SedonaOffice Inspection Linked RMR

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Inspection Linked RMR Overview

The SedonaOffice application now provides the ability to link a recurring line to an Inspection setup record. This new linking feature is for two purposes: 1) to ensure that contracted inspections being performed are also being invoiced through cycle billing, and 2) to provide the option to be able to invoice the customer for the contracted inspection once the inspection work has been completed via the cycle billing process.

Companies have the option of linking Inspections and Recurring Lines for informational and reporting purposes then cycle bill the customer for the inspection services regardless if the inspection work has been completed or, separate cycle invoicing into two batches; one for all non-inspection linked recurring and the other for inspection-linked recurring where the inspection ticket has been completed and closed.

To be able to generate Inspection Linked Cycle Billing batches, this feature must be activated within your company's SedonaOffice database. Please contact sedonaoffice.support@boldgroup.com or open a support ticket on the web to request the activation of this feature.

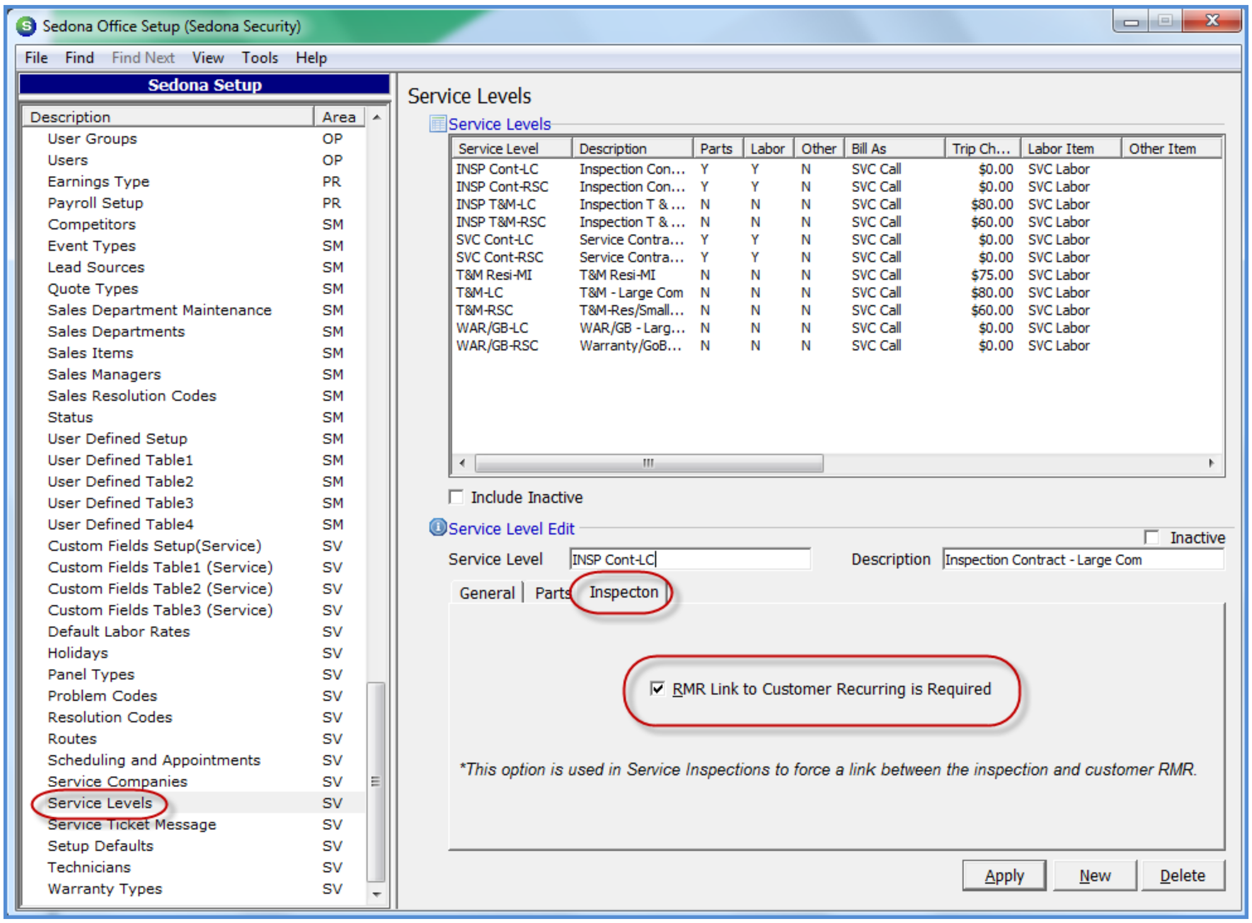
This document will cover the following topics:

- Setup/User Group Permissions
- Linking of an Inspection to a Recurring Line
- Cycle Billing for Linked RMR

Setup

Service Level

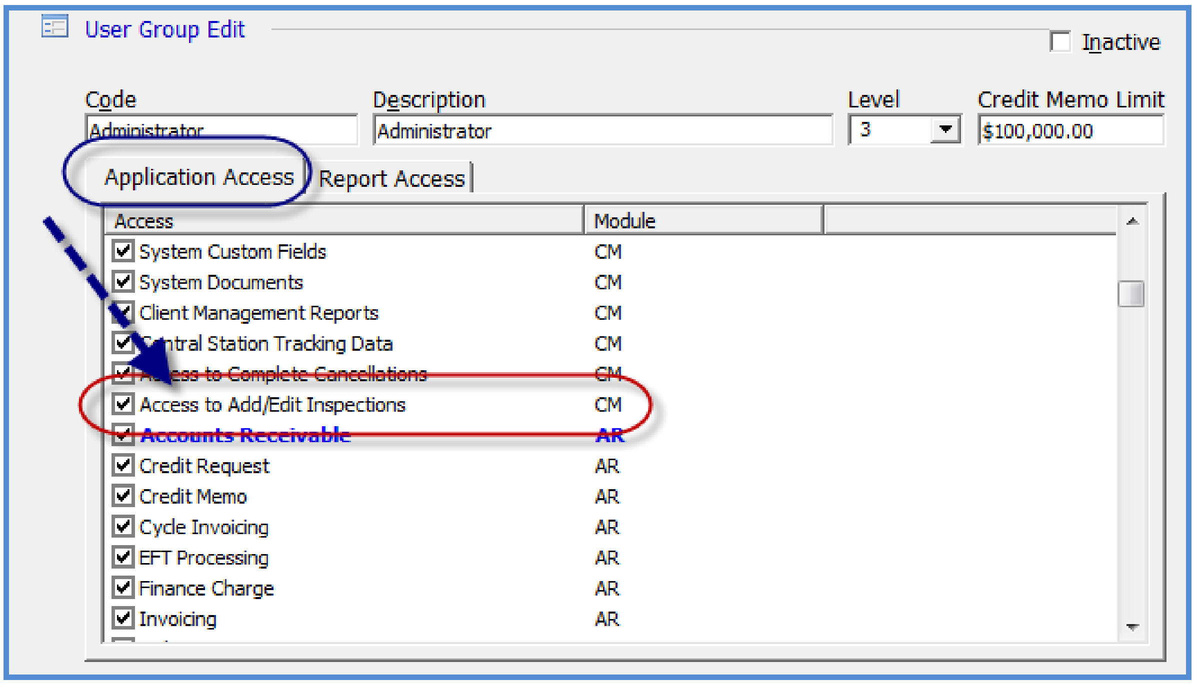
With the release of SedonaOffice version 5.6.128, a new tab was added to the Service Level setup forms. This new form labeled “Inspection”, has been added to facilitate linking an Inspection Record to an existing Recurring Line. If this option is selected, when creating or modifying an existing Inspection Record assigned to this Service Level, the User must link the Inspection to an active Recurring Line for the customer site.



Setup (continued)

User Group Security

To be able to setup a new Inspection record or edit an existing Inspection record, the User must be granted permission within the User Group to which they are linked. The permission is located on the Application Access tab within the CM permission group, labeled *Access to Add/Edit Inspections*.

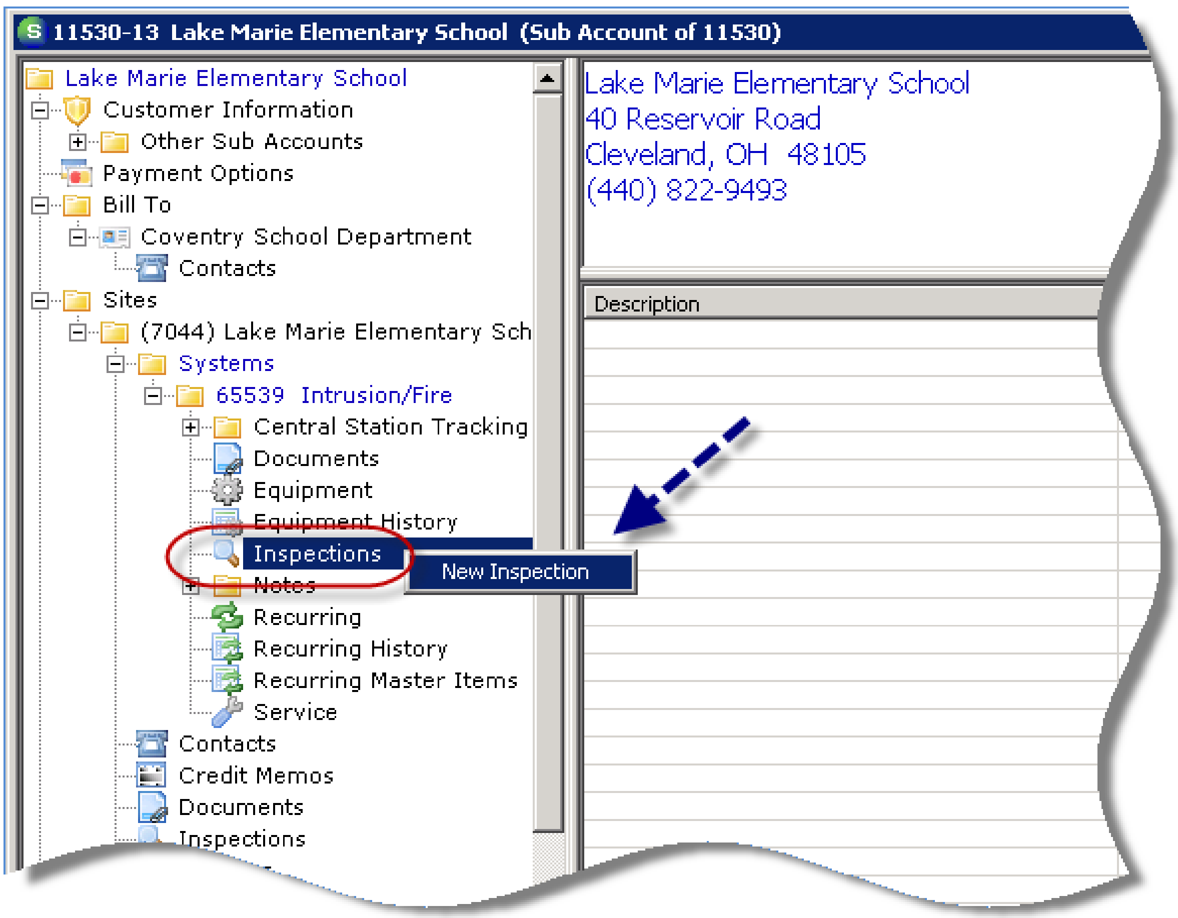


The Process

Inspection-RMR Linking – New Inspections

Prior to linking an Inspection record, the recurring line(s) must first exist on the customer record.

1. From the Customer Explorer, navigate within the customer tree to the *System* level where the Inspection setup will be created. Highlight the *Inspections* tree option within the System tree, right-click and select the option *New Inspection*.



New Inspection-RMR Linking (continued)

2. The *System Inspections* [setup] form will be displayed. Fill in the data entry fields on left according to your normal business practices.

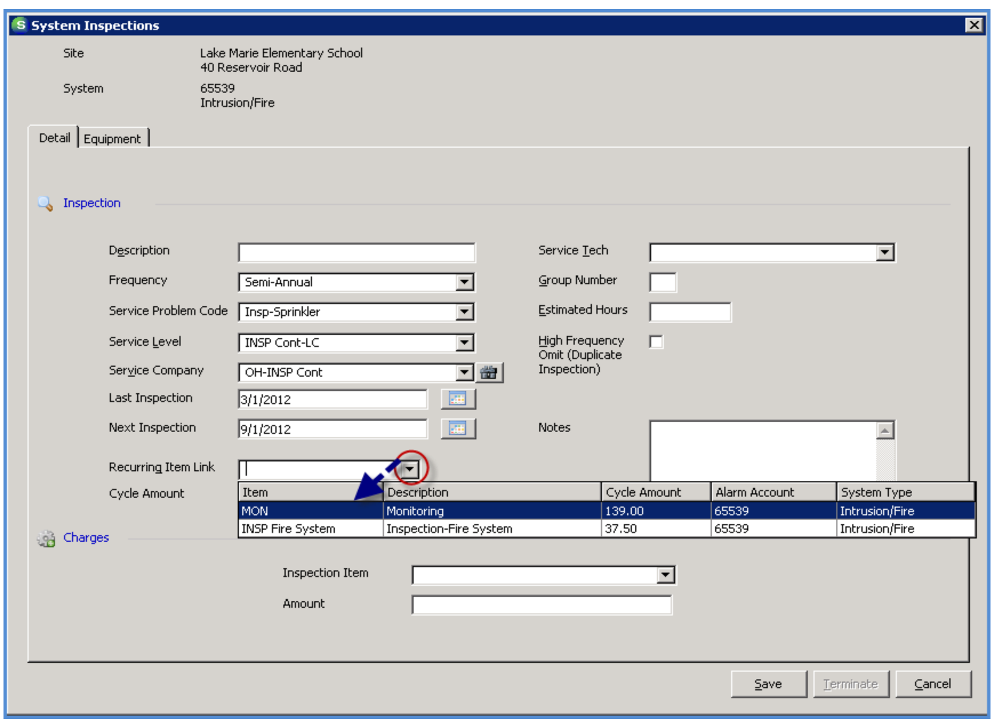
- In the *Service Level* field, you must select a Service Level that has been flagged to be used for linking to an active RMR record. If the Service Level selected is not flagged for RMR Linking, then the *Recurring Item Link* field will not be displayed on the new Inspection setup form.
- In the *Recurring Item Link field*, click on the drop-down arrow to the right of the field and select the appropriate recurring item from the list.

Once the form has been filled in, press the *Save* button at the lower right.

If additional Inspections need to be set up for the same system, repeat the above process.

Note: Once a recurring item has been selected, the description linked to that recurring item will auto-fill into the *Description* field on the form. This is by design; if you prefer a different description for the inspection, you may return to the *Description* field and re-type the desired text.

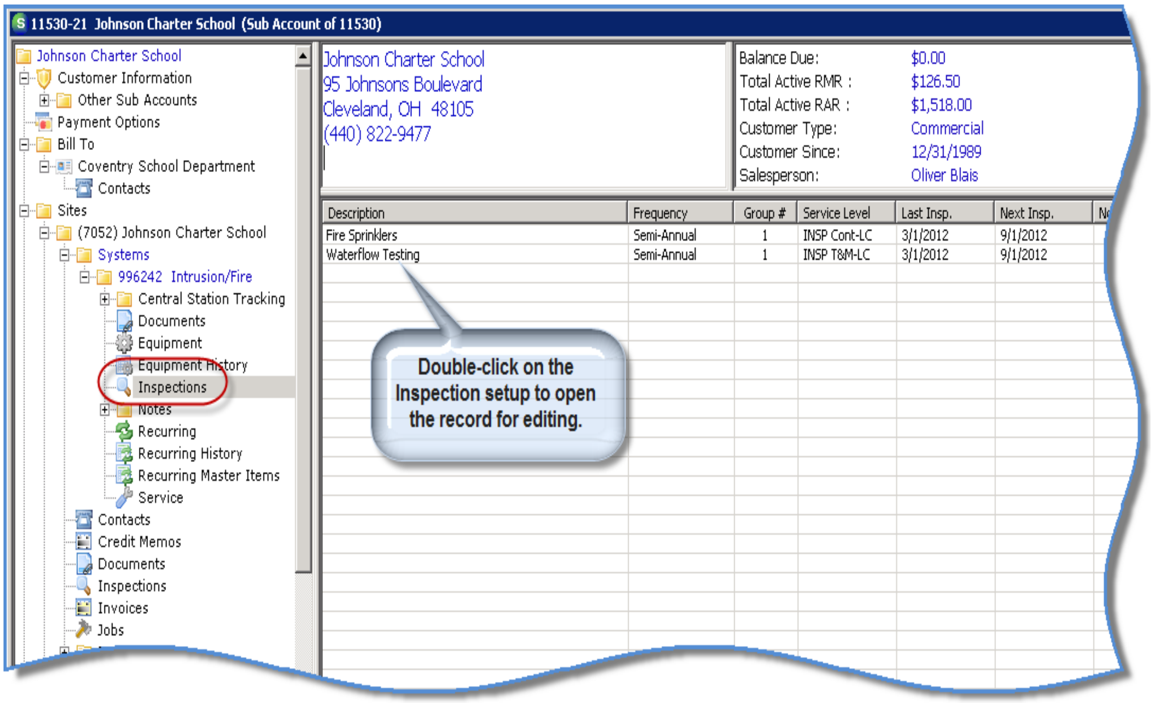
Multiple Inspection records may be linked to the same recurring item. If your company will be cycle billing linked recurring separately from non-linked recurring, if more than one inspection is linked to the same recurring item, as soon as at least one inspection ticket linked to the same recurring item is completed and closed, that recurring line will be flagged as available to cycle invoice as of the next cycle date of that recurring line.



Inspection-RMR Linking – Existing Inspections

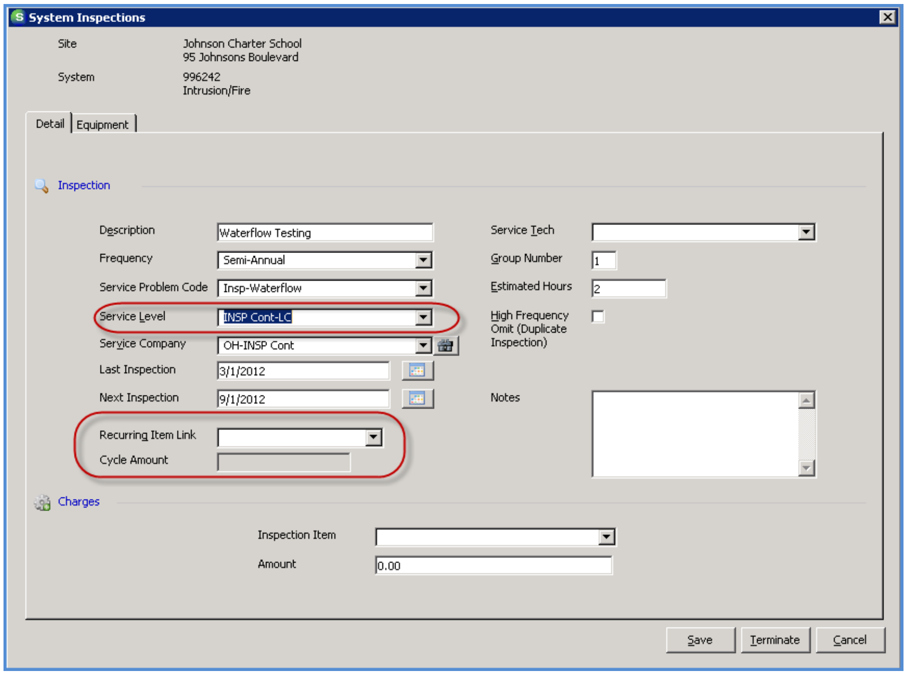
Prior to linking an Inspection record, the recurring line(s) must first exist on the customer record.

1. From the Customer Explorer, navigate within the customer tree to the *System* level where the existing Inspection setup will be linked. Highlight the *Inspections* tree option within the System tree, and double-click on the Inspection setup record within the active pane to open for editing.



Existing Inspection-RMR Linking (continued)

2. The System Inspections [setup] form will be displayed. Navigate to the Service Level field and select a Service Level that is flagged to be used for RMR linking. Once a Service Level flagged for RMR Linking has been selected, two new fields will be displayed on the form; Recurring Item Link and Cycle Amount.



3. In the *Recurring Item Link field*, click on the drop-down arrow to the right of the field and select the appropriate recurring item from the list.

   Once the form has been filled in, press the *Save* button at the lower right.

   If additional Inspections need to be linked for the same system, repeat the above process.

Note: Once a recurring item has been selected, the description linked to that recurring item will auto-fill into the *Description* field on the form. This is by design; if you prefer a different description for the inspection, you may return to the *Description* field and re-type the desired text.

Inspection Linked Cycle Billing

Prior to generating Inspection Linked Cycle Billing batches, this feature must be activated within your company's SedonaOffice database. Please contact sedonaoffice.upport@boldgroup.com or open a support ticket on the web to request the activation of this new feature.

When an Inspection Ticket is closed that is linked to a recurring line, a flag is set on that recurring line which allows that recurring line to be invoiced through Cycle Billing.

When creating an Inspection Cycle batch, you will be selecting the "Only Inspection Linked RMR" radio button. It is a good idea to add text to the batch description indicating the batch is for the purpose of Inspection RMR only.

Once the cycle batch has been generated, the remainder of the process is the same as the normal cycle billing process with respect to posting and printing invoices.