

SedonaSchedule Functionality

CONTENTS

ABOUT THIS DOCUMENT	7
LAUNCHING SEDONASCHEDULE 1	11
WHERE TO START A NEW TICKET 1	2
CREATING A NEW TICKET FROM SEDONASCHEDULE	5
Service Ticket Form-Data Entry Fields	20
CUSTOM FIELDS	<u>2</u> 4
DOCUMENTS 2	25
Add an Existing Document to a Ticket	27 28
Тіскет Log 2	<u>29</u>
Service History	30
SCHEDULING TICKET APPOINTMENTS	31
Scheduling a Technician Appointment from a Ticket Scheduling a Technician Appointment from the Schedule Board Delete a Technician Appointment	34 36
DISPATCHING	11
Dispatch a Technician from the Schedule Board Manual Dispatching Dispatch a Technician from a Ticket	45
Parts	51
Parts Warehouse	52 54 56
ORDERING PARTS FOR A TICKET	58
Notes 6	51
JOURNAL	52
Journal Detail	64
Bold Group SedonaOffice-SedonaSchedule Functionality	3

PREPARING A TICKET FOR INVOICING	6
REVIEW TICKET CHARGES	57
REVIEW TICKET NOTES	6
Review Parts6	;9
Review Labor	' 0
Override Warranty7	71
REVIEW OTHER ITEMS7	' 2
REVIEW BILLING – CREATE AN INVOICE	'3
CLOSING A TICKET	' 6
BATCH BILLING OVERVIEW	7
Usergroup Permissions7	77
BATCH BILLING QUEUE	7
Field Chooser	30 30
VENDOR TICKETS	33
CREATING A VENDOR TICKET 8	34
CUSTOM FIELDS	36
CREATING A PURCHASE ORDER FOR VENDOR SERVICE	37
Scheduling Vendor Tickets	39
Scheduling an Appointment from a Vendor Ticket9 Scheduling a Service Provider Appointment from the Schedule Board	ЭО Э1
PROCESSING VENDOR TICKETS)3
INSPECTIONS)4
INSPECTION SETUP)5
Inspection Setup – Detail form9	97
Modifying an Inspection Record 10)0
TERMINATING AN INSPECTION RECORD10)1
CREATING INSPECTION TICKETS 10)2
ADDITIONAL FEATURES)5
MISCELLANEOUS APPOINTMENTS)6

Creating a Miscellaneous Appointment106 View List of Miscellaneous Appointments
FIRM APPOINTMENTS 110
Flag an Appointment as "Firm"111 Remove the Firm Flag112
APPOINTMENT CLOCK-OUT & CLOCK-IN
Appointment Clock-out
APPOINTMENT COPY & PASTE
DELETE A TICKET 117
GROUP TICKETS OVERVIEW 118
Group Ticket Concepts118
INSPECTION LINKED TO RECURRING LINE
Inspection Groups & Inspection Linked to a Recurring Item
GROUP TICKETS SETUP
Service Level Setup
INSPECTION RECORD SETUP
Creating a New Inspection Record
GENERATING THE GROUP TICKETS 127
Working in the Group Tickets Queue
SCHEDULING GROUP TICKET APPOINTMENTS
Scheduling "Group" Appointments
JOB FEATURES
OPEN JOBS LIST
THE JOB SCHEDULING FORM
SCHEDULING A JOB APPOINTMENT 150
SCHEDULE A JOB APPOINTMENT FROM THE SCHEDULE BOARD
SCHEDULE A JOB APPOINTMENT FROM THE OPEN JOBS LIST
MANAGING JOB APPOINTMENTS 155
Bold Group SedonaOffice-SedonaSchedule Functionality 5

J	OB APPOINTMENT DISPATCHING	156
	COMPLETING A JOB APPOINTMENT (NO DISPATCHING METHOD)	157
	LIVE DISPATCHING A JOB APPOINTMENT	158
	MANUALLY DISPATCHING A JOB APPOINTMENT.	159

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.

-		Ticke	ket#6594	x
Ticket Cent	tral Station			
	pointments Billing Documents and Parts Go To	wrnal Notes Other Items		
Saint Lawren	151-1) Created By carolyn ue Dover Gardens	:23 PM	Contact I I I I I I I I I I I I I I I I I I I	
Site and System Detail		Ticket Detail		
System Account a 483	306	Problem	Low Battery	
System Type Intrusio	on	Secondary Problem		
Panel Type 2200		Route Code	M	
Location		Expertise	3	
Next Inspection 9/1/20		Priority	Medium	
	556-3952 e2	Estimated Length	60	
Map Code	Timezone	Comments		
Cross Street				
Warranty 90-P 3				
Warranty End Expired	d	Service Coordinator		
Memo		Technician	Fuller Electric Co, Inc	
Comments		PO #		
Notes Secondary Account		Category	SV-T&M	
Keys		Resolution	×	
	er Electric Co. Inc	Use Payment Informa	mation On File	
Service Level T&M-		None Bank (1)		
Receiver/Transmitter	-nes	Credit Card (2)		
neceiver/Transmitter				
		Vendor Service	s	ave

8

 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.

- 23 =		Ticke	t#6583 ×
Ticket	Central Station		
Service Ticket	Appointments Billing Documents (0) Equipment and Labor	(0) Items	
Site Arndale 23, 1st Saint L	e (48351) Created 12/16/ e (48351-1) Created By Admin Avenue Dover Gardens awrence Status Open 28,Christ Church,Barbados	2021 2:15 PM strator	Contact I V III Phone Est V Notify V
Site and System Det	ail	Ticket Detail	
System Account	a 48351-l	Problem	Insp-Other 🗸
System Type	Intrusion	Secondary Problem	×
Panel Type	2200	Route Code	
Location		Expertise	5
Next Inspection	9/1/2021 (Quarterly)	Priority	Medium
Site Phone	(055) 556-3952 e2	Estimated Length	120
Map Code	Timezone		120 A
Cross Street		Comments	
Warranty	90-P 30-L		<u>~</u>
Warranty End	Expired	Service Coordinator	
Memo		Technician	Fuller Electric Co, Inc
Comments		PO #	
Notes		Category	SV-T&M
Secondary Account		Resolution	~
Keys			- 0.51
Service Company	Fuller Electric Co, Inc 🛛 🗸 🔕	Use Payment Inform	ation On File
Service Level	Inspection	O Bank (1)	
Receiver/Transmitter		Credit Card (2)	
		Vendor Inspect	on Save

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.

9

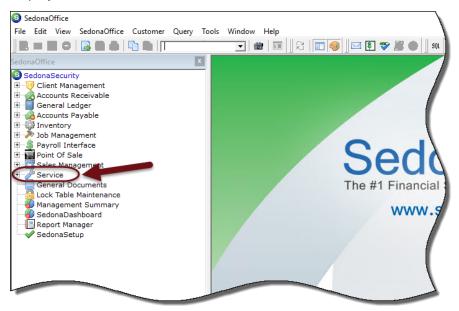
Purchase Orders

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.



+ =					- a x
View Service Options Fleetmati	tics Jobs Options				
Show/Hide Calendar Bar Navigation		Warning Count = 7 Tickets List * Warning List * Tickets On Site SedonaMonitor	OH Techs	oup Day Within Owner	
Calendar					
✓ January 2022 February 2022 ► SMTWTFS SMTWTFS	1/12 [Unassigned]	Madison Morr	ison orla	indo Smith	Oscar Martin
1 1 2 3 4 5 2 3 4 5 6 7 8 6 7 8 9 10 11 12 9 10 11 12 13 14 15 13 14 15 16 17 18 19	12 am 1:00				
16 17 18 19 20 21 22 20 21 22 23 24 25 26 23 24 25 26 27 28 29 27 28 30 31	2:00 3:00				
© Tkt 6550(SC)	4:00				
Site Mark Fleming 80 Perry St Cleveland OH 44110	6:00				
System 12345 Intrusion	8:00	TKT 6550 - AC Power Failu	re (Medium)	TKT 6549 - Insp- Cellular/Radio (Medium) Solon	Ashlyn Small @127 Public Square
Contact Problem AC Power Failure(Medium)	10:00		Bethany Calhoun	Bethany Calhoun	TKT 6557 - Insp-Int (Medium) Cleveland
Technician Madison.Morrison	12 pm	TKT 6535 - INSP-Fire (Hig Smokey Treats BBQ @15000 /			Select Design @208 Flynn Avenue
Dispatched 🔍 🗘	2:00				
Arrived 🔍 🗘 🗐 Departed	4:00		TKT 6551 - Insp-C Darren Jacobs @33	CTV (Medium) Solon Juniper Rd	TKT 6558 - Insp-Int (Medium) Cleveland Select Design @208 Flynn Avenue
New Appt	5:00 6:00			-	
🔚 Save 😡Edit	7:00 8:00				
Notes 🚺 Map 🖂 Email	9:00				
Refreshed: 1/12/2022 11:07 AM	10:00 11:00				

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.

New Service Ticke	et			Warning Warning List Tickets On S
				S
Calendar	February 2022 🔹	1/13		
	February 2022 → SMTWTFS	1/13	3 [Unassigned]	Madison
January 2022 SMTWTFS 1	<u>SMTWTFS</u> 12345	1/13 12 am		Madison N
January 2022 SMTWTFS 1 2 3 4 5 6 7 8	<u>SMTWTFS</u> 1 2 3 4 5 6 7 8 9 10 11 12			MadisonN
January 2022 SMTWTFS 1	<u>SMTWTFS</u> 12345	12 am 1:00		Madison N
January 2022 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19	12 am 1:00 2:00		Madison N
January 2022 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26	12 am 1:00		Madison

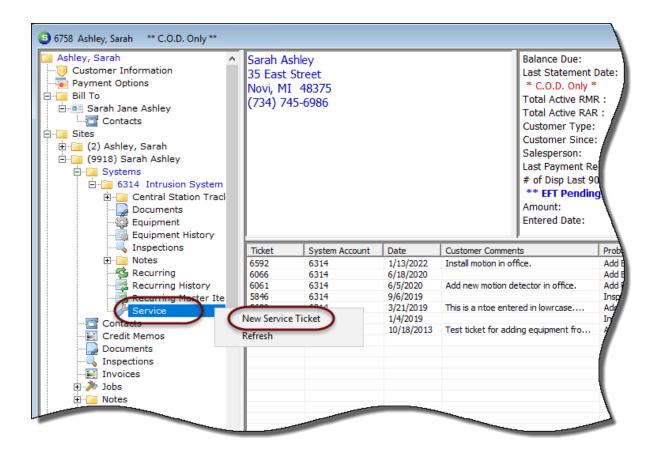
3. To create a Ticket and schedule a Technician for a particular date and time, you would use the "Double-Click to Add" method. First, make certain the button to the left of Wrench Icon in the Calendar Options Ribbon group is selected.

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.

+ = View Service Options Fleetr	matics Jobs Options			
Show/Hide Today	eet Queue 🔐 Removed Parts 🛄 up Tickets 😇 Misc Appointments section Creation 🎤 Open Jobs Arrangement	Warning Count = 7 Tickets List * Warning List * Tickets On Site SedonaMonitor	OH Techs Show Unassigned Display Group Technicians Croup Day Within Owe Zoom Calendar Options	Solution Solution
Zalendar			/	
 January 2022 February 2022 	1/12			
SMTWTFS SMTWTE	[Unassigned]	Madison Morr	rison orlando Smith	Osc
2 3 4 5 6 7 9 6 7 8 9 10 11 1				
9 10 112 914 15 13 14 15 16 17 18 1 16 17 18 19 20 21 22 20 21 22 23 24 25 2	00			
23 24 25 26 27 28 29 27 28 30 31	20 2:00 3:00			
30.31	4:00			
③ Tkt 6550(SC)	5:00			
Site Mark Fleming	6:00			1
80 Perry St Cleveland OH 44110	7:00			
System 12345 Intrusion	8:00		TKT 6548 - Insp- TKT 6549 - Insp-	
Contact	9:00	TKT 6550 - AC Power Fail		Ashlyn Small @127 Publi
	10:00		Bethany Calhoun Bethany Calhoun	
Problem AC Power Failure(Medium) Technician Madison Morrison	11:00			TKT 6557 - Insp-Int (I Select Design @208 Flyn
	12 pm	TKT 6535 - INSP-Fire (Hig Smokey Treats BBQ @15000		Select Design @208 Flyh
Scheduled 09:00 AM V	1:00	Shickey heats bbg @15000		
Dispatched 🗸				
Arrived 🗸			TKT 6551 - Insp-CCTV (Medium) Solon Darren Jacobs @33 Juniper Rd	TKT 6558 - Insp-Int Select Design @208 Fi
Departed				-
	5:00 Double-click in t	he		
New Appt	l echnician time-sid	ot for		
📄 Save 😡 Edit	8:00 the desired	for		
🐱 Notes Map 🖂 Email	9:00 the new Ticket			
	10:00			
Refreshed: 1/12/2022 44 05 44		and the second se		

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.

C +	w Servic	ce Options Fleetmati	ics Jo	bs Op	tions	
Show/Hide Calendar Ba Navig	r	 Day Day Ticket Q Week Group T Month Inspection 	ïckets	-	Removed Parts I Misc Appointments Open Jobs	IN O W
Calend	ry 2022	February2022 ► SMTWTFS		1/12	[Unassigned]	
2 3 4 9 10 11 <mark>1</mark>	1 5 6 7 8 2 13 14 15 9 20 21 22	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26	12 am 1:00 2:00			
23 24 25 2 30 31	6 27 28 29	27 28	3:00			
③ Tkt 655	50(SC)		4:00			
Site	Mark Flen 80 Perry S	~	6:00			
	Cleveland	d OH 44110	7:00	-		

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.

SedonaOffic	e Search - SedonaSe	ecurity							-		×
🔏 AR Search	🚕 AP Search										
AR Search Crit	eria										
Add Criteria	Clear Criteria	3 searc	ch criteria defined					Realtime Search		Search	
Search For:	Customer	~	ashley, sa					Contains	\sim		^
Name	Number	Site	Bill To				[Include Canc	eled		
<i>`</i>											- *
AR Search Re			(((
Customer # 6758	Nan Ashley, Sarah	ne	System Account 6314	System Description Intrusion System	n Site # 9918	Site Name Sarah Ashley	Site Addre 35 East Stre		dress 2	Novi	ite C
6758	Ashley, Sarah		35 Gavione Syste		2	Ashley, Sarah	35 Gavione	EL		Charlo	otteto
<	_										>
Simple View	Found	2 results						Selec	t	Close	

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.

	3 =			Tic	ket#6592			x	
	Ticket Central Station								
Service Ticket	Custom Fields Appointments Billin and Labor		Equipment and Parts Go To	Notes Oth Ite			Ticket Ticket Log Group	Critical Messages (1) C.O.D. Only Notifications	
Customer	6758 Ashley, Sarah	Created	1/13/2022 11:48 A	M	Contact	Sarah Ashl	ey	v	
Site	Sarah Ashley 35 East Street	Created By	carolyn		Phone	(734) 745-6	986	Ext	
	Novi, MI 48375 Eastern Time	Status	Scheduled		Notify	sarah@gma	ill.com		
Entered B Expires:									

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.

- 12 -			Ticket#6592	x
Ticket	Central Station			
Service Ticket	and Labor (1) and	ment Journal Notes Parts (2) Go To	Notifications	
Site Sarah 35 Ea Novi, I	y, Sarah iAshley Created By ca st Street	13/2022 11:49 AM arolyn eparted	Contact Sarah Ashley Carah Phone (734) 745-6996 Ext Notify sarah@gmail.com	
Site and System De	tai	Ticket Detail		
System Account	6314	TTODICIT	System.	
System Type	Intrusion	Secondary Pro		
Panel Type	UNKNOWN	Route Code		
Location	4766	Expertise	3	
Next Inspection	9/1/2022 (Annual)			
Site Phone	(734) 745-6986	Priority	Medium	
Map Code	9918 Timezone E			
Cross Street	4766	Comments	Install motion in office.	
Warranty	One Year P & L		· · · · · · · · · · · · · · · · · · ·	
Warranty End	Expired This is the f	ield where I can enter Sy	ystem Comments from the System record.	
Memo	9918			
Comments	This is the field where I can enter System Comme	This is the field where I ca	can enter System Notes from the System record.	
Notes	This is the field where I can enter System Notes from	Category	SV-T&M	
Secondary Account		Resolution	✓	
Keys				
Service Company	MI-T&M	None	t Information On File	
Service Level	T&M-Res	✓ O Bank (0)		
Receiver/Transmitte	۲	O Credit Card	d (1)	
			Save	

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".

- 23 -		Ticke	x#6592 x
Ticket	Central Station		
Service Ticket	Appointments Billing Documents Equipment and Labor (1) Equipment Go To	urnal Notes Other (2)	
Customer 6758 Ashley	, Sarah Created 1/13/2022 1	1:49 AM	Contact Sarah Ashley
Site Sarah	Ashley Created By carolyn		Phone (734) 745-6986 Ext
	st Street / 48375 Status Departed		Notify sarah@gmail.com
	n Time		
Site and System De	tail	Ticket Detail	
System Account	6314	Problem	Add Equipment
System Type	Intrusion	Secondary Problem	~
Panel Type	UNKNOWN	Route Code	
Location	4766	Expertise	3
Next Inspection	9/1/2022 (Annual)	Priority	Medium
Site Phone	(734) 745-6986	Estimated Length	120
Map Code	9918 Timezone ET		Install motion in office.
Cross Street	4766	Comments	
Warranty	One Year P & L		Y
Warranty End	Expired	Service Coordinator	
Memo	9918	Technician	~
Comments	This is the field where I can enter System Comments from t	PO #	123456
Notes	This is the field where I can enter System Notes from the §	Category	SV-T&M
Secondary Account		Resolution	v
Keys		1	
Service Company	MI-T&M	Use Payment Inform None	ation On File
Service Level	T&M-Res	O Bank (0)	
Receiver/Transmitter		Credit Card (1)	
			Save

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.

B) =	-	-			Ne	w Ticket	-	10.00	-		ar see	X
Т	icket												
B	Q	\$			B				1	B	ag.	Critical Mess	ages (1)
Service Ticket	Appointme and Labo		Documents	Equipment and Parts	Journal	Notes	Other Items	Purchase Orders	e Service History	Ticket Log	Ticket Group		
Go To											Notificatio	ns	
Customer	Customer 1004 Created 12/23/2014 Precision Tune Auto Care Created 12/23/2014							(Contact	Greg V	Vilson	-	
Site	Precision [*]	une Auto C		Created By	Adminis	strator			Phone	(619) 33	25- <mark>9</mark> 821	Ext	
	1191 E Ma El Cajon C			Status	Open				Notify greg.wilson@ptac.com				
								6	-	_	_		
Site and	d System Deta	I					icket Deta	ail					
System Acc	count 23-	1-3365			100	0	Problem	[[•
System Typ	e Intr	sion					Secondan	Problem					Ţ

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.

			Ticke	t#6592			×
Ticket	Central Station						
Service Ticket	Appointments Billing Doc	cuments Equipment Jo (1) and Parts Go To	urnal Notes Other (2) Items			Image: Critical Messages (3) Image: Critical Messages (3)	
Customer 6758		Created 1/13/2022 1	1:49 AM	Contact	Sarah Ashley	~ 🖾	
Ashley Site Sarah		Created By carolyn		Phone	(734) 745-6986	Ext	
35 Eas	t Street						
Novi, N Easter	11 48375 n Time	Status Departed		Notify	sarah@gmail.com		
Caster	n time						
Site and System Det	ail		Ticket Detail				
System Account	6314	200	Problem	Add Equipm	ent	~	
System Type	Intrusion	10.00	Secondary Problem			~	
Panel Type	UNKNOWN		Route Code			~	
Location	4766		Expertise	3		×	
Next Inspection	9/1/2022 (Annual)		Priority	3 Medium		~	
Site Phone	(734) 745-6986					×	
Map Code	9918	Timezone ET	Estimated Length	120			
Cross Street	4766		Comments	Install motion i	n office.	^	
Warranty	One Year P & L					~	
Warranty End	Expired		Service Coordinator			~	
Memo	9918		Technician			~	
Comments	This is the field where I can enter Sy	ystem Comments from t	PO #	123456			
Notes	This is the field where I can enter S	ystem Notes from the (Category	SV-T&M		¥	
Secondary Account			Resolution			~	
Keys			(<		Terrent	
Service Company	MI-T&M	~	Use Payment Informa None	stion Un File			
Service Level	T&M-Res	~	🔘 Bank (0)	-			
Receiver/Transmitter			Credit Card (1)				
							Save

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

-		Ticket	ket#6592 x
Ticket	Central Station		
Service Ticket	Appointments Billing Documents Equipment Journal Appointments Go To	irnal Notes Other (2) Items	
Customer 6758	Created 1/13/2022 11	:49 AM	Contact Sarah Ashley
Ashley Site Sarah			Phone (734) 745-6986 Ext
35 Eas	tStreet		Notify sarah@gmail.com
Novi, N Easter	146373		
Site and System Det		Ticket Detail	
System Account	6314	Problem	Add Equipment
System Type	Intrusion	Secondary Problem	n 🗸
Panel Type	UNKNOWN	Route Code	×
Location	4766	Expertise	3
Next Inspection	9/1/2022 (Annual)	Priority	Medium
Site Phone	(734) 745-6986	Estimated Length	120
Map Code	9918 Timezone ET	Comments ABC	Install motion in office.
Cross Street	4766	×	
Warranty	One Year P & L		×
Warranty End	Expired 9918	Service Coordinator	
Memo	This is the field where I can enter System Comments from t	Technician	
Comments Notes	This is the field where I can enter System Comments from t	PO #	123456
Secondary Account	This is the field where I can enter System Notes from the t	Category	SV-T&M
Keys		Resolution	×
Service Company	MI-T&M	Use Payment Informa	mation On File
Service Level	T&M-Res	None Bank (0)	
Receiver/Transmitter		Credit Card (1)	
			Save

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.

	<u>3</u>) =					Ticket#6592					×
Т	icket Central S	tation									
	Custom Fields Appoint and La	ments Billing		Equipment Journa and Parts Go To	Notes (1)	Other Purc Items Orde			5/14	Critical Messages (1) C.O.D. Only Notifications	
Customer	6758 Ashley, Sarah		Created	1/13/2022 11:49	AM	Contac		0.000755		V	
Site	Sarah Ashley 35 East Street			/ carolyn		Phone	(734) 745-		Ext		
	Novi, MI 48375 Eastern Time		Status	Scheduled		Notify	sarah@gm	all.com			
Tables											
Parts Use	d			~							
Customer	Paid By			~							
User Table											
Text											
QTY/Item	i										
User Text	2										
User Text	3										
User Text	4										
User Text	5										
Checkboxes Check Bo		_		Money			0.00	-			
Check Bo				Quoted Price Money Labe			0.00				
Check Bo				Dates	-		0.00				
Check Bo				Return Date				/			
Check Bo	x 5			Referral Cred	dit			/			
											Save

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

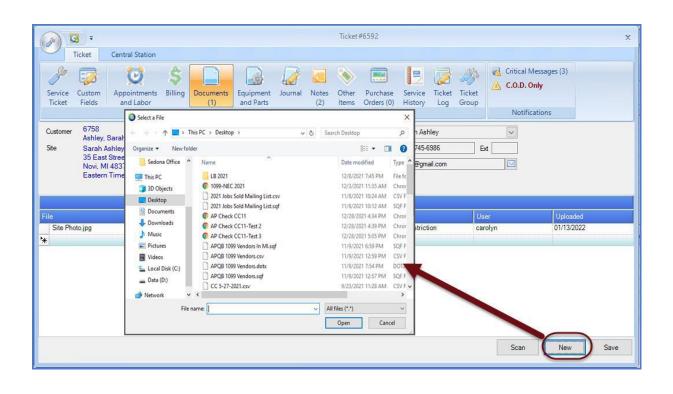
Documents

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.

- 23 -		Ticket#6592			x
Ticket Central Station Image: Construction of the state of the s	Silling Documents (2) Go To	al Notes Other Purcha (2) Items Orders (se Service Ticket Ticke	C.O.D. Only	s (3)
Customer Site Site Novi, Karah Site Sarah Ashley 35 East Street Novi, H4375 Eastern Time	Created 1/13/2022 11:4 Created By carolyn Status Departed	19 AM Contact Phone Notify	Sarah Ashley (734) 745-6986 sarah@gmail.com		
		Documents			
File	Description Type		Level		Uploaded
	Site Condition Pictures	\frown	1 - No Restriction	carolyn	01/13/2022
* C:\Users\CarolynJ\Desktop\CC 5-27		(V)	1 - No Restriction)	
	Type	Description	2 - Customer Restricted		
	.csv .PDF	.csv .PDF	3 - Management Only		
	A1	A1 Document Type Test			
	CHARACTER	R* Testing special characters			
	Contract	Contract			
	Manual	Manual			
1	Pictures	Pictures			
				Scan	New Save

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.

Ticket Central Station Image: Service Custom Ticket Fields	Silling Documents Equipment Journal Notes Other Purchase Service Ticket Ticket Critical Messages (3) Billing Documents Journal Notes Other Purchase Service Ticket Ticket C.O.D. Only Go To Go To Other Purchase Service Ticket Ticket Notifications											
Customer Ashley, Sarah Site Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	Created1/13/2022 11:49 AMContactSarah AshleyCreated BycarolynPhone(734) 745-6986ExtStatusDepartedNotifysarah@gmail.comImage: Compare the sarah@gmail.com											
	Documents											
File	Description Type Level User Uploaded											
Site Photo.jpg	Site Cond SedonaOffice X lo Restriction carolyn 01/13/2022											
Site Photo, jpg Site Colo SedonaUffice in Resultation Cardiyin Uffisizazz												
	Scan New Save											

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.

🌛 SedonaSca	n	\times
Service	6592	
File		
Description		
Security Level	1 - General	~
Document Typ	e	\sim
SedonaScan	Scanner Software	
Status	No default scanning device. Please dick Setup.	
-For Testing		
	Save Settings Duplex	
- Cotur	D c	
😡 Setup	Normal Scan	
	Cancel	

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.

19				Tic	et #6592
Tick	et Central Station				
	istom ields Appointments and Labor	\$ Billing	Documents Equipme (1) Equipme and Par Go		Other Purchase Service Ticket Critical Messages (1) Others Orders (0) History Critical Messages (1) Main Council And
Site Site	8758 Ashley, Sarah Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time		Created 1/13/ Created By carol Status Depa		Contact Sarah Ashley Phone (734) 745-6986 Ext Notify sarah@gmail.com
	Timestamp		User Code	Туре	Description User Comments
1/13/2022 3:1	3 PM	carolyn		UPDATE	Resolution code removed.
1/13/2022 3:11	PM	carolyn		UPDATE	Resolution Code changed from "1 Add" to "Go
/13/2022 3:11	PM	carolyn		UPDATE	Updated Note
/13/2022 3:10	PM	carolyn		ADD	Added Part BOSDS820
1/13/2022 3:10	PM	carolyn		UPDATE	Updated Part IM1270
/13/2022 3:09	PM	carolyn		UPDATE	Updated Other SVC Misc
/13/2022 2:58	PM	carolyn		ADD	Added Other SVC Misc
/13/2022 2:36	PM	carolyn		UPDATE	Resolution Code changed from " to "1 Add".
/13/2022 2:36	PM	carolyn		UPDATE	Updated Appointment for Mark.Taylor 1/13/20
/13/2022 2:29	PM	carolyn		ADD	Added Part IM1270
/13/2022 2:19	PM	carolyn		ADD	Added document Site Photo.jpg
/13/2022 2:06	PM	carolyn		OTHER	User Viewed Ticket
1/13/2022 11:56	S AM	carolyn		OTHER	User Viewed Ticket
1/13/2022 11:49	AM	carolyn		ADD	Added Appointment for Mark.Taylor 1/13/2022
1/13/2022 11:49	AM	carolyn		ADD	Added Service Ticket 6592

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.

B -							Tic	:ket#659	2					x
	Ticket	Central Station								\frown				
Service Ticket	Custom Fields	Appointments B and Labor	\$ Billing D	Documents (1)	Equipment and Parts Go To	Journal	Notes (2)	Other Items	Purchase Orders (0)		Ticket	Ticket Group	240	Critical Messages (1) C.O.D. Only Notifications
Customer Site	6758 Ashley, Sarah A 35 East Novi, M Eastern	shley Street I 48375		Created Created By Status	1/13/202: y carolyn Departed		AM		Contact Phone Notify	Sarah Ash (734) 745-69 sarah@gma	986	Ex		
	Date	▼ Ticket	ST		System			Problem	1	R	esolution		Billa	CustomerComments
06/18/2020		6066	CL	6314	- Fi	A	dd Equipn	nent		1 Add			Y	testing cogs posting for parts.
06/05/2020		6061	CL	6314		A	dd Equipn	nent		Completed			Y	Add new motion detector in office.
09/06/2019		5846	CL	6314		l	nsp-Int			Insp Comp.				
03/21/2019		5620	CL	6314		A	dd Equipn	nent		Completed			Y	This is a ntoe entered in lowrcase.
01/04/2019		5478	CL	6314		h	nsp-Int			Insp Comp.			Y	
10/18/2013	3	2764	CL	6314		F	dd Equip	ment					N	Test ticket for adding equipment from

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.

Schedule Ticket # 6592	— 🗆 X
View	\sim
∢ January 2022 February 2022 → Display Group OH Techs	Zoom 🔘 🖂
S M T W T F S S M T W T F S 26 27 28 29 30 31 1 1 2 3 4 5 Select 🔽 Code Name Service Co	
2 3 4 5 6 7 8 9 10 11 12 9 10 11 12 13 14 15 13 14 15 16 17 18 19 Madison Morrison Madison Morrison OH	
9 10 11 12 13(14) 15 13 14 15 15 17 18 19 16 17 18 19 20 21 22 20 21 22 23 24 25 26 23 24 25 26 77 28 29 27 28 1 2 3 4 5 Mike.Walker Mike Walker Mi-SVC Cont	
23 24 20 20 20 20 20 20 20 20 20 20 20 20 20	v
Schedule Board	
1/13	*
[Unassigned] Madison Morrison Mark Taylor Mike Walker orlando Smith	Oscar Martin
2:00	
3:00	
5:00	
8:00 TKT 6491 - Add Equipment TKT 6529 - Can't Set B/A TKT 6551 - Insp-CCTV	shlyn Small @127 Public Square
9:00 Alvin Summers @23235 Tree line (Medium) Novi Arrived @ 8:00 AH Darren Jacobs @33 Juniper Rd	shiyn Small @127 Public Square
10:00 Danielle Hawkins @80 Perry	
11:00 TKT 6592 - Add Equipment	
12 pm (Hedium) Novi 1:00 Sarah Ashley @35 East Street	
2:00	
3:00 Create Appointment X	
4:00	
5:00 Are you ready to create an appointment for Oscar.Martin at 1/13/2022 12/00:00 PM?	
6:00 IZ:00:00 PMr	
7:00	
9:00	
9:00 10:00 1	•

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.

A) 🖸	÷	Dispatch			Ticket#6	5592		×
Tic	cket Central Station	Dispatch						
Service C	Custom Fields	Billing Documents		otes Other Purchas (2) Items Orders (e Ticket Ticket	y	
Customer	6758	Created	1/13/2022 11:49 AM	Contact	Sarah A	shley		
Ste	Ashley, Sarah Sarah Ashley	Created B	y carolyn	Phone	(734) 74	5-6986 Ext		
	35 East Street Novi, MI 48375 Eastern Time	Status	Departed	Notify	sarah@g			
Labor								
🗌 Manual	Labor Hours	Rate	Amou	nts	Servic	e Fee		
Regular	2.25	120.00	Total Labor	270.00	Amount	115.00		
Overtime	0.0	180.00	Tax	19.58				
Holiday	0.0	240.00	Total Amount	\$289.58			Sa	ave
lame	Appointment	Dispatched	Arrived	Departed	Firm	Est Len Service_Company_Code	Act Len Billabl	le Len
Mark Taylor		1/13/2022 11:45 AM	1/13/2022 12:00 PM	1/13/2022 2:00 PM		120 MI-T&M	135	13
nark laylor	1/13/2022 12:00 PM					120 OH-INSP Cont	0	

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

+ View Show/Hide Calendar Bar Navigat	Today Month Q Inspection	ueue ickets	Jobs Options Removed Parts Misc Appointments Open Jobs ement	 Warning Count = 10 Warning List Tickets On Site SedonaMonito 	Tickets List 🔻	OH Techs Display Group Tec	+ 🞲 :hnicians + Cali
	<u>_</u>	Andigo		Scaonawionitori			
Calenda Calenda January S M T W	2022 February 2022		1/13 [Unassigned]	Oscar Martin	orlan	do Smith	Ma
2 3 4 5 9 10 11 12 16 17 18 19 23 24 25 26 30 31	1 1 2 3 4 5 6 7 8 6 7 8 9 10 11 12 13 14 15 13 14 15 16 17 18 19 20 21 22 20 21 22 23 24 25 26	12 am 1:00 2:00 3:00					
③ Tkt 6592	2(SC)	4:00					1
Site	Sarah Ashley 35 East Street Novi MI 48375	5:00 6:00 7:00					
System Contact	6314 Intrusion Sarah Ashley (734) 745-6986	8:00 9:00 10:00		Ashlyn Small @127 Public	TKT 6551 - 1 (Medium) S Darren Jacob		
Problem Technician	Add Equipment(Medium) Mark.Taylor	11:00 12 pm		rKT 6592 - Add			
Scheduled Dispatched	01:00 PM ~	1:00		Sarah Ashley @35 East Street			
Arrived	01/13/2022 V 11:45 AM V II 01/13/2022 V 12:00 PM V II	3:00					_\
Damage	MO. MO.	4:00					hard

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.

			cs Jo	obs Options	
Show/Hide Calendar Ba	Today	Day P Ticket Q Week Group Ti Month Q Inspection	ickets on Creatio	 Misc Appointments Open Jobs 	War Tick
Naviga			Arrange	ment	
Calend	The second s			1/13	
S M T W		ebruary 2022 M T W T F S		[Unassigned]	1
	1	1 2 3 4 5	12 am		
	5678 6	7 8 9 10 11 12	1:00		-
16 17 18 1	Accessed in the second second	14 15 16 17 18 19 21 22 23 24 25 26	2:00		
23 24 25 2		28	3:00		-
30 31					-
View All		~	4:00		
		hinted a	5:00		
-		Refresh	6:00		
芋 Tkt マ	Branch V	Cust ^	7:00		
6583	FL	48351	8:00		
6578	MI	TRINITY-3	9:00		1
6579	MI	47791	10:00		-
6565	MI	PW234			-
6567	MI	47666	_11:00		-
6568	MI	4770299947044	12.pm		
6569	MI	4770299947044	1:00		
6580	Release Testing_	24247 2426	2:00		
6581	Release Testing_	125 125 125	3:00		-
6582	Spain	10024-2	4:00		-
6591	MI OH	48370 47703			
6571	OH	47703	5:00		-
6572	Release Testing_		6:00		
6573	Release Testing_	1.000,000	7:00		
6574	Release Testing		8:00		
6575	Release Testing		9:00		
<			10:00		

Dragging a Ticket to the Schedule Board

B) +	Ŧ				SedonaSchedule	e 6.2.0.0 - Sedo	naSecurity	
	lew Service Ti	cket Fleetmati	cs J	obs Options				
	-52	🗾 Day 🥜 Ticket Q	ueue	🍓 Removed Parts 🛛 📑	🕕 Warning Count = 10	Tickets List 🔹	OH Techs	
		📑 Week 🤌 Group T	ickets	🧿 Misc Appointments	Warning List 💌		Display Grou	p Techn
Show/Hide Calendar Ba		Month 🔍 Inspectio	on Creatio	n 🎤 Open Jobs	Tickets On Site			
Navig			Arrange		SedonaMonito	or		
Calend	lar							
	iai iry 2022	February 2022		1/13				1
SMTV		SMTWTFS		[Unassigned]	Oscar Martin	orlan	do Smith	
	1	1 2 3 4 5	12 am					
	5 6 7 8 2 13 14 15	6 7 8 9 10 11 12 13 14 15 16 17 18 19	1:00					
	19 20 21 22	20 21 22 23 24 25 26	2:00					
	26 27 28 29	27 28						
30 31			3:00					1
View All			4:00					1
All			5:00					
		Refresh	6:00					
🛃 Tkt 🛛	7 Branch	∆ T Cust ^	7:00					
6553	MI	10036	8:00			TKT 6551 -		1
6554	MI	10191	9:00		Ashlyn Small @127 Public	(Medium) S	olon s @33 Juniper	
6556	MI	34737	10:00			Darren Jacob	s @33 Juniper	H
6559	MI	119						
6564	MI	404-2	11:00					<u> </u>
6565	MI	PW234	12 pm		TKT 6592 - Add			
6566	MI	47655-1	1:00		Sarah Ashley @35 East Street			
6568	MI	477029994764	2:00					
6569	MI	4770299947044	3:00		\bigcirc			
6577	MI	TRINITY-1	4:00					
6578	MI	TRINITY-3	5:00					
6579	MI	47791	6:00					
6585	MI	48448						1
Crown	_	49448	7:00					
			8:00			and the second division of the second divisio		

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.

+ · · · · · · · · · · · · · · · · · · ·	Service Options Fleetmati	cs J	obs Options	SedonaSchedule	e 6.2.0.0 - Sedo	naSecurity	
	Day & Ticket Q		🍓 Removed Parts 🔢	Warning Count = 10	Tickets List 🔹	OH Techs	- 🗊 I
	🔛 📄 Week 🥠 Group T	ickets	🧿 Misc Appointments	Warning List 💌		Display Group Te	echnicians 👻
Show/Hide Calendar Bar	Today 📃 Month 🔍 Inspectio	on Creatio	on 🤌 Open Jobs	Tickets On Site			Z
Navigatio	on	Arrange	ement	SedonaMonito	or	Cal	
🗷 Calendar							
 January 2 			1/13				
SMTWT	1 <u>SMTWTFS</u> 1 12345		[Unassigned]	Oscar Martin	orlan	Ido Smith	Madi
2 3 4 5	67 8 6789101112	12 am					
9 10 11 12 1 16 17 18 19 2		1:00					
23 24 25 26 2	27 28 29 27 28	2:00					- 1
30 31		4:00					
③ Tkt 6555	(SC)	5:00					
	Ashlyn Small	6:00		Appointment Delete		×	
	127 Public Square Cleveland OH 44105	7:00		- ···			
	30519 Cell	8:00	r	Are you sure you want to delete this appointment?			
Contact	50515 Gell	9:00	L	Ast			
Contact		10:00			Yes	No	
	Insp-Cellular/Radio(Medium)	11:00					
Technician	Oscar.Martin	12 pm	· · · · · · · · · · · · · · · · · · ·	FKT 6592 - Add			
Scheduled	08:00 AM 🗸	1:00		Sarah Ashley @35 East Street			
Dispatched		2:00					
Arrived		3:00					
Departed		4:00					
		5:00					
		6:00			and the second division of the second divisio		

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.

		Dispatch				Ticket#6592	2		×
Service Cu Ticket Fi Customer 6 A Site S 3	et Central Station stom Appointments and Labor 3758 schley, Sarah Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	Dispatch S Billing Documents (2) Creater Creater Status	and Parts Go To	(2) Items	Purchase Orders (0) Contact Phone Notify		6 E	Critical Mess C.O.D. Only Notificatio	
Labor Manual Li Regular Overtime Holiday	abor Hours 2.25 0.0 0.0	Rate 120.00 180.00 240.00	Total Labor Tax Total Amount	1		Service Fe		15.00	Save
Name Mark Taylor Oscar Martin	Appointment 1/13/2022 1:00 PM 1/13/2022 12:00 PM	Dispetched 1/13/2022 11:45 A	SedonaOffice	you wish to delete	<u> </u>		Len Service 120 MI-T&M 120 OH-IN		Act Len Billable Len 135 13 0

Re-Schedule an Appointment

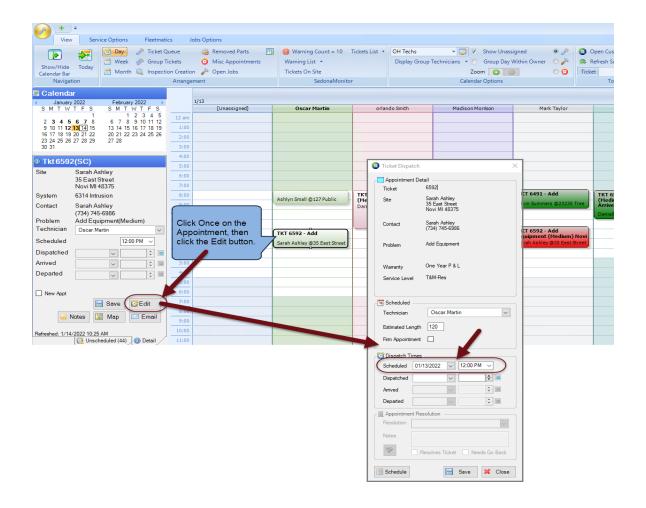
If an appointment needs to be re-scheduled, this may be accomplished from the Schedule Board or from the Appointments and Labor form of the Ticket. Both methods are described below.

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.



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.

	3 ∓ Ticket Central Station	Dispatch Dispatch	_		Ticket#659	12		×
Service Ticket	Custom Fields	S Billing Documents (2)	Equipment and Parts Go To	Notes Other Purcha (2) Items Orders	ise Service		Critical Messages (3)	
Customer Site	6758 Ashley, Sarah Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	Created Created E Status	1/13/2022 11:49 AM ly carolyn Scheduled	Contact Phone Notify	Sarah Ashl (734) 745-65 sarah@gmai	986 Ext		
Labor — Manu	Ial Labor Hours 2.25	Rate	Amo Total Labor	270.00	Service F	ee 115.0	-	
Regular Overtime	0.0	180.00	Tax	19.58	Amount	115.0	U	
Holiday	0.0	240.00	Total Amount	\$289.58				Save
Name	Appointment	Dispatched	Arrived	Departed	Firm Es		mpany_Code Act Len	Billable Len
Mark Taylo		1/13/2022 11:45 AM	1/13/2022 12:00 PM	1/13/2022 2:00 PM		120 MI-T&M 120 OH-INSP C		35 13
		1						

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.

() G) Ŧ	Dispatch		;	Ticket#6592	x
Depart and Disput Customer Site	d Resolve atch 6758 Ashley, Sarah Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time		1/13/2022 11:49 AM care n Schedule	Contact Phone Notify	Ticket Dispatch X Ticket Dispatch Sta Appointment Detail Ticket Sta Stah Ashley 35 East Street Novi MI 48375 Contact Sarah Ashley (734) 745-6596 Problem Add Equipment	
Manua Regular Overtime Holiday	Labor Hours 2.25 0.0 0.0	Rate 120.00 180.00 240.00	Amounts Total Labor Tax Total Amount	21,00 A 19.58 \$289.58	Waranty One Year P & L Service Level T&M-Res	Save
Name Mark Taylor Oscar Marti	Appointment 1/13/2022 1:00 PM n 1/13/2022 12:00 PM	Dispatched 1/13/2022 11:45 AM		Departed /13/2022 2:00 PM	Fim Appointment Chisnatch Times Scheduled 01/13/2022 Dispatched 12:00 PM Dispatched 12:00 PM Antved 12:00 PM Depatched 12:00 PM Antved 12:00 PM Depatched 12:00 PM Appointment Resolution 10:00 PM Resolution 10:00 PM Notes 10:00 PM Schedule 12:00 PM State 12:00 PM Schedule 12:00 PM	ct Len Eillable Len 135 135 0 0

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.

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Show/Hide	Today.	📑 Week 🤌 Group T	ickets	🧿 Misc Appointme	ents	Warning List 👻		Display Group T	echnicians 👻 🔲 🛛 Gr
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Naviga	tion		Arrange	ement		SedonaMonit	or		Calendar
🗷 Calenda	ar								
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	1	12345	12 am	[Undasigned]		Oscal Hartin	onui	do Sintin	Madison
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③ Tkt 659:	2(SC)		5:00						
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System	6314 Intri	usion	8:00			TKT 6592 - Add	TKT 6551 -	Insp-CCTV	
Contact	Sarah As	shley	9:00			Sarah Ashley @35 East Street	 (Medium) S Darren Jacob 	olon s @33 Juniper	
	(734) 745		10:00						
Problem Technician		ipment(Medium)	11:00						
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			6:00				and the second designed and the second designed and the second designed and the second designed and the second		

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" **b** 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.

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one	35 East S			6:00						1
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Contact	Sarah As			9:00		- 4		Darren Jacob	s @33 Juniper	
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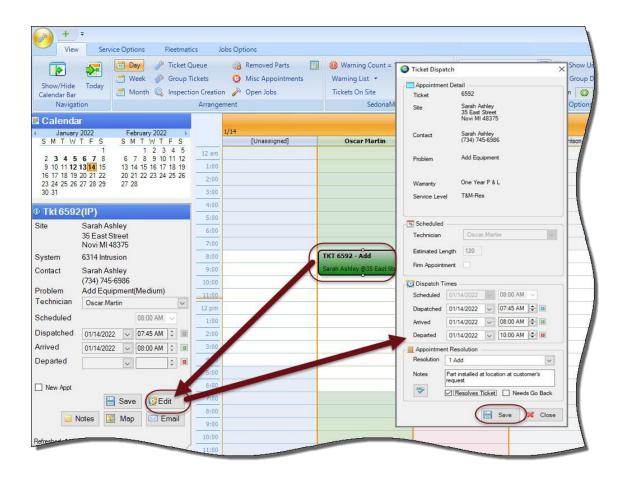
Live Dispatching - Departed

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.

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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.

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.

Ficket	om Appointments	Dispatch Dispatch S Contemports (2)	Equipment Journ and Parts Go To	Dispatch N Arrive Now Depart and Dispa	ow Resolve S	al Station New App Edit Appo end Text Me Appointn	ointment essage		
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Holiday 0	0.0	240.00	Total Amount	Holiday	0.0		240.00		Total Amount
Name	Appointment	Dispatched	Arrived	Name	Appointme	nt	Dispatched		Arrived
Mark Taylor Oscar Martin	1/13/2022 1:00 PM 1/14/2022 8:00 AM	1/13/2022 11:45 AM	1/13/2022 1	Mark Taylor Oscar Martin	1/13/2022 1 1/14/2022		1/13/2022 1	1:45 AM	1/13/2022 12:00

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Т	ïcket (Central Station	Dispatch						
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Customer Site	6758 Ashley, Sa Sarah Ash 35 East Si Novi, MI 4 Eastern T	nley treet 8375		Created Created By Status	1/13/2022 11:49 AN carolyn Scheduled	A Contact Phone Notify	(734)	h Ashley V 745-6936 Ext @gmail.com V	
Labor									
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Overtime	0.0		180.00		Tax	19.58			
Holiday	0.0		240.00		Total Amount	\$289.58			Save
Name		pointment	Dispatche		Arrived	Departed	Firm	Est Len Service_Company_Code	Act Len Billable Len
Mark Taylor Oscar Martir		3/2022 1:00 PM	1/13/202		1/13/2022 12:00 PM	1/13/2022 2:00 PM		120 MI-T&M 120 OH-INSP Cont	135 13 0
e sear matur		2022 0.00 AM	U14/2022						U

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.

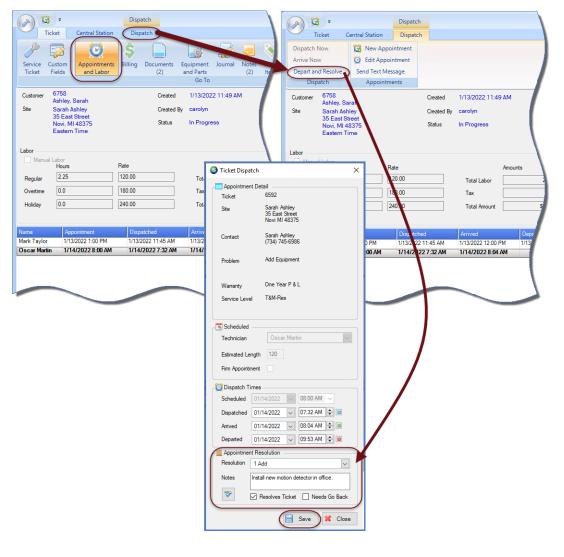
Image: Second station Dispatch Ticket Central Station	Dispatch
Josephilie State	Ticket Central Station Dispatch Dispatch Now
Customer 6758 Ashley, Sarah Created 1/13/2022 11:49 AM Site Sarah Ashley Created By carolyn 35 East Street Novi, MI 48375 Status In Progress Eastern Time Fastern Time Status In Progress	Customer 6758 Ashley, Sarah Created 1/13/2022 11:49 AM Site Sarah Ashley Created By carolyn 35 East Street Novi, MI 48375 Status In Progress Eastern Time Fastern Time Status In Progress
Labor Amounts Hours Rate Amounts Regular 2.25 120.00 Total Labor 2 Overtime 0.0 180.00 Tax 1 Holiday 0.0 240.00 Total Amount \$2	Labor Manual Labor Amount Hours Rate Amount Regular 2.25 120.00 Total Labor Overtime 0.0 180.00 Tax Holiday 0.0 240.00 Total Amount
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Dispatch Ticket Central Station Dispatch	Ticket #6592 ×
Service Custom Appointments Ticket Fields Appointments Billing Documents (2) Journal Notes Oth Go To	
Customer 6758 Ashley, Sarah Created 1/13/2022 11:49 AM Site Sarah Ashley Created By carolyn 35 East Street Novi, MI 48375 Status In Progress Eastern Time Fastern Time Status In Progress	Contact Sarah Ashley Phone (734) 745-6986 Ext Notify sarah@gmail.com
Labor Amounts Manual Labor Hours Rate Amounts Regular 2.25 120.00 Total Labor Image: Comparison of the co	Z70.00 Amount 115.00
Holiday 0.0 240.00 Total Amount S	19.58 \$289.58

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.

B	2 ÷	Dispatch					S Tick	et Dispatch	×
	Ticket Central Station	Dispatch					App Tick	pointment De	etail
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Site	Ashley, Sarah Sarah Ashley 35 East Street	Created	By carolyn	9 AM	Pł	noi	Prob	lem	Add Equipment
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- Labor	ual Labor Hours	Rate		Amounts			Serv	ice Level	, and the a
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							Д Ар	pointment Re	
							Res	plution 1,	Add
							Note	es Inst	alled motion detector in office.
							ABC		Resolves Ticket
									Save X Close

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.

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	IM1270	IM1270			06/24/2020	Job	2217			*
				Servic	Ticket Parts					
ock Warehouse Part Description Location Qty Unit Price Total Price Est Tax Exempt Costing Serial	ock Warehouse	Part	Description	Location		Unit Price	Total Price Es	st Tax Exempt	Costing	Serial-Lo

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.

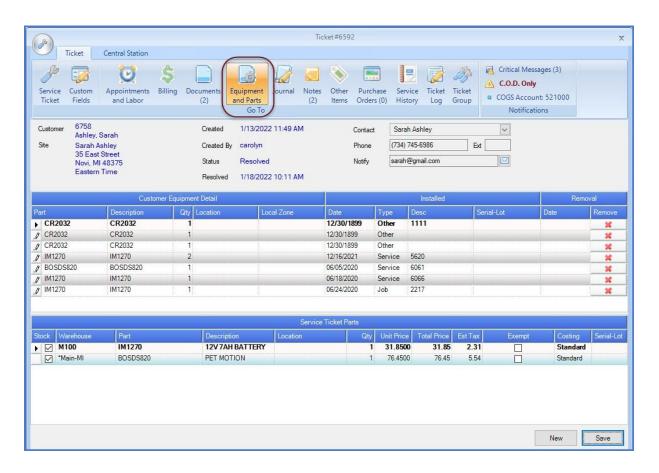
In the Part field, the User may type in the exact part number or click on the lookup button to the right of this field to search for the part number within the warehouse that is currently selected.

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:

Ticket Cent	tral Station								
Service Custom App	pointments Billing Do ind Labor	cuments (2) Equipment and Parts Go Te	(3) Items	Purchase Orders (0)	Service Ti	cket Ticket Log Group	Critical Mess C.O.D. Only COGS Accour Notificati	nt: 521000	
Customer Site Ste Novi, MI 483: Eastern Time	/ et 75	Created By carolyn Status Resolve		Contact Phone Notify	Sarah Ashley (734) 745-6986 sarah@gmail.c	Б	d		
	Customer Equipmer	nt Detail Roman	e Equipment		× st	alled		Rem	oval
Part De	escription Qty	Location	e equipment			5	Serial-Lot	Date	Remove
CR2032 CF	R2032 1								×
/ CR2032 CF	R2032 1	(?	Do you want to replace IM	1270 with IM	1270?				×
Ø CR2032 CF	R2032 1		4						×
/ IM1270 IM	A1270 2			~)				×
Ø BOSDS820 BC	OSDS820 1		Yes		No				*
g IM1270 IM	11270 1								*
Ø IM1270 IM	11270 1		06/24/20	20 Job	2217				*
			Service Ticket Pa	rts					
Stock Warehouse	Part	Description	Location C	ty Unit Pr	ice Total P	rice Est Tax	Exempt	Costing	Serial-Lot
▶ 🗹 M100	IM1270	12V 7AH BATTERY		1 31.8	500 3	1.85 2.31		Standard	
Main-MI	BOSDS820	PET MOTION		1 76.4	500 7	6.45 5.54		Standard	

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.

Service Custom Ticket Fields Appr an Customer 6758 Ashley, Sarah Site 6758 Ashley, Sarah Sarah Ashley 35 East Street Novi, MI 4837 Eastern Time	id Labor	Created By carolyr Status Resolv Resolved 1/18/20	(3) o 022 11:49 AM	Other Purchi Items Orders Contact Phone Notfy	ase Servi (0) Histo Sarah (734) 7	Ashley 45-6986 Pgmail.com	Ticket	Critical Messay	: 521000 ns	
Service Custom Appx Ticket Fields an Customer 6758 Ashley, Sarah Ste Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	ointments Billing (Id Labor 5	Created By carolyr Status Resolved 1/18/20	(3) 0022 11:49 AM 1 red	Other Purchi Items Orders Contact Phone	ase Servi (0) Histo Sarah (734) 7	Ashley 45-6986 Pgmail.com	Ticket Group	C.O.D. Only COGS Account Notificatio	: 521000 ns	
Service Custom Appr Ticket Fields an Customer 6758 Ashley, Sarah Ste Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	ointments Billing (Id Labor 5	Created By carolyr Status Resolved 1/18/20	(3) 0022 11:49 AM 1 red	Other Purchi Items Orders Contact Phone	ase Servi (0) Histo Sarah (734) 7	Ashley 45-6986 Pgmail.com	Ticket Group	COGS Account	ns	
Ticket Fields an Customer 6758 Ashley, Sarah Ste 35 East Street Novi, MI 48375 Eastern Time	nd Labor	(2) and Parts Go T Created 1/13/20 Created By carolyr Status Resolv Resolved 1/18/20	(3) 0022 11:49 AM 1 red	Items Orders Contact Phone	(0) Histo Sarah (734) 7	Ashley 45-6986 Dgmail.com	Ticket Group	COGS Account	ns	
Customer 6758 Ashley, Sarah Site Sarah Ashley 35 East Street Novi, MI 4837! Eastern Time	5	Go T Created 1/13/20 Created By carolyn Status Resolv Resolved 1/18/20	o 022 11:49 AM ved	Contact Phone	Sarah (734) 7	Ashley 45-6986 9gmail.com	Stoup	Notification	ns	
Ashley, Sarah Site Sarah Ashley 35 East Street Novi, MI 4837 Eastern Time	5	Created 1/13/20 Created By carolyr Status Resolv Resolved 1/18/20	022 11:49 AM 1 ved	Phone	(734) 7	45-6986 Pgmail.com	Ext [~		
Ashley, Sarah Site Sarah Ashley 35 East Street Novi, MI 4837 Eastern Time	5	Created By carolyr Status Resolv Resolved 1/18/20	n ved	Phone	(734) 7	45-6986 Pgmail.com	Ext			
Site Sarah Ashley 35 East Street Novi, MI 4837 Eastern Time	5	Status Resolv Resolved 1/18/2(ved			gmail.com	Ext			
Novi, MI 4837 Eastern Time	5	Resolved 1/18/20		Notify	sarah@	-				
Eastern Time		Resolved 1/18/20		Notify	Barante	-				500 F
	Customer Equit		022 10:11 AM							Make
	Customer Equip	nment Detail		1					1	No.
			Installed					Removal		
Part De	escription Q	Qty Location	Local Zone	Date	Туре	Desc	Sei	ial-Lot	Date	Remove
	R2032	1		12/30/1899		1111				*
	72032	1		12/30/1899	Other					*
7 CR2032 CF	R2032	1		12/30/1899	Other				1	*
g IM1270 IM	11270	2		12/16/2021	Service	5620			01/18/2022	*
	JSDS820	1		06/05/2020	Service	6061			4	*
	1270	1		06/18/2020		6066			~	*
g IM1270 IM	1270	1		06/24/2020	Job	2217			/	×
			Service	Ticket Parts						
Stock Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Est Tax	Exempt	Costing	Serial-Lo
M100 I	IM1270	12V 7AH BATTER	Y	1	31.8500	31.85	2.31		Standard	
Main-MI E	BOSDS820	PET MOTION		1	76.4500	76.45	5.54		Standard	

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.

Service Custom Ticket Fields	Appointments Billin and Labor	g Documents (2)	Equipment and Parts Go To	Journal Notes (3)	Other Items	Purchase Orders (0)		Ticket	Ticket	Critical Messa C.O.D. Only COGS Accoun Notificatio	t: 521000	
Customer 6758 Ashley, S Site Sarah A 35 East Novi, MI Eastern	shley Street 48375	Created Created E Status Resolved	1/13/2022 y carolyn Resolved 1/18/2022		F	Contact Phone Notify	Sarah As (734) 745 sarah@gr	6986	Ext [
	Customer	Equipment Detail	Undo Equipm	ent Pernoval				istalled	j.		Rem	oval
Part	Description	Qty Location	ondo Equipri	ient Keniovai					S	erial-Lot	Date	Remov
CR2032	CR2032	1										×
7 CR2032	CR2032	1		you sure you wa Jipment?	nt to undo	the remo	al of this					×
7 CR2032	CR2032	1		apinenti								×
9 IM1270	IM1270	2			-						01/18/2022	×
9 BOSDS820	BOSDS820	1			(Ye	es)	No					×
ø IM1270	IM1270	1										×
9 IM1270	IM1270	1			06/24/2	2020 J	ob 22	217				×
Stock Warehouse	Part IM1270		H BATTERY	Service Location	Ticket Part	Qty U	31.8500	Total Price 31.85	Est Tax 2.31	Exempt	Costing Standard	Serial-L
Main-MI	BOSDS820	PET MC	TION			1	76.4500	76.45	5.54		Standard	

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.

Ticket 0	Central Station			Ticket#6592						1
ا چ	Appointments Billing		ipment G Parts Go To	Notes Other (3) Items	Purchase Ser		11/42	Critical Messa C.O.D. Only COGS Account Notificatio	: 521000	
Customer 6758 Ashley, Sa Site Sarah Ash 35 East Si Novi, MI 4 Eastern Ti	nley treet 18375	Created By d	1/13/2022 11:49 AM carolyn Resolved 1/18/2022 10:11 AM	ſ	hone (734)	ah Ashley 745-6986 @gmail.com	Ext			
Part	Customer E	Equipment De Remov	e Equipment	4		×	ed S	Serial-Lot	Ren	noval Remove
CR2032 CR2032	CR2032 CR2032	1	Are you sure you v replacement part?	vant to remove th	nis equipment wi	thout a				*
CR2032 IM1270 BOSDS820	CR2032 IM1270 BOSDS820	1		F	-					*
	IM1270	1		06/24	Yes	No 2217				×
Ø IM1270 Ø IM1270	IM1270	1								
7 IM1270	IM1270	1	S	ervice Ticket Part	s	1				
7 IM1270	IM1270 Part	Description			s Qty Unit Pri	ce Total Price	Est Tax	Exempt	Costing	Serial-L

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 <u>un-check</u> the "Stock" option to the left of each part that will be ordered on a PO.

Ticket	Central Station			Tick	et#6592						
Service Custom Ticket Fields	Appointments and Labor		ments 2) Equipment and Parts Go To	Journal Notes (3)	Other Purchas Items Orders (ice Ticket Ti	199	Critical Messag C.O.D. Only COGS Account: Notification	521000	
Customer 6758 Ashley, S Site Sarah As 35 East S Novi, MI Eastern T	hley Street 48375		Created By carolyn Status Resolver	22 11:49 AM d 22 10:11 AM	Contact Phone Notify	(734) 7	iAshley 145-6986 ⊇gmail.com	Ext			
	Cus	stomer Equipmer	t Detail			-	Installed	1		Remo	oval
art	Description	Qty L	ocation	Local Zone	Date	Туре	Desc	5	Serial-Lot	Date	Remov
CR2032	CR2032	1			12/30/1899	Other	1111				*
	CR2032	1			12/30/1899	Other					*
											×
CR2032	CR2032	1			12/30/1899	Other					
CR2032 IM1270	CR2032 IM1270	1			12/16/2021	Service					
CR2032 IM1270 BOSDS820	CR2032 IM1270 BOSDS820	2		ר	12/16/2021 06/05/2020	Service Service	6061				
IM1270	CR2032 IM1270 BOSDS820 IM1270	2	a PO for the]	12/16/2021 06/05/2020 06/18/2020	Service Service Service	6061 6066				×
 CR2032 IM1270 BOSDS820 	CR2032 IM1270 BOSDS820 IM1270	2 To create	a PO for the tock option]	12/16/2021 06/05/2020	Service Service	6061			01/18/2022	×
CR2032 IM1270 BOSDS820 IM1270	CR2032 IM1270 BOSDS820 IM1270 IM1270	2 To create part, the S			12/16/2021 06/05/2020 06/18/2020	Service Service Service	6061 6066			01/18/2022	**
CR2032 IM1270 BOSDS820 IM1270	CR2032 IM1270 BOSDS820 IM1270 IM1270	2 To create part, the S	tock option	Service T	12/16/2021 06/05/2020 06/18/2020	Service Service Service	6061 6066			01/18/2022	**
CR2032 IM1270 BOSD5820 IM1270 <i>IM1270</i>	CR2032 IM1270 BOSDS820 IM1270 IM1270	2 To create part, the S	tock option	Service T	12/16/2021 06/05/2020 06/18/2020 <i>06/24/2020</i>	Service Service Job	6061 6066 <i>2217</i>	EstTax	Exempt	01/18/2022	×××××××××××××××××××××××××××××××××××××××
CR2032 IM1270 BOSDS820 IM1270	CR2032 IM1270 BOSDS820 IM1270 IM1270	2 To create part, the S	tock option n-checked.	Location	12/16/2021 06/05/2020 06/18/2020 06/24/2020 icket Parts Qty	Service Service Service Job	6061 6066 2217 ce Total Price	Est Tax 2.31			Serial

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.

B			Purch	nase Ord						Ticket	#6592					x
	Ticket	Central Station	Purc	hase Order												
Servic Ticke		Appointments and Labor	\$ Billing	Documents (2)	Equipment and Parts Go To	Journal	Notes (3)	Other Items	Purchase Orders (0)			Ticket Group	▲ C.O.D	I Messages (3) • Only ifications		
Custon	ner 6758 Ashley	Sarah		Created	(13/202	2 11:49 A	М		Contact	Sarah As	hley		~			
Site	Sarah			Created B	, c. plyn				Phone	(734) 745-	6986	Ext				
		11 48375		Status	De _l , rte	1			Notify	sarah@gm	nail.com					
	Edstein	in nine			B	1			Purchase							
	PO #		Vendor			cket	Central St	tation	Purchase	Order					Closed	
						Purchase Drder										
					Create P Customer	orchase Orc	der			Created	1/10/000	2 11:49 AM				
					Site	Ashley, S Sarah As				Created By	carolyn	2 TT:49 AM		Co		
					540	35 East 8 Novi, MI	Street 48375			Status	Departed			Notify		
						Eastern	Time									
						PO #		V	/endor		Amount		Ordered			
														(
														7		

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.

S New Purch	ase Order						_		×
Vendor	Categ	jory				F	Print Now 🗹	Direct Expens	е
Tri-Ed	V 📑 SV-1	Г&М	~			□ <i>I</i>	Acknowledged		
Purchase			PO #	5039		Branch	MI	~	•
Vendor Address	Tri-Ed P.O. Box 402433		Tracking #			Ordered	01/18/2022	~	•
	Atlanta, GA 30384 (800) 366-4472		Ship		\sim				
	SedonaSecurity		Parts Due		\sim	Ticket	6592		
🏠 Ship To	45185 Joy Road Plymouth, MI 48170-1721		Created By			Ship Method		`	/
			Last Updated						
(iii) D-+- 020		ocuments							
/ 🎲 Parts \$30	.58 🚫 Expenses 🔂 D	ocuments						Select From /	VI Parts
Part	Description	Vendor Part	Vendor Desc	Pkg Quantity	Unit_Of_Mea	asure Code	Quantity	C	ost A
BOSDS820		DSDS820	PET MOTION		EA	_	1	30.58	300
<									>
								**	New
Memo	This is the information neede	ed to print on all Tri-Ed				Total			\$30.58
	Purchase Orders.					Received			
						💼 Apply	Sav	e) 🗶 (Close

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.

		Ticket#6592			x
Ticket Central Station	nts Equipment Journal and Parts Go To		Service Ticket History Log Group	Critical Messages (3)	
Ashley, Sarah	ated 1/13/2022 11:49 AM ated By carolyn tus Departed	Contact Phone Notify	Sarah Ashley (734) 745-6986 Ext sarah@gmail.com		
Notes Install motion in office.	2 - Customer Restricted	olution Entered		Edited 1/13/2022 11:49 AM	Edited By carolyn
Replaced panel battery. Need to order the motion det Installed motion detector in office.	1 - No Restriction	□ 1/13/2022 2:36 □ 1/18/2022 10	and the second	1/13/2022 3:11 PM 1/18/2022 10:11 AM	carolyn carolyn
Installed motion detector in office.					^
					v
Access Level 1 - No Restriction V Resolutio	n Note		Alt List	linstructions New	/ Save

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.

(3)		ol	ournal				Ticket#6	5592			x
Service Custom Ticket Fields	Central Sta	ents Billir	ng pcuments (2)	Equipment and Parts Go To		tes Other Purcha 3) Items Orders	ase Servic	e Tick	et Ticket	Critical Messages (3)	
Customer Ashley. : Site 35 East Novi, M Eastern	shley Street 1 48375	Detail Detail Summa	econcile	Journ							
Reg No. 🔺	Туре	Vie							ription	Ехр Туре	Amount
1200754	LABO	Customer	6758 Ashley, Sarah		Created	1/13/2022 11:49 AM		Contact	C Labor Deferred	[L	\$112.50 (\$112.50)
		Site	Sarah Ashley 35 East Street		Created By	carolyn	1	Phone	C Labor	L	\$70.50
1200952	LABO		Novi, MI 48375 Eastern Time		Status	Departed	1	Notify	eferred	17	(\$70.50)
			Eastern Time						Receipts*		(\$30.58)
1200953	RCPT	Reg No.	∆ Type		Date 4	Reference	1	Acct	Parts	M	\$30.58
		120075		R	01/13/2022	Svc Labor:6592 Svc Labor:6592	521010 259100				
		120095	2 LABO	R	01/14/2022	Svc Labor:6592 Svc Labor:6592	521010 259100				
		1200953	RCP	r	01/18/2022	5039 5039	210310 520001		/		

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.

8)		Journal			Ticket#6592		>
Ticket	Central Station	Journal					
Detail							
Summan							
Parts Rector	cila						
View	cile						
Customer 675 Ash		Created	1/13/2022 11:49 AM	Contact	Sarah Ashley	~	
	a Ashley	Created	By carolyn	Phone	(734) 745-6986	Ext	
		oroaroa		1 Horio	(
35 E		200.00	100 C	100.000	Transformer Commencement		
Nov	ri, N. 48375	Status	Departed	Notify	sarah@gmail.com		
Nov		Status	Departed	Notify	sarah@gmail.com		
Nov Eas	/i, h. 48375 stern Time						
Nov	/i, h 48375 stern Time	Status	A Reference	Acct	Description	Ехр Туре	
Nov Eas Reg No. A	vi, 1, 48375 stern Time Type	∆ Date	△ Reference Svc Labor:6592	Acct 521010	Description COGS SVC Labor		\$112.5
Nov Eas	/i, h. 48375 stern Time		A Reference Svc Labor:6592 Svc Labor:6592	Acct 521010 259100	Description COGS SVC Labor SVC Labor-Deferred	Exp Type	\$112.5 (\$112.50
Nov Eas Reg No. A 1200754	ri, n. 48375 stern Time Type LABOR	△ Date 01/13/2022	△ Reference Svc Labor:6592 Svc Labor:6592 Svc Labor:6592	Acct 521010	Description COGS SVC Labor	Ехр Туре	Amour \$112.5 (\$112.50 \$70.5
Nov Eas Reg No. A	vi, 1, 48375 stern Time Type	∆ Date	A Reference Svc Labor:6592 Svc Labor:6592	Acct 521010 259100	Description COGS SVC Labor SVC Labor-Deferred	Exp Type	\$112.5 (\$112.50
Nov Eas Reg No. A 1200754	ri, n. 48375 stern Time Type LABOR	△ Date 01/13/2022	△ Reference Svc Labor:6592 Svc Labor:6592 Svc Labor:6592	Acct 521010 259100 521010	Description COGS SVC Labor SVC Labor-Deferred COGS SVC Labor	Exp Type L	\$112.5 (\$112.50 \$70 .5

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.

B		Journal			Ticket#6592		X
От	icket Central Station	Journal					
Customer	6758 Ashley, Sirah	Created	1/13/2022 11:49 AM	Contact	Sarah Ashley	~	
Site	Sarah Ashay	Created	By carolyn	Phone	(734) 745-6986	Ext	
	35 East Struet Novi, MI 483 5	Status	Departed	Notify	sarah@gmail.com		
	Eastern Time						
	Acct No	De	scription		Debit	Credit	Ne
210310	Acct No.		scription		Debit \$0.00	Credit \$30,58	
	Acct No.	De Open Inventory R SVC Labor-Deferre	eceipts*			Credit \$30.58 \$183.00	(\$30.58
259100	Acct No.	Open Inventory R	eceipts*		\$0.00	\$30.58	(\$30.58 (\$183.00
210310 259100 520001 521010 Totals	Acet No.	Open Inventory R SVC Labor-Deferred	eceipts* I ts		\$0.00 \$0.00	\$30.58 \$183.00	Net (\$30.58 (\$183.00) \$30.58 \$183.00

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.

6				urnal			Ticket#659	2			x
	Ti	icket (Central Station Jo	urnal							
	Detail										
	Summ	any									
(Parts R Vie	Reconcile)								
Cus	stomer	6758 Ashley, S	ah	Created	1/13/2022 11:49 AM	Contact	Sarah Ash	ley	~		
Site	e	Sarah Ash		Created By	carolyn	Phone	(734) 745-6	986	Ext		
		35 East S Novi, MI 4		Status	Departed	Notify	sarah@gma	ail.com			
		Eastern T								_	
P/Cr	00000	Part Code		Description		cket Qty	Issued G	lty	Will Is		Balance
IM12	5DS820 270		BOSD IM1270		1	1			U 1	0 0	
						Ticket	#6500				
			Ticket (Central Station		licket	+0392				
			Ca Ca	2.0				8-1		Critical Messad	ner (3)
			J 🖓 🐼	U S				2	12 200	C.O.D. Only	jes (5)
	_		Service Custom Ticket Fields	Appointments Billin and Labor	ng Documents Equipme (2) and Par		ther Purcha ems Orders (COGS Account	521000
					Go			.,,		Notification	ns
			Customer 6758 Ashley, Sa	arah	Created 1/13/	2022 11:49 AM	Contact	Sarah As	hley	~	
			Site Sarah Asl	hley	Created By carol	yn	Phone	(734) 745-	6986 E	Ext	
			35 East S Novi, MI 4	18375	Status Depa	arted	Notify	sarah@gn	nail.com		
	N.		Eastern T	ïme							
	А			Custome	r Equipment Detail				Installed		Removal
			Part	Description CR2032	Qty Location	Local Zone	Date		esc 111	Serial-Lot	Date Remov
			CR2032	CR2032 CR2032	1		12/30/1899 12/30/1899	Other I			×
			_/ CR2032	CR2032	1		12/30/1899	Other			*
			IM1270	IM1270	2		12/16/2021	Service 56			×
			IM1270 BOSDS820						061		× ×
			IM1270	IM1270 BOSDS820	2		12/16/2021 06/05/2020	Service 56 Service 60 Service 60	061		×
			M1270 BOSDS820 MIN 270	IM1270 BOSDS820 IM1270	2 1 1		12/16/2021 06/05/2020 06/18/2020 <i>06/24/2020</i>	Service 56 Service 60 Service 60	061 066		×××××××××××××××××××××××××××××××××××××××
			 № 11270 № ROSDS820 № 110270 № 110270 № 110270 	IM1270 BOSDS820 IM1270 <i>IM1270</i>	2 1 1 7	Service Tic	12/16/2021 06/05/2020 06/18/2020 06/24/2020	Service 56 Service 60 Service 60 Job 22)61)66 217		₩ ₩ 01/18/2022
			A IM1270 POSD5820 M M270 M12 Stock Wareh ve	IM1270 BOSDS820 IM1270 <i>IM1270</i> Part	2 1 1	Location	12/16/2021 06/05/2020 06/18/2020 06/24/2020 tet Parts	Service 56 Service 60 Service 60 Job 20	061 066 217 Total Price Est T		×××××××××××××××××××××××××××××××××××××××
			 № 11270 № ROSDS820 № 110270 № 110270 № 110270 	IM1270 BOSDS820 IM1270 <i>IM1270</i>	2 1 1 7 Description	Location	12/16/2021 06/05/2020 06/18/2020 06/24/2020 cet Parts	Service 56 Service 60 Service 60 Job 20	161 166 217 Total Price Est T 31.85 2.	ax Exempt 31	01/18/2022 ¥
			M1270 © SD5820 M72 M72 Stock Waren ve M100	IM1270 BOSDS820 IM1270 IM1270 Part IM1270	2 1 1 7 Description 12V7AH BAT	Location	12/16/2021 06/05/2020 06/18/2020 06/24/2020 cet Parts	Service 56 Service 60 Service 60 Job 2 Unit Price 1 31.8500	161 166 217 Total Price Est T 31.85 2.	.31	Costing Serial- Standard

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.

	Ticket#65	592	x
Ticket Central Station			
Service Custom Ticket Fields Appointments Billing Docume and Labor (2)	ents Equipment and Parts Go To		Critical Messages (3) C.O.D. Only Notifications
Ashley, Sarah Site Sarah Ashley Cre 35 East Street	eated 1/13/2022 11:49 AM Nated By carolyn Itus Departed	Contact Sarah Ashley Phone (734) 745-6986 Ex Notify sarah@gmail.com	
Notes	Level Resolution	Entered By	Edited Edited By
Install motion in office.		1/13/2022 11:49 AM carolyn	1/13/2022 11:49 AM carolyn
Replaced panel battery. Need to order the motion det		1/13/2022 2:36 PM carolyn	1/13/2022 3:11 PM carolyn
Installed motion detector in office.	1 - No Restriction 🔽	1/18/2022 10:11 AM carolyn	1/18/2022 10:11 AM carolyn
Installed motion detector in office.			~
Access Level 1 - No Restriction V Resolution	in Note	All List	Instructions New Save

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).

Service Custom Ticket Fields	Central Station Appointments and Labor		quipment and Parts Go To	ournal Notes (2)	Other Purc Items Order	hase Sen	vice Ticket 1	Ficket	Critical Mess C.O.D. Only COGS Accour Notificati	nt: 521000	
Site Sarah 35 Ea Novi,	y, Sarah h Ashley ast Street MI 48375 rm Time	Created Created By Status Resolved	1/13/2022 carolyn Resolved 1/18/2022		Contac Phone Notify	(734)	h Ashley 745-6986 @gmail.com	Ext [
	Custom	er Equipment Detail					Installed	20.5		Remo	val
Part	Description	Qty Location	Loc	al Zone	Date	Туре	Desc	Seria	I-Lot	Date	Remove
CR2032	CR2032	1			12/30/1899	Other	1111				×
CR2032	CR2032	1			12/30/1899	Other					×
CR2032	CR2032	1			12/30/1899	Other				1	*
/ IM1270	IM1270	2			12/16/2021	Service	5620				×
Ø BOSDS820	BOSDS820	1			06/05/2020	Service	6061				×
/ IM1270	IM1270	1			06/18/2020	Service	6066				×
Ø IM1270	IM1270	1			06/24/2020	Job	2217				*
otock Warehouse	Part	Deserve	14×1	Location	Ticket Parts	Unit Price	Total Price	Est Tax	-	Contract	Serial-Lo
entellered i filosofiel disease et es	IM1270	Description 120/704	BATTERY	Location	Qty			2.31	Exempt	Costing Standard	Senai-Lo
M100	BOSDS820	PET MOT			1			5.54		Standard	
	00000000	TET NOT				10.400	10.40	0.04		Standard	

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.

Service Custom Appointments and Labor Created 1/13/2022 11:49 AM Contact Sarah Ashley C.O.D. Only Customer 6758 Created By Carolyn Phone Created By Carolyn Notifications Ste Sarah Ashley Created By Carolyn Phone Created By Carolyn Notifications Ste Sarah Ashley Created By Carolyn Phone Created By Carolyn Phone Ste Sarah Ashley Created By Carolyn Phone Created By Carolyn Phone Via Manual Labor Created By Carolyn Phone Created By Carolyn Phone Via Manual Labor Created By Carolyn Phone Created By Carolyn Created By Carolyn Created By Carolyn Created By Carolyn <th>0</th> <th></th> <th></th> <th></th> <th>Ticket#6592</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>x</th>	0				Ticket#6592						x
Custofiel Ashley, Sarah Created If 10/20/2 11:49 AM Contact Set an Ashley Site Sarah Ashley Created By carolyn Phone (734/745-6386 Ext Site Sarah Ashley Created By carolyn Phone (734/745-6386 Ext Site Sarah Ashley Satus Resolved Notify sarah@gmail.com Manual Labor Resolved 1/18/2022 11:00 AM Labor Hours Rate Amounts Regular 2.25 120.00 Total Labor 720.00 Vertime 2.5 180.00 Tax 52.21 Holday 0.0 240.00 Total Amount \$772.21 Name Appointment Dispatched Arrived Departed Firm Est Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 1:00 PM 1/13/2022 1:00 PM 1/13/2022 1:00 PM 1/13/2022 1:00 PM 135 1	Service	Custom Appointments		and Parts	lotes Other Purchas	e Servi	e Ticket Ti	cket roup			
Site Sarah Ashley Created By carolyn Phone (734) 745-6386 Ext 35 East Street Status Resolved Notify sarah@gmail.com Image: Status Resolved Notify sarah@gmail.com Image: Status Resolved 1/18/2022 11:00 AM Labor Hours Rate Amounts Image: Status Service Fee Amount 115:00 Overtime 2.5 180:00 Tax 52:21 Amount 115:00 Save Name Appointment Dispatched Arrived Departed Firm Eat Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 11:00 PM 1/13/2022 12:00 PM 1/13/2022 12:00 PM 1/13/2022 100 PM 1/13/201 135 1	Customer		Created	1/13/2022 11:49 AM	Contact	Sarah	Ashley	~			
Noi: MI 48375 Status Resolved Notify sarah@gmail.com Astern Time Resolved 1/18/2022 11:00 AM Labor Manual Labor Rate Amounts Wanual Labor Rate Amounts Vertime 2.25 120.00 Total Labor Vertime 2.5 180.00 Tax Vertime 2.5 180.00 Total Amount Vertime 2.40.00 Total Amount \$772.21 Name Appointment Dispatched Arrived Departed Firm Eat Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 1:00 PM 1/13/2022 1:00 PM 1/13/2022 1:00 PM 1/13/2022 1:00 PM 135 1	Site	Sarah Ashley	Created By	carolyn	Phone	(734) 74	5-6986	Ext			
Resolved 1/18/2022 11:00 AM Labor Service Fee Manual Labor Rate Amounts V Manual Labor Image: Comparison of the comparis		Noi, MI 48375	Status	Resolved	Notify	sarah@	gmail.com				
Manual Labor Hours Rate Amounts Regular 2.25 120.00 Total Labor 720.00 Overtime 2.5 180.00 Tax 52.21 Holday 0.0 240.00 Total Amount \$772.21 Name Appointment Dispatched Arrived Departed Firm Eat Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 1:00 PM 1/13/2022 1:00 PM 1/13/2022 2:00 PM 120 MI-T&M 135 1		astern Time	Resolved	1/18/2022 11:00 AM							
✓ Manual Labor Hours Rate Amounts ✓ Service Fee Regular 2.25 120.00 Total Labor 720.00 Amount 115.00 Overtime 2.5 180.00 Tax 52.21 Amount 115.00 Holday 0.0 240.00 Total Amount \$772.21 Save	Labor										7
Name Appointment Dispatched Arrived Departed Firm Est Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 11:45 AM 1/13/2022 12:00 PM 1/13/2022 11:45 AM 1/13/2022 12:00 PM 120 MI-T&M 135 1			Rate	Amou	unts	🗹 Servi	ce Fee				
Holiday 0.0 240.00 Total Amount \$772.21 Name Appointment Dispatched Arrived Departed Firm Est Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 11:45 AM 1/13/2022 12:00 PM 1/13/2022 12:00 PM 120 MI-T&M 135 1	Regular	2.25	120.00	Total Labor	720.00	Amount		115.00			
Name Appointment Dispatched Arrived Departed Firm Est Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 11:00 PM 1/13/2022 11:45 AM 1/13/2022 12:00 PM 120 MI-T&M 135 1	Overtime	2.5	180.00	Tax	52.21						
Name Appointment Dispatched Arrived Departed Firm Est Len Service_Company_Code Act Len Billable Len Mark Taylor 1/13/2022 11:00 PM 1/13/2022 11:45 AM 1/13/2022 12:00 PM 120 MI-T&M 135 1	Holiday	0.0	240.00	Total Amount	\$772.21					Save	
Mark Taylor 1/13/2022 1:00 PM 1/13/2022 11:45 AM 1/13/2022 12:00 PM 1/13/2022 2:00 PM 📋 120 MI-T&M 135 1										Save)
	Name	Appointment	Dispatched	Arrived	Departed	Firm	Est Len S	ervice_Company_Code	Act Len	Billable Le	an
Oscar Martin 1/14/2022 8:00 AM 1/14/2022 7:32 AM 1/14/2022 8:04 AM 1/14/2022 9:53 AM 📋 120 OH-INSP Cont 141 1											135
	Oscar Marti	n 1/14/2022 8:00 AM	1/14/2022 7:32 AM	1/14/2022 8:04 AM	1/14/2022 9:53 AM		120 O	H-INSP Cont	141		141

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.

Ticket	Central Station		Ticket#6	5592		×
Service Ticket	Ø \$	cuments Equipment (2) and Part Go			Critical Messages (3) C.C.e.t C.O.D. Only Notifications	
Sīte Sarah 35 Ea: Novi, M Easter	. Sarah Ashley ti Street Al 148375 n Time	Created By caroly Status Resol	olved /2022 11:00 AM	Contact Sarah Addley Phone (734) 745-6986 Notify sarah@gmail.com		
Site and System De System Account System Type Panel Type Location Next Inspection Site Phone Map Code Cross Street Warranty Warranty End Memo Comments Notes Secondary Account Keys Service Company Service Level Receiver/Transmitter	6314 Intrusion UNKNOWN 4766 9/1/2022 (Annual) (734) 745-6986 9918 4266 One Year P & L Labor 5/21/2022 Parts:5/21/2022 9918 This is the field where I can enter S This is the field where I can enter S MI-T&M T&M-Tes	System Comme System Notes 1 Servic Ticke Custon Ste	Secondary Problem Route Code Expertise Priority Estimated Length Comments Service Coordinate Service Coordinate Service Coordinate Service Coordinate Service Coordinate Service Coordinate Service Coordinate Service Coordinate Service Service Livel	3 Medium 120 Install motion in office. or Install motion in office.	3) Items Orders (1) History Log Group	
		FSU Pay	tact 1/18/2022 ✓ Add Resolution Not ✓ Close Ticket After Is		Bill to Cycle Next Cycle Date 2/1/2022 Cose Taket After Adding to Cycle	S901.18 Add to Next Cycle Seve

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.

Ticket Central Station					
Service Custom Ticket Fields Appointments Billing		ther ems Purchase	e Service Ticket Ti	Critical Messages (3) Cket a Other costs covered by contrac Notifications	t
Customer 6758 Ashley, Sarah Site Sarah Ashley 35 East Street Novi, MI 48375 Eastern Time	Created 1/13/2022 11:49 AM Created By carolyn Status Resolved Resolved 1/18/2022 11:00 AM	Contact Phone Notify	Sarah Ashley (734) 745-6986 sarah@gmail.com	Ext	
em Code	Description	Qty Ur	it Price Total Price	Exempt	Tax
SVC Misc	Miscellaneous Hardware	1	11.95 11.95		0.87
SVC Call	Waive Minimum Service Call Charge	1 .	-115.00 -115.00		-8.34
				New	Save

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.

Ticket #6592 ×															
9	Ticket Cent	ral Station	_												
Service Ticket		ointments ad Labor	ling Documen (2)	s Equipment and Parts Go To	Journal	Notes (3)	Other Items	Purchase Orders (1)	Service History	Ticket Log	Ticket Group	10000	Critical Messages (3) C.O.D. Only Notifications		
Customer	6758	_	Creat	ed 1/13/202	2 11:49 A	M		Contact	Sarah Ash	ey		JL			
Site	Ashley, Sarah Sarah Ashley		Creat	ed By carolyn				Phone	(734) 745-6	986	Б	xt 🗍			
	35 East Stree Novi, MI 4837		Statu	Resolve	d			Notify	sarah@gma	ail.com					
	Eastern Time		Reso	ved 1/18/202	2 11:00 A	м									
Billing On	verrides						Ticke	t Charges							
	✓ Override Warranty								Cost Tax						
	Override Se	rvice Level					To	tal Parts		108.30		7.85			
Invoice	Invoice									720.00	5	52.21			
	1 T 🗌	iird Party Bill To					Total Other -103.05 -7.47								
								ib Total		725.25	5	52.59			
Bill To	Sara	h Jane Ashley		~			То	stal					\$777.84		
Contact				Image: A state of the state			👼 Bi	II to Cycle							
Invoice	Duic	/2022				_		Cycle Date	2/1/2022						
		ld Resolution Note ose Ticket After In			Create In	voice) ☑ °	lose Ticket A	iter Adding to	o Cycle			🛃 Add	to Next Cycle	
	\sim			-											
-FSU		1					1								
Payme Remitta	nt Received N ance N														
		-													
														Save	

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.

Lula Later View Sedanal Itte	Ticket#6592 X
View Service C	Ticket Central Station
Open Appointment App	Project Image: Service Custom Appointments Eight graphents Image: Service Custom Image: Service Custom
Calendar	Customer 6758 Created 1/13/2022 11:49 AM Contact Sarah Ashley
✓ January 2022	Ashley, Sarah Site Sarah Ashley Created By carolyn Phone (734) 745-6306 Ext
SMTWTFS S	35 East Street Novi, MI 48375 Status Resolved Notify sarah@gmail.com
2 3 4 5 6 7 8	Eastern Time Resolved 1/18/2022 11:00 AM
9 10 11 12 13 14 15 1 16 17 18 19 20 21 22 2	House in order and
23 24 25 26 27 28 29 2 30 31	Billing Overrides Ticket Charges
	Cost Total Tax
③ Tkt 6592(RS)	Override Service Level Total Parts 108.30
Site Sarah Ashley 35 East Stree	Invoice #/20458
Novi MI 4837	Third Party Bit To
System 6314 Intrusion	
Contact Sarah Ashley (734) 745-698	
Problem Add Equipme	Contact
Technician Oscar.Martin	Next Cycle Date 2/1/2022
Scheduled	View Invoice
Dispatched 01/14/2022	
Arrived 01/14/2022 [FSU
Departed 01/14/2022	Payment Received N
Resolution 1 Add	Remitance N
Resolves Ti	
E S	
	🗧 🗔 💁 🥕 🖉

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.

e												
🕒 In	voice											×
Custo	omer ID		C <u>a</u> tegory	A/R Account			Ta <u>x</u> Group					
6758	3	1415 1415	SV-T&M	▼ 110111	•	-	MI-Wayne County	•				
In	voice #	# 720458						Invoice Dat		Aging Date		
								1/18/2022		1/18/2022		
		Sarah Jane Ashley PO Box 2342	, ,					Branch		P.O. Numbe	er	
		Plymouth, MI 481	70					MI	•	123456		
								Warehouse		Term		
	te	Sarah Ashley 35 East Street							-	Due On R	eceipt	-
A	ddress:	Novi, MI 48375						Invoice <u>Typ</u>		Ticket <u>#</u>		
								Service	•	6592	•	
								Salesperso		Posting Dat		
-								N/A	– 🕹	1/18/2022		
(1	tems \$61	6.95 Parts \$108.30										
										Show Custo	m Fields	
					Item Li							▲
	Item		Description		E	Exempt	Qty	Rate	Amount			-11
Ŀ	Ø SVC Li	abor	Service Labo	r			2.25	120.00	270.00			
	SVC L	abor	S rvice Labo	r			2.5	180.00	450.00			
	SVC M	lisc	liscellaneou	s Hardware			1	11.95	11.95			
								N/A	-	/18/2022		
	Item:	s \$616.9 Parts \$108.	30									
-												
C		D	Deserver		Part List				10-1-		-	
C		Part IM1270	Description 12V 7AH B			Exempt	-	y Un 1	1 Rate 31.85	Amount 31.85		Ы
N		BOSDS820	PET MOTIO			-		1	76.45	76.45		
		00505820	PETMOTIC	AN				1	/0.45	70.45		
	*											
											<u> </u>	\square
	Descrip	tion Service Call		•					Sub Total	725.25		
_ 1	Contac	t		- 🔤 🖻					Tax Total	52.58	<u></u>	
_ 1	Memo	Installed motion dete	actor in office						Balance Due	777.83		
		a builded moudil dett	etter ar officer						1			
	Comp											
		to Print Queue						Invoice Li	st EFT	Save Clo	se	
- 1	Add t	to Email Queue (No email	address defined)							2010 20		

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.

(<i>b</i>)			Ticket#659	92			x
Ticket	Central Station						
Service Ticket	Appointments Billing Do	ocuments (2) Equipment and Parts Go To	Journal Notes Other (3) Items	Purchase Orders (1)	Service History	11/44	Critical Messages (3) C.O.D. Only Notifications
Customer 6758	, Sarah	Created 1/13/2022	11:49 AM	Contact	Sarah Ashley		~
- 1. A - A - A - A - A - A - A - A - A - A	Ashley	Created By carolyn		Phone	(734) 745-6986	Ext	
	st Street /II 48375	Status Resolved		Notify	sarah@gmail.com		
	n Time	Resolved 1/18/2022	11-00 AM	,		-	
		110/2022	11.00 AM				
Site and System Det	tail		Ticket Detail				
System Account	6314	3 12 B	Problem	Add Equipme	ent		~
System Type	Intrusion		Secondary Problem				~
Panel Type	UNKNOWN		Route Code				~
Location	4766		Expertise	3			~
Next Inspection	9/1/2022 (Annual)		Priority	Medium			~
Site Phone	(734) 745-6986		Estimated Length	120			
Map Code	9918 4766	Timezone ET	Comments	Install motion in	n office.		^
Cross Street	4/66 One Year P & L	Close Ticket			X		
Warranty Warranty End	Labor:5/21/2022 Parts:5/21/2022	2 Oth					
Memo	9918						
Comments	This is the field where I can enter :		u sure you want to close t	his service tic	ket?		<u>v</u>
Notes	This is the field where I can enter						
Secondary Account			Yes) NO			Y
Keys							<u> </u>
Service Company	MI-T&M	~	Use Payment Informa	ation On File			
Service Level	T&M-Res	~	None Bank (0)				
Receiver/Transmitter			Credit Card (1)				
L							
							Close Ticket Save

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.

+ = View Serv	vice Options Fleetmati	cs Jobs O	ptions	_			
Show/Hide Today Calendar Bar Navigation	Day & Ticket Q Week & Group T Month Q Inspection	ickets 🖸			Batch Billing icon	MI Installers Display Group Te	▼ 🞲 🕅 chnicians マ 🗖 Zoo Calenda
Calendar January 2022 S M T W T F S 1	February 2022 SMTWTFS 12345	1/19	[Unassign	ned]	Mark Taylo	r	M

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

+ = View Servi	e Options Fleetmati	cs Jobs Options		Queue				
Show/Hide Calendar Bar Navigation	Day Week Month	Ticket Queue Froup Tickets	0	Removed Parts	atch Billing	Warning Cou Warning List * Se	nt = 11 Tickets Tickets donaMonitor	
Calendar		Drag a column hea	der here to gro	up by that column.				
January 2022	February 2022		Created V S	T V Scheduled On		nt ☆ Customer ☆	Car Address	City
SMTWTFS	SMTWTFS		and the second		201 - Carlos A. C.		and the second se	
2345678	1 2 3 4 5	6582	12/16/2021 C				8340 Forrest Drive	
2 3 4 5 6 7 8 9 10 11 12 13 14 15	6 7 8 9 10 11 12 13 14 15 16 17 18 19	6553	12/16/2021 IF	1/18/2022 11:00 AM	10036	Fip Constru	170 Kingswood R	Plymo
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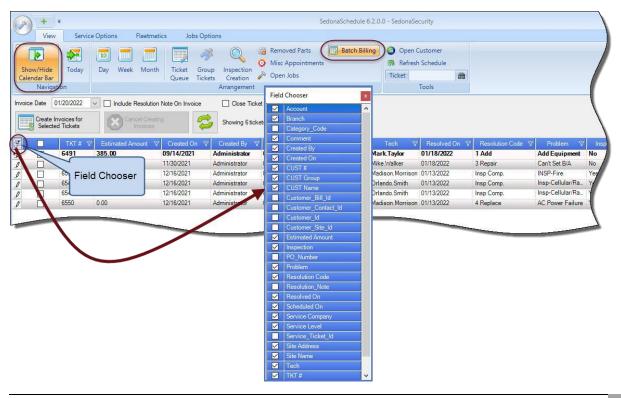
Once you have access the Batch Billing Queue, a list of all Resolved tickets with an amount to invoice greater than \$0.00 will be listed.

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.

_	View	v Service	e Options Fleetma	tics Jobs Op	50013							
Sho	w/Hide ndar Bar Naviga		10 10 Day Week		pup Inspection	 Removed Parts Misc Appointme Open Jobs 	Batch Billi	Refresh Ticket	ustomer Schedule Tools			
	e Date	01/20/2022	V Include Resolution	n Note On Invoice	Close Tick	et After Invoicing						
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2	Create I Selecte	Invoices for ted Tickets	Cancel Creat	ng	Showing 6 tick	tets for invoicing.	Comment ⊽ testing		Resolved On ⊽ 01/18/2022	Resolution Code 😙	Problem ▼ Add Equipment	No
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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.

Field	Chooser	×
	Account	^
	Branch	
	Category_Code	
	Comment	
	Created By	
	Created On	
	CUST #	
	CUST Group	
	CUST Name	
	Customer_Bill_Id	
	Customer_Contact_Id	
	Customer_Id	
	Customer_Site_Id	
	Estimated Amount	
	Inspection	
	PO_Number	
	Problem	
	Resolution Code	
	Resolution_Note	
	Resolved On	
	Scheduled On	
	Service Company	
	Service Level	
	Service_Ticket_Id	
	Site Address	
	Site Name	
	Tech	
	TKT #	Y

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.

	View Ser	vice Options F	leetmatics Jobs O	Options							
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Crea Sel	ate Invoices for lected Tickets TKT # 6491	Estimated Amo 385.00	el Creating voices ount V Created On 09/14/2021	Creat Administrato	kets for invoicing.	g	Mark.Taylor	01/18/2022 01/18/2022	1 Add	Add Equipment	P N
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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.

	ow/Hide endar Bar Naviga	Today tion	Day Week Month	Ticket Grou Queue Ticke	p Inspection	 Removed Parts Misc Appointmer Open Jobs 	Batch Billin	Refresh Ticket		
void	Create I	01/20/2022 [Invoices for ed Tickets	Include Resolution Cancel Creatin Invoices		Close Ticke Showing 6 ticke	-				ļ
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		6491	385.00	09/14/2021	Administrator	01/13/2022		Mark.Taylor	01/18/2022	1 Add
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		6535	1,120.24	12/16/2021	Administrator	01/12/2022		Madison.Morrison		Insp Comp.
		6548	135.31	12/16/2021	Administrator	01/12/2022		Orlando.Smith	01/13/2022	Insp Comp.
		6549	216.50	12/16/2021	Administrator	01/12/2022			01/13/2022	Insp Comp.
		6550	0.00	12/16/2021	Administrator	01/12/2022		Madison.Morris	01/13/2022	4 Replace
Image: A state of the state										

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."

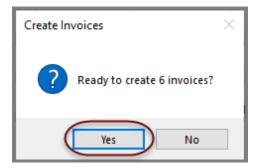
When the correct invoice selections have been made, click the button "Create Invoices For the Selected Tickets".

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.

P)	+ =						SedonaSchedule 6.2	2.0.0 - SedonaSe	curity	
	View	Service	e Options Fleetmat	ics Jobs Opt	ions					
) w/Hide	Today	Day Week Month	Ticket Grou		 Removed Parts Misc Appointment 	Batch Billin		n Schedule	
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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.



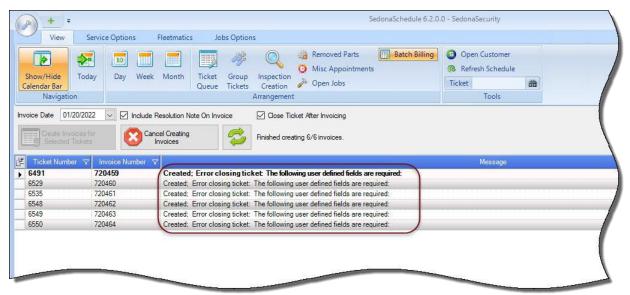
Messages

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

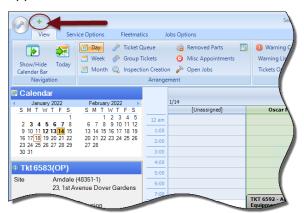
A Vendor Ticket is used when a service call or an inspection is performed by a Service Provider (subcontractor) on behalf of your company. What distinguishes a regular Service Ticket from a Vendor Ticket is the Service Company selected on the Service Ticket form. If the Service Company selected is a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

System Inspections						×
	ale (48351-1) st Avenue Dover Gardens					
System a 483 Intrus						
Detail Equipment Inspection Ite	ems Reports					1
🔍 Inspection ————						
Description	Quarterly Intrusion Inspection		Service <u>T</u> ech		•	
Frequency	Quarterly	-	<u>G</u> roup Number	0		
Service Problem Code	Insp-Other	•	Estimated Hours	0		
Service Level	Inspection		High Frequency Bypass			
Ser <u>v</u> ice Company	Fuller Electric Co, Inc		E <u>x</u> clude from High Frequency Check			
Last Inspection	8/4/2021					
Next Inspection	11/1/2021					
Next Inspection At	Ticket Resolved	~	Notes		^	
					~	
Charges						
-	Inspection Item	SubContractor Exper	ise	•		
	Amount	100.00				
					Save Terminate	<u>C</u> ancel

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.

Search For:	Customer 🗸	48351				Conta	ains 🗸	_
<mark>∕ N</mark> ame	☑ Number	Bill To					clude Canceled	
AR Search Re	esults							
Customer #	Name	System Account	System Description	Site #	Site Name	Site Address	Site Address 2	Site
8351	Arndale (48351)	48351-1 C2	CCTV	48351-1	Arndale (48351-1)	23, 1st Avenue	Saint Lawrence	
8351	Arndale (48351)	a 48351-l	Intrusion System	48351-1	Arndale (48351	23, 1st Avenue	Saint Lawrence	
8351	Arndale (48351)	48351-1 C1	CCTV	48351-1	Arndale (48351-1)	23, 1st Avenue	Saint Lawrence	
8351	Arndale (48351)	48351	CCTV	48351-1	Arndale (48351-1)	23, 1st Avenue	Saint Lawrence	
8351	Arndale (48351)	48351-0 I	Intrusion System	48351-0	Arndale Estate (1456 Main		Clevelar
8351	Arndale (48351)	48351-0 A	Access Control	48351-0	Arndale Estate (1456 Main		Clevelar

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.

- 2			Nev	v Ticket			×
Ticket	Central Station						
Service Ticket Appoin		Equipment Journal and Parts Go To	Notes Other Purcha Items Order			Notifications	
Site Arndale 23, 1st Saint L	e (48351) e (48351-1) Avenue Dover Gardens Jawrence 2/8,Christ Church,Barbados, N/A	Created By carolyn Status Open	022 1:37 PM	Contact Phone Notify		Ext	
Site and System Det	tail		Ticket Detail				
System Account	a 48351-l	U 300	Problem			~	
System Type	Intrusion		Secondary Problem			~	
Panel Type	2200		Route Code	MI		~	
Location			Expertise	1		~	
Next Inspection	9/1/2021		Priority			~	
Site Phone	(055) 556-3952 e2		Estimated Length	0			
Map Code		Timezone				0	
Cross Street			Comments				
Warranty	90-P 30-L					*	
Warranty End	Expired		Service Coordinator			~	
Memo			Technician	Fuller Electric Co	o, Inc		
Comments			PO #				
Notes			Category	SV-T&M		~	
Secondary Account			Resolution			~	
Keys				1			
Service Company	Fuller Electric Co, Inc		Use Payment Inform	ation On File			
Service Level	T&M-Res		Bank (1)				
Receiver/Transmitter			Credit Card (2)				
			Vendor Servic	e			Save

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.

-		Ticke	et#6595	×
Service Custom Appo		uipment Journal Notes Othe Id Parts Go To		ations
Saint Lawrence	I-1) Created By Dover Gardens	1/18/2022 1:37 PM carolyn Open	Contact Amy Arndale Phone (330) 555-1111 Ext Ext Notfy amy.amdale@gmail.com	
Tables Parts Used Customer Paid By User Table 3		y y y		
Text QTY/Item User Text 2 User Text 3 User Text 4 User Text 5				
CheckBoxes Check Box 1 Check Box 2 Check Box 3 Check Box 4 Check Box 5		Money Quoted Price Money Label 2 Dates Return Date Referral Credit		Save

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.

Ticket Central	Purchase Ord Station Purchase Order	Ticket#6595
	thents Billing Doluments Labor Billing Doluments Go To	Other Items Others (0) Others (0) Other Log Group
Customer 48351 Arndale (48351 Site Arndale (48351 23, 1st Avenue I Saint Lawrence BB15028,Christ	Image: Create Purchase Order Order Order Service Order From Vendor Create Purchase Order	Ext Back Orde
	Customer 48351 Created Arndale (48351) Created Site Arndale (48351-1) Created 23, 1st Avenue Dover Gardens Saint Lawrence Status BB15028, Christ Church, Barbados, N/A Status	By carolyn Open
	PO # Vendor	Amount Ordered

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.

S New Purch	nase Order							-	- 🗆	×
Vendor Fuller Electric	Co, Inc 🗸	Category SV-T&M	~					rint Now 🗹 cknowledged	Direct Exper	ise
Purchas		1414		PO #	5040		Branch	MI	[~
Vendor Address	Fuller Electric Co, 126 Mid Tech Driv Detroit, MI 48201			Tracking #		~	Ordered	01/18/2022		~
🏠 Ship To	SedonaSecurity 45185 Joy Road Plymouth, MI 4817	0-1721		Parts Due Created By Last Updated			Ticket Ship Method	P030		~
Parts \$0.	00 ⁹ SExpenses \$		ients General Ledger					Job C	osting	
Accor	1998 C	Description Service-Subcon	Quantity	Rate \$65.00	Amount	Category SV-T&M	6595	Ticket	Туре 5	
										~
									0	New
Memo	Service for Amy Am replacement.	dale ticket number 6	595. Battery				otal ceived			\$65.00
Closed							Apply	E Sav	/e 🗱	Close

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.

Service (1	\$ illing	Docume (0)		quipm and Pa G	nent Jo	ournal N						
Customer	48351 Arndale (4	Schell	dule 😵 🐖	6595											
Site	Arndale (4	View													
	23, 1st Ave		anuary 2022 TWTF		February: SMTW	2022	Disp	olay Group	MI Subs					🗸 🧔 Zoo	om 🕥 🥥
	Saint Law	26 27	28 29 30 31	1	1.2	2345	5 Se	lect 🗹	Code	Name		Service Co			
	BB15028,		4 5 6 7 11 12 13 14		6 7 8 9				Fuller Electric Co, Inc		ectric Co, Inc	Fuller Bectric Co, Inc			
		16 17	18 19 20 21	22 2	20 21 22 2	3 24 25 26	6		CBA Services Newington Electric Co.	CBA Serv Newington	ices Electric Co.	ABCD Service Provider Newington Electric Co.			
Site and Sy	stem Detail	23 24 30 31	25 26 27 28	29 2	272812 6789										
System Acc	ount a	Sched	ule Board	1											
System Type	e Intr	Conca		-											
Panel Type	22		1/18			_									
Jan	T				(Unassigne	ed]			Fuller Electric Co, In	c		BA Services	Newing	gton Electric Co.	
	and the second s	8_ <u>am</u>													
		-							Create Appointment			×			
		9 00							Are you ready to create 1/18/2022 9:00:00 AM?	an appointment	for Fuller Electric Co, I	Inc at			
									IT IN COLOR STORIOU ANT						
		_								(Yes	No			
								_							
		10_00													1
		-													
		-													
		11 00													

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.

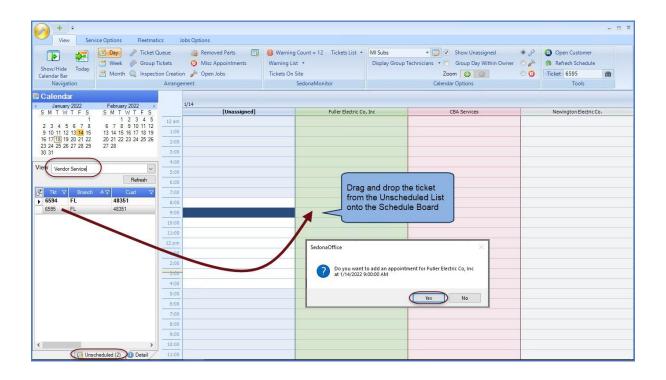
You must have the Day view selected from the Ribbon to be able to drag and drop a Vendor Ticket onto the Schedule Board.

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.



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.

	🗊 Day 🥜 Ticket Q		Removed Parts	0 Warning	Count = 12 Tickets List +	(MI Subs	→ 🔯 🔽 Show Unassigned	00	(D) Open (
	Week 🧼 Group T		Misc Appointments	Warning List			nicians • Group Day Within Ov		Refresh
Show/Hide Today	🖞 Month 🔍 Inspecti			Tickets On S		Display Group Tech		a second and a second second	Ticket 65
Calendar Bar	inspecti	Arrange	and the second		ite SedonaMonitor		Zoom 💿 🥥	00	licket 03
3		Arrange	ment		sedonaivionitor		Calendar Options		
Calendar									
January 2022	February 2022		1/14 [Unassigned]		Fuller Electric Co	1	CBA Services		Newing
SMTWTFS	SMTWTFS 12345		[Unassigned]		Fuller Electric Co	, Inc	CDA Services		Newing
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iew Vendor Service	~								
		5:00							
	Refresh	6:00			1				
≝ Tkt 🟹 🛛 Branch 🛆	v⊽ Cust ⊽	7:00					the desired time-		
6594 FL	48351	8:00			sic	ot for the Servi	ce Provider.		1
6595 FL	48351	9:00			<				
		10:00							1
	the second se	11:00							

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.

	_	lr.		
Ashley, Sarah Will Customer Information	^	Sarah Ashley		
Payment Options		35 East Street		
		Novi, MI 48375		
Sarah Jane Ashley		(734) 745-6986		
Contacts				
- Sites				
🗄 🛅 (2) Ashley, Sarah				1
🖃 🛅 (9918) Sarah Ashley				
🗄 🛅 Systems				
🖻 🛅 6314 Intrusion Syst				
🗄 🛅 Central Station T	racl		1-	
🔛 Documents		Description	Frequency	Group #
- 😳 Equipment				1
Equipment Histor	У			
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Recurring				
Recurring His Recurring Ma	light-o	click to setup a		
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9918-F Fire Sys	ew m	spection record		
9918-F Fire Sys	7			
9918-F Fire Sys				
9918-F Fire Sys				
Documents Equipment Hist		New Inspection		
9918-F Fire Sys Documents Equipment Inspections				
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P918-F Fire Sys Documents Equipment Equipment Hist Inspections Notes Recurring	/			(
P918-F Fire Sys Documents Equipment Equipment Hist Inspections Notes Recurring Recurring History	/			(

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.

6758 9918-F	Fire System						×
🤟 Customer:	6758 Sarah Ashley		Address: 35 East 9 Novi, MI				
System Custo	om Fields Recurring	Equipmen	ctions Notes & Cor	mments			
Description	Frequency	Problem Code	Service Level	Last Insp	Next Insp	Notes	
<					Ć	New Edit	
	CS Data Tr	acking	☐ Inact	ive		<u>S</u> ave <u>C</u> lo	ise

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.

System Inspections					Х
	Ashley st Street				
System 9918-					
Fire	, ,				
Detail Equipment Inspection Ite	ms Reports				1
🔍 Inspection ————					
D <u>e</u> scription	Inspection-Fire System		Service <u>T</u> ech	Devan Clements 💌	
Frequency	Annual	•	<u>G</u> roup Number	0	
Service Problem Code	Insp-Fire-AN	•	Estimated Hours	2	
Service <u>L</u> evel	INSP Cont-Res	•	High Frequency Bypass		
Ser <u>v</u> ice Company	MI-INSP T&M	- #	Exclude from High		
Last Inspection			Frequency Check		
Next Inspection	10/1/2022				
Next Inspection At Recurring Item Link	Ticket Closed INSP Fire System	- -	Notes	Inspection all fire equipment and leave a copy of the report with the customer.	
Cycle Amount	125.00				
Charges	120100			,	
	Inspection Item	INSP Trip		•	
	Amount	55.00		_	
		,			
				Save Terminate Cance	

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.

Curtary lange ations		· • · · · · · · · ·			
System Inspections					×
	ah Ashley East Street				
System 99: Fire	18-F				
\bigcirc					
Detail Equipment Inspection	Items Reports				1
🔍 Inspection ————					
D <u>e</u> scription	Inspection-Fire System		Service <u>T</u> ech	Devan Clements 💌	
Frequency	Annual	•	<u>G</u> roup Number	0	
Service Problem Coo	le Insp-Fire-AN	•	Estimated Hours	2	
Service <u>L</u> evel	INSP Cont-Res	•	High Frequency Bypass		
Ser <u>v</u> ice Company	MI-INSP T&M	▼	Exclude from High		
Last Inspection			Frequency Check		
Next Inspection	10/1/2022				
Next Inspection At	Ticket Closed	-	Notes	Inspection all fire equipment and leave a	
Recurring Item Link	INSP Fire System			copy of the report with the customer.	
Cycle Amount	125.00			×	
Charges					-
	Inspection Item	INSP Trip		•	
	Amount	55.00			
				Save Terminate Cance	

- 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.

System Inspection	ctions		•			×
Site		Ashley st Street				
System	9918- Fire	F				
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	nent inspection re					
🔍 Inspection	n					
Di	escription	Inspection-Fire System		Service <u>T</u> ech	Devan Clements 💌	
Fr	requency	Annual	T	<u>G</u> roup Number	0	
Se	ervice Problem Code	Insp-Fire-AN	•	Estimated Hours	2	
Se	ervice <u>L</u> evel	INSP Cont-Res	•	<u>H</u> igh Frequency Bypass		
Se	er <u>v</u> ice Company	MI-INSP T&M	▼ 📸	Exclude from High		
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Ri	ecurrin <u>a</u> Item Link	INSP Fire System	T		copy of the report with the customer.	
C	ycle Amount	125.00			V	
🙀 Charges						
		Inspection Item	INSP Trip		•	
		Amount	55.00		_	
					Save Terminate Cancel	

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.

System Ins	pections	· · · <u> </u>				×
Site		h Ashley ast Street				
System						
		1				
Detail	ipment Inspection It	ems Reports				
🔍 Inspec	aon					-
	Description	Inspection-Fire System		Service <u>T</u> ech	Devan Clements	
	Frequency	Annual	•	<u>G</u> roup Number	0	
	Service Problem Code	Insp-Fire-AN	•	Estimated Hours	2	
	Service <u>L</u> evel	INSP Cont-Res	•	<u>H</u> igh Frequency Bypass		
	Service Company	MI-INSP T&M				
	Last Inspection			Frequency Check		
	Next Inspection	10/1/2022				
	Next Inspection At	Ticket Closed	-	Notes	Inspection all fire equipment and leave a copy of the report with the customer.	
	Recurrin <u>a</u> Item Link Cycle Amount	INSP Fire System	<u> </u>			
🙀 Charge		1125.00			· ·	.
		Inspection Item	INSP Trip		•	
		Amount	55.00		_	
		,	133.00			
					Save Terminate Cance	1

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, <u>never</u> 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.

Site	Sarah Ashley				
	35 East Street				
`	9918-F Fire				
Equipment Inspect	ion Items Reports				
Inspection					
Description	Inspection-Fire System		Service Tech	Devan Clements	
Frequency	Annual	•	Group Number	0	
Service Problem	Code Insp-Fire-AN	•	Estimated Hours	2	
Service Level	INSP Cont-Res	•	High Frequency Bypass	Г	
Service Compan	MI-INSP T&M		Exclude from High	Г	
Last Inspection			Frequency Check		
Next Inspection	10/1/2022	500			
Next Inspection	At Ticket Closed	-	Notes	Inspection all fire equipment and leave a \land	
Recurring Item L	ink INSP Fire System	<u> </u>		copy of the report with the customer.	
Cycle Amount	125.00			×	
Charges					
	Inspection Item	INSP Trip		<u> </u>	
	Amount	55.00			
				Save Terminate Ga	an

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.

System Insp	ections					
Site		n Ashley ast Street				
System	9918 Fire	f				
Inspection	on					
	Description	Inspection-Fire System		Service Tech	Devan Clements 💌	
	Frequency	Annual	-	Group Number	0	
	Service Problem Code	Insp-Fire-AN	•	Estimated Hours	2	
	Service Level	INSP Cont-Res	•	High Frequency Bypass	Г	
	Ser <u>v</u> ice Company	MI-INSP T&M		Exclude from High Frequency Check	Г	
	Next Inspection	10/1/2022				
	Next Inspection At	Ticket Closed	•	Notes	Inspection all fire equipment and leave a 🔨	
	Recurring Item Link	INSP Fire System	<u> </u>		copy of the report with the customer.	
	Cycle Amount	125.00			~	
G Charges						
		Inspection Item	INSP Trip		I .	
		Amount	55.00			
					Save Terminate Ca	ancel

Creating Inspection Tickets

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

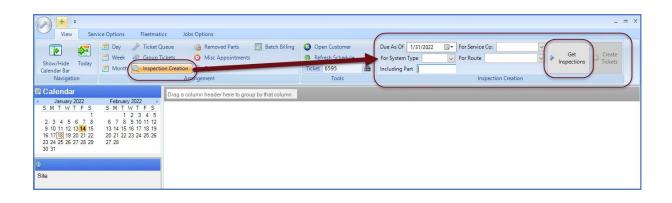
A new Ribbon Group, labeled "Inspection Creation" will be displayed. The fields on this Ribbon Group are used to select which Inspection Tickets will be created.

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.

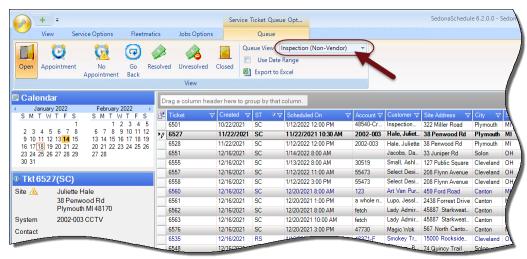
+ = View Serv	ice Options Fleetmat	ics Jobs Option	Ś							- *
Show/Hide Today Calendar Bar	Day Jricket C Week Jricket C Month O Inspect	Tickets 🧿 Mis		Billing	Refresh Schedule Ticket 6595	Due As Of 1/31/202 For System Type Including Part	2 💽 🔻 For		✓ Inspe	et Create Tickets
Navigation		Arrangemer	it		Tools			Inspection Creation	n	
Calendar		Drag a column he	ader here to group by that co	lump					/	
January 2022	February2022 → SMTWTFS	Account		System	Site	Address	Date	Route Code	City	Service Level
3 1 1	12345	484	MI	Intrusion	Jon - Test	2203 Eastlawn Dr	01/01/2022	MI	Midland	Bill 5 Minute Increm.
2 3 4 5 6 7 8	6 7 8 9 10 11 12	☑ 45		usion	Johnson, Gino-Lake.		01/01/2022	N/A	Traverse City	T&M-Res
9 10 11 12 13 14 15	13 14 15 16 17 18 19		k this box to select	and a second second	Alicia Hess	4 Old Forge Road	01/01/2022	OH	Canton	Bill 5 Minute Increm
16 17 18 19 20 21 22 23 24 25 26 27 28 29	20 21 22 23 24 25 26 27 28	and the second data was a second data w		rusion	Ann Foster	39 Saddle Ridge	01/01/2022	N/A	Plymouth	Inspection
30 31	27 20		pection records.	rusion	Darlene Jackson	106 Longwater Dr	01/01/2022	N/A	Plymouth	Inspection
		65		rusion	Jillian Russell	24 White Rd	01/01/2022	N/A	Canton	Inspection
		6562913	MI	Intrusion	Jillian Russell	24 White Rd	01/01/2022	N/A	Canton	Inspection
Site		6562913	ML	Intrusion	Jillian Russell	24 White Rd	01/01/2022	N/A	Canton	Inspection
		103-F	M	Fire	Marina Environment.	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
		6691528	MI	Intrusion	Jordan Williams	14 Beverly Way	01/01/2022	N/A	Plymouth	Inspection
System		12	MI	Fire	Jordan Williams	14 Beverly Way	01/01/2022	N/A	Plymouth	Inspection
Contact		3350-0	MI	Intrusion	Michael Johnson	2235 Mills	01/01/2022	N/A	Plymouth	Inspection
Jondor			MI	Fire	Michael Johnson	2235 Mills	01/01/2022	N/A	Plymouth	Inspection
Problem		A10331	MI	Intrusion	Plymouth Stamp W	201 Locust Street	01/01/2022	N/A	Plymouth	Inspection
lechnician		20226	MI	Fire	Talon Capitol Llc	1001 Farmington Ave	01/01/2022	N/A	Plymouth	Inspection
	×		MI	Fire	Mr. Sparkle Car Wa_	818 Sullivan Ave.	01/01/2022	N/A	Cleveland	Inspection
Scheduled	~	C 6621101	MI	Intrusion	Alaxia Shanhard	215 R Pine In Evte	01/01/2022	N/A	Plumouth	Inonaction

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.

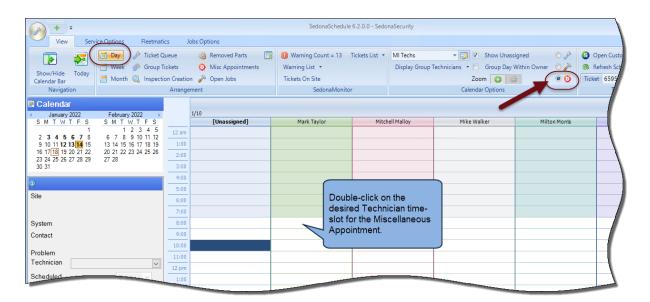
You may schedule a miscellaneous appointment for one or multiple Technicians at the same time. These appointments may be for a single day, a portion of a day or several consecutive days. For example, if several Technicians will be attending a meeting on the same date and time, you may setup all of these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

S Appointment				×								
Туре	Type Meeting											
Description	Meeting											
Notes	Health Insurance Benefits Meeting-Mandatory											
	Occurs Daily											
Start Time	01/10/2022	V (08:00 AM	1 🗸 - 09:00 AM									
End Time	01/10/2022	\sim										
		Technicians										
In Group 🔳	Code	Name	Service Co 🛛 🛆	Install Co 🔨								
	A.Sant	Anthony Santiago	ACK-Test	Testing Install C								
	00025	Eric Lugo	ACK-Test	6.158								
	1111	Justin Walling	ACK-Test	Borque								
	Borque Fire	Borque Fire	Borque	Borque								
	Jesslynn	Jesslynn Lupo	From Dispatch	N/A								
	Matt.Miller	Matt Miller	MI	MI								
	Mitchell.Malloy	Mitchell Malloy	MI	MI								
	Mike.Walker	Mike Walker	MI-SVC Cont	MI								
	Bob.Olson	Bob Olson	MI-T&M	MI								
	Mark.Taylor	Mark Taylor	MI-T&M	MI								
	1100 II 1)elete 🗶 Close								
			Save 🥥 🕻	A Close								

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

			SedonaSchedule 6.2.0.0 - Sedo	maSecurity			_ =
vice Options Fleetmati	cs Ji	obs Options					
🗂 Week 🥠 Group T	ickets on Creatio		Warning Count = 13 Tickets List * Warning List * Tickets On Site SedonaMonitor	Display Group Technicians 👻 🗐 Zoc	Group Day Within Owner 🔿	Refresh Schedule	m
February 2022 > S M T F S 1 2 3 4 5 6 7 8 9 10 11 2 13 14 15 16 7 8 9 10 11 2 13 14 15 17 18 19 20 21 22 3 24 25 26 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 27 28 29 29 21 21 22 23 24 25 26 27 28 29 27 28 27 28 27 28 27 28 27 28 29 21 21 <t< th=""><th>12 am 1:00 2:00 3:00 4:00 5:00 6:00</th><th>1/10 [Unassigned]</th><th>Mark Taylor</th><th>Mitchell Malloy</th><th>Milton Morris</th><th>Madison Mont</th><th>son</th></t<>	12 am 1:00 2:00 3:00 4:00 5:00 6:00	1/10 [Unassigned]	Mark Taylor	Mitchell Malloy	Milton Morris	Madison Mont	son
>	7:00 8:00 9:00 10:00 11:00 12 pm		(Heeting; Health Insurance Benefits)	Heeting; Health Insurance Benefits	Meeting; Health Insurance Sene	fits) Meeting; Health Insuran	nce Benefi
	Image: Second	Days Joint Ticket Queue Week Group Tickets Month Inspection Creation S. M. T. W. T. F. S. 12 am S. M. T. W. T. F. S. 12 am 131 44 516 171 819 2020 202 728 2100 3100 2100 5.6 7.8 9 10 111 12 100 2021 22 23 24 25 26 2100 3100 6:00 9:000 0:000 10:00 10:00	Days P Ticket Queue Removed Parts Week Group Tickets Misc Appointments Month Inspection Creation Open Jobs Arrangement Image: Compare the second	Vice Options Fleetmatics Jobs Options	Image: Second Parts Image: Second Parts<	Vice Options Fleetmatics Jobs Options Image: Description of the state of the st	February 2022 Nisc Appointments Warning List * MITechs Software Group Tickets Open Jobs Refresh Schedule Image: Software Misc Appointments Warning List * Tickets On Site Tools S N T. W. T.F. S 12 a.4 f. [1/10 Mitchell Malloy Milton Morris Madison Morris 20 21 22 23 24 25 2 12 a.4 f. [1/10 Image: Comparison of the Site Site Site Site Site Site Site Sit

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.

→ + +		Miscellaneous Appo	pintments		SedonaS	chedule 6.2.0.0	SedonaSecurity	100		- = 3
View Service Options Fleetma	atics Jobs Options	Miscellaneous App	ointments							
Show/Hide Today Day Week Month		ection Open Jo	pointments	ing Open Custo Refresh Sch Ticket 6595						
Navigation		gement	/	Tool						
Calendar	Drag a column header h	nere to group by the	tumn.							
January 2022 February 2022 S M T W T F S S M T W T F S	Туре	Description	Notes	Start Date	End Date	Start Time	End Time	Entered By	Entered	Edited By
1 1 2 3 4 5		Vacation		01/04/2022	01/07/2022	08:00 AM	05:00 PM	carolyn	01/13/2022	carolyn
2 3 4 5 6 7 8 6 7 8 9 10 11 12 9 10 11 12 13 14 15 13 14 15 16 17 18 19	- Meeting	Meeting	Health Insurance Benefits	01/10/2022	01/10/2022	08:00 AM	09:00 AM	carolyn	01/18/2022	carolyn
16 17 18 19 20 21 22 20 21 22 23 24 25 26	Code	Name	ls_Result_Of_Clock_Out	Clock Out Dispatch						
23 24 25 26 27 28 29 27 28 30 31	Matt Miller	Matt Miller								
30.51	Mitchell.Malloy	Mitchell Malloy								
0	Mark.Taylor	Mark Taylor								
Site	Milton.Morris	Milton Morris on Madison Morrison		-						
Sile	Madison.morris	on Madison Morrison				0				
	Туре	Description	Notes	Start Date	End Date	Start Time	End Time	Entered By	Entered	Edited By
System	Holiday	Holiday		01/03/2022	01/03/2022	08:00 AM	05:00 PM	carolyn	01/13/2022	carolyn
Contact										
Problem										

Firm Appointments

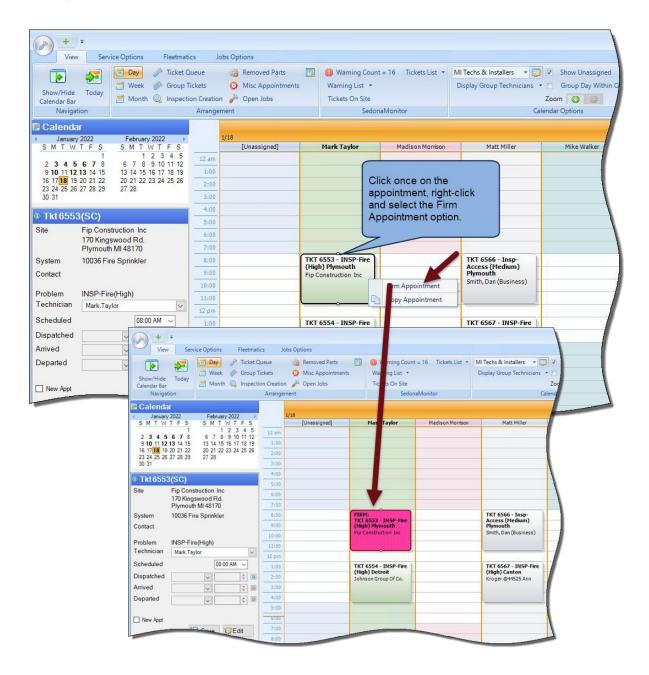
A "Firm Appointment" is one that must be completed on the scheduled date and time and should not be changed. Once an appointment has been marked as "Firm", it may not be moved or modified within the Schedule Board unless the User removes the "Firm" flag. The Firm Appointment option may be used for Ticket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

+ = View Service Options Fleetma		obs Options				
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30 31	3:00				elect the Firm	
Tkt 6553(SC)	4:00			Appo	intment option.	
Site Fip Construction Inc	5:00					
170 Kingswood Rd.	6:00					1
Plymouth MI 48170	7:00					
System 10036 Fire Sprinkler	8:00			6553 - INSP-Fire		TKT 6566 - Insp- Access (Medium)
Contact	9:00		(Hig Fip C	h) Plymouth		Plymouth Smith, Dan (Business
Problem INSP-Fire(High)	10:00					
Technician Mark.Taylor				Сору Арр	ointment	
Scheduled 08:00 AM V	12 pm		-			_
	1:00			6554 - INSP-Fire h) Detroit		TKT 6567 - INSP- (High) Canton
Dispatched 🔽 🚖			John	son Group Of Co.		Kroger @44525 A
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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.

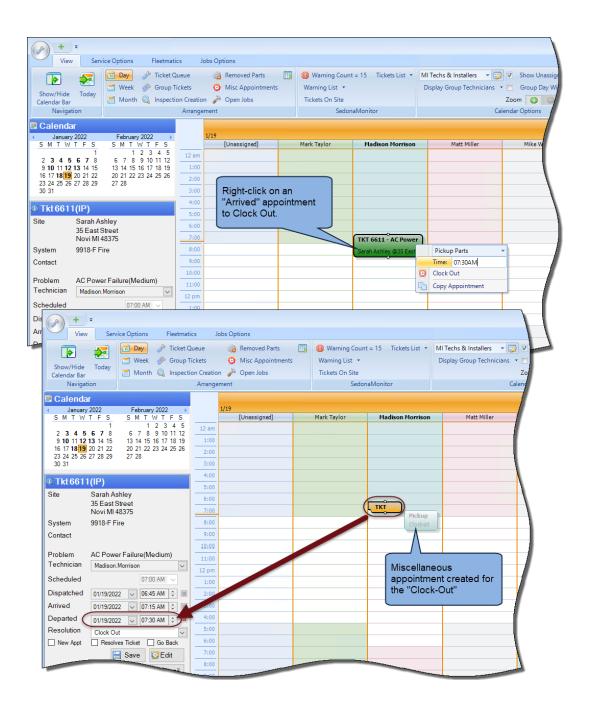
Clocking-out will prevent labor hours and costs from being applied to the Ticket or Job.

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.

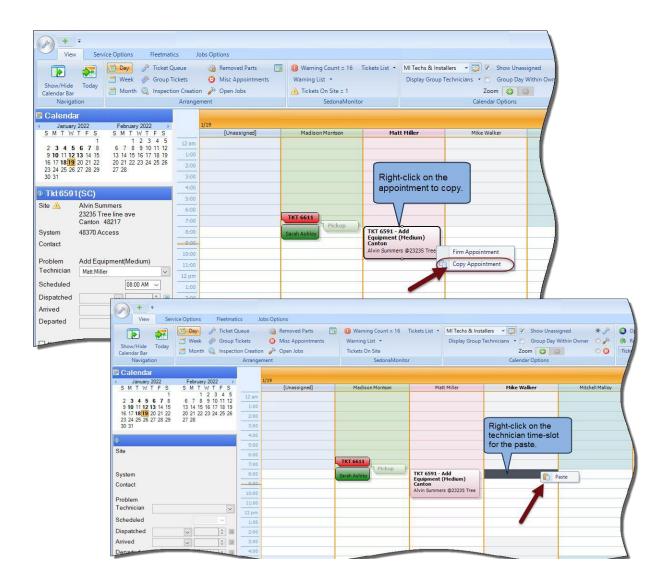
In our example, we clocked-in at 8:10am. The clock-in action automatically entered a departed time of 8:10am on the miscellaneous appointment, and then automatically created a new technician appointment that began at 8:10am.

+ = View Sen		Fleetmatic	Jeue	Jobs Options			Warning Count		le 6.2.0.0 - Sedor Tickets List 🔹	MI Techs 8			Show Unassigned	• •
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	Technician	Madison.M	Aorriso	1 V	12 pm									
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			-	and the second states of the s	7:00									

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: <u>Never delete an Inspection type of ticket, as this will affect the correct advancing</u> 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.

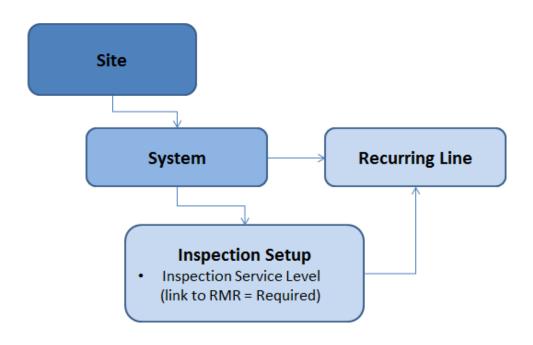
Inspection Linked to Recurring Line

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.

6		Sy	/stem Inspec	tions		×
Site System	137 \	outh Plantation-Visitor/Pavillion (Fire) Warren Avenue 5-14-03				
System	Fire	5 14 05				
Detail Equipm	ent Inspection Ite	ms Reports				1
🔍 Inspection	n —					
D	escription	A Fire Contern		Service <u>T</u> ech	r	
	requency	A-Fire System Annual		Group Number	1	•
	ervice Problem	Insp-Fire	-	Estimated Hours	40	
	ervice <u>L</u> evel	INSP Cont-LC		High Frequency		
	ervice <u>c</u> ever	MI-INSP Cont		Bypass	_	
	ast Inspection	1/12/2016		Exclude from High Frequency Check		
Ne	ext Inspection	6/1/2016				
Ne	ext Inspection At	Ticket Closed	•	Notes	[<u>^</u>
Re	ecurring Item Link	INSP Cont	$\overline{\mathbf{y}}$			
	yde Amount	780.00				~
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These two fi Service Leve	ields are only vi el requires a lin	isible when the k to a Recurring Line				
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	*This ontion	is used in Service Inspections to	force a link he	tween the inspec	tion and customer RMR	
	nno option			areen the mapee		
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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.

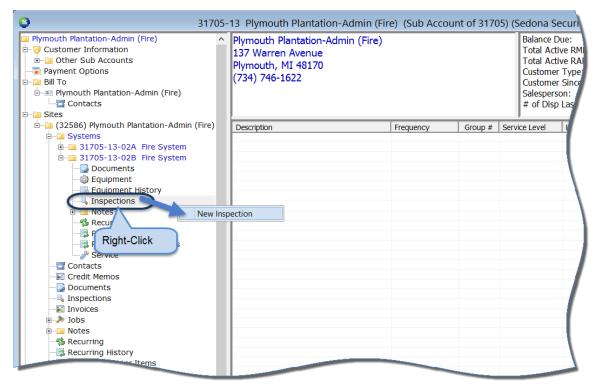
Service Level Edit Service Level INSP Cont-LC Description Inspection Contract - Large Com General Parts Inspection
This option is used in Service Inspections to force a link between the inspection and customer RMR.
<u>Apply</u> <u>N</u> ew <u>D</u> elete

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.

6	:	System Inspections	×
Site System	Plymouth Plantation-Admin (Fire) 137 Warren Avenue 31705-13-028 Fire		
Detail Equipment 1	Inspection Items Reports		1
Inspection Description	Monthly Fire - Visual	Service Iech	The Group for the Inspection
Frequency	Monthly	Group Number 2	
Service Problem	Insp-Fire	Estimated Hours 2	Should this Inspection be skipped if there is another Inspection due on
Ser <u>v</u> ice Company	MI-INSP T&M	Bypass E <u>x</u> clude from High	the same date that is less frequent
Next Inspection	6/1/2015		This box is selected if you always want to generate an Inspection Ticket for this Inspection record
	Ticket Closed	Notes	~
Charges	Inspection Item	<u> </u>	
	1	<u>S</u> ave	<u>C</u> ancel

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	\checkmark	
Annual Sprinklers	1		\checkmark
Annual Water Flow	1		\checkmark

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	\checkmark	
System A - Annual Sprinklers	1		\checkmark
System A - Annual Water Flow	1		\checkmark
System B – Monthly Visual	2	\checkmark	
System B – Annual Sprinklers	2		\checkmark
System B – Annual Water Flow	2		\checkmark

0					System	Inspectio	ns			×	
Ste			Plantation-Admir	n (Fire)							
System	15	137 Warre 31705-13- Fire									
Detai Equip	pment Inspect	ion Items F	Reports								
- Inspect	ion									-	
Description	n Mo	nthly Fire - 1	/sual	_	Ser	vice <u>T</u> ech			•		
Frequency	M	onthly		•	Gro	up Number	2				
Service Pri	oblem In	sp-Fire		•	Est	mated Hours	2	-			
Service Le	vel IN	SP T8M-LC		•		h Frequency					
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		8 0	arges			[Gancel

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.

<i>></i> + =				S	edonaSchedule 6.2.0.0 - SedonaS	Security				
View Servi	ice Options Fleetmat	ics Jobs Option	;							_
	😇 Day 🤌 Ticket O	Dueue 🙀 Rer	noved Parts 🔢 Ba	tch Billing	Open Customer	Due As Of 1/31/20	22 🔍 🛪 For :	Service Co:		
🛃 🛃	📑 Week 🥔 Group 1		c Appointments		Refresh Schedule	For System Type	For I			Get 👝 Create
Show/Hide Today	-						V FOI I	Route	Insp	ections Tickets
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2 3 4 5 6 7 8 9 10 11 12 13 14 15	6 7 8 9 10 11 12 13 14 15 16 17 18 19	WooWoot!	MI	Fire Sprin	kler Lupo, Jesslynn	2438 Forrest Drive	01/16/2022	N/A	Canton	Inspection
16 17 18 19 20 21 22	20 21 22 23 24 25 26	103-F	MI	Fire	Marina Environment.	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
23 24 25 26 27 28 29	27 28	103-F	MI-T&M	Fire	Marina Environment	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
30 31		103-F	MI-T&M	Fire	Marina Environmen	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
		103-F 12345	MI	Intrusion	Mark Fleming	80 Perry St	01/11/2022	N/A	Cleveland	ACK-SVC-Cont
		12345	MI	Intrusion	Mark Fleming	80 Perry St	01/28/2022	N/A	Cleveland	ACK-SVC-Cont-2
ite		48151	MI	Intrusion	Mary Stevens	55 Willow Rd	01/14/2022	N/A	Plymouth	Insp-Hourly
		48151	MI	Intrusion	Mary Stevens	55 Willow Rd	01/30/2022	N/A	Plymouth	T&M-Res
		3350-0	MI	Intrusion	Michael Johnson	2235 Mills	01/01/2022	N/A	Plymouth	Inspection
Svetom			MI	Fire	Michael Johnson	2225 Mille	01/01/2022	N/A	Plymouth	Inspection

Next, click the Create Tickets button.

+ =					S	edonaScl	nedule 6.2.0.0 - SedonaS	ecurity				
View Serv	ice Options Fleetmat	cs	Jobs Option	s								
P	🗾 Day 🎤 Ticket C	lueue	e 🍓 Rer	moved Parts 🔣 B	atch Billing	6 Op	en Customer	Due As Of 1/31/20	22 🔲 🔻 For S	Service Co:	~	()
	🗂 Week 🤌 Group 1	icket	s 👩 Mi	sc Appointments		Re Re	fresh Schedule	For System Type	For F	Route		Get O Create
Show/Hide Today Calendar Bar	MonthInspecti	on Ci	reation 2 Op	en Jobs		Ticket	6595 📸	Including Part	Landsty .	1	insp	ections Tickets
Navigation			Arrangemer	nt			Tools	and a set of		Inspection Creation	on	\sim
Calendar		Dr	ag a column hei	ader here to group by th	at column.							
January 2022 SMTWTES	February 2022 SMTWTFS		Account	Service Co	System		Site 🛆	Address	Date	Route Code	City	Service Level
1	1 2 3 4 5		13078	OH	Intrusion		Lombardi Express	105 Clark Drive	01/01/2022	N/A	Cleveland	Inspection
2 3 4 5 6 7 8	6 7 8 9 10 11 12	П	WooWoot!	MI	Fire Sprin	nkler	Lupo, Jesslynn	2438 Forrest Drive	01/16/2022	N/A	Canton	Inspection
9 10 11 12 13 14 15 16 17 18 19 20 21 22	13 14 15 16 17 18 19 20 21 22 23 24 25 26	Ø	103-F	MI	Fire		Marina Environment.	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
23 24 25 26 27 28 29	27 28		103-F	MI-T&M	Fire		Marina Environment.	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
30 31			103-F	MI-T&M	Fire		Marina Environmen	13331 E. Trumball	01/01/2022	N/A	Plymouth	Inspection
		P	12345	MI	Intrusion		Mark Fleming	80 Perry St	01/11/2022	N/A	Cleveland	ACK-SVC-Cont
		П	12345	MI	Intrusion		Mark Fleming	80 Perry St	01/28/2022	N/A	Cleveland	ACK-SVC-Cont-2
Site			48151	MI	Intrusion		Mary Stevens	55 Willow Rd	01/14/2022	N/A	Plymouth	Insp-Hourly
			48151	MI	Intrusion		Mary Stevens	55 Willow Rd	01/30/2022	N/A	Plymouth	T&M-Res
			3350-0	MI	Intrusion		Michael Johnson	2235 Mills	01/01/2022	N/A	Plymouth	Inspection
Svetom				MI	Fire		Michael Johnson	2235 Mille	01/01/2022	N/A	Plymouth	Inspection

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.

Inspections Selected										
Action	Site	Group Num	Account	System	Inspection	Next Insp Date				
Set Next Insp	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Monthly	1/01/2022				
Create Group	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Annual	1/01/2022				
Create Group	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Annual	1/01/2022				
Set Next Insp	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Monthly	1/01/2022				
Create Group	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Annual	1/01/2022				
Create Group	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Annual	1/01/2022				

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.

	Group Ticket Opt		SedonaSchedule 5.7.92	.12356 - Sedona Security		- = >
View Service Options Fleetmat	cs Jobs Options Group Tickets					
Show/Hide Calendar Bar Navigation	Group Queue Tricket Creation C	. Ref	en Customer resh Schedule 27348 Tools			
+ 🗂 🔑 🖻 🍪 27348 📼						
🖥 Calendar	Master Ticke, lumber V					
A January 2022 February 2022 Februar	B. Master Ticket Number: 27604 (4 items) Master Ticket Number: 27509 (2 items) Master Ticket Number: 27529 (2 items) Master Ticket Number: 27516 (2 items) Master Ticket Number: 27509 (5 items) Master Ticket Number: 27509 (5 items) Master Ticket Number: 27509 (4 items) Master Ticket Numb: 27499 (3 items)					
System	Master Ticket Number 27348 (3 items)					
Contact		♡ Insp Est Hours	♥ PR ♥ Critical	Account V 9876C	Name V St. Mary Mercy Hospital	Problem ⊽ F-Insp
Problem	27349 4/21/2020 3:36 PM	0	Critical		St. Mary Mercy Hospital	F-Insp-MO
Technician 🗸	27350 4/21/2020 3:36 PM	0	Critical		St. Mary Mercy Hospital	F-Insp-MO
Scheduled Dispatched Arrived						
Departed 🔍 🗘	Master Ticket Number : 27325 (2 items) Master Ticket Number : 27321 (2 items)					

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	3 =			Ticket #27348		x
	Ticket Central Station					
Service Ticket	Service Additional Info	Billing Documents Equip	mment Journal Note Parts Go To		Ret Group	Notifications
Customer Site Other Ticke	St. Mary Mercy Hospital St. Mary Mercy Hospital 36475 5 Mile Rd Livonia, MI 48154-1971	Created 4/21/202 Created By Administr Status Open		Contact Phone Notify		
Ticket	Date	ST	System	System Type	Problem	Resolution
27349	04/21/2020	OP	İ	Fire Sprinkler	F-Insp-MO	N/A
27350	04/21/2020	OP		Integrated Installation	n F-Insp-MO	N/A
	A Remove ∨ C	Dispatch Resolve.		All tickets must be resolved to invoice or	close Invoice/Close Problem	Resolution
Ticket	Date	51	System	System Type	Problem	Resolution

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

S Dispatch						_	□ ×
Appointment(s)							
			Appointments for	Group			
Name	Scheduled	Dispatched	Arrived	Departed	Est Len	Res Code	Note
							>
Add	Delete						
Scheduled -			Appointment Resolu	ution			
Technician Estimated Length	0	F	Resolution			Nee	eds Go Back
Esumated Length	U	I	Notes				
🔯 Dispatch Time	s						
Scheduled	\sim	~					
Dispatched	\sim	* E					
Arrived	\sim	÷ 🗉					
Departed	\sim	÷ •	🎾 Open Ticket			Save	😫 Close

- 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.

S Group Ticket				– 🗆 X
/iew				
January 2022 February 2022 ▶ Display Gr S M T W T F S S M T W T F S			1	A Zoom O O
26 27 28 27 1 2 3 4 5 Select 2 3 4 B 6 7 8 9 10 11 2 3 4 5 Select 9 10 11 15 13 14 15 16 17 18 19 16 17 18 19 20 21 22 22 22 22 22 22 22 22 24 25 6 7 8 9 10 11 12 Image: 12	Code Bob.Oliver David.Jones Madison.Morrison Matt Miller	Name Bob Oliver David Jones Madison Morrison Matt Miller	Service Co MI MI MI Matt Miller	Ĵ
Schedule Board				
1/19 [Unassigned] Bob Oliver 8_m	David Jones Madison Morrison	Matt Miller Max	vell Knife Mike Walker	Milton Morris Mitchell Malicy
9 00 Create Appointment Are you ready to create an appointment	for Matt Miller at 1/19/2022			
9:00:00 AM?	Yes No			
11 00				
Name Scheduled Dispatched Matt Miller 1/19/2022 9:00 AM	Appointments for Group	arted Est Len 240	Res Code Note	
< Add Delete			>	
C Scheduled Technician Matt Miller Estimated Length 240	Resolution N/A Notes		Needs Go Back	
Dispatch Times Scheduled 01/19/2022 V 09:00 AM V Dispatched V 10:00 AM V				
Anived Departed	🤌 Open Ticket	E	Save X Close	

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.

Appointment(s)									
			Appoin	tments for Gro	qu				
Name	Scheduled	Dispatched	Arriv		Departed	Est Len	Res Code	Not	te
Matt Miller	1/19/2022 9:00 AM					240			
Mike Walker	1/19/2022 9:00 AM					240			
,									
<									
< Add	Delete								
Add	Delete		C Appointm	ent Resolution					
Add			Appointm Resolution	ent Resolution			Ne	eeds Go Ba	ack
			Resolution	ent Resolution			Ne	eeds Go Ba	ack
Add Scheduled Technician Estimated Length	0			ent Resolution			Ne	eeds Go Ba	acl
Add	0		Resolution	ent Resolution			Ne	eeds Go Ba	acl
Add Scheduled Technician Estimated Length	0es		Resolution	ent Resolution			Ne	eeds Go Ba	acl

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.

	8 =				Ticket	#27348		
Service Ticket	Ticket Central Station	l 💎 ments Billing	Document (0)	and Parts	Journal To	 Notes (0) Other Items Purchase Orders (0) 	📝 Ticket Log	OPT Web Services
Customer Site Other Ticket	TRINITY-4 St. Mary Mercy Hospital St. Mary Mercy Hospital 36475 5 Mile Rd Livonia, MI 48154-1971		Created Created By Status	4/21/2020 3:36 Administrator Open	PM	Contact [Phone [Notify [
Ticket	Date	ST		System		System Type	Problem	Resolution
27349	04/21/2020	ОР				Fire Sprinkler	F-Insp-MO	N/A
27350	04/21/2020	OP				Integrated Installation	F-Insp-MO	N/A
Add Site Tickets	not in Group:	Dispa		Resolve			e resolved to invoice or cla	
Ticket	Date	ST		System		System Type	Problem	Resolution

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.

2				SedonaSchedule 5.7.9	2.12356 - Sedona	a Security		
View Serv	vice Options Fleetmat	ics Jo	obs Options					
💽 🌌	🗾 Day 🥜 Ticket C)ueue	🍓 Removed Parts	🛐 🕕 Warning Count = 0	Tickets List 💌	MI-Inspectors	👻 🔯 🔽 Show Ur	nassigned 💿 🎤
	📑 Week 🥠 Group 1	ïckets	🧿 Misc Appointments	Warning List 👻		Display Group	o Technicians 🔹 🔽 🛛 Group 🛙	ay Within Owner 🛛 💿 🍌
Show/Hide Today Calendar Bar	📑 Month 🔍 Inspecti	on Creatio	n 🎤 Open Jobs	Tickets On Site			Zoom 👩	00
Navigation		Arrange	ment	SedonaMon	tor		Calendar Options	
+ 🔳 🎤 🖬 🎓 27	348 -							
Calendar			[Unassigned]	Matt Miller	Maxv	well Knife	Mike Walker	Milton Morris
January 2022	February 2022		1/19	1/19	1/19		1/19	1/19
SMTWTFS	SMTWTFS	1:00	1/19	1/19	1/19		1/19	1/19
2345678	1 2 3 4 5 6 7 8 9 10 11 12				_			_
9 10 11 12 13 14 15	13 14 15 16 17 18 19	2:00						
16 17 18 19 20 21 22 23 24 25 26 27 28 29	20 21 22 23 24 25 26 27 28	3:00						
30 31	27 20	4:00						
		5:00						
		6:00						
Site		7:00						
		8:00						
		9:00		GRP 27348 - F-Insp	1		GRP 27348 - F-Insp	
System		10:00		(Critical) Livonia St. Mary Mercy Hospital			(Critical) Livonia St. Mary Mercy Hospital	
ontact		11:00		Science Prospital			Sumary mercy Hospital	
		12 pm					t	
roblem		12 pm		(<u> </u>				
echnician	\sim							
cheduled	×	2:00			_			
ispatched	V + 0	3:00						
rrived		4:00						
		5:00						
)eparteria	0	6:00		and the second				

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.

	Group Ticket Opt	SedonaSchedule 5.7.92.12356 - Sedona Security	- a x
View Service Options Fleetma	tics Jobs Options Group Tickets		
Show/Hide Calendar Bar Navigation	Misc Appointments	tch Billing Open Customer Befrech Schedule Ticket 27348	
+ 🗂 🎤 🗃 🍪 27348 🗧			
🖪 Calendar	Master Ticke lumber V		
Image January 2022 February 2022 February 202 February 202	Master Ticket II: mber : 27604 (4 items) Master Ticket IV: mber : 27602 (2 items) Master Ticket IV: mber : 27502 (2 items) Master Ticket IV: mber : 27524 (2 items) Master Ticket IV: mber : 27516 (2 items) Master Ticket IV: mber : 27509 (5 items) Master Ticket IV: mber : 27504 (4 items) Master Ticket IV: 17502 (2 items) Master Ticket IV: 17502 (2 items) Master Ticket IV: mber : 27504 (3 items) Master Ticket IV: 17502 (2 items) Master Ticket IV: mber : 27507 (2 items) Master Ticket IV: mber : 27507 (2 items) Master Ticket IV: mber : 27507 (2 items)		
System	Master Ticket Number 27352 (2 items) Master Ticket Number 1348 (3 items)		
Contact		DEst Hours V PR V Account Critical 9876C	V Name V Problem V St. Mary Mercy Hospital F-Insp
Problem	27349 4/21/2020 3:36 PM 0	Critical	St. Mary Mercy Hospital F-Insp-MO
Technician 🗸	27350 4/21/2020 3:36 PM 0	Critical	St. Mary Mercy Hospital F-Insp-MO
Scheduled Dispatched Arrived Departed C C C C C C C C C C C C C C C C C C C	Master Ticket Number : 27340 (2 items) Master Ticket Number : 27338 (2 items) Master Ticket Number : 27334 (4 items) Master Ticket Number : 27329 (4 items) Master Ticket Number : 27325 (2 items)		
	B Master Ticket Number : 27321 (2 items)		

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.

	÷		Ticket#	27348		x
	Ticket Central Station					
Service Ticket	Service Additional Info	Silling Documents (0) Equipment and Parts	Journal Notes Other Purcl (0) Items Order Go To	hase Service Ticket Ticket	Pb OPT Web Services	Notifications
Customer Site	TRINITY-4 St. Mary Mercy Hospital St. Mary Mercy Hospital 36475 5 Mile Rd Livonia, MI 48154-1971	Created 4/21/2020 3:36 F Created By Administrator Status Open	PM Contact Phone Notfy	Ext	V M	
	ets in Group:		,			
Ticket	Date	ST	System	System Type	Problem	Resolution
27349 27350	04/21/2020 04/21/2020	OP OP		Fire Sprinkler Integrated Installation	F-Insp-MO F-Insp-MO	N/A
_	s not in Group:	Dispatch Resolve			ce/Close	
Ticket	Date	ST	System	System Type	Problem	Resolution

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.

S Dispatch							-	□ ×
Appointment(s)							
			Appoin	tments for Grou	qu			
Name	Scheduled	Dispatched	l Arriv	ed	Departed	Est Len	Res Code	Note
Matt Miller	1/19/2022 3.00					240	\supset	
Mike Walker	1/19/2022 9:00 AM					240		
< Add	Delete	/						>
Scheduled Technician Estimated Len	Matt Miller		Resolution Notes	ent Resolution Insp Comp-B	illable		V Ne	eds Go Back
🔯 Dispatch 1	Times							
Scheduled	01/19/2022 🗸 09:00 /	AM ~						
Dispatched	01/19/2022 🗸 08:30 /	AM 🖨 🖣						
Arrived	01/19/2022 🗸 09:00 /	\M ≑ 🗖						
Departed	01/19/2022 🗸 01:00 F	M 🗘 🖉	🥜 Open Tic	:ket		(📄 Save	💢 Close

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.

		G	roup Ticket Opt		SedonaSchedu	le 5.7.92.12356 - Sedona	a Security	- 5
View	Service Options Fleetm	atics Jobs Options	Group Tickets					
Show/Hide To Calendar Bar Navigation	day Day Week Mon	th Ticket Group Queue Tickets rranger	on 🥜 Open Jobs	Batch Billing	 Open Customer Refresh Schedule Ticket 27348 Tools 			
+ 🗆 🖉 🖻 🗇	27348 =							
Calendar		Master Ticke Tumber 7						
January 2022 S M T W T F 2 3 4 5 6 7 9 10 11 12 13 14 16 17 18 9 20 21 23 24 25 26 27 28 30 31 Site	1 1 2 3 4 5 8 6 7 8 9 10 11 12 15 13 14 15 16 17 18 19 22 20 21 22 23 24 25 26	Master Ticket N mber: 27(M	02 (2 items) 29 (2 items) 22 (3 items) 16 (2 items) 09 (5 items) 04 (4 items) 02 (2 items) 93 (3 items) 57 (2 items)					
System		Master Ticket Number 273 Master Ticket Number 273	52 (2 items) 48 (3 items)	_				
Contact		Ticket Number	Created On	V Insp Est Hours		V Account	✓ Name	
Problem Technician	~	27348 27349	4/21/2020 3:36 PM 4/21/2020 3:36 PM 4/21/2020 3:36 PM	0	Critical Critical Critical	9876C	St. Mary Mercy Hospita St. Mary Mercy Hospita St. Mary Mercy Hospita	I F-Insp-MO
Scheduled		Master Ticket Number : 273						
Dispatched		Indition monor multipor . 275	134 (4 items)					
Departed	× •	Master Ticket Number : 273 Master Ticket Number : 273 Master Ticket Number : 273	21 (2 items)					

- 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.

	3 =			Ticket#273	348			x
Service		n Dintments d Labor	Documents Equipment (0)	Journal Notes (0)	Other Purchas Items Orders (e Service Ticket Ti	Cket	
Customer Site	TRINITY-4 St. Mary Mercy Hospit St. Mary Mercy Hospit 36475 5 Mile Rd Livonia, MI 48154-197	al al	Created 4/21/2020 3:36 Created By Administrator Status Open		Contact Phone Notify	Ext		N
Other Ticket 27349 27350	ets in Group: Date 04/21/2020 04/21/2020	ST OP OP	System	Fire	tem Type e Sprinkler grated Installation	Froblem F-Insp-MO F-Insp-MO	Resolution N/A N/A	
Site Ticket Ticket	Remove V s not in Group: Date Resolve	y Dispato	h Resolve		All tickets must be resi tem Type	olved to invoice or close	Invoice/Close	
		Comp-Billable	Overwrite existing Re	esolution on tickets				
	Errors		Reso	sive X Cancel				

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.

())	Group Ticket Opt		SedonaSchedule 5.7.9	2.12356 - Sedona Security	1	-	σx
View Service Options Fleetma	tics Jobs Options Group Tickets						
Show/Hide Calendar Bar Navigation	Ticket Queue Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket Ticket		n Customer esh Schedule 27348 📸 Tools				
+ 🗂 🔑 🗃 🍪 27348 🛛 🖛							
🖪 Calendar	Master Ticke, lumber 7						
Image Single February 2022 February 202 February	(ii) Master Ticket1 mber : 27604 (4 items) (iii) Master Ticket1 mber : 27602 (2 items) (iii) Master Ticket Ni ber : 27523 (2 items) (iii) Master Ticket Ni ber : 27523 (2 items) (iii) Master Ticket Ni mer : 27505 (2 items) (iii) Master Ticket Ni min r : 27504 (1 items)						
0	Master Ticket Number : 27504 (4 items) Master Ticket Number : 27502 (2 items)						
Site	Master Ticket Number 27362 (2 items) Master Ticket Number 27357 (2 items) Master Ticket Number 27352 (2 items)						
System	Master Ticket Number 27348 (3 items)						
Contact		☑ Insp Est Hours	✓ PR S Critical	7 Account 9876C	V Name S St. Mary Mercy Hospital	7 Problem F-Insp	V
Problem	27349 4/21/2020 3:36 PM	0	Critical		St. Mary Mercy Hospital	F-Insp-MO	
Technician	27350 4/21/2020 3:36 PM	0	Critical		St. Mary Mercy Hospital	F-Insp-MO	
Scheduled V Dispatched V 10 Arrived V 10	Master Ticket Number : 27340 (2 items) Master Ticket Number : 27338 (2 items) Master Ticket Number : 27334 (4 items) Master Ticket Number : 27329 (4 items)						
Departed 🔽 🗘	Master Ticket Number : 27325 (2 items) Master Ticket Number : 27321 (2 items)						

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.

	≆ Ticket Central Station		Tie	:ket#27348		x
Service Ticket	Additional Info		Equipment and Parts Go To	Notes Other Purchase (0)	Service History	
Customer Site Other Ticke	TRINITY-4 St. Mary Mercy Hospital St. Mary Mercy Hospital 36475 5 Mile Rd Livonia, MI 48154-1971 ets in Group:	Created By	W21/2020 3:36 PM Administrator Open	Contact Phone Notify	Et	
Ticket	Date	ST	System	System Type	Problem	Resolution
27349	04/21/2020	OP		Fire Sprinkler	F-Insp-MO	N/A
27350	04/21/2020	OP		Integrated Installation	F-Insp-MO	N/A
Add Site Tickets	Remove V	Dispatch	Resolve	All tickets must be resolve System Type	ed to invoice or close	pice/Close Resolution
Пскег	Date	51	System	System Type	Problem	Resolution

- 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.

Invoice Group T	ïckets	×
Invoice		
	Third Party Bill To	
Bill To	Trinity Health System	
Contact		
Invoice Date	1/20/2022	
	Add Resolution Note to Invoice	
Errors		
		^
		v]
-	Preview Invoice Cano	el

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.

] [] [] [] [] [] [] [] [] [] [] [] [] []	H 💷 🎯 🎒 🛃 - 100%		
Sedona Security I5185 Joy Road		Preview	
Canton, MI 48187	Customer	Trinity He	alth System
(734) 414-0760	Customer Number		TRINITY
	Invoice Number		Dending
	Invoice Date		1/20/2022
CAL	CULATED 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
	- Fire Extinguisher		
Ticket # 27350 , Quarterly Inspection T4-FE		80.00	80.00
1.00 Inspection Labor			
		Subtotal:	385.00
		Subtotal: Tax:	385.00 0.00

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
	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.

View	Service Options Fleetm	atics Jobs Option	5							
Show/Hide To Calendar Bar Navigation	day Day Week Mont	Queue Tickets	Inspection Creation	Removed Parts Batch Billing Mice Appointments Open Jobs	Open Customer Refresh Schedule Ticket 6595 Tools					
Calendar	February 2022		Arrangement	Schedule Total Open Jobs: 36	10015					2
SMTWTF	S SMTWTFS 1 12345		ader here to group 7 Customer #		Address		√ Start Date	✓ Proj. End Date 5	7 Type	⊽ S
2 3 4 5 6 7 9 10 11 12 13 14			2003	2 Site Name 4 5	43 Rene Court	Cleveland	a Start Date	T FIO, END Date 1	ACC-Res	Parts
16 17 18 19 20 21	22 20 21 22 23 24 25 26		48370	Alvin Summers	23235 Tree line ave	Canton			ACC-Com	Scheo
23 24 25 26 27 28 30 31	29 27 28	463	194	Ashley, Victoria	2001-B Greenleaf Road	Westland			ACC-Res	Jobco
		/ 123	48507	Bill Nye	123 Main Street	Attalla	07/01/2021		ACC-Com	Sche
0			1000-1	Bob's new business	241 Reed Ave	Marion	07/01/2021	07/01/2021	ACC-Res	Parts
Site	F	ield Chooser	11164-03	Emily Grayson	35 Timberwood Road	Plymouth	UNU NEUEI	UTU NEGET	CCTV-Res	Sche
		2404	4263	Emily Wood	25 Fairview Road	Novi			CCTV-Res	Parts
		2471	4263	Emily Wood	25 Fairview Road	Novi			Intrusion-Res	Parts
System		2441	48026	Garry Site 2	45185 Joy Rd	Canton			ACC-Res	Parts
Contact		2222	JobTemplate	JobTemplate	1 Main	Plymouth			Template	Part
		2472	0214-0	Johnson, Alexis	33225 Warner	Canton			Intrusion-Res	Jobc
Problem Technician	~	2473	0214-0	Johnson, Alexis	33225 Warner	Canton			Fire-Com	Sche
	~	2443	2002	Juliette Hale	38 Penwood Rd	Plymouth			ACC-Com	Sche
Scheduled	×	2450	2002	Juliette Hale (2)	514 Robbe Ave	Belleville			ACC-Com GP	Parts
Dispatched	V .	2462	387	Nicole Binny	7 Friendly Drive	Portsmouth			ACC-Res	Jobco
Arrived			48463	Nicole Job	123 Job St	Ypsilanti			BSP	Parts
Departed		2450	48294-4	Palpatine	515 Robbe Ave	Belleville			Job	Activa
Dopaneu	×	2426	2064	Roberts House Of Liquor	862 Park Street	Detroit			ACC-Res	Parts
		2427	2064	Roberts House Of Liquor	862 Park Street	Detroit			ACC-Res	Scheo
		2429	2064	Roberts House Of Liquor	862 Park Street	Detroit			ACC-Res	Parts

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.

Schedule Job Number 2476	j				- 🗆 X
Job: 2476 Type: CCTV-Res	Customer: 67 Ashley, Sarah	58	Select installers to schedu	ile below: Gro	oup: MI Techs & Installers 🗸
Status: Parts	Ashiey, Sarah		Installer Madison Morrison Mark Taylor	Service Company OH MI-T&M	Install Company OH MI
Job Hours Estimated Total Hours: Hours Used: Proposed Hours: Hours Remaining:	Site: Sarah Ar 12.00 35 East Street 0.00 Novi MI 0.00 (734) 745-6986 12.00 12.00		Matt Miller Mike Walker Milton Morris Mitchell Malloy	MI MI-SVC Cont MI-T&M MI	MI MI MI
Job Task: Installation Start Date: 1/19/2022	Labor Task: End Date:	Equipment Install		Select Remove Rer	nove All
Start Time: 10:12 AM 🗸	End Time:	06:12 PM 🗸	Showing: 🗹 Confl	icts 🗹 Proposed	Previous Auto Refresh:
Exclude Sat	Exclude Sun	Clear	Installer	Job Number Sched	uled Est Length
January 2022 <u>S M T W T F S</u> 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	February 2022 S M T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 28 26 27 28	March 2022 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9			
S Go to Job					Schedule 😫 Close

 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.

Schedule Job Number 2476				– 🗆 X
Job: 2476	Customer: 6758	Select installers to schedule	below: Gr	oup: MI Techs & Installers
Type: CCTV-Res Status: Parts	Ashley, Sarah	Installer	Service Company	Install Company
Status, Faits		Madison Morrison	ОН	ОН
		Mark Taylor Matt Miller	MI-T&M MI	MI MI
Job Hours	Site: Sarah Ashley	Mike Walker	MI-SVC Cont	MI
Estimated Total Hours: 12.00	35 East Street Novi MI	Milton Morris Mitchell Malloy	MI-T&M MI	MI MI
Hours Used: 0.00		Mitchell Malloy	MI	MI
Proposed Hours: 0.00	(734) 745-6986			
Hours Remaining: 12.00				
Job Task: Installation	Labor Task: Equipment Install			
			Select	
Start Date: 1/19/2022	End Date: 1/20/2022		Remove Re	move All
Start Time: 09:00 AM 🗸	End Time: 04:00 PM V	Showing: 🗹 Conflict	s 🔽 Proposed	Previous Auto Refresh: 🔽
		Installer	Job Number Sched	luled Est Length
Exclude Sat	un Clear	Installer	Job Number Sched	Luied Est Length
	nary2022 March2022 ➤ WTFS SMTWTFS			
	2 3 4 5 9 10 11 12 6 7 8 9 10 11 12			
9 10 11 12 13 14 15 13 14 15	3 9 10 11 12 6 7 8 9 10 11 12 5 16 17 18 19 13 14 15 16 17 18 19			
16 17 18 19 20 21 22 20 21 22 23 24 25 26 27 28 29 27 28	2 23 24 25 26 20 21 22 23 24 25 26 27 28 29 30 31 1 2			
30 31	3 4 5 6 7 8 9			
\sim	/			
S Go to Job				Schedule 💢 Close

• **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.

Schedule Job Number 2476		- 🗆 X
Job: 2476 Type: CCTV-Res Status: Parts	Customer: 6758 Ashley, Sarah	Select installers to schedule below: Group: MI Techs & Installers Installer Service Company Install Company Madison Morrison OH OH Mark Taylor MI-T&M MI
Job Hours Estimated Total Hours: 12.00 Hours Used: 0.00 Proposed Hours: 14.00 Hours Remaining: -2.00 Job Task: Installation	Site: Sarah Ashley 35 East Street Novi MI (734) 745-6986 Labor Task: Equipment Install	Matt Miller MI MI Mike Walker MI-SVC Cont MI Milton Morris MI-T&M MI
Start Date: 1/19/2022 Start Time: 09:00 AM ↓	End Date: 1/20/2022 End Time: 04:00 PM v	Remove Remove All
Exclude Sat Exclude Su	un Clear	Installer Job Number Scheduled Est Length
S M T F S M T 26 27 28 29 30 31 1 1 1 2 3 4 5 6 7 8 6 7 8 9 10 11 12 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 13 14 15 14 15 13 14 15 13 14 15 13 14 15 13 14 15 <td>ary 2022 March 2022 > W T F S S M T W T F S 1 2 3 4 2 3 4 5 1 2 3 4 5 10 11 12 6 7 8 9 10 11 12 12 13 14 15 16 17 18 19 12 24 25 26 20 21 22 32 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9</td> <td></td>	ary 2022 March 2022 > W T F S S M T W T F S 1 2 3 4 2 3 4 5 1 2 3 4 5 10 11 12 6 7 8 9 10 11 12 12 13 14 15 16 17 18 19 12 24 25 26 20 21 22 32 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9	
G Go to Job		😇 Schedule 😫 Close

- **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.

Schedule Job Number 2476					- C	ı ×
Job: 2476	Customer: 6758	Select installers to sched	ule below:	Group: MI Techs	& Installers	~
Type: CCTV-Res Status: Parts	Ashley, Sarah	Installer	Service Compa	any Install Co	mpany	
Status: Parts		Mark Taylor	MI-T&M	MI		
		Matt Miller	MI	MI		
Job Hours	Site: Sarah Ashley	Mike Walker	MI-SVC Cont	MI		
Estimated Total Hours: 12.00	35 East Street	Milton Morris	MI-T&M	MI		
Hours Used: 0.00	Novi MI					
Proposed Hours: 28.00	(734) 745-6986					
Hours Remaining: -16.00						
Job Task: Installation	Labor Task: Equipment Install					
			c	Select		
				bolost		- 1
Start Date: 1/19/2022	End Date: 1/20/2022		Remove	Remove All		
			Hemove	Homove An		
Start Time: 09:00 AM 🗸	End Time: 04:00 PM 🗸	Showing: 🗹 Cont	iicts 🔽 Prop	osed 🗌 Previous	Auto Ref	resh: 🔽
		Installer	Job Number	Scheduled	Est Leng	th
Exclude Sat Exclude S	Sun Clear	Madison Morrison	TCK 6611	1/19/2022 7:50:00 AM	84	
		Mitchell Malloy		1/19/2022 9:00:00 AM	420	
	0000	Madison Morrison		1/20/2022 9:00:00 AM 1/20/2022 9:00:00 AM	420	
	uary 2022 March 2022 > WTFS SMTWTFS	S Mitchell Malloy		1/20/2022 9:00:00 AM	420	
	1 2 3 4 5 1 2 3 4 5					
	8 9 10 11 12 6 7 8 9 10 11 12 5 16 17 18 19 13 14 15 16 17 18 19					
	2 23 24 25 26 20 21 22 23 24 25 26					
23 24 25 26 27 28 29 27 28	27 28 29 30 31 1 2					I
30 31	3 4 5 6 7 8 9					I
1						
0.000						
S Go to Job				Schedule 👂	¢ Close	

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.

Schedule Job Number 2476				-	o x
Job: 2476 Type: CCTV-Res	Customer: 6758 Ashley, Sarah	Select installers to schedule b	elow: Group:	MI Techs & Installe	ers 🗸
Status: Parts		Mark Taylor Matt Miller	Service Company MI-T&M MI	Install Company MI MI	
Job Hours Estimated Total Hours: 12.00 Hours Used: 0.00 Proposed Hours: 28.00 Hours Remaining: -16.00	Site: Sarah Ashley 35 East Street Novi MI (734) 745-6986		MI-SVC Cont MI-T&M	MI MI	
Job Task: Installation	Labor Task: Equipment Install		Select		
Start Date: 1/19/2022	End Date: 1/20/2022		Remove	e All	
Start Time: 09:00 AM 🗸	End Time: 04:00 PM V	Showing: Conflicts	Proposed	Previous Auto	o Refresh: 🔽
Exclude Sat Exclude Su	In Clear			7:50:00 AM	Length 84 420
S M T F S M T 26 27 28 29 30 31 1 1 2 3 4 5 6 7 8 6 7 8 9 10 11 12 13 14 15 13 14 15	ary 2022 March 2022 > W T F S S M T W T F S 1 2 3 4 5 9 10 11 12 6 7 8 9 10 11 12 16 17 18 19 13 14 15 16 17 18 19 23 24 25 26 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9	Madison Morrison Mitchell Malloy	1/20/2022	9:00:00 AM	420 420
Go to Job			5	chedule 💥 Close	e

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).

Schedule Job Number 2476								×
-				· · · · · · · · · ·				~
Job: 2476	_	ustomer: 6758		Select installers to schedu	ule below: G	roup: MI Techs & Installe	ers 🗸	
Type: CCTV-Res	A	shley, Sarah		Installer	Service Company	Install Company		
Status: Parts				Madison Morrison	OH	OH		
				Mark Taylor	MI-T&M	MI		
Job Hours	c	ite: Sarah Ashley		Matt Miller	MI	MI		
		5 Fast Street		Mike Walker	MI-SVC Cont	MI		
	12.00 N	ovi MI		Milton Morris	MI-T&M	MI		
Hours Used:	0.00	OVEM						
Proposed Hours:	14.00 (7	734) 745-6986						
Hours Remaining:	-2.00							
Job Task: Installation	~	Labor Task: Equipment I	and all					
Installation	\sim	Labor Task: Equipment I	nstall ~					
					Select			
Start 🛙 🧕 Create appointments	for Job Numb	er 2476		×	Remove Re	emove All		
The appointmen	nts listed below	will be saved when you click	the Save button	. Review the list for				
Start T All accuracy, and u scheduler.	unselect any tha	at you find are in error. You ca	n also click Car	ncel to go back to the	ts 🗹 Proposed	Previous Aut	o Refresh:	
Installer	Job Number	Scheduled Date	Start Time	End Time				_
Ex Control Malloy	2476	1/19/2022		4:00 PM			Length	
Mitchell Malloy	2476	1/20/2022		4:00 PM		2022 9:00:00 AM	420	
					1/20/	2022 9:00:00 AM	420	
1 1								
					1			
				Save 🗙 Cancer				
GG			-			🗉 Schedule 🕽 💥 Clos	e	

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.

View Ser	vice Options Fleetmati		obs Options						
💽 🧩	🗾 Day 🤌 Ticket C	lueue	Removed Parts	U Warning Count = 17 Tickets List • MI Installers			👻 😺 🗹 Show Unassigne	Open Custor	
Show/Hide Today	📑 Week 🥠 Group T		O Misc Appointments	Warning List		Display Group Tecl	inicians 🔹 🔄 Group Day Withi	in Owner 🤎 🥜	Refresh Sch
Calendar Bar	📑 Month 🔍 Inspecti	on Creation	n 🤌 Open Jobs	Tickets On Si			Zoom 🔘 🥥		Ticket 6595
Navigation		Arrange	ment	S	SedonaMonitor		Calendar Options		Tool
Calendar								-	
January 2022 SMTWTFS	February 2022 → SMTWTFS		1/20 [Unassigned]		Mark Taylor		Matt Miller		Mike Wi
3 1 1 1 1	12345	12 am	[Onassigned]		Hark Taylor		Place Plate		Plike W
2 3 4 5 6 7 8	6 7 8 9 10 11 12 13 14 15 16 17 18 19	1:00							
9 10 11 12 13 14 15 16 17 18 19 20 21 22	20 21 22 23 24 25 26	2:00							
23 24 25 26 27 29	27 28								
30 31		3:00							
		4:00							
ite	-	5:00							
		6:00							
		7:00					Daulata allata		
ystem		8:00				\sim	Double-click		
ontact		9:00					on the		
		10:00					Technician		
Problem							Time-slot		

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

Job#	Customer #	Site Name	Address	City	Created	If	you know the	e Job 🛛	nits Ren	m Unit	
2222	JobTemplate	JobTemplate	1 Main	Plymouth	06/23/2020	Nu Nu	umber, you n	nav type it	5	5	
2423	48507	Bill Nye	123 Main Street	Attalla	06/28/2021	07/04/1	here.		0	0	
2426	2064	Roberts House Of Liq	862 Park Street	Detroit	06/29/2021	1	nere.		0	0	
2427	2064	Roberts House Of Liq	862 Park Street	Detroit	06/29/2021				18	18	
2429	2064	Roberts House Of Liq	862 Park Street	Detroit	06/29/2021		ACC-Res	Parts	0	0	
2430	2000	Vacation House	16 Jencks Street	Canton	06/30/2021		ACC-Res	Jobcost	0	0	
2431	1000-1	Bob's new business	241 Reed Ave.	Marion	06/30/2021	07/01/2021	ACC-Res	Parts	0	0	
2435	48516	Worthington Automoti	10225 El Segundo	Los Angeles	07/07/2021		Intrusion-Com	Jobcost	18	7.75	
2436	48516	Worthington Automoti	10225 El Segundo	Los Angeles	07/07/2021	07/05/2021	Fire-Com	Jobcost	24	-1.5	
2440	48370	Alvin Summers	23235 Tree line a	Canton	07/12/2021		ACC-Com	Scheduling	0	0	
2441	48026	Garry Site 2	45185 Joy Rd	Canton	07/13/2021		ACC-Res	Parts	0	0	
2443	2002	Juliette Hale	38 Penwood Rd	Plymouth	07/15/2021		ACC-Com	Scheduling	0	0	
2471	4263	Emily Wood	25 Fairview Road	Novi	11/16/2021		Intrusion-Res	Parts	0	0	
2472	0214-0	Johnson, Alexis	33225 Warner	Canton	11/18/2021		Intrusion-Res	Jobcost	0	0	
2473	0214-0	Johnson, Alexis	33225 Warner	Canton	11/22/2021		Fire-Com	Scheduling	0	0	

- 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

Schedule Job Number 2440		- 🗆 X
Job: 2440 Type: ACC-Com Status: Scheduling	Customer: 48370 Alvin Summers	Select installers to schedule below: Group: MI Installers Installer Service Company Install Company Mike Walker F MI-SVC Cont MI
Job Hours Estimated Total Hours: 32.00 Hours Used: 0.00 Proposed Hours: 32.00 Hours Remaining: 0.00 Job Task: Installation	Site: Alvin Summers 23235 Tree line ave Canton (248) 159-2635 Labor Task: Equipment Inst	
Start Date: 1/20/2022	End Date: 1/21/2022	Select Remove All
Start Time: 08:00 AM	End Time: 04:00 PM	Showing: 🗹 Conflicts 🗹 Proposed 🗋 Previous Auto Refresh: 🗹
S M T W T F S M T 26 27 28 2 1	n Clear W T F S 2 3 4 5 5 9 10 11 12 13 14 55 16 7 8 9 10 11 12 13 14 15 16 17 18 19 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9	Installer Job Number Scheduled Eat Length Mark Taylor 1/20/2022 8:00:00 AM 480 Mark Taylor 1/20/2022 8:00:00 AM 480 Mark Taylor 1/21/2022 8:00:00 AM 480 Mark Taylor 1/21/2022 8:00:00 AM 480 Mark Miller 1/21/2022 8:00:00 AM 480
G Go to Job		Schedule 😫 Close

- 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.

_						
S Create	e appointments	for Job Numbe	r 2440			×
			vill be saved when you click you find are in error. You ca			
Installer		Job Number	Scheduled Date	Start Time	End Time	
🗹 📀 Mark	k Taylor	2440	1/20/2022	8:00 AM	4:00 PM	
🖂 📀 Matt	Miller	2440	1/20/2022	8:00 AM	4:00 PM	
🗹 📀 Mark	k Taylor	2440	1/21/2022	8:00 AM	4:00 PM	
🖂 📀 Matt	Miller	2440	1/21/2022	8:00 AM	4:00 PM	
				G	🗧 Save 🕽 💥 Can	cel
				6		

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.

					See	donaSchedule 6.2.0	.0 - SedonaSecurity			
View Service	Options Fleetmati	cs	Jobs Options							
Show/Hide Calendar Bar Navigation	Day Week Month		ueue Tickets		emoved Parts isc Appointments pen Jobs	Batch Billing	 Open Custor Refresh Sche Ticket 6595 Tools 	edule #2		
Calendar] 🗏 🖌 ([Double-click shows Sc	hedule) otal Ope	n Jobs: 37				
January 2022 SMTWTFS	February 2022 S M T W T F S 1 2 3 4 5	Dr	ag a column head	der here to group b	y that column.					(
2345678	6 7 8 9 10 11 12	Ē	Job# △ 🏹	Customer # 🗸	Commercial V	Site Na	ame 🗸	Address	√ City	
	13 14 15 16 17 18 19 20 21 22 23 24 25 26		2222	JobTemplate	Y	JobTemplate		1 Main	Plymouth	1
	20 21 22 23 24 25 26 27 28		2423	48507	N	Bill Nye		123 Main Street	Attalla	07/01/202
30 31			2426	2064	Y	Roberts House Of L	Liquor	862 Park Street	Detroit	
~			2427	2064	Y	Roberts Hou			Detroit	
D			2429	2064	Y	Roberts Hou Do	ouble-click o	n the Job	Detroit	
Site			2430	2000	Y		cord to be s		Canton	
			2431	1000-1	Y	Bob's p		cheduled.	Marion	07/01/20
			2435	48516	Y	W			Los Angeles	1
System			2436	48516	Y	Worthington Autom	otive	10225 El Segundo	Los Angeles	07/05/2
Contact		F	2440	48370	Y	Alvin Summers		23235 Tree line ave	Canton	
Problem			2441	48026	Y	Garry Site 2		45185 Joy Rd	Canton	
Technician			2443	2002	N	Juliette Hale		38 Penwood Rd	Plymouth	
			2449	48497-1	N	Test Site		1234 Road	Ypsilanti	03/01/2
Schedula		-	2450	2002	N			the second second	Belleville	

- 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

Schedule Job Number 2440						- 🗆 ×
Job: 2440	Customer: 483	70	Select installers	to schedule below:	Group: MI Insta	llers 🗸
Type: ACC-Com	Alvin Summers					
Status: Scheduling			Installer Mike Walker	F MI-SVC C		Company
			Mike Walker	F MI-SVC C	ont MI	
Job Hours	Site: Alvin Sum	mers				
Estimated Total Hours:	32.00 23235 Tree line	3V8				
Hours Used:	0.00 Canton					
	32.00 (248) 159-2635					
Hours Remaining:	0.00					
		B				
Job Task: Installation	Labor Task:	Equipment Inst				
_					Select	
Start Date: 1/20/2022	End Date:	1/21/2022		Remo	Remove All	
Start Time: 08.00 AM 🔍 💭	End Time:	04:00 PM	Showing:	Conflicts	Proposed Previous	Auto Refresh: 🖂
					,	
Exclude Sat	Exclude Sun	Clear	Installer	Job Number		Est Length
			Mark Taylor Matt Miller		1/20/2022 8:00:00 AM 1/20/2022 8:00:00 AM	
			Matt Miller		1/21/2022 8:00:00 AM	
< January 2022	February 2022	March 2022 >	Matt Miller		1/21/2022 8:00:00 AM	
SMTWTFS	SMTWTFS	SMTWTFS	-			
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					_	
1					G	
S Go to Job					C Schedule	X Close
					Carlo Ochodolo	

- 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.

S Create	e appointments	for Job Numbe	r 2440			Х
			vill be saved when you click you find are in error. You ca			
Installer		Job Number	Scheduled Date	Start Time	End Time	
🗹 🔮 Mark	k Taylor	2440	1/20/2022	8:00 AM	4:00 PM	
🖂 📀 Matt	Miller	2440	1/20/2022	8:00 AM	4:00 PM	
🗹 📀 Mark	k Taylor	2440	1/21/2022	8:00 AM	4:00 PM	
🗹 📀 Matt	Miller	2440	1/21/2022	8:00 AM	4:00 PM	
				6	🔄 Save 🛛 🗶 Can	cel
-				C		Cei

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.

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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.

📰 Install Company Setup	Inactive
Install MI	Parts WIP 122100
Description SedonaSecurity	Misc WIP 122140 💌 🕎
🎾 🗹 Labor To GL ———————————————————————————————————	
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Type © Expense thru WIP	Overhead Credit
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Labor Deferred 258100 Deferred Labor - 1	
	ion is selected for the Install y, the dispatcher would only
need to	check a box to confirm the intment was completed.

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.

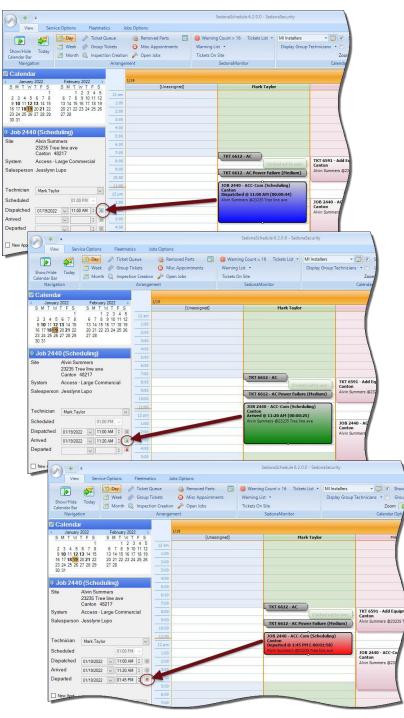
You may only use this method if the Install Company assigned to the job has been flagged for no dispatching.

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Site Alvin Summers 23235 Tree line ave Canton 48217	6:00 7:00					Schedu		_	
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New Appt Completed	6:00 7:00						블 Save 😫	Close	

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.

+ =			SedonaSchedule 6.2.0.0 - Sedo	onaSecurity	S Job Dispatch X]
View Service Optio Show/Hide Today Calendar Bar Navigation	y 🌽 Ticket Queue		 Warning Count = 16 Tickets List • Warning List • Tickets On Site SedonaMonitor 	MI Installers	Job Type ACC-Com Job Status Scheduling	er ule
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Arrived Departed New Appt New Appt Notes Map					Scheduled 01/19/2022 ↓ 01:00 PM ↓ Dapatched 01/19/2022 ↓ 11:00 AM ↓ B Artived 01/19/2022 ↓ 11:20 AM ↓ B Depated 01/19/2022 ↓ 01:45 PM ↓ B E Save € Close	