

SedonaOffice

The #1 Financial Software for Security Companies

Service Management Reference Guide

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About this Guide

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Service Setup


The SedonaOffice Service module automates the process of tracking your customer service calls as well as automating the customer invoicing process. The application will automatically calculate the Service Invoice based on elements of data contained in the System record for which the Service Ticket is created, the dispatch times entered for the Technician appointment, any parts used, and the Resolution Code selected on the Service Ticket. The key data elements from the System record are:

- Warranty Start Date
- Warranty Type
- Service Level – may be changed to a different Service Level on the Service Ticket

Warranty Type


Warranty Types are setup and maintained within the SedonaSetup module. Each Warranty Type specifies the length of time (in days) the warranty period will last, what types of charges are covered by the Warranty Type; Parts, Labor and Other charges.

Warranty

 **Warranty**

Warranty Code	Description	Length	Parts	Labor	Other	Inactive
Full Warranty	Full Warranty	365	Y	Y	Y	N
None	None	0	N	N	N	N
One Year P & L	One Year Parts and Labor	365	Y	Y	N	N

Include Inactive

 **Warranty Edit**

Warranty Code

Description

Length - Days

Costs included in this Warranty

Parts

Labor

Other

Inactive

Service Level

Service Levels are setup and maintained within the SedonaSetup module. Each Service Level specifies may elements that are used to automatically calculate charges on the Service Invoice. Service Levels are setup and used for both regular Service Tickets and Inspection Tickets. These elements of the Service Level are:

- What Types of Charges are Billable; Parts, Labor, Other
- Which Item Code to use when billing for Labor charges
- Which Item Code and amount to use for a Trip Charge
- Hourly Labor Rates used to calculate on-site Technician time
 - Regular – Used during normal business hours of the Service Company.
 - Overtime – Used when a Technician arrives before or after normal business hours of the Service Company.
 - Holiday – Used when a Technician is dispatched on a date that is setup in the Holiday setup table.
- Labor Calculation determines when to invoice charges from, either Dispatch Time or Arrival Time.
- Billing Time Increments that will be used to calculate Labor charges.
- Other Charges – an optional charge that will automatically be added to the Service Invoice.

Service Level Edit Inactive

Service Level: Time and Material Description: Time and Material

General | Parts

General

Costs Included: Parts Labor Other

Labor Item: Service Labor

Labor Rates

Regular: \$70.00
Overtime: \$95.00
Holiday: \$125.00

Trip Charge

Bill as Labor

Item Code	Charge
Service Fee	\$75.00
Fuel	\$10.00

Labor Calculation From Dispatch From Arrival

Billing

1 min 5 min 10 min
 15 min 30 min 60 min

After the first 30 minutes.

Apply New Delete

New Part Tab

This new tab provides additional Part Expense features for the Service Tickets.

- Material COGS – This allows you to pick with COGS account to use for Parts on the Service Ticket, this is an override account.
- Parts Item Code – This allows you to pick the Invoice Item Code to be used for the Invoicing of Parts Sold.
- Part Pricing – This allows you to determine the Price to sell the Parts. The modifier for Residential and Commercial Customers only works for Price #1.

Service Level Edit Inactive

Service Level: Time and Material Description: Time and Material

General **Parts**

General

Material COGS: 52105 COG-Service

Parts Item Code: Equipment TX

Part Pricing

Use Service Price 1:

Res Price Modifier: 1.0000

Comm Price Modifier: 0.8500

Use Service Price 2:

Part Edit – Service Pricing

Service

Invoice Description: X36

Price 1: 5.0000

Price 2: 5.0000

Available to FSU

Resolution Code

Resolution Codes are setup and maintained within the SedonaSetup module. A Resolution Code typically defines how the Technician resolved the issue reported on the Service Ticket. Each Resolution Code contains a Billable option checkbox. Service Tickets that specify a Resolution Codes that have the Billable option selected can possibly be billable. If a Resolution Code is selected on the Service Ticket that is not flagged as billable, no charges may be invoiced to the customer.

Resolution

Resolutions

Resolution	Description	Billable	Inactive
Add Equipment	Add Equipment	Y	N
Clean Equipment	Clean Equipment	Y	N
Cust Cancel	Customer Cancelled prior to Appt Date	N	N
Go Back	Go Back	N	N
Insp Comp.	Inspection Completed	Y	N
Insp Decl.	Inspection Declined	Y	N
No Show	No Show	Y	N
Repair Equipment	Repair Equipment	Y	N
Replace Equipment	Replace Equipment	Y	N
User Error	User Error	Y	N
Void	Void	N	N

Include Inactive

Resolution Edit Inactive

Resolution Code

Description

Billable

How Are Service Ticket Invoice Charges Determined?

Once a Resolution Code is selected on the Service Ticket, the application goes through a series of checks to determine what if any charges will automatically be calculated to invoice the customer. If a System is within the Warranty period, the user has the option of overriding the Warranty and the Service Level, and may invoice the customer for charges.

Systems Under Warranty

For Systems that are covered by the Warranty period of time, the following evaluations are made by the application.

1. Is the Resolution Code Billable?
 - a. No - Charges will not be calculated, and the Service Ticket is ready to be closed.
 - b. Yes – Is the System within the Warranty Period?
2. Evaluate the Warranty setup
 - a. Are Parts covered?
 - No – parts will be calculated on the invoice based on the default Service Price in the part setup.
 - Yes – parts will not be charged on the invoice.
 - b. Is Labor covered?
 - No – Labor charges will be calculated on the invoice based on the total Technician on-site time times the rate contained on the Service Ticket Service Level.
 - Yes – Labor charges will not be charged on the invoice.
 - c. Are Other Charges covered?
 - No – User may manually enter Other charges into the Service Ticket which will appear on the invoice.
 - Yes – No Other charges may be entered on the Service Ticket.

Systems Out Of Warranty

For Systems where the Warranty period has expired, the following evaluations are made by the application.

1. Is the Resolution Code Billable?
 - a. No - Charges will not be calculated, and the Service Ticket is ready to be closed.
 - b. Yes – The application will evaluate the Service Level rules.
2. Evaluate the Service Level setup
 - a. Are Parts covered?
 - No – parts will be calculated on the invoice based on the default Service Price in the part setup.
 - Yes – parts will not be charged on the invoice.
 - b. Is Labor covered?
 - No – Labor charges will be calculated on the invoice based on the total Technician on-site time (less any minutes entered on the Service Level “After the first X minutes” field) times the rate contained on the Service Ticket Service.
 - Yes – Labor charges will not be charged on the invoice.
 - c. Are Other Charges covered?
 - No – User may manually enter Other charges into the Service Ticket which will appear on the invoice.
 - Yes – No Other charges may be entered on the Service Ticket.
 - d. Does the Service Level contain a Trip Charge?
 - No – No Trip Charge is calculated for the invoice.
 - Yes – The Trip Charge amount and Item Code will appear on the invoice.

Service Costing

Labor, materials and miscellaneous expenses may be expensed on Service Tickets. The elements expensed and the method used for expensing to a service ticket, are determined by two setup elements; Service Setup Defaults and the Service Company associated with the Service Ticket. Any miscellaneous expenses linked to a Service Ticket from an accounts payable bill will be expensed immediately to the Service Ticket.

Service Costing Setup

Service Setup Defaults

The Service Setup Defaults are used to determine:

- Will Labor be expensed on Service Tickets
- Will Labor be expensed when dispatch times are entered
- Will Labor be expensed through Work in Process
- Will Parts be expensed on Service Tickets
- Will Inventory be relieved when the part is entered or issued to the ticket
- Will Inventory be relieved through Work in Process
- Will Parts be expensed to COGS when invoiced or when the ticket is closed

Service Setup

Labor To GL

Labor Expense Type
 Expense at time of entry
 Expense thru WIP

Labor Expense: 50010
Cost of Goods-Labor

Labor Deferred: 21090
Payroll Suspense

Labor WIP: 12020
Work In Process-Labor

Override Tech Rate: 0

Inventory Processing

Use WIP for Service Parts

WIP Account: 12010
Work In Process-Materials

Service COGS: 50000
Cost of Goods-Materials

Default to Expense Inventory on Service Tickets (By Svc Co)
 When Invoiced

Service Company Setup

Each System record is assigned to a default Service Company. The setup of the Service Company determines if and how to expense costs associated with the Service Ticket. The Service Company setup form is divided into two forms; Company Detail and Labor.

Service Company – Company Detail Setup

The Company Detail form defines whether you will expense inventory parts used on the Service Ticket. If the Expense Inventory option is selected, you have the option of selecting the When Invoiced option. If the When Invoiced option is selected, parts will post to the COGS account when the Service Invoice is generated; otherwise the parts will be expensed to the COGS account when the ticket is closed.

The screenshot shows the 'Service Companies' setup form with the 'General' tab selected. The form includes the following fields and options:

- Code:** CA
- Description:** CJM Security
- Inactive:**
- Company Detail | Labor Setup:** (Company Detail is selected)
- Ticket Form:** Standard (dropdown menu)
- Does NOT use service ticket form for inspections:**
- Category:** Service (dropdown menu)
- COGS Acct:** 50000 (dropdown menu)
- Expense Inventory on Service Tickets:**
- When Invoiced:**
- Vendor:** (empty dropdown menu)
- Warehouse:** CA Main (dropdown menu)
- Critical Message:** (warning icon)
- Expires On:** (empty date field)

Service Company – Labor Setup

The Labor Setup form defines whether you will expense labor costs to the Service Ticket. If the Labor To GL option is selected, you will then select the expensing method; Expense at time of entry or Expense thru WIP. The application will post actual labor performed to the G/L accounts specified in this setup form. The labor rate used to post Technician time is found on the Technician setup record. If you do not want to post the labor costs to the Service Ticket using the Technician labor rates, you may enter a rate in the Override Tech Rate field. If a rate is entered in the Override Tech Rate field, the total Technician on-site time will be multiplied by this rate and recorded to the Service Ticket Journal.

The screenshot shows the 'Service Companies' interface. At the top right, there is an 'Inactive' checkbox. The 'Code' field contains 'CA' and the 'Description' field contains 'CJM Security'. Below this is a 'Company Details' section with a 'Labor Setup' button circled in red. The 'Address' field shows '122 Magnolia, Riverside, CA 92505'. The 'Appointments' section has 'Start' set to 'Monday 8:00:00 AM' and 'End' set to 'Friday 5:00:00 PM'. The 'Labor To GL' section is checked and includes: 'Labor Expense Type' set to 'Expense thru WIP', 'Labor Expense' set to '50010' (Cost of Goods-Labor), 'Labor Deferred' set to '21090' (Payroll Suspense), 'Labor WIP' set to '12020' (Work In Process-Labor), and 'Override Tech Rate' set to '0'.

Miscellaneous Service Expenses

Where miscellaneous expenses are expected for a Service Ticket, you should open a Purchase Order for these expenses. This will ensure all miscellaneous expenses costs are recorded to the Service Ticket.



The application will not allow a User to close a Service Ticket where any open Purchase Orders exist.

Service Ticket Journal

The Service Ticket Journal displays all costs incurred against the Service Ticket. Once the ticket is invoiced or closed, expenses will post to the Cost of Goods sold accounts.

Service Ticket Journal - Parts & Labor Expensed Through WIP

Ticket # 7010												
Customer: 10046 Allston Wine & Spirits				Status: Resolved								
Site: Allston Wine & Spirits 223 Cambridge Street Corona, CA 92880				Created: 9/10/2008 10:42:42 PM								
				Created By: administrator								
Ticket	Custom Fields	Tech Appt	Billing	Field Notes (1)	Parts	Labor	Other	Equip List	History	PO	Log	Journal
Reg No.	Type	Date	Reference	Acct	Exp Type	Description	Amt					
215	LABOR	9/11/2008	Svc Labor	12020		Work In Process-Labor	\$20.00					
				21090		Payroll Suspense	(\$20.00)					
216	BILL	9/11/2008	16565	20000		Accounts Payable*	(\$15.00)					
				60430	P	Parking Fees/Fines	\$15.00					
219	MWIP	9/11/2008	7010	12000		Inventory*	(\$7.34)					
				12010		Work In Process-Materials	\$7.34					
220	INV	9/11/2008	1008	11000		Accounts Receivable*	\$192.89					
				40020		Revenue, Installation Materials	(\$35.00)					
				40100		Revenue, Service Labor	(\$155.00)					
				22010		Sales Tax Payable-CA*	(\$2.89)					
221	COGS	9/11/2008	7010	12010		Work In Process-Materials	(\$7.34)					
				50000	M	Cost of Goods-Materials	\$7.34					
222	LABOR	9/11/2008	7010	12020		Work In Process-Labor	(\$20.00)					
				50010	L	Cost of Goods-Labor	\$20.00					

Service Ticket Journal - Parts & Labor Expensed Immediately

Ticket # 7015												
Customer: 10000-7 Sweet Millie Teahouse				Status: Resolved								
Site: Sweet Millie Teahouse 3221 Scottsdale Road Scottsdale, AZ 85251				Created: 1/11/2009 9:46:35 AM								
				Created By: Administrator								
Ticket	Custom Fields	Tech Appt	Billing	Field Notes (1)	Parts	Labor	Other	Equip List	History	PO	Log	Journal
Reg No.	Type	Date	Reference	Acct	Exp Type	Description	Amt					
323	LABOR	1/11/2...	Svc Labor	50010	L	Cost of Goods-Labor	\$15.00					
				21090		Payroll Suspense	(\$15.00)					
324	INV	1/11/2009	1044	11000		Accounts Receivable*	\$195.00					
				40020		Revenue, Installation Materials	(\$35.00)					
				40100		Revenue, Service Labor	(\$160.00)					
325	COGS	1/11/2009	7015	12000		Inventory*	(\$7.34)					
				50000	O	Cost of Goods-Materials	\$7.34					

Service Ticket Journal - Miscellaneous Expense Item

Ticket # 7010																				
Customer: 10046 Allston Wine & Spirits				Status: Resolved																
Site: Allston Wine & Spirits 223 Cambridge Street Corona, CA 92880				Created: 9/10/2008 10:42:42 PM																
				Created By: administrator																
<table border="1"> <tr> <td>Ticket</td> <td>Custom Fields</td> <td>Tech Appt</td> <td>Billing</td> <td>Field Notes (1)</td> <td>Parts</td> <td>Labor</td> <td>Other</td> <td>Equip List</td> <td>History</td> <td>PO</td> <td>Log</td> <td>Journal</td> </tr> </table>								Ticket	Custom Fields	Tech Appt	Billing	Field Notes (1)	Parts	Labor	Other	Equip List	History	PO	Log	Journal
Ticket	Custom Fields	Tech Appt	Billing	Field Notes (1)	Parts	Labor	Other	Equip List	History	PO	Log	Journal								
Reg No.	Type	Date	Reference	Acct	Exp Type	Description	Amt													
215	LABOR	9/11/2008	Svc Labor	12020		Work In Process-Labor	\$20.00													
				21090		Payroll Suspense	(\$20.00)													
216	BILL	9/11/2008	16565	20000		Accounts Payable*	(\$15.00)													
				60430	P	Parking Fees/Fines	\$15.00													
219	MWIP	9/11/2008	7010	12000		Inventory*	(\$7.34)													
				12010		Work In Process-Materials	\$7.34													
220	INV	9/11/2008	1008	11000		Accounts Receivable*	\$192.89													
				40020		Revenue, Installation Materials	(\$35.00)													
				40100		Revenue, Service Labor	(\$155.00)													
				22010		Sales Tax Payable-CA*	(\$2.89)													
221	COGS	9/11/2008	7010	12010		Work In Process-Materials	(\$7.34)													
				50000	M	Cost of Goods-Materials	\$7.34													
222	LABOR	9/11/2008	7010	12020		Work In Process-Labor	(\$20.00)													
				50010	L	Cost of Goods-Labor	\$20.00													

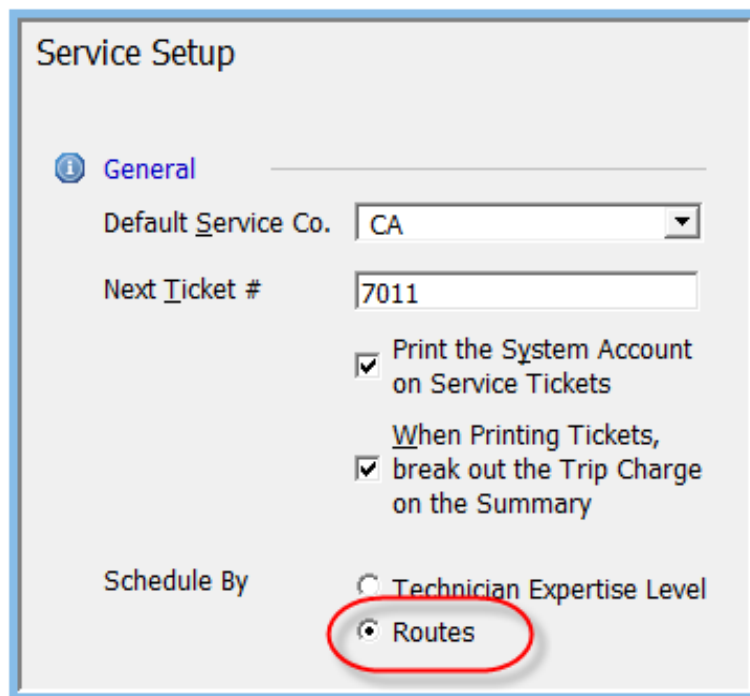
Service Routes

Service Routes is a new feature that was introduced in version 5.1. Service Routes are used in scheduling your Service and Inspection appointments. A Service Route may define a geographical area or some other element that will be useful in scheduling service tickets. If using Service Routes, each Technician is linked to one or more Routes in the Technician setup. When scheduling appointments from the Appointment Summary, the Technicians displayed in the scheduling grid will be those Technicians linked to the Routes selected on the Appointment Summary Routes list.

Activating Service Routes

Service Setup Defaults

The use of Service Routes is activated from the Service Setup Defaults form within SedonaSetup. Once Routes are activated, a Route field will be displayed on all Service Tickets. The User will be required to select a Route prior to saving a new Service Ticket. If Routes are activated, you still have the option of scheduling by Service Company on the Appointment Summary.



The screenshot shows the 'Service Setup' window with the 'General' tab selected. The 'Default Service Co.' dropdown is set to 'CA' and the 'Next Ticket #' is '7011'. Two checkboxes are checked: 'Print the System Account on Service Tickets' and 'When Printing Tickets, break out the Trip Charge on the Summary'. Under the 'Schedule By' section, the 'Routes' radio button is selected and circled in red, while 'Technician Expertise Level' is unselected.

Field	Value
Default Service Co.	CA
Next Ticket #	7011
Print the System Account on Service Tickets	<input checked="" type="checkbox"/>
When Printing Tickets, break out the Trip Charge on the Summary	<input checked="" type="checkbox"/>
Schedule By	<input checked="" type="radio"/> Routes, <input type="radio"/> Technician Expertise Level

System Type Setup

There is a default Route that is associated with each System Type. When a User creates a new System, the default Route found on the System Type setup will automatically fill in the Route field on the System record. The User may override the default Route on the System record.

The screenshot shows the 'Systems' window with two main sections: 'System List' and 'System Edit'.

System List Table:

Code	Description	Route	Inactive
Access	Access Control	A1	N
Burg/Fire Com	Burg/Fire Commercial	F1	N
Burg/Fire UL	Burg/Fire UL	UL	N
CCTV	CCTV	C2	N
Cell Back-up	Cell Back-up	B2	N
Fire	Fire System	F2	N
Intrusion	Intrusion System	B2	N
Intrusion UL	Intrusion UL	UL	N
PERS	PERS	P1	N

System Edit Section:

Code: Description: Route Code: Inactive

Routes Setup

Service Routes are setup and maintained in SedonaSetup.

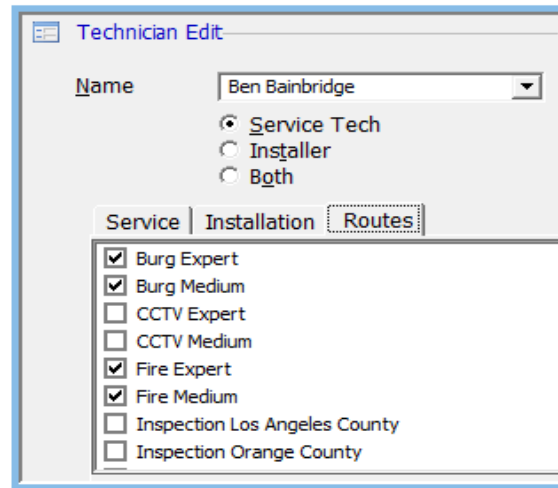
The screenshot shows the 'Routes' window with a 'Route List' section containing a table of service routes.

Route List Table:

Code	Description	Inactive
A1	Access Expert	N
A2	Access Medium	N
B1	Burg Expert	N
B2	Burg Medium	N
C1	CCTV Expert	N
C2	CCTV Medium	N
F1	Fire Expert	N
F2	Fire Medium	N
ILACO	Inspection Los Angeles County	N
IOC	Inspection Orange County	N
IR	Inspection Riverside County	N
P1	PERS Expert	N
P2	PERS Medium	N
UL	UL	N

Technician Routes Setup

Each Technician is linked to one or multiple Routes.



Technician Edit

Name: Ben Bainbridge

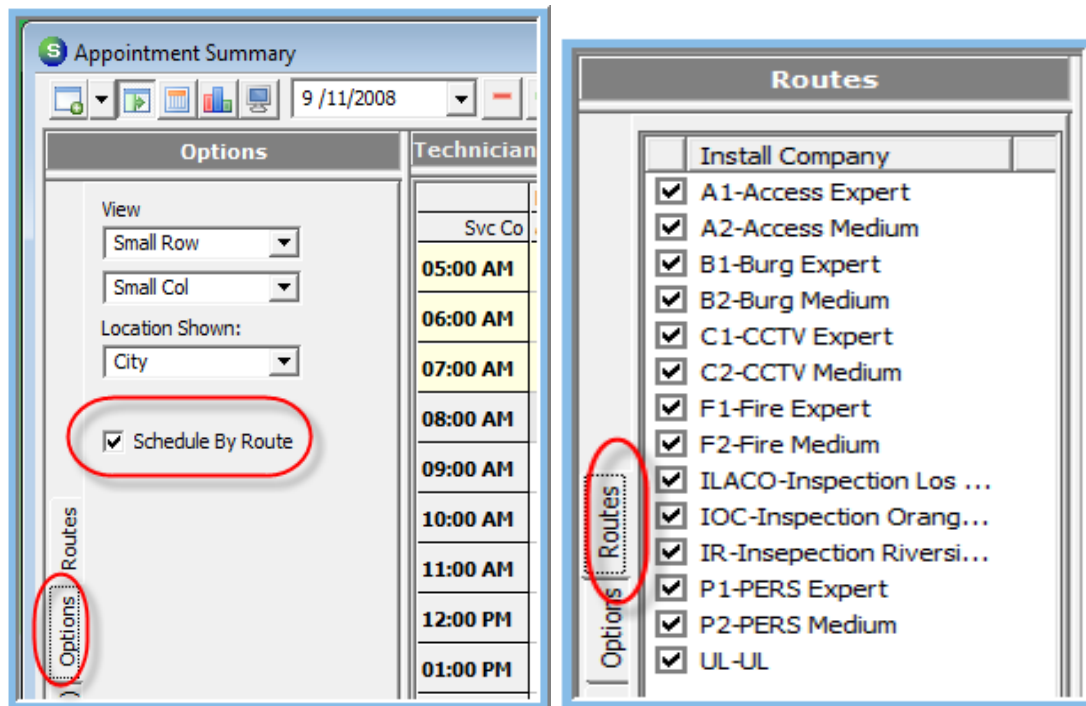
Service Tech
 Installer
 Both

Service | Installation | **Routes**

- Burg Expert
- Burg Medium
- CCTV Expert
- CCTV Medium
- Fire Expert
- Fire Medium
- Inspection Los Angeles County
- Inspection Orange County

Scheduling From the Appointment Summary

If Routes have been activated in the Service Setup Defaults, each User has the option of how to view the Appointment Summary; by Service Company or by Routes. If Routes are selected, the list of tickets displayed in Ticket List will be just the tickets associated with the Routes selected.



Appointment Summary

9 / 11 / 2008

Options

View: Small Row, Small Col

Location Shown: City

Schedule By Route

Routes

Technician	Svc Co
	05:00 AM
	06:00 AM
	07:00 AM
	08:00 AM
	09:00 AM
	10:00 AM
	11:00 AM
	12:00 PM
	01:00 PM

Routes

Install Company
<input checked="" type="checkbox"/> A1-Access Expert
<input checked="" type="checkbox"/> A2-Access Medium
<input checked="" type="checkbox"/> B1-Burg Expert
<input checked="" type="checkbox"/> B2-Burg Medium
<input checked="" type="checkbox"/> C1-CCTV Expert
<input checked="" type="checkbox"/> C2-CCTV Medium
<input checked="" type="checkbox"/> F1-Fire Expert
<input checked="" type="checkbox"/> F2-Fire Medium
<input checked="" type="checkbox"/> ILACO-Inspection Los ...
<input checked="" type="checkbox"/> IOC-Inspection Orang...
<input checked="" type="checkbox"/> IR-Insepection Riversi...
<input checked="" type="checkbox"/> P1-PERS Expert
<input checked="" type="checkbox"/> P2-PERS Medium
<input checked="" type="checkbox"/> UL-UL

New Service Reports

Three new reports have been added to the Report Manager. Each of these reports is a custom report that was developed by a particular SedonaOffice customer. You may use any of these reports however, as with all our custom reports, modifications cannot be made to any of these reports without the permission of the customer who designed the report.

Daily Service Snapshot* Technician Performance* Taxable Service With Materials*

Daily Service Snapshot*

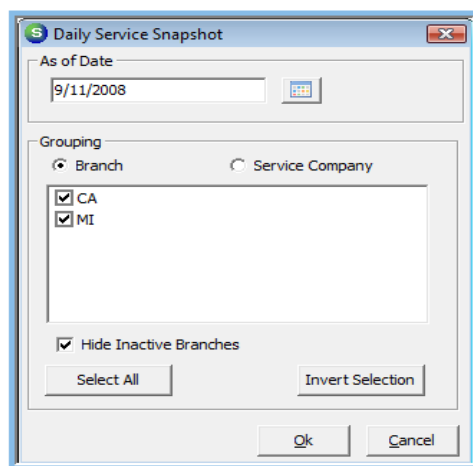
This report will print a listing of Service Ticket activity on the selected date.

- Total dollars invoiced
- Number of tickets completed
- Number of tickets open (Service & Inspections split out)
- Number of tickets where a Technician is assigned (Service & Inspections split out)
- Number of tickets resolved (on the selected date)
- Number of tickets in the Go Back queue

Report Options

The Report Selection Options:

- As of Date
- Branch – You may select all, one or multiple Branches.
OR
- Service Company – You may select all, one or multiple Service Companies.



Daily Service Snapshot* Report Sample – By Branch

Daily Service Snapshot

CJM Security

By Branch
9/11/2008

Branch	Total Invoiced	Completed	Open Service	Tech Assigned	Open Inspections	Tech Assigned	Resolved Tickets	Go back Tickets
CA	190.00	1	2	0	4	0	1	0
MI	0.00	0	0	0	0	0	0	0
	190.00	1	2	0	4	0	1	0

Technician Performance*

This report displays sales information from Service and Inspection tickets that were invoiced or closed without being invoiced within a specific period of time. Columns of data displayed on this report are:

- Labor hours spent on-site
- Amounts invoiced for Parts
- Amounts invoiced for Labor
- Amounts invoiced for Other charges

Report Options

There are many selection options available on this report.

- Period of time
- Branch or Service Company
- Technicians
- Primary Grouping
- Secondary Grouping
- Sort by option

The screenshot shows the 'Technician Performance' configuration window. It is divided into several sections:

- General:** Includes radio buttons for 'Accounting Period' (selected) and 'Dates'. Below are two date range dropdown menus, both showing '9 09/01/08 - 09/30/08'.
- Branches:** A list box containing 'CA' and 'ME', both checked. Below is a 'Hide Inactive Branches' checkbox (checked) and 'Select All' and 'Invert Selection' buttons.
- Service Companies:** A list box containing 'CA' and 'ME', both checked. Below is a 'Hide Inactive Companies' checkbox (checked) and 'Select All' and 'Invert Selection' buttons.
- Technicians:** A list box containing 'Bailey Barr', 'Barney Barber', 'Ben Bainbridge', 'Cain Cabe', 'Edgar Eden', and 'Egor Earle', all checked. Below is a 'Hide InactiveTechnicians' checkbox (unchecked) and 'Select All' and 'Invert Selection' buttons.
- Group By:** A dropdown menu with 'Technician' selected. A list of options is shown: '(None)', 'Branch', 'Service Company', 'Technician', 'Problem', and 'Service Level'.
- Secondary Group By:** A dropdown menu with 'Problem' selected. A list of options is shown: '(None)', 'Branch', 'Service Company', 'Technician', 'Problem', and 'Service Level'.
- Sort By:** A dropdown menu with 'Ticket Number' selected. A list of options is shown: 'Ticket Number', 'Site Name', 'Account #', and 'Total Charge'.

Technician Performance* Report Sample

- Grouped By Technician & Service Level

Technician Performance						CJM Security		
All Active Branches All Active Service Companies All Service Techs September 2008								
Ticket	Appointment	Hours	Labor	Parts	Other	Total	Site	Account#
Bailey Barr								
Time and Material								
7007 *	9/10/2008	5.0	770.00	542.10	0.00	1,312.10	Beale & Company	9206
Ben Bainbridge								
Time and Material								
7010	9/11/2008	2.0	90.00	35.00	65.00	190.00	Allston Wine & Spirits	7416
Whitney Walsh								
Time and Material								
7007 *	9/2/2008	2.0	770.00	542.10	0.00	1,312.10	Beale & Company	9206
		<u>9.0</u>	<u>1,630.00</u>	<u>1,119.20</u>	<u>65.00</u>	<u>2,814.20</u>		

Taxable Service With Materials*

This is an export report that will save the results of the report to a file in the .csv format to the file name and location specified by the User. This report is used by companies that need to know the actual material costs associated with service calls for tax reporting purposes. The export file will contain one row for each Service Ticket where parts were used within the period of time specified in the report options setup. The date range specifies the invoice date range. Only tickets where the customer was invoiced for parts will display in the .csv file created by the export.

Report Options

When generating this export report, you need to specify a date range and a file name and location of where the report will be saved.

Technician Performance* Report Sample

	A	B	C	D	E	F	G	H	I
1	Branch_ Code	Ticket_ Number	Customer_ Number	Customer_ Name	Invoice_ Date	Invoice_ Number	Amount	Taxing_Group_Code	Material_ Cost
2	CA	7000	10001	Wyman, Benjamin	12/30/2008	1001	\$397.06	CA-Orange Co	\$91.95
3	CA	7001	10001	Wyman, Benjamin	12/30/2008	1003	\$179.11	CA-Orange Co	\$7.34
4	CA	7007	10010	Beale & Company	9/10/2008	1007	\$1,393.60	CA-Los Angeles Co	\$182.63
5	CA	7010	10046	Allston Wine & Spirits	9/11/2008	1008	\$192.89	CA-Riverside Co	\$7.34
6	CA	7013	10005	Ashley, Desire	1/8/2009	1014	\$231.88	CA-Orange Co	\$67.40
7	CA	7014	10025	Bartlett, Keith	1/10/2009	1038	\$376.41	CA-Orange Co	\$67.40