

Overview

Sedona Office contains functionality within the Service Module to generate Inspection Service Tickets. Many installed systems, particularly fire systems, are required by law to be inspected on a periodic basis. The application keeps track of how frequent a system requires an inspection, when the last inspection was performed and when the next inspection is due. Service tickets generated for inspections and are viewable in a separate ticket queue which makes scheduling simple and easy to manage.

As of version 3.02.010, new functionality was added to allow multiple Inspections for a single System. For instance if for a particular system you perform an annual inspection but also need to perform another inspection on the same system on a quarterly basis, you may now create multiple inspection records. You may create as many inspections as you desire for any system. Some of the data entry forms have been modified and new tabs and forms have been added, which will be covered within this document.

Since an inspection is related to a particular system, the setup of inspection information is input on a special form within the system record. Inspection information may be input after a new system record is manually created or when a new job is created. One of the required fields for inspection information is the service Problem Code. When an inspection ticket is created, this problem code will be assigned to the ticket. Suggested problem codes are: Annual Fire Inspection, Semi-Annual Fire Inspection, or Security Inspection. Problem codes are created and maintained within the Sedona Setup application, and may be found in the SV (service) area.

You also have the ability to assign a Service Level to the System Inspection that may be different than the Service Level assigned to the system itself. For example, the inspection service may be prepaid, invoiced as a recurring service or invoiced to the customer each time an inspection is performed. Make certain the appropriate Service Level is assigned to the inspection so invoicing of the Inspection ticket is performed accurately.

Inspection Dates

Sedona will automatically advance the *Next Inspection Date* based upon the *Frequency* assigned to the inspection record and the date entered in the *Next Inspection Date* field of the inspection record. Once the Inspection Ticket has been closed, the Next Inspection date will be calculated by the application (Next Inspection Date + Frequency days or months) and this new date will be displayed in the Next Inspection Date field. The Last Inspection Date field will be updated with the date the Inspection Ticket is closed.

For example, if today's date is 01/15/2005 and the inspection frequency is set to quarterly and the next inspection date is entered as 02/01/2005, and the inspection ticket is generated then closed on 02/05/2005, the last inspection date will be updated to 02/05/2005 and the next inspection date will advance to 05/01/2005.

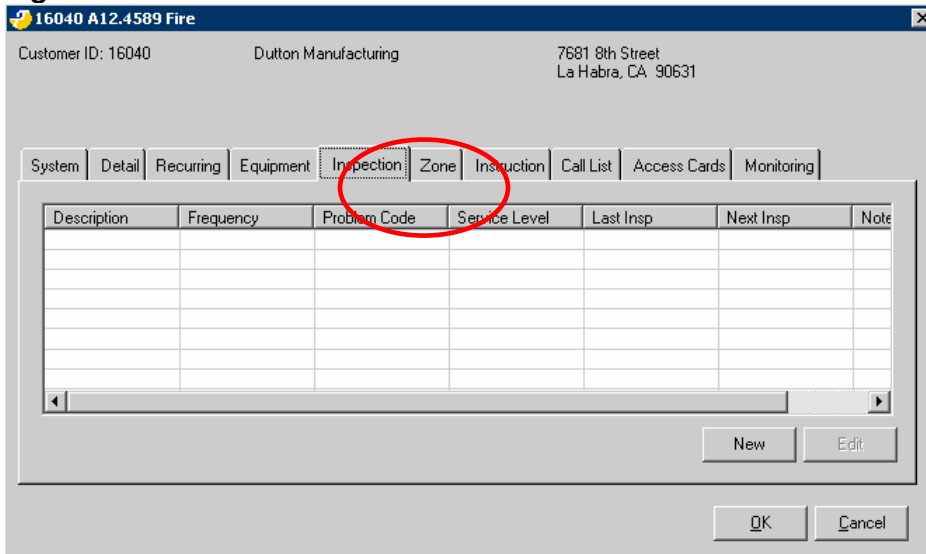
If you forget to generate an inspection ticket, it is possible the application could generate another inspection ticket too soon. For example if the next inspection date was set to 01/10/2005 and the Inspection Ticket is generated on 04/01/2005, the inspection is performed and the ticket is closed on 04/04/2005, Sedona would set the next inspection due date to be 04/10/2005. If this situation occurs, you may manually change the next inspection date on the inspection record to be a different date in the future.

If an Inspection is missed and closing a ticket would produce a Next Inspection Date calculation that would result in a date in the past, the next inspection date would advance to the next logical date depending on the frequency. For example, if today's date is 04/04/2005 and the Next Inspection Date is set to 01/01/2005; the Inspection ticket is generated on 04/04/2005, the Inspection is performed and closed on 04/05/2005, the application will advance the Next Inspection Date to 07/01/2005.

NOTE: You may have only one Inspection Ticket open for a given Inspection record at one time.

The data entry fields for Inspection information vary slightly depending on when you access the System Inspection information. Inspection information for newly created System can only be entered after the new Customer record has been saved. After creating the new Customer, Site and System, open the customer record, navigate to the System record, and open the System information. A new tab labeled *Inspection* is used to create new Inspection records or edit existing Inspection records. Please refer to figure 1.1 below.

Figure 1. 1



The table below lists each field required to set up a System Inspection and a description of each field. Fields which are driven by values entered in setup tables are denoted by a down arrow to the left of the field name.

Field Name	Description	Existin g Syste m	New Job
Description	A brief description of the type of Inspection to be performed.	X	
Frequency	Select from the drop down list how often an inspection should be performed on the system.	X	X
▽ Service Problem Code	This will be the problem code assigned to the inspection ticket; typically the code of Inspection is used.	X	X
▽ Service Level	Select the appropriate Service Level for the system inspection.	X	X
Last Inspection (date)	Enter the date the last inspection was performed for the system.	X	
Next Inspection (date)	Enter the next date that an inspection is due for this system.	X	X
Notes	This field is for important notes related to the inspection of this system. These notes will print on the Inspection Service Ticket.	X	X

Inspection Setup: Existing System

Navigate to the System record, click on the Inspection tab and press the New button located at the bottom of the Inspection tab. Enter the information in each of the fields:

Inspection Information

- Description – A brief description of the type of inspection. Examples are Fire Inspection, Annual Inspection.
- Frequency – Select from one of the choices from the drop-down list by pressing on the down arrow at the right of this field. If the frequency of By Request Only is selected, this inspection record will not be evaluated when generating Inspection Tickets. Valid selections available are:

Annual	Biennial	Semi-Annual	Quarterly	Monthly
Bi-Monthly	Semi-Monthly	Weekly	Bi-Weekly	Daily
Three Year	Four Year	Five Year	Eighteen Month	By Request Only

- Service Problem Code – Select from the drop-down list of Problem Codes. This code will be assigned to the Inspection Ticket upon creation.
- Service Level - Select from the drop-down list of Service Level Codes.
- Last Inspection (Date) - The Last Inspection Date would be used if this was a system takeover and you have the information available to you as to when the last inspection was performed. This field is not required, but valuable for reporting purposes.
- Next Inspection (Date) – Enter the next date the System is due to be inspected.
- Notes – Enter any important notes that you want to print on the Inspection Ticket.

Customer Equipment (Optional)

If you are tracking the devices installed for the System, you have the option to select parts which need to be inspected from the System equipment list. To create a list of parts to be inspected, click on the first line in the Part Code field and select from the list of parts contained on the equipment list. You may also manually type in a note related to each part line entered.

Figure 1. 2

Part Code	Description	Serial Number	Notes
* [dropdown]			
Smoke Detector	Smoke Detector		
Firelite 5210	Firelite 5210	FL76387	

Once you have finished entering all the information, press the OK button to save the Inspection record. Figure 1.3 below illustrates a saved Inspection record.

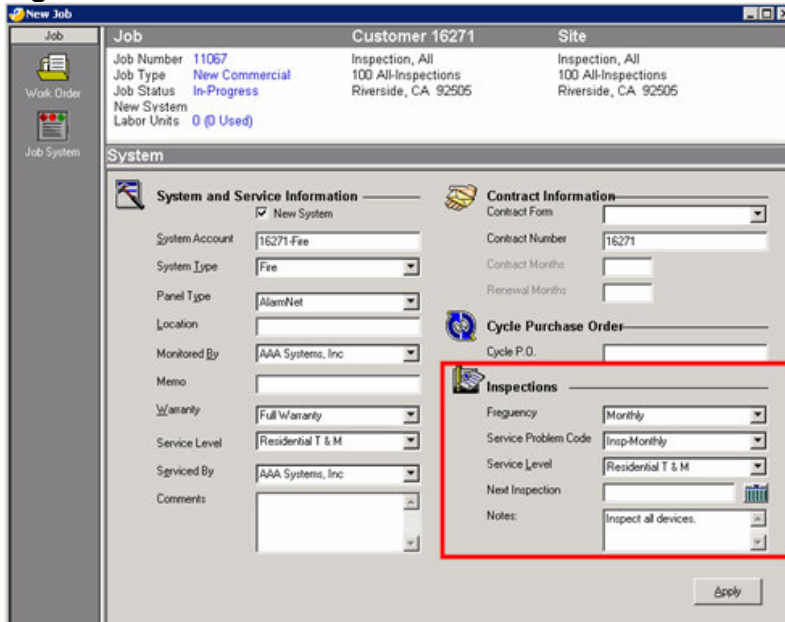
Figure 1. 3

Description	Frequency	Problem Code	Service Level	Last Insp	Next Insp	Notes
Fire Inspection	Monthly	Insp-Monthly	Commercial T &...		4/1/2005	Inspect all

Inspection Setup: System on a new Job

If Inspection information is entered on the Job System form of an Installation Job you will enter as much information as is available during the creation of the job. Since the inspection start date is usually determined by the date the system goes on line or the job is completed, you may populate the Next Inspection date field prior to closing the job. If you did not enter the Next Inspection date prior to closing the job, you may access the system record and enter the date after the Job is closed.

Figure 1. 4



Generating Inspection Tickets

Once Inspection information has been entered for a system you will now be able to generate Inspection Tickets for the Inspection to be performed. Inspection tickets are considered a sub-set of Service Tickets, and are accessed from the Service Ticket Queue and processed within the Inspection Ticket Queue of the Service module.

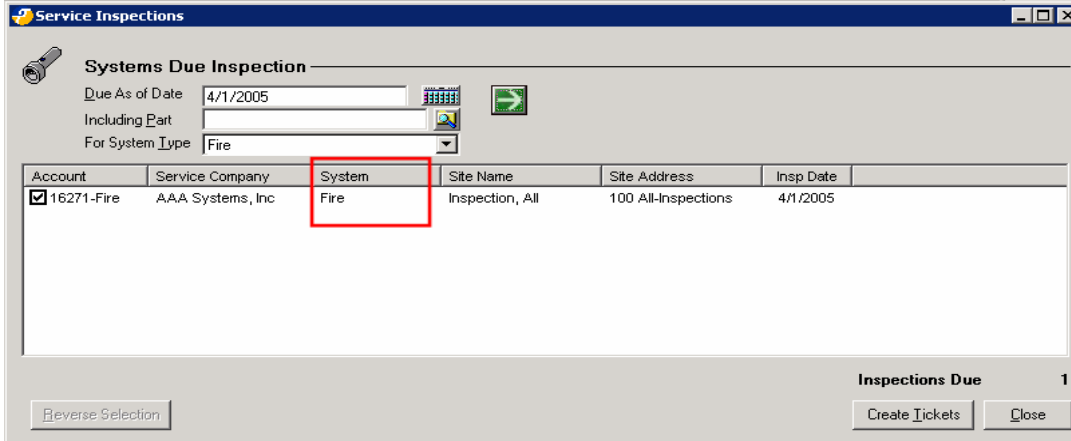
New to this release of Sedona Office are two additional fields on the Service Inspections selection form:

- **Including Part** – You may select to generate Inspection Tickets for system inspections that have a particular part assigned to the inspection record.
- **For System Type** – You may select to generate Inspection Ticket for systems of a particular type.

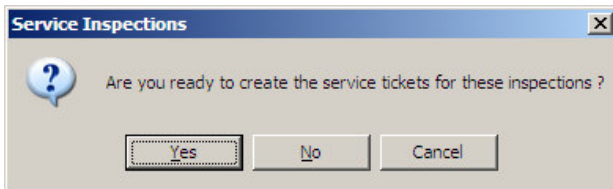
To begin, navigate to the Service module and select the menu item Inspections. The Service Inspections window will be displayed. In the *Due As of Date* field (required), enter the through date that you want Sedona to search for all Inspections that are due. You may also select a particular part number from in the Including Part field and/or select a particular system type in the For System Type field. After pressing the green arrow button, the application will look for all systems that have inspection information set up and compare the *Next Inspection* date on the System record to the date entered in the *Due As of Date* field on this window to determine which systems are ready for an inspection. If values were entered in the Including Part and/or For System Type fields, these fields will be considered in the evaluation process as well.

After entering the *Due As of Date* and the other two optional fields, press the green arrow to begin the process. All system inspections that are due to be inspected will appear in the Service Inspection window. Inspections that are past due will be displayed in red. By default, each system will have the check box to the left of the account number checked on. Only check the box on systems for which you are ready to create an inspection service ticket. Press the Create Tickets button located on the lower right portion of this window to generate the inspection tickets. Please refer to figure 1.5 below.

Figure 1.5

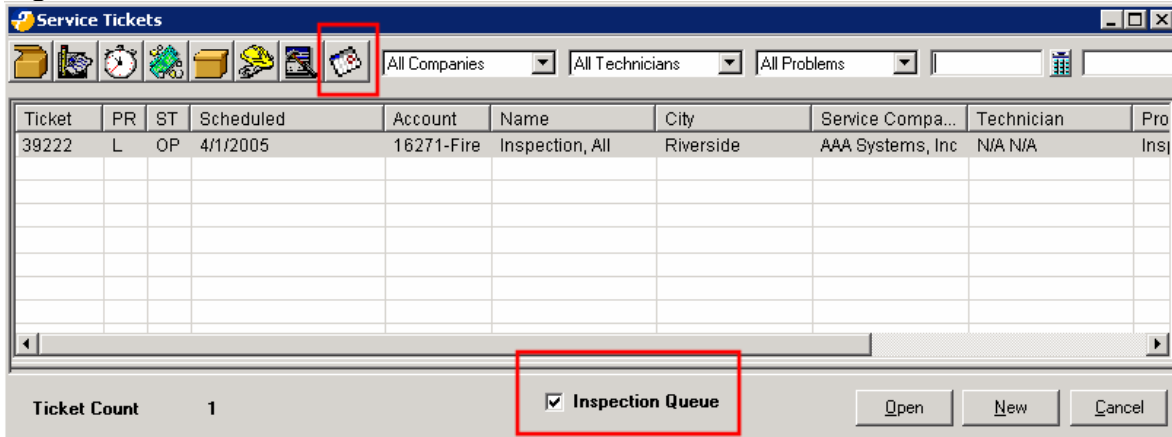


The application will prompt you with a question confirming whether you are ready to create the Inspection Tickets. Press *Yes* to confirm or *No* if you are not ready to create the tickets at this time.



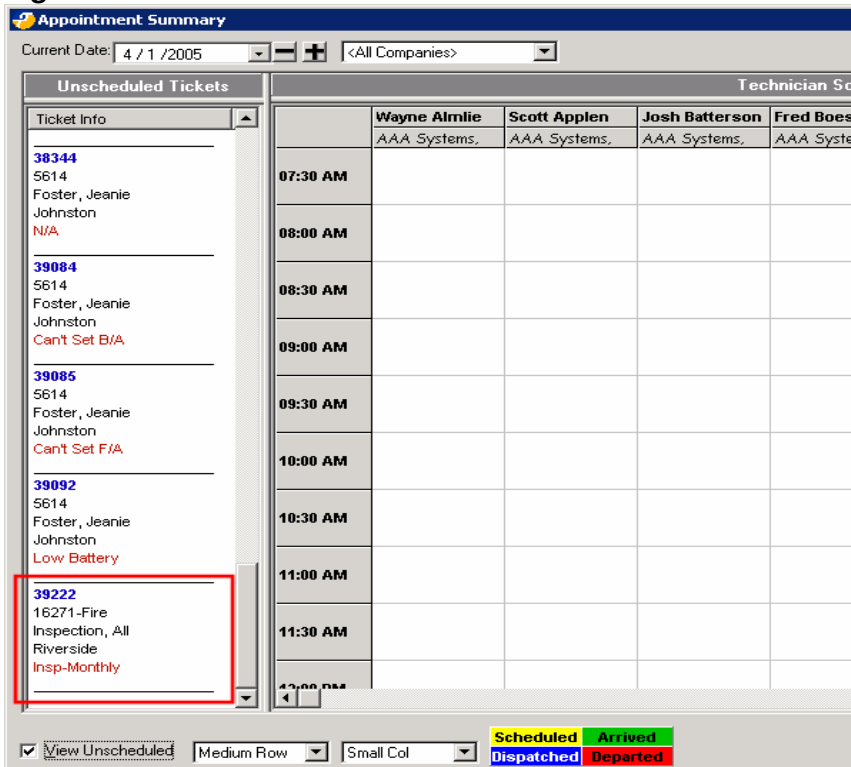
Once the Inspection Ticket generation process has completed, open the Service Ticket Queue (Service module/Service Ticket Queue menu option) and check the Inspection Queue box located at the bottom of the window. This will change the Service Ticket Queue into the Inspection Ticket Queue. Only Inspection Tickets will be displayed in this window. Scheduling the Inspections will be handled as any other Service Ticket. To access the Appointment Schedule, press the Appointment Summary button located on the toolbar (last button on the right) to schedule your appointments. Please refer to figure 1.6 below.

Figure 1. 6



Once the Appointment Summary window is open, you may check the View Unscheduled box located on the lower left portion of this window to begin scheduling the new Inspection Tickets. Dispatch and billing of Inspection tickets is handled in the same manner as a normal service ticket.

Figure 1. 7



Inspection Tickets

Inspection Tickets contain all the same data entry and processing tabs as are available on regular Service Tickets except for one tab. The Equipment List tab present on Regular Service Tickets is replaced with a new tab labeled Inspection Parts. Another distinguishing feature is the words Inspection Ticket found in bold text at the bottom of the ticket form. If the inspection is past due, the Next Inspection date field text will appear in red.

Figure 1. 8

The screenshot shows a software window titled "Ticket # 39222". At the top, it displays "Customer: 16271 Inspection, All" and "Site: Inspection, All 100 All-Inspections Riverside, CA 92505". Below this are several tabs: "Ticket", "Tech Appointment", "Billing", "Field Notes", "Parts", "Labor", "Other Charges", "Inspection Parts", "Site Service History", and "FSU". The main area is divided into two columns. The left column, "Customer System Information", contains fields for Service Company (AAA Systems, Inc), System (16271-Fire), Type (Fire), Panel (AlarmNet), Location, Next Insp (4/1/2005), Phone, Warranty (Full Warranty), Svc Level (Commercial T & M), Map Code, Cross Street, and Memo. The right column, "Ticket Detail", contains fields for Contact, Phone, Problem (Insp-Monthly), Expertise Level (0), Priority (Low), Est Length (30 minutes), Customer Comments, Tech, Status (Open), Created (4/1/2005 10:23:14 PM), Created By (Carolyn), GL Category, and Resolution. The "Next Insp" field is highlighted with a red box, and the date "4/1/2005" is displayed in red text. At the bottom of the window, the text "Inspection Ticket" is centered, and there are "OK" and "Cancel" buttons on the right.

When you are ready to close an Inspection Ticket, you will need to select a Resolution Code. Recommended Resolution codes are Inspection Complete or Inspection Declined. If your customer declines the inspection, you may make note of this in the field notes tab of the Inspection Ticket as well as select a resolution code that indicates the inspection was not performed. This information will be saved as part of the service history for the system.

When Inspection Tickets are closed, the Sedona Office application will automatically update the Last Inspection date and Next Inspection date fields. The date the Inspection Ticket was closed will be the date used to update the Last Inspection date field. The Next Inspection date field will advance depending on the frequency code selected for the Inspection. If the Next Inspection date was set to 01/01/2005 and the frequency is set to Annual, once the Inspection Ticket is closed, the Next Inspection date will be updated to 01/01/2006.

Form Changes

- The Inspection data entry fields previously available on the System form are no longer present. If at the time of upgrading to build 3.03.010 you had existing inspection information entered with a frequency *other* than By Request Only, the update program would automatically move this information into an Inspection Record which is now accessible from the Inspection tab for the System record.
- A new tab labeled Inspection has been added to the System record.
- For Inspection Service Tickets generated, the tab previously labeled Equipment list has been replaced with a tab labeled Inspection Parts.

If you have any questions regarding the content of this document, please contact us by emailing your questions or comments to support@sedonaoffice.com , or you may contact the Sedona Office Helpdesk at (734) 414-0760.