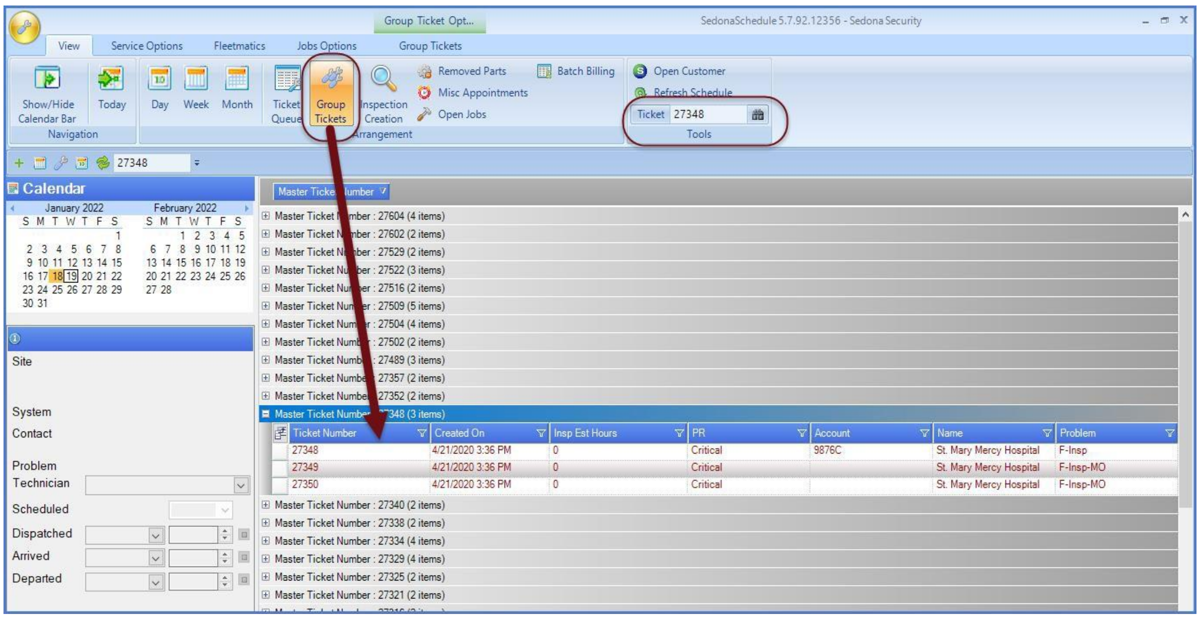
Resolving Group Tickets

To be able to invoice and close or just close the group ticket if non-billable, you must first use the Resolve option button on the Group Ticket form. This form will ask for a resolution code and you have a field available for notes that may be printed on the customer's invoice.

Follow the instructions below and on the following pages to Resolve the Group Tickets.

Note: All appointments scheduled for tickets within the Group Ticket (scheduled from the Schedule Board or from the Group Ticket Dispatch form), must be completely dispatched before you will be able to Resolve and create and invoice for the customer.

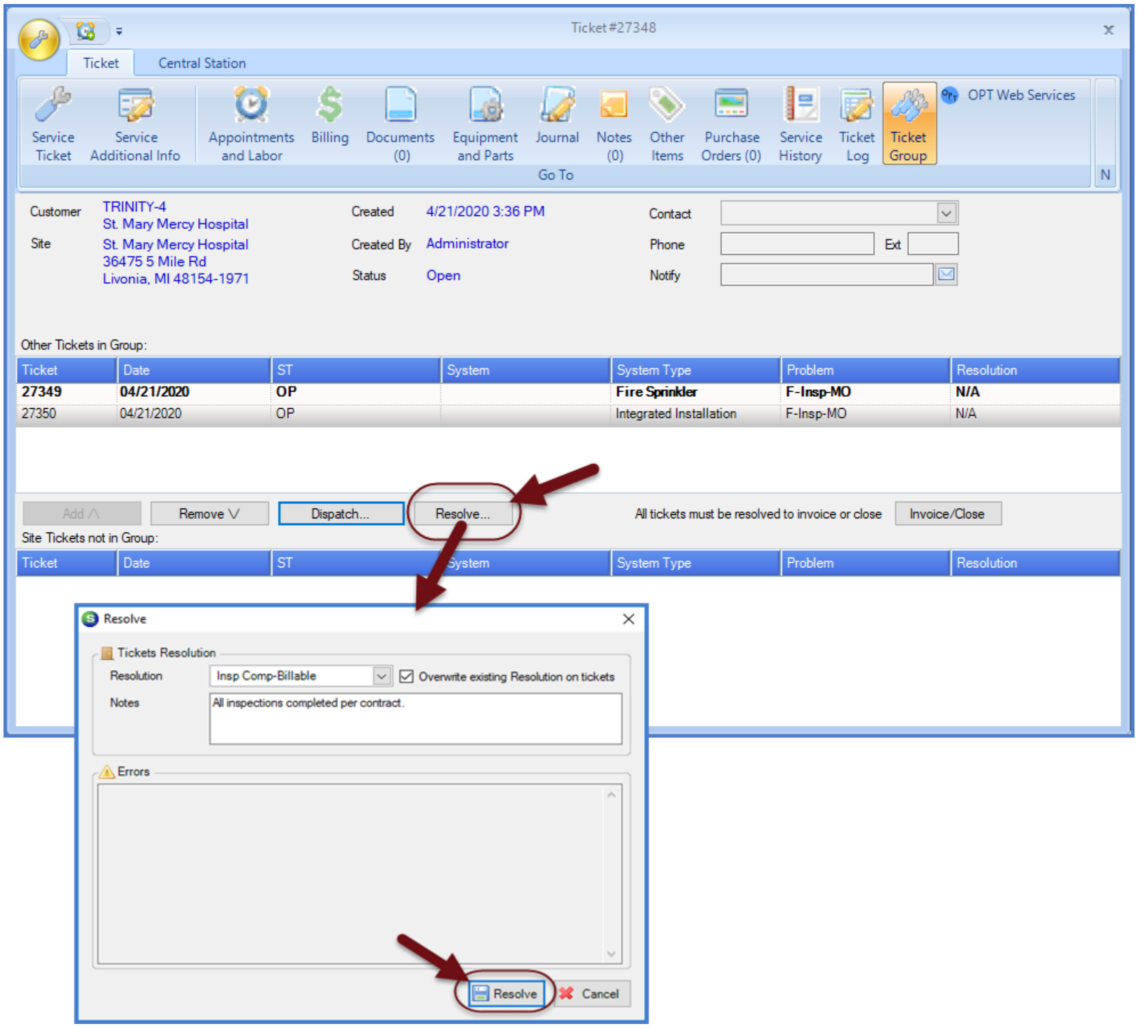
1. Open the master "Group Ticket" number from the Group Tickets option on the main ribbon, or in the ticket [search] field on the main ribbon, type in the master group ticket number.



2. Once the master group ticket is displayed, click on the Ticket Group button from the main ribbon, and then click on the Resolve button in center of the form.
3. The Resolve form will be displayed. Select a Resolution code from the drop-down list. If you want all of the tickets in the Ticket Group to be closed with the same resolution code, check the box “Override Existing Resolution on Tickets”.

   In the Notes text box, type in any information that you want to print on the customer’s invoice.

   When finished, click the Resolve button at the lower right of the form.

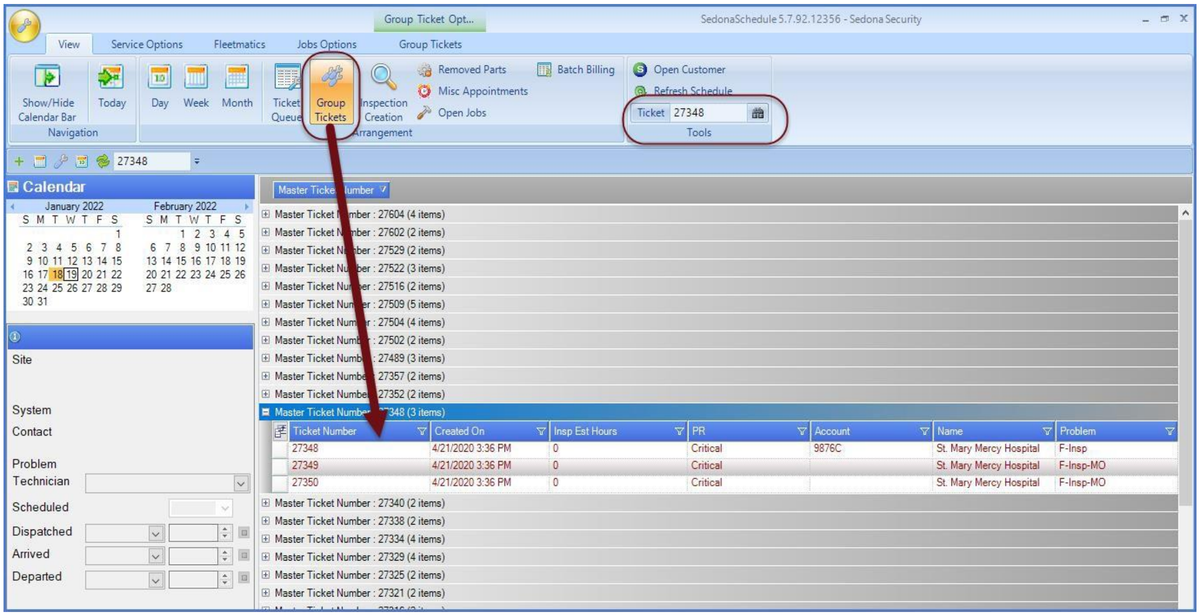


Invoice & Close Group Tickets

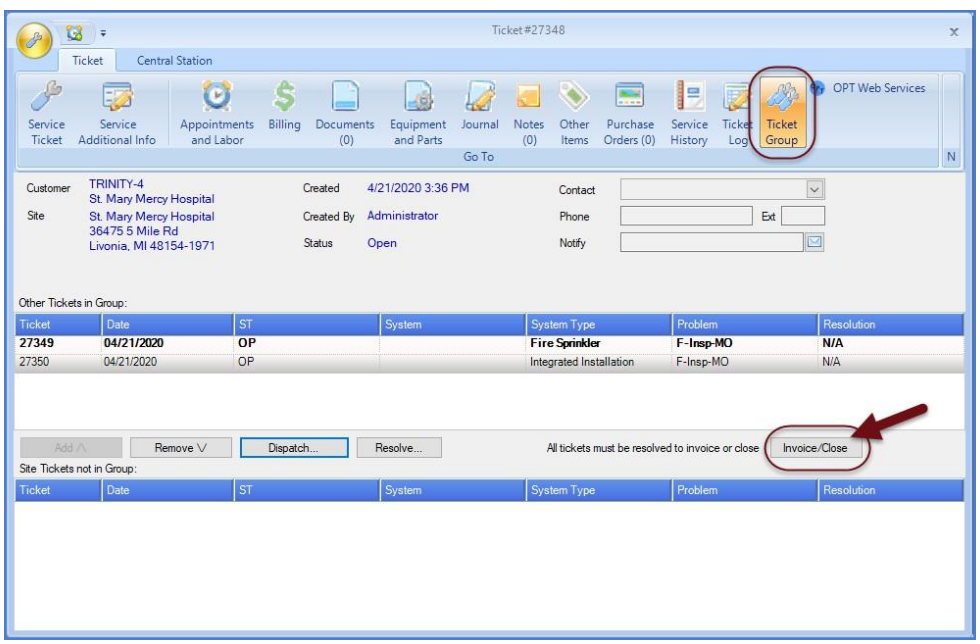
After Resolving the Group Tickets, you will proceed to the Invoice / Close step.

Follow the instructions below and on the following pages.

1. Open the master "Group Ticket" number from the Group Tickets option on the main ribbon, or in the ticket [search] field on the main ribbon, type in the master group ticket number.

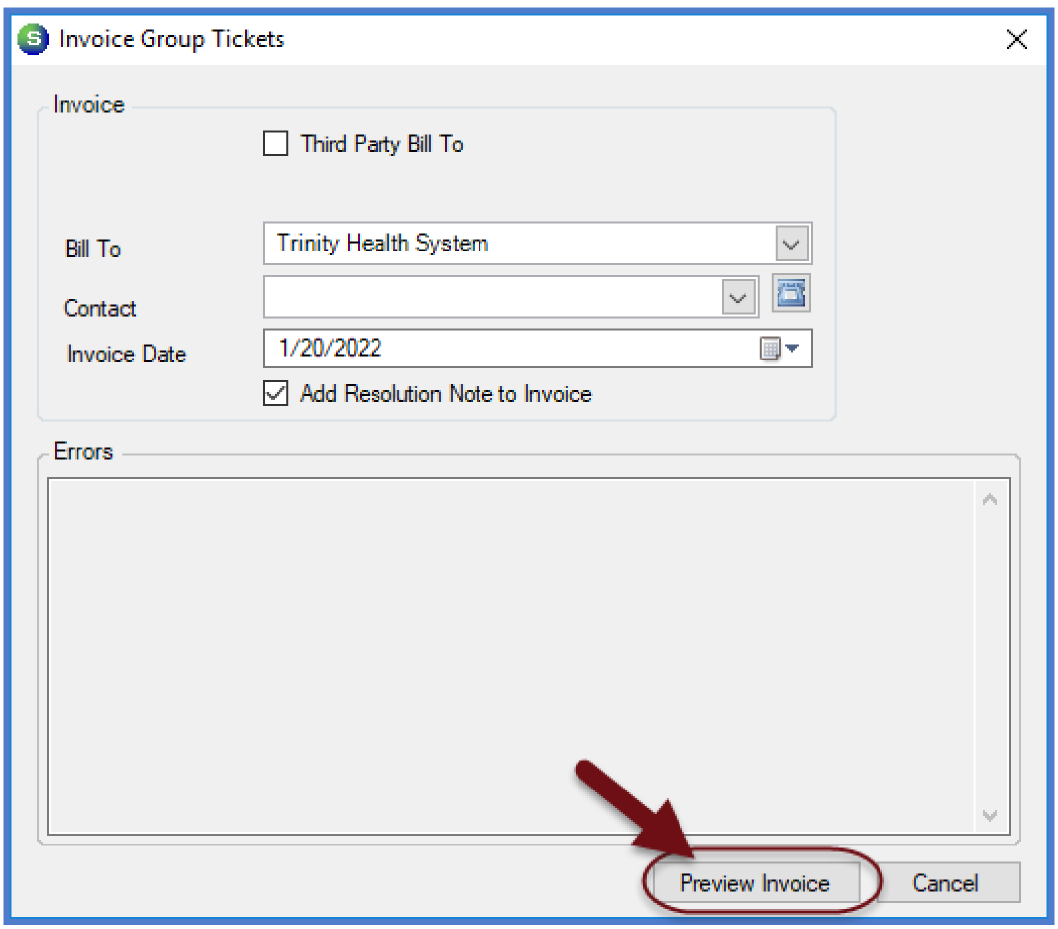


2. Once the master group ticket is displayed, click on the Ticket Group button from the main ribbon, and then click on the Invoice/Close button in center of the form.



3. The Invoice Group Tickets form will be displayed – fill in the form.
    - **Third Party Bill To –** If you need to invoice a different customer for this Group Ticket, check the box, and a new field will be displayed for looking up the customer you want to invoice.
    - **Bill To** - The Bill To field will auto-fill with the default service Bill To on the customer's account. If the customer has more than one Bill To, you may make a selection from the drop-down list.
    - **Contact –** If contacts exist for this customer and you want a contact name to print on the customer invoice, make a selection from the drop-down list.
    - **Invoice Date –** This field will default to today's date. You may change this to another date if needed, as long as the date is in an open accounting period.
    - **Add Resolution Note to Invoice –** Check this box if you want to print the Resolution Note on the customer invoice.

When finished, click the Preview Invoice button located at the lower right of the form.

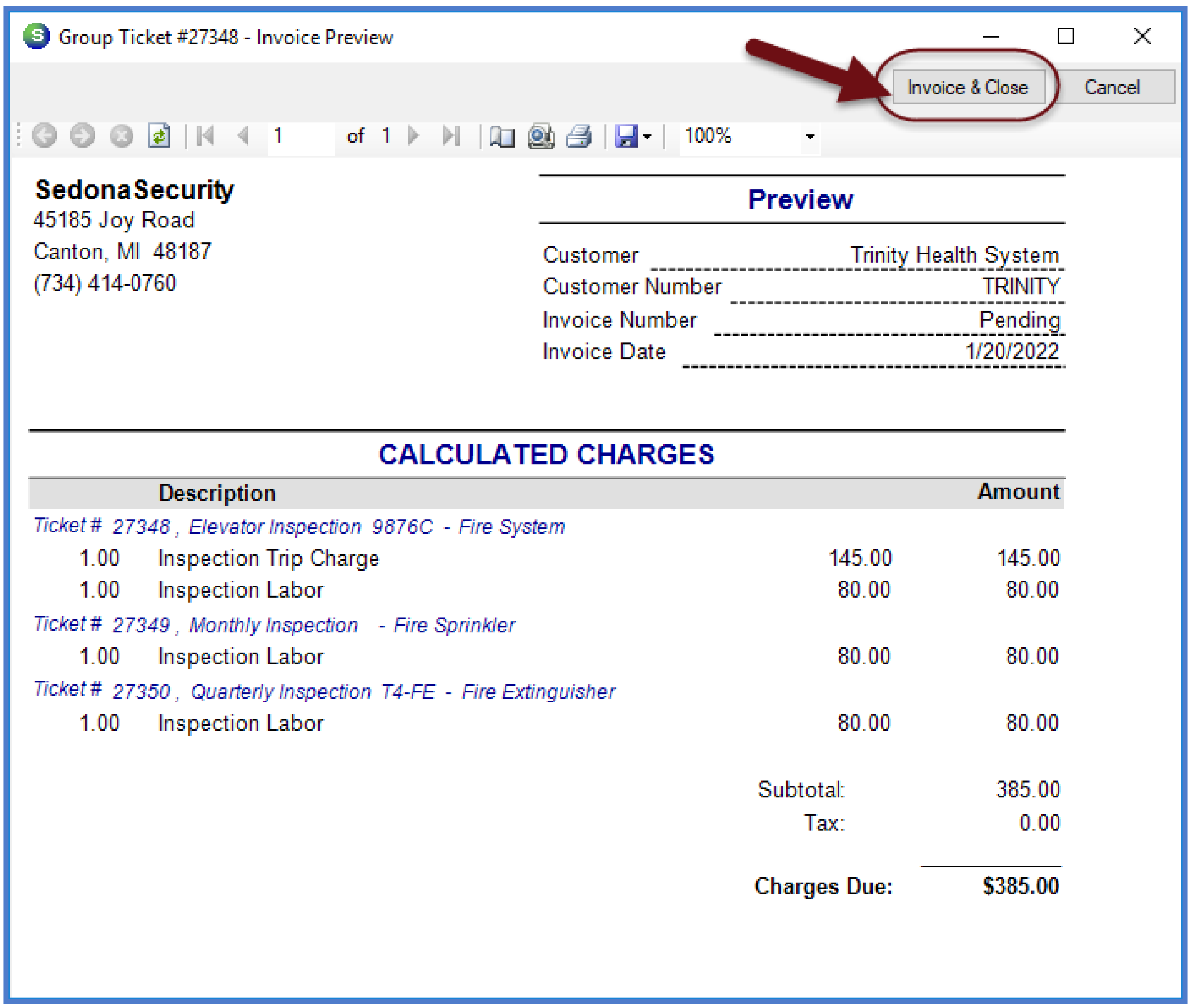


4. The Invoice Preview will be displayed. Review the charges listed for accuracy. If you are satisfied with the amounts, click on the Invoice & Close button located at the upper right of the form.

   If the amounts are not correct, click the Cancel button and open the ticket(s) where the charges are incorrect to make corrections. After making any corrections on the tickets, repeat this same process to return to the invoice preview.

   After clicking the Invoice & Close button, the invoice will be created and be added to the invoice printing queue. All tickets in the Ticket Group will be closed.

Note: The layout of the Preview Invoice is not how the actual invoice will appear – this depends on which invoice form your company uses for printing.


Group Ticket #27348 - Invoice Preview

Invoice & Close | Cancel

1 of 1 100%

SedonaSecurity
45185 Joy Road
Canton, MI 48187
(734) 414-0760

Preview

Customer: Trinity Health System
Customer Number: TRINITY
Invoice Number: Pending
Invoice Date: 1/20/2022

CALCULATED CHARGES

	Description		Amount
Ticket # 27348 , Elevator Inspection 9876C - Fire System			
1.00	Inspection Trip Charge	145.00	145.00
1.00	Inspection Labor	80.00	80.00
Ticket # 27349 , Monthly Inspection - Fire Sprinkler			
1.00	Inspection Labor	80.00	80.00
Ticket # 27350 , Quarterly Inspection T4-FE - Fire Extinguisher			
1.00	Inspection Labor	80.00	80.00
		Subtotal:	385.00
		Tax:	0.00
		Charges Due:	**$385.00**

Job Features

There are two main Job related features available in SedonaSchedule - the ability to view the list of open Jobs, (which is similar to the Job Queue in the main SedonaOffice application) and the ability to create/dispatch and manage Job Appointments. Both of these features may be accomplished from a Job record within the main application, however for companies that want to manage all appointments in one place, SedonaSchedule was designed for this purpose.

The Open Job List within SedonaSchedule provides more flexibility than the Job Queue in the main SedonaOffice application by utilizing filters and arranging the columns within the list according to individual user preferences.

Scheduling Job Appointments in SedonaSchedule is quite a bit different from the method available within a Job record. In SedonaSchedule, users are able to schedule Job Appointments on multiple dates for the same Installer as well as multiple Installers and dates all from one form. This feature is not available when scheduling within a Job record in the main SedonaOffice application.

Of course, there is nothing preventing companies from scheduling exclusively from a Job record - it is a matter of preference for each company.

Open Jobs List

The Open Job List is accessed by clicking on the Open Jobs button located in the Arrangement Ribbon Group.

When clicking on the Open Jobs button, the list of Jobs will be displayed.

The Job List is configured with the Field Chooser, which functions just as the Field Chooser in the Ticket Queues.

In the header area of the Job List are a few function buttons:

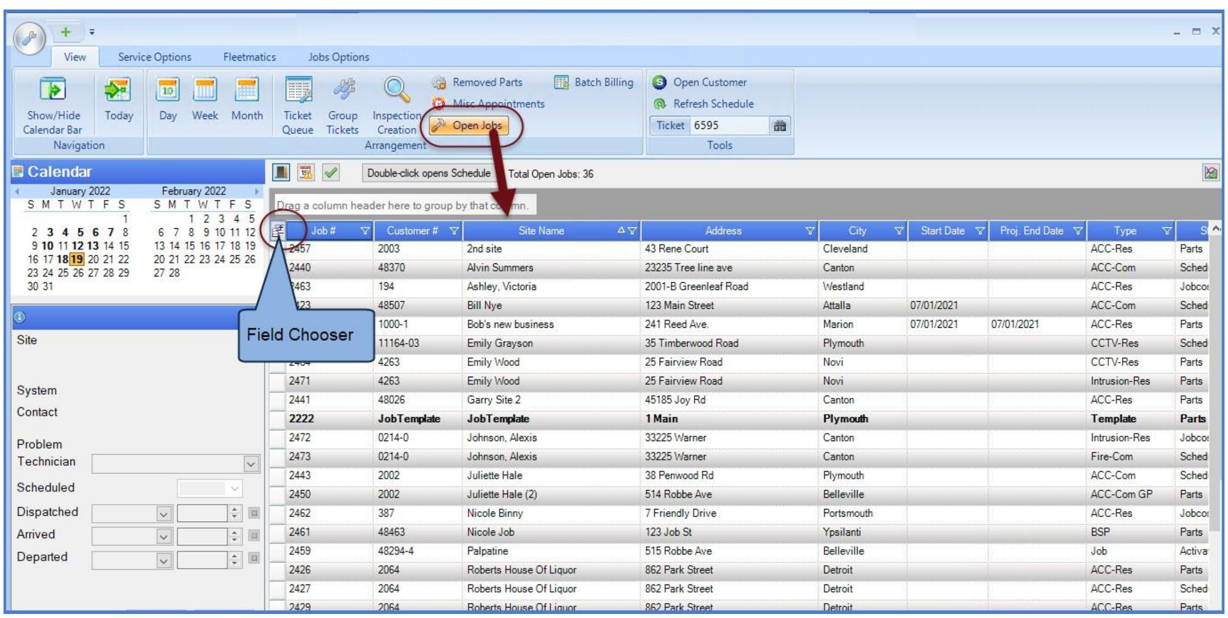
Open Door button  – when clicking on this button, the list is refreshed with all Open Jobs.

Calendar button  - clicking on this button will list all Un-scheduled Jobs (Jobs that have never been scheduled).

Checkmark button  - this option displays the list of Upcoming Tasks (setup on a Job Task List).

Toggle button [Double-click shows Schedule] [Double-click shows Job] - clicking this button will toggle functionality to the desired function:

- When the button is displayed as Double-click shows Schedule, double-clicking on a Job in the List will open the Job Appointment Scheduling form.
- When the button is displayed as Double-click shows Job, double-clicking on a Job in the List will open the Job record in the main SedonaOffice application.

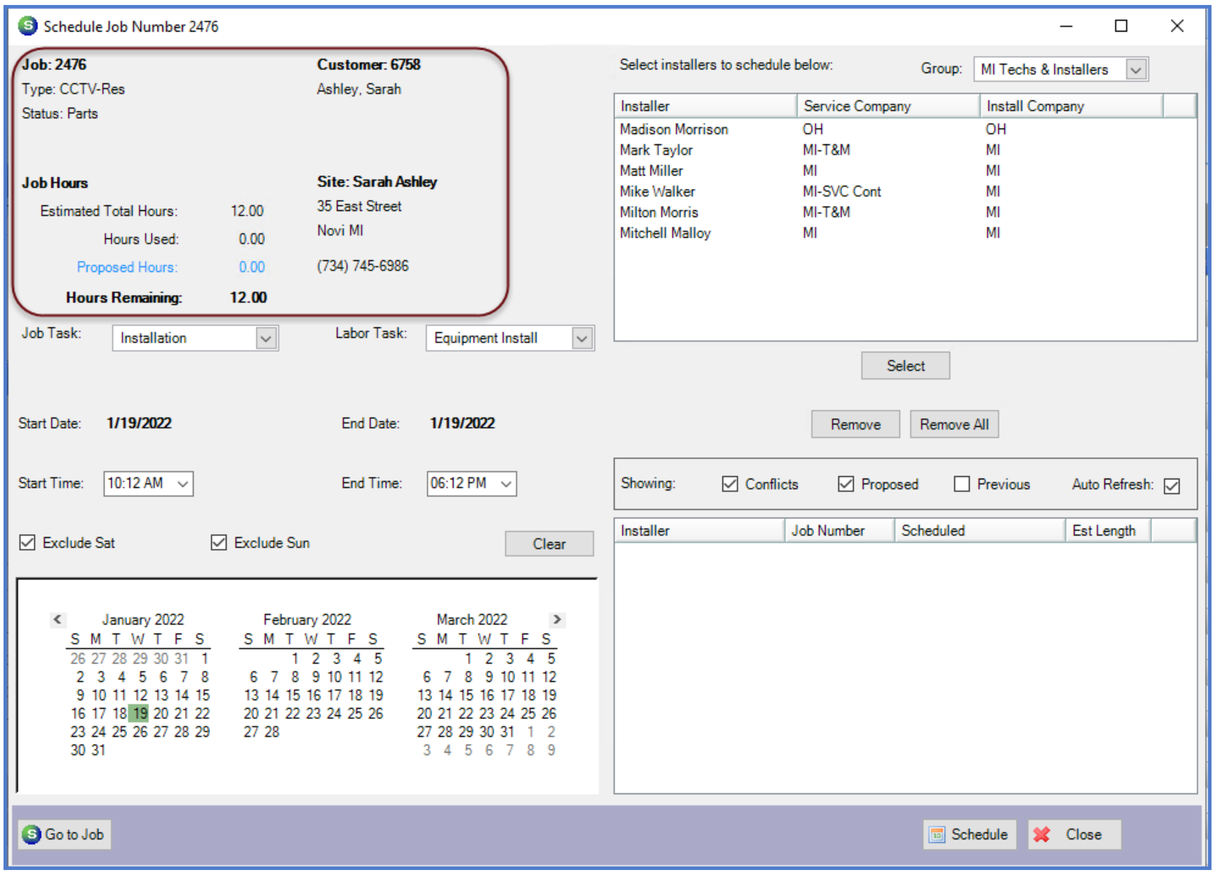


The Job Scheduling Form

Before scheduling a Job Appointment, it is important to understand the layout and functionality of the Schedule Job form.

The Schedule Job form is comprised of several components, each of which will be explained below and on the following pages.

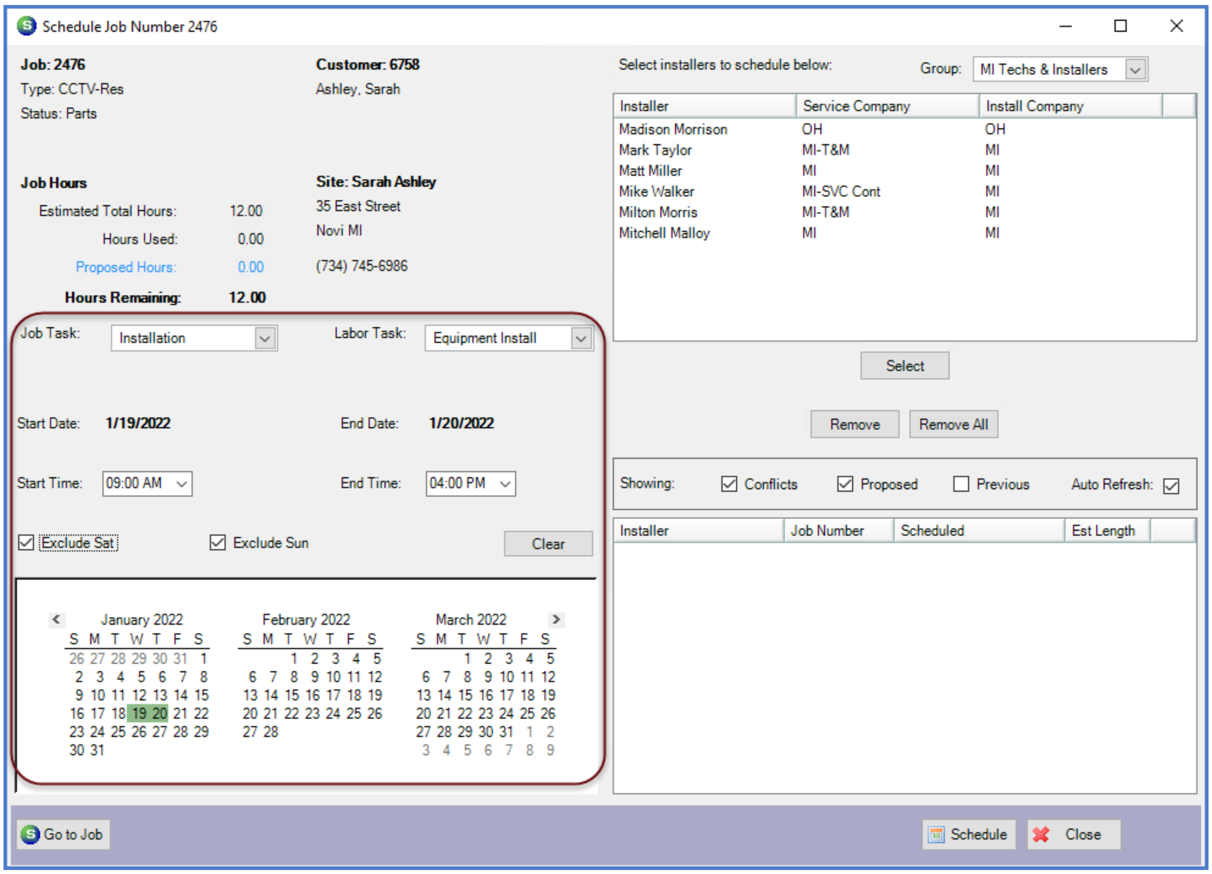
- **Job Information** – The upper left area displays information about the Job including the total estimated hours, hours used, proposed hours and remaining hours. As dates, times and Installers are selected in the scheduling form, the Proposed hours is automatically updated.



- **Task/Date/Time Information –** The left side of the form below the Job Information is used to select the Job Task being scheduled, the Labor Task to be performed, start and end times for the appointment(s), and the Calendar on which you select the date(s) for the appointment(s).

When selecting a Labor Task, the application automatically sets the Start and End Time based on the default minutes assigned to the Labor Task in SedonaSetup. This is just the default to expedite the scheduling process and may be changed.

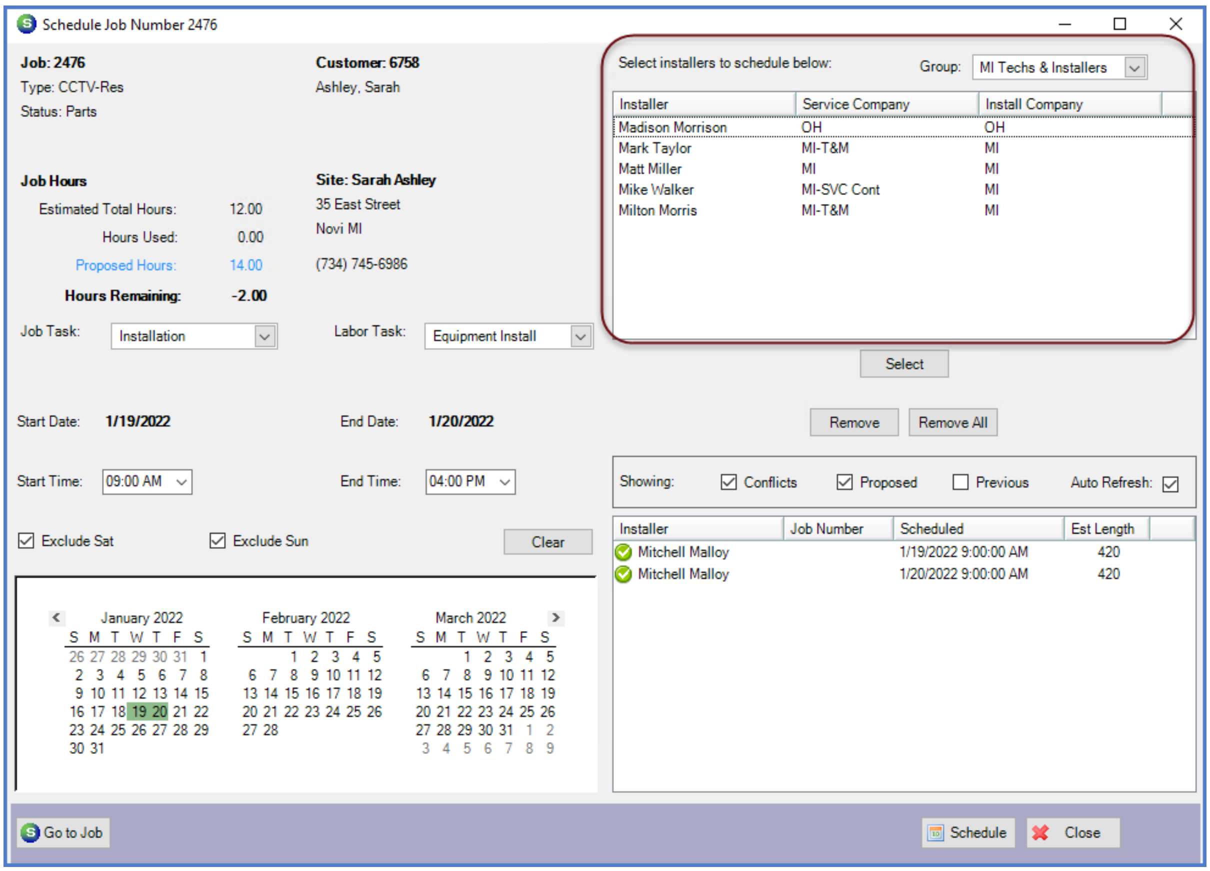
The Start Date and End Date will automatically default to the current date; clicking on the desired date or dates on the calendar will refresh the Start and End Dates displayed above the calendar.



- **Installer Selector** – The right side of the form is used to select one or multiple Installers to perform the work.

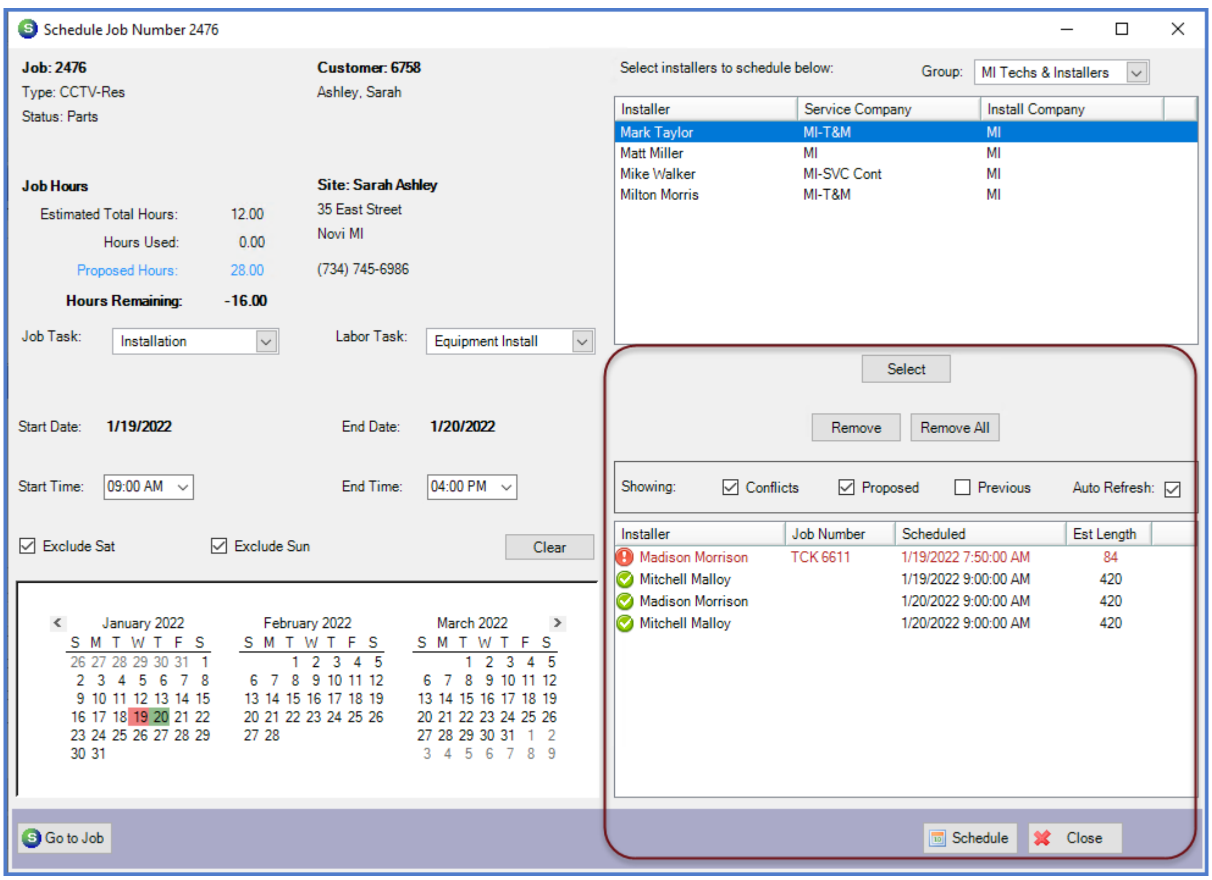
The names of Installers displayed in the upper tier are determined by the Display Group selected at the upper right of the form. These are the same Display Groups used on the Schedule Board for Tickets. The Display Group that is defaulted into this form is the current Display Group selected on the main SedonaSchedule Schedule Board. Many companies setup Display Groups specifically for Installers. Changing the Display Group will refresh the list of Installer names.

Double-clicking on an Installer name or highlighting an Installer name then clicking on the Select button will move the Installer to the lower tier of Proposed Appointments.



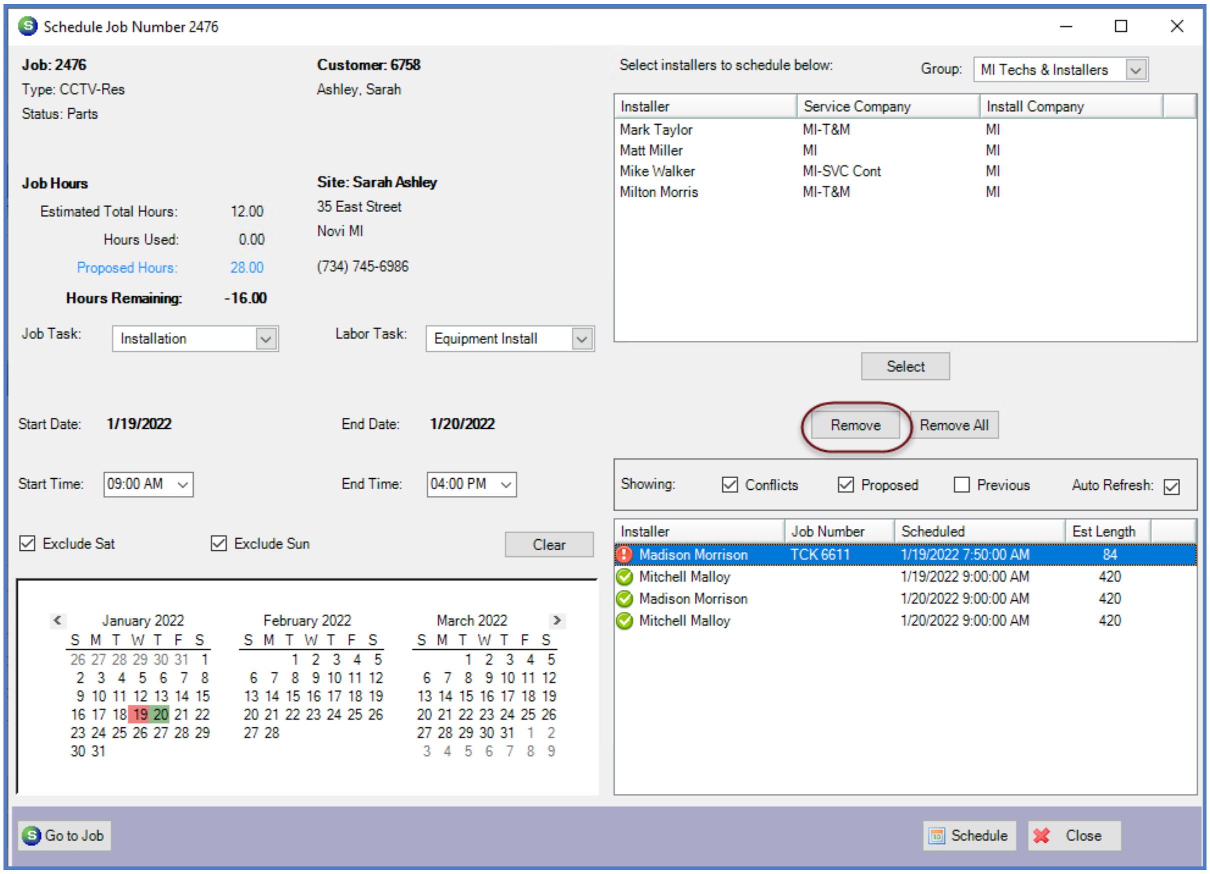
- **Proposed Appointments** – The Installer name along with the proposed schedule date and estimated length of time is displayed as names are selected from the Installer Selector list [upper tier]. There are four option checkboxes at the top of the Proposed Appointments area:
  - **Conflicts** – When this option is selected, the application checks to see if the selected Installer is already scheduled for a Ticket or Job that will conflict with the appointment you are trying to schedule. It is highly recommended this option is always selected.
  - **Proposed** – Selecting this option will update the Proposed Hours in the Job Information area (upper left).
  - **Previous** – With this option selected, any other previously scheduled appointments (completed or yet to be completed) for the Job will display below the Proposed Appointments.
  - **Auto Refresh** – Selecting this option will refresh the Proposed Appointment area if another staff member has scheduled the Proposed Installers at a time that would conflict with your current scheduling attempt. It is highly recommended to leave this option selected at all times.

In the below example, one of the selected Installers is already scheduled for a Ticket on one of the proposed appointment dates.

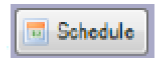


If Scheduling conflicts are displayed, in the Proposed Appointment list, highlight the Installer Name then click on the Remove button.

Note: The application will allow you to create a Job Appointment for an Installer even if a scheduling conflict exists.

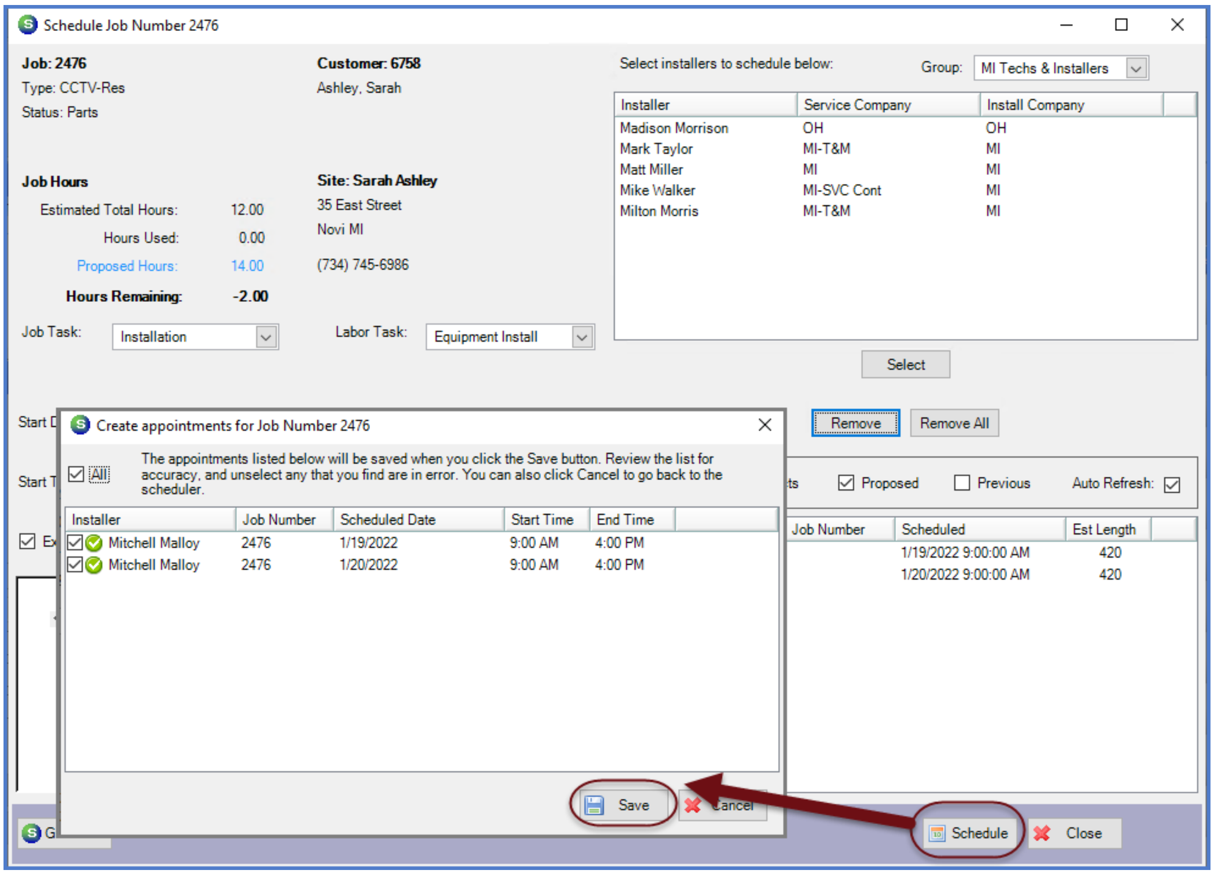


If you do not want to continue scheduling a Job Appointment, click on the Close button located at the lower right of the Job Schedule form.

If you are ready to create the Job Appointment(s), click on the Schedule 

button located at the lower right of the Job Schedule form.

A confirmation message will be displayed listing the Proposed Appointments. If you change your mind and want to remove any Proposed Appointment from the list, un-check the box to the left of that row. Appointments will only be created for rows that are checked. Click on the Save button when ready to create the Appointment(s).



Scheduling a Job Appointment

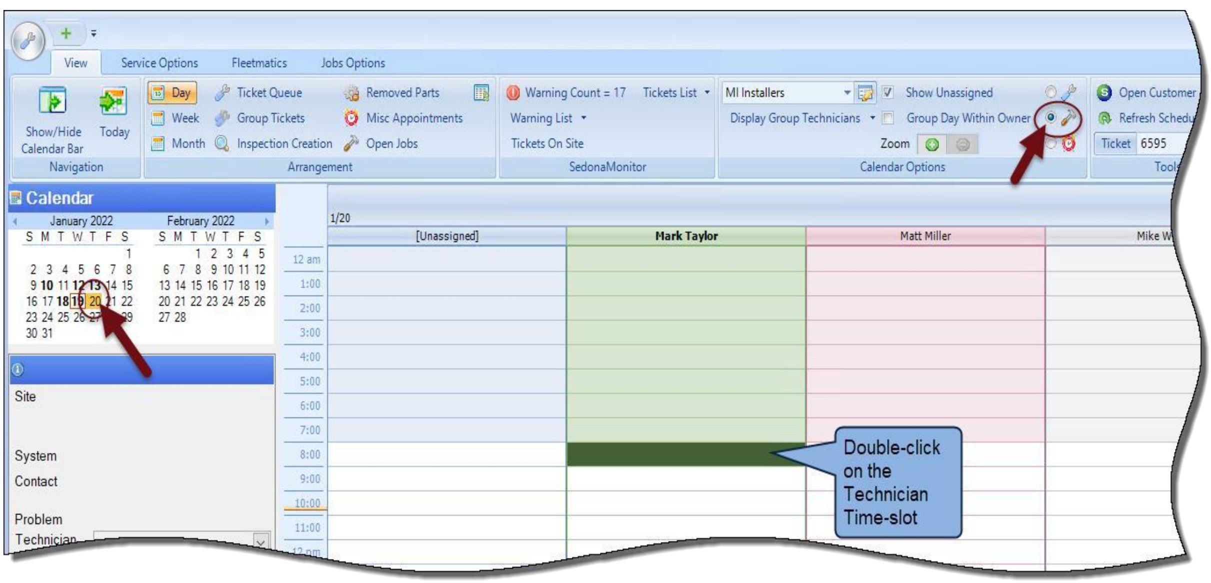
There are two methods available for Scheduling a Job Appointment:

- From the Schedule Board by double-clicking on a Technician time-slot
- Selecting a Job from the Open Jobs list

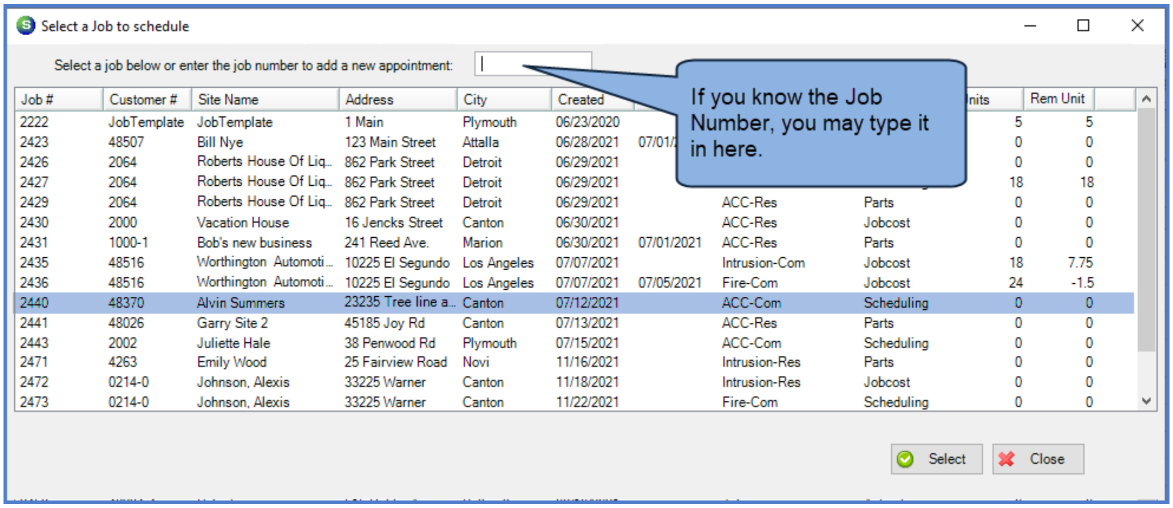
Both methods will open the Schedule Job form – it is simply a matter of preference which method you choose to use. Both methods are described below and on the following pages.

Schedule a Job Appointment from the Schedule Board

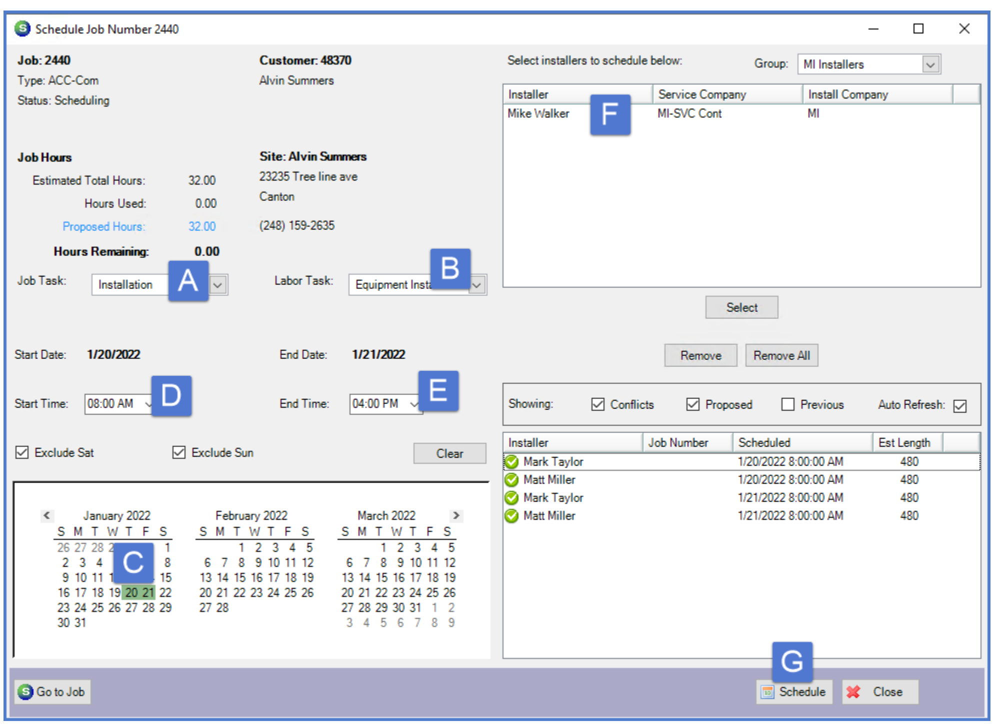
1. Navigate to the Schedule Board and click on the Day view. Click on the "Hammer" radio button at the upper right of the ribbon.
2. On the Calendar, select the date on which you want to schedule the appointment.
3. Double-click on the Technician time-slot of where you want the appointment to begin.



4. The list of Open Jobs will be displayed. Locate the desired Job within the list, and then double-click on the job row.



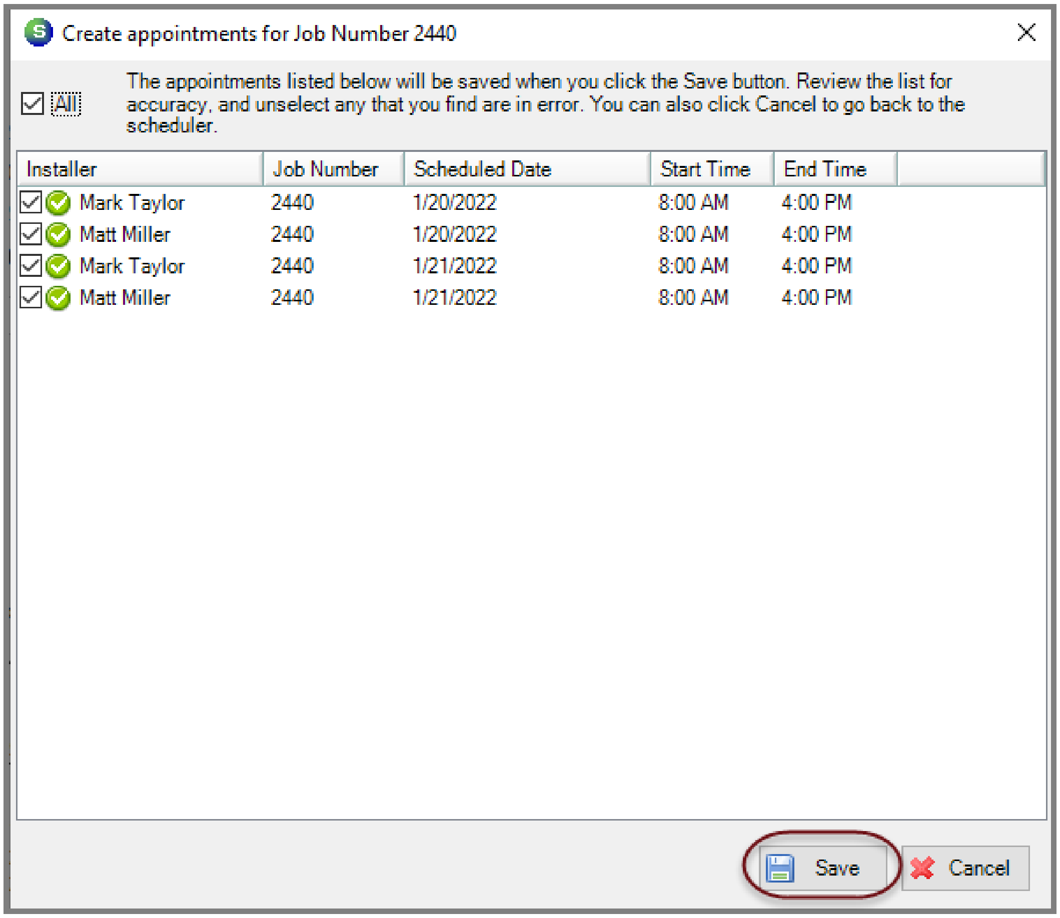
5. The Schedule Job form will be displayed. Fill in the fields as noted below.
   A. Select the Job Task from the drop-down list.
   B. Select the Labor Task from the drop-down list.
   C. On the Calendar, click on the dates for which you want to schedule an appointment.
   D. Select the appointment Start time.
   E. Select the appointment End time



F. Select the Installer(s) for the appointment(s).

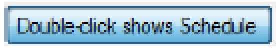
G. Click on the Schedule button when finished.

A confirmation message will be displayed. If the appointments are acceptable, click the Save button at the lower right of the form.

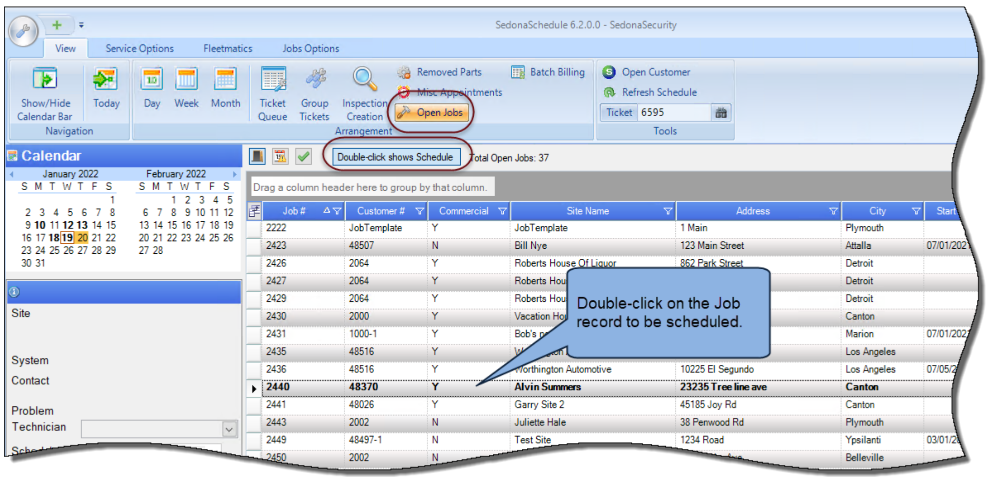


Schedule a Job Appointment from the Open Jobs List

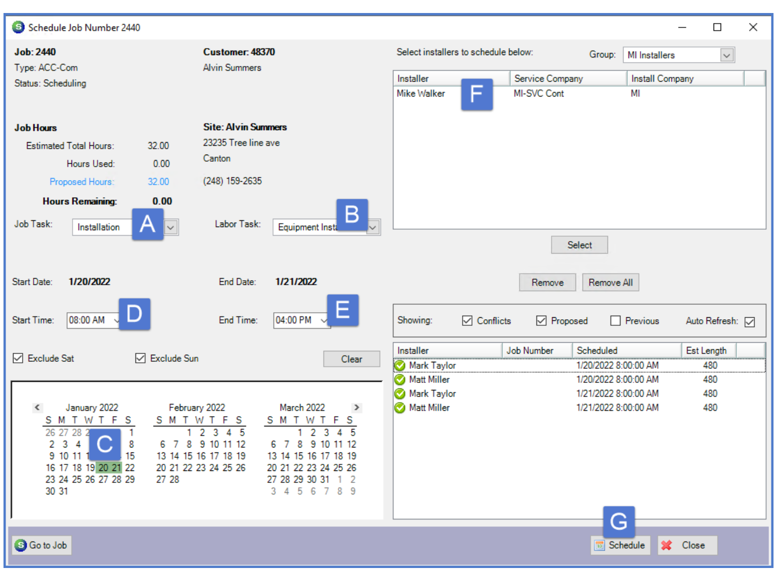
1. Click on the Open Jobs button from the main ribbon within SedonaSchedule.
2. Click on the toggle button so that it displays the words “Double-click shows Schedule”.



3. Within the list of open jobs, double-click on the Job record you will be scheduling.



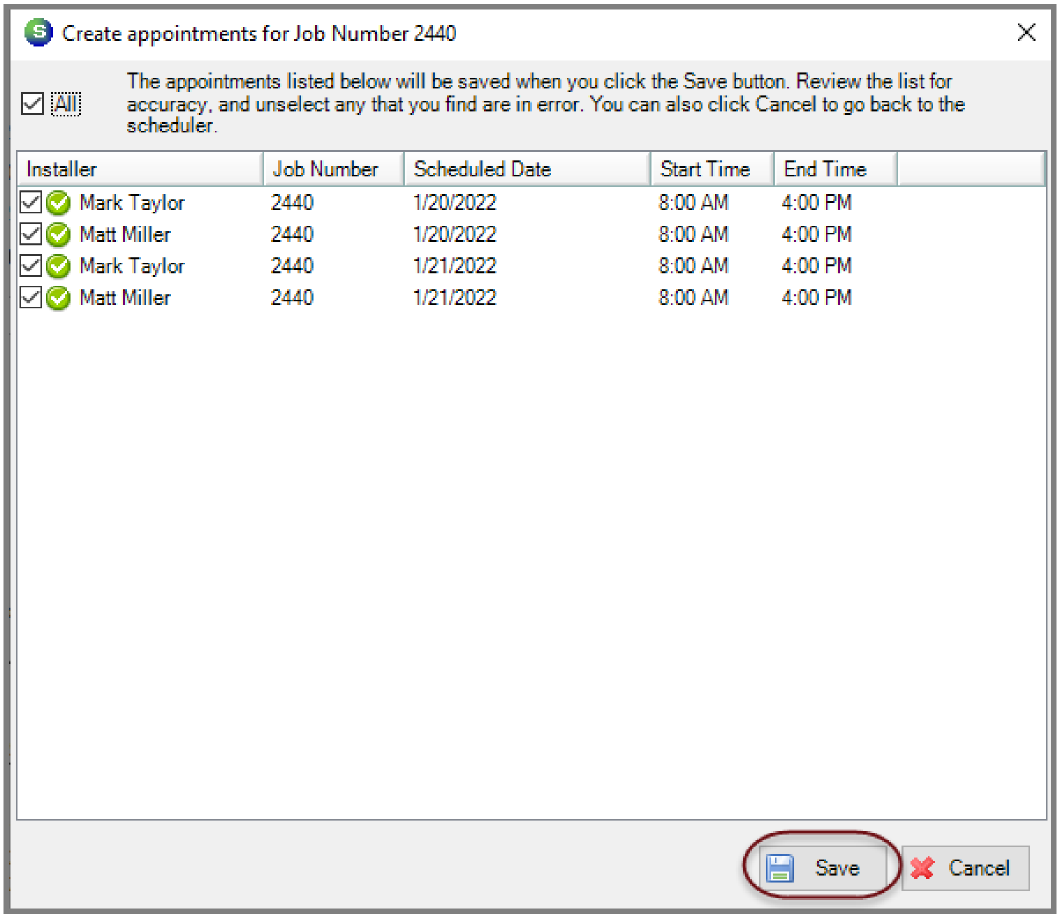
4. The Schedule Job form will be displayed. Fill in the fields as noted below.
   A. Select the Job Task from the drop-down list.
   B. Select the Labor Task from the drop-down list.
   C. On the Calendar, click on the date(s) for which you want to schedule an appointment.
   D. Select the appointment Start time.
   E. Select the appointment End time



F. Select the Installer(s) for the appointment(s).

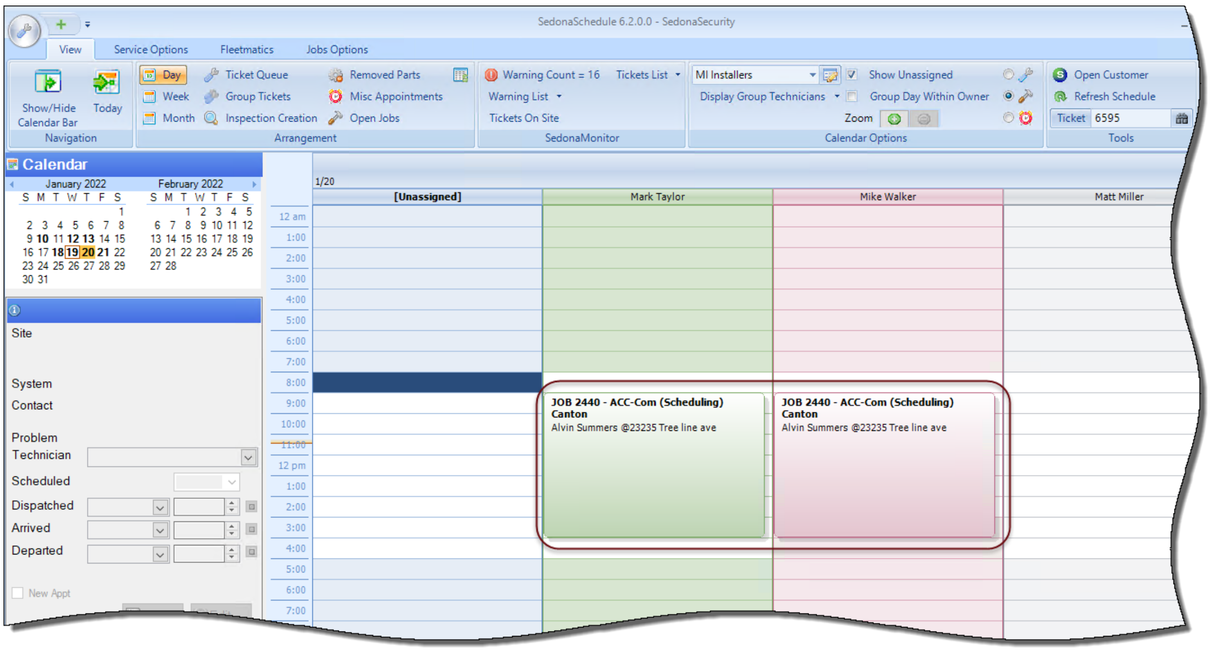
G. Click on the Schedule button when finished.

A confirmation message will be displayed. If the appointments are acceptable, click the Save button at the lower right of the form.



Managing Job Appointments

Once Job Appointments have been created, they will appear on the Schedule Board. Any scheduling changes (re-scheduling, changing the appointment length, deleting appointments, copy and paste and using the clock-out and clock-in function) are handled the same as Service/Inspection Tickets.

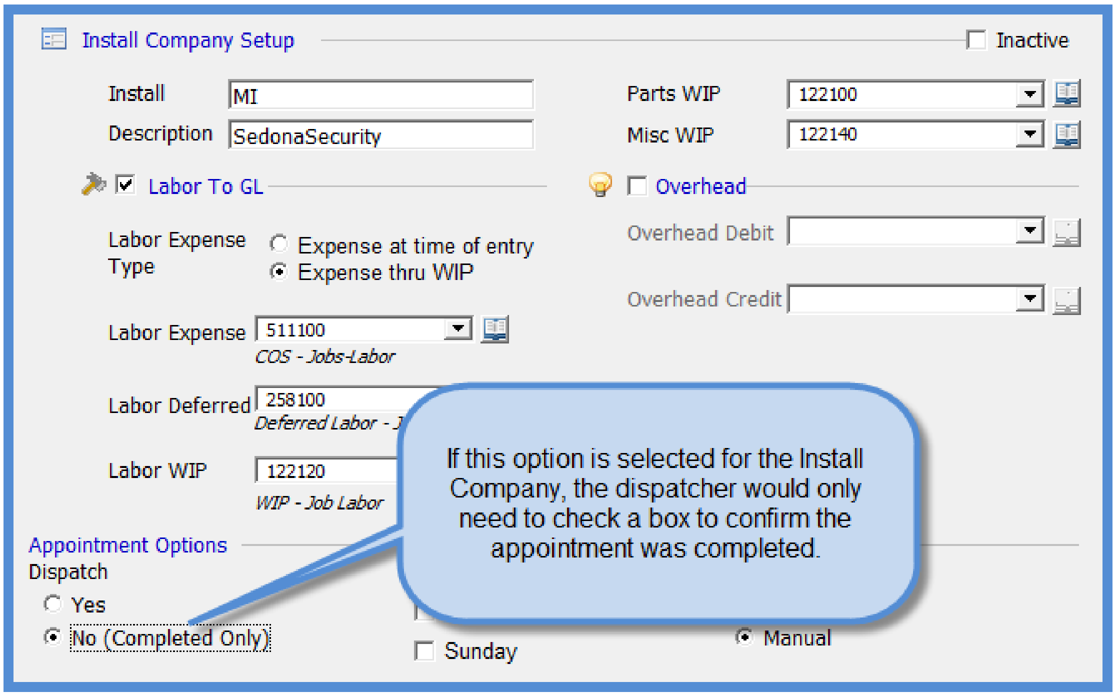


Job Appointment Dispatching

Dispatching Job Appointments is similar to Ticket Appointment dispatching – the only difference is there are fewer fields that need to be populated on the Dispatch form.

If your company does not want to enter dispatching times for Job Appointments but manually enter timesheets at a later time, you have the option of flagging the Install Company to mark appointments as Complete when they are finished – no data entry of dates/times required.

Live Dispatching or Manual Dispatching may be used for Job Appointments. Which method is used is determined by your company policies and procedures.

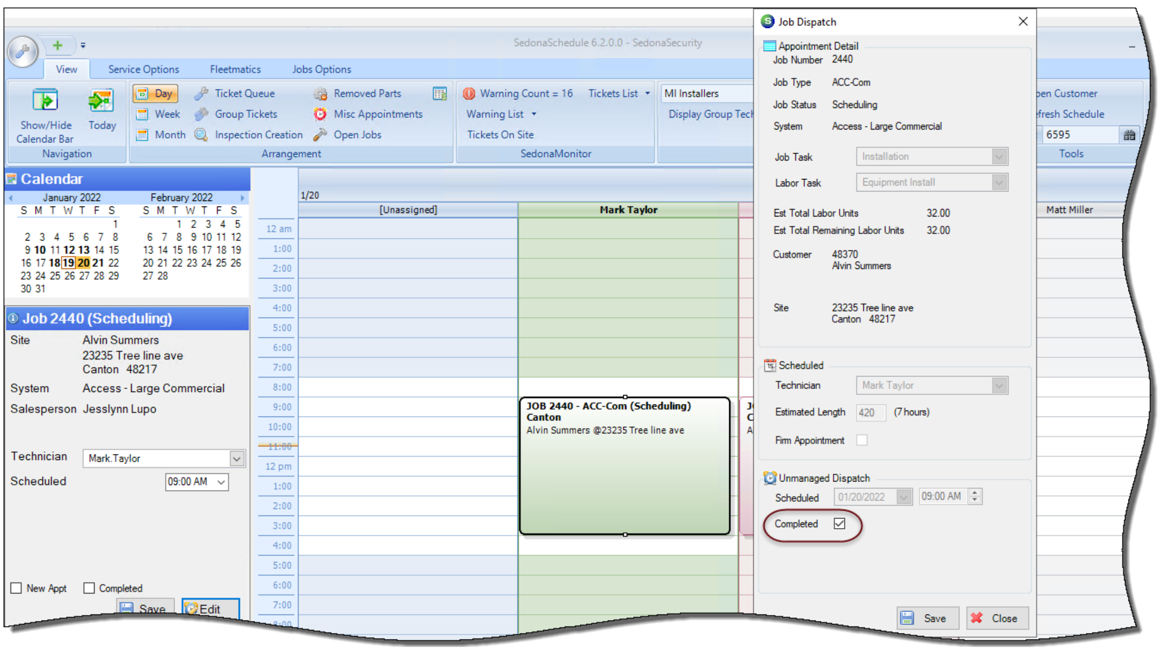


Completing a Job Appointment (No Dispatching Method)

To mark a Job Appointment as “Completed”, from the Schedule Board, click once on the Job Appointment then click on the Edit button in the Detail Information Viewer. The Job Dispatch form will open - check the Completed checkbox at the bottom of the form then click on the Save button. The background color of the Job Appointment will change to Red to indicate the Appointment was completed.

Note: Marking a Job Appointment as “Completed” will not update the Labor Units Used on the Job record. When a timesheet is posted to the Job, this will update the Job Labor Units used.

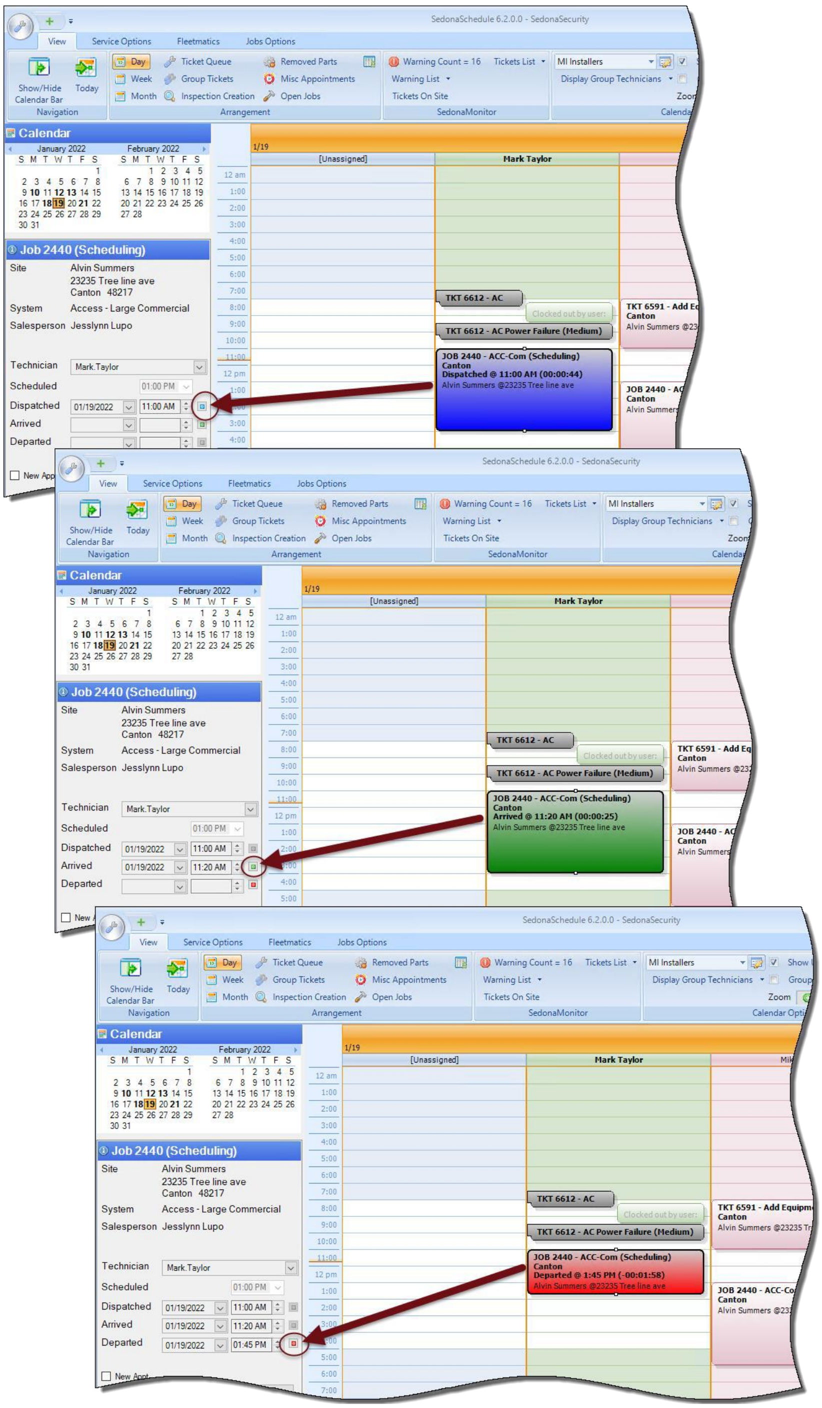
You may only use this method if the Install Company assigned to the job has been flagged for no dispatching.



Live Dispatching a Job Appointment

Live Dispatching is used if your Installers are calling in or communicating to the office when they are on the way to the Job, arrived on site, and have finished the Job Appointment. If your Installers are using the FSU or SedonaX Mobile, this is also considered as Live Dispatching.

Live Dispatching is performed from the Schedule Board. Click once on the Job Appointment, then in the Detail Information Viewer use the Live Dispatch buttons to record the dispatch times.



Manually Dispatching a Job Appointment

Manual Dispatching is used when you want to enter the Installer's dispatch information (dispatched, arrived and departed) at a later time.

Manual Dispatching is performed from the Schedule Board. Click once on the Job Appointment, and then click on the Edit button in the Detail Information Viewer.

The Job Dispatch form will be displayed - enter the times in the Dispatched, Arrived and Departed fields. Click on the Save button when finished.