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SedonaOffice® USERS CONFERENCE

MARCO ISLAND, FLORIDA
JANUARY 27 - 29, 2014



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NETWORK



ACHIEVE

Job Creation

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Job Deposits

Once a deposit has been received from your customer for a new Job, it will be posted in SedonaOffice through Payment Processing and saved as an Advance Deposit for the Job. Job deposits may be in the form of a check, bank draft (ACH) or credit card. Electronic payments are processed a bit differently than checks.

Often times Job Deposits are received before the Customer and/or Job have been created in SedonaOffice. In these situations the payment will need to be handled a bit differently.



- A suggested Job Task would be “Job Deposit posted”.
- For SedonaSync Users, you may want to send an email alert to the responsible person to move a deposit saved as unapplied cash to an Advance Deposit once the Job has been created.

Deposit Received Prior to Customer Creation

In situations where a Job Deposit is received from a new Customer and you want to deposit the payment immediately, you can setup an internal company customer to be used for this purpose. Once the new Customer is created, the deposit payment may be transferred to the correct customer.

Bill Contacts		
Title	Contact	Phone
Open Invoices	\$0.00	
Invoice #	Site Name	Description
Open Credits	\$0.00	
Credit #	Site #	Credit Type

Notes

The payment is applied to the "Job Deposits" customer as unapplied cash. Use the Check Memo field to type in details of from whom the payment was received.

Payment Processing

Batch Tape Amount: 1,500.00 Amount Entered: 0.00 Batch Balance: 1,500.00 Entry # 1 of 1

Branch: MI

Customer: Job Deposits

Invoice #:

Address: Job Deposits
48185 Joy Road
Canton, MI 48187

Memo: Walter T. Grant, 125 Cardinal, Canton, MI

Balance to Apply: 0.00

Amount: 1,500.00

Payment Method: Check

Check Number: 12345

Posting Date: 12/31/2013

Check Date:

Other Credits: 0.00

Invoices: Other

Miscellaneous:

Account:

Category Code:

Amount: 0.00

Advance Deposit:

Job:

Amount: 0.00

Late Fee:

Amount: 0.00

Unapplied Cash: Amount: 1,500.00

Future Auto Apply:

Total Due: \$0.00 Auto Clear

Job Deposits Job Deposits

Job Deposits
48185 Joy Road
Canton, MI 48187

Balance Due: (\$1,500.00)

Total Active RMR :
Total Active RAR :
Customer Type : Residential
Customer Since: 12/31/2012
Last Payment Rec'd: \$1,500.00 (12/31/13)

Date	Method	Check #	Amount	Reference	Invoice Pmt	Credit/Misc	Memo	Ha
12/31/2013	Check	12345	\$1,500.00	Unapplied Cash	\$1,500.00		Walter T. Grant, 125 Cardinal, Cant...	N
	Total		\$1,500.00					

Payment Memo

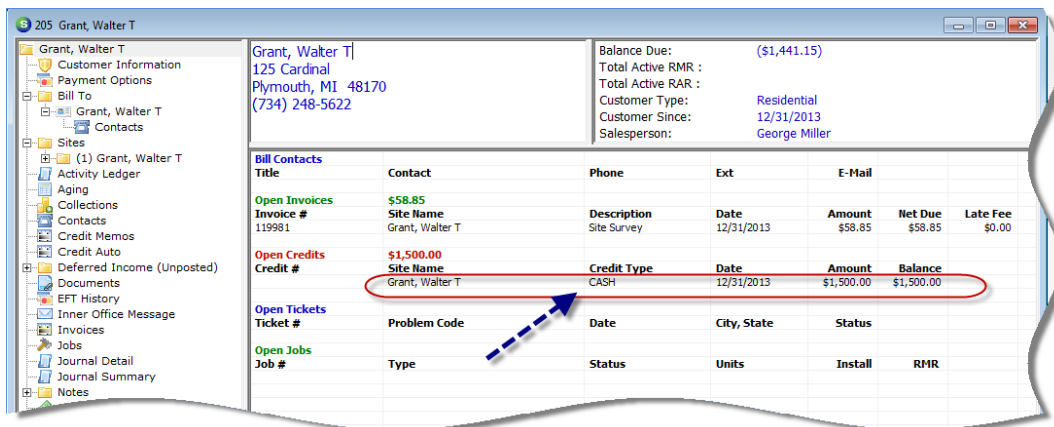
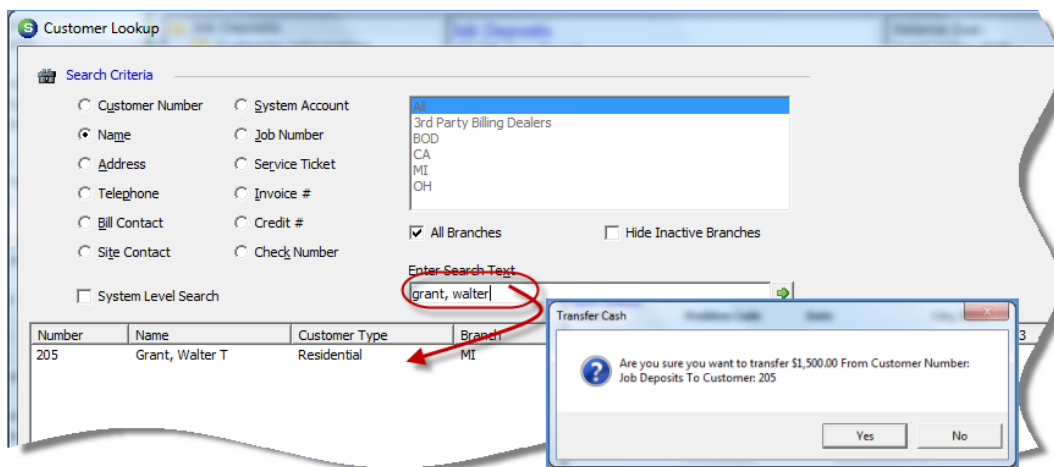
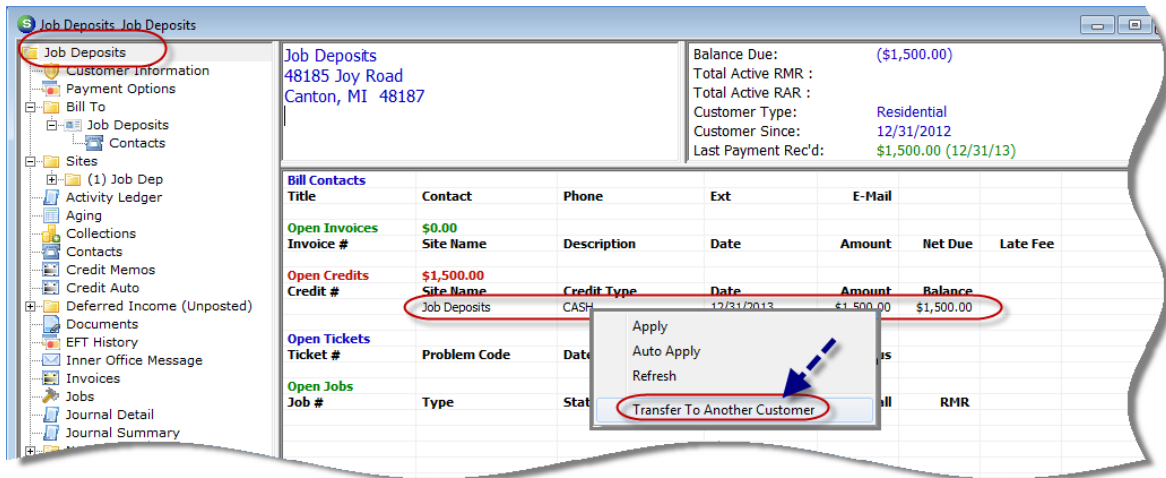
Walter T. Grant, 125 Cardinal, Canton, MI

OK

Notes

Transfer Unapplied Cash (Job Deposit)

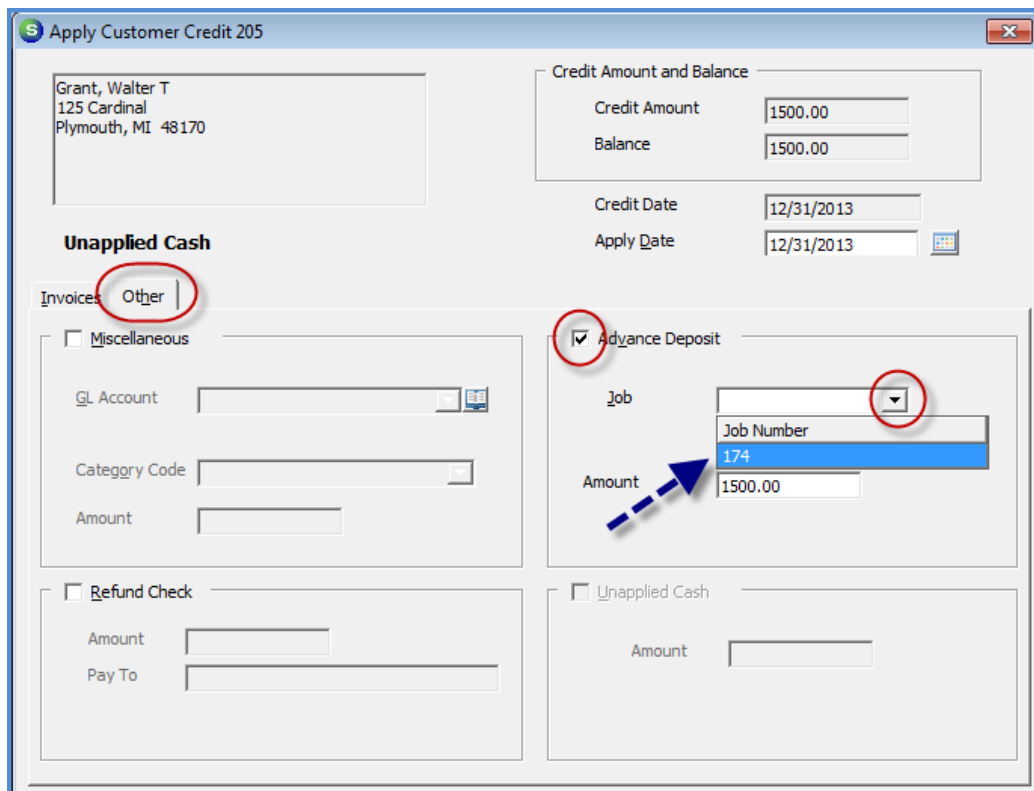
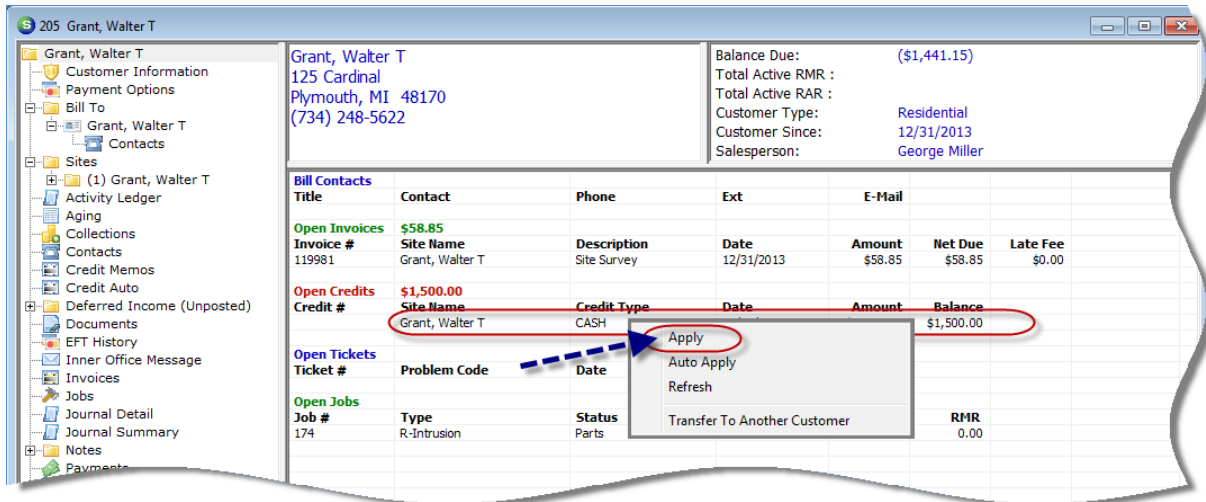
Once the new Customer has been setup, transfer the Unapplied Cash to the correct customer. If the Job has not yet been setup, the payment must remain as unapplied cash. The unapplied cash may be transferred to the Job Advance Deposit after Job creation.



Notes

Move Unapplied Cash to Job Deposit

Once the Job has been created, you will transfer the Unapplied Cash to an Advance Deposit linked to the Job.



205 Grant, Walter T

Grant, Walter T
 125 Cardinal
 Plymouth, MI 48170
 (734) 248-5622

Balance Due: (\$1,441.15)
 Total Active RMR :
 Total Active RAR :
 Customer Type: Residential
 Customer Since: 12/31/2013
 Salesperson: George Miller

Invoice #	Site Name	Description	Date	Amount	Net Due	Late Fee
119981	Grant, Walter T	Site Survey	12/31/2013	\$58.85	\$58.85	\$0.00

Credit #	Site Name	Credit Type	Date	Amount	Balance
174	Grant, Walter T	ADVDEP	12/31/2013	\$1,500.00	\$1,500.00

Ticket #	Problem Code	Date	City, State	Status
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Job #	Type	Status	Units	Install	RMR
174	R-Intrusion	Parts	0	0.00	0.00

Job - 174 (Grant, Walter T)

Job	Customer 205	Site
Job Number 174	Grant, Walter T	Grant, Walter T
Job Type R-Intrusion	125 Cardinal	125 Cardinal
Job Status Parts	Plymouth, MI 48170	Plymouth, MI 48170
System 25-2051 Intrusion	(734) 248-5622	(734) 248-5622
Labor Units 0 (0 Used)		

Sales Summary

Installs	Description	Quantity	Amount
Total			\$0.00

Parts	Description	Quantity	Amount
Total			\$0.00
Total Non Recurring			\$0.00
Total Non Recurring Billed			\$0.00
Total Credits			\$0.00
Balance to Bill			\$0.00

Recurring	Description	Monthly Amt
Total Recurring		\$0.00
Total Recurring Billed		\$0.00
Advance Deposit Available		\$1,500.00

Notes

New Job Creation

The process of creating a new Job will vary depending on whether your company is using QuoteWerks or WeEstimate. If your company is not using QuoteWerks or WeEstimate, when creating the new Customer, you will setup the Customer, Site and the System information, and then create the Job.

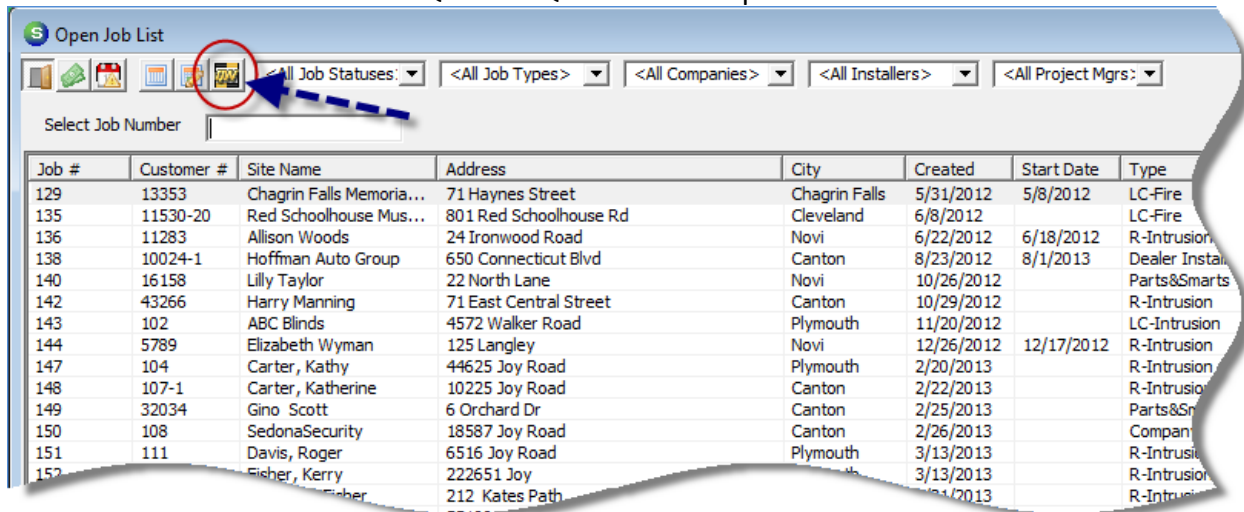
If your company is creating a new Job for a new customer from either QuoteWerks or WeEstimate, a System record is not created during the import process. Once the basic information is entered for the new Job, you will open the new Customer record, setup the System information, then return to the Job record and import the System Information into the Job System form.

Notes

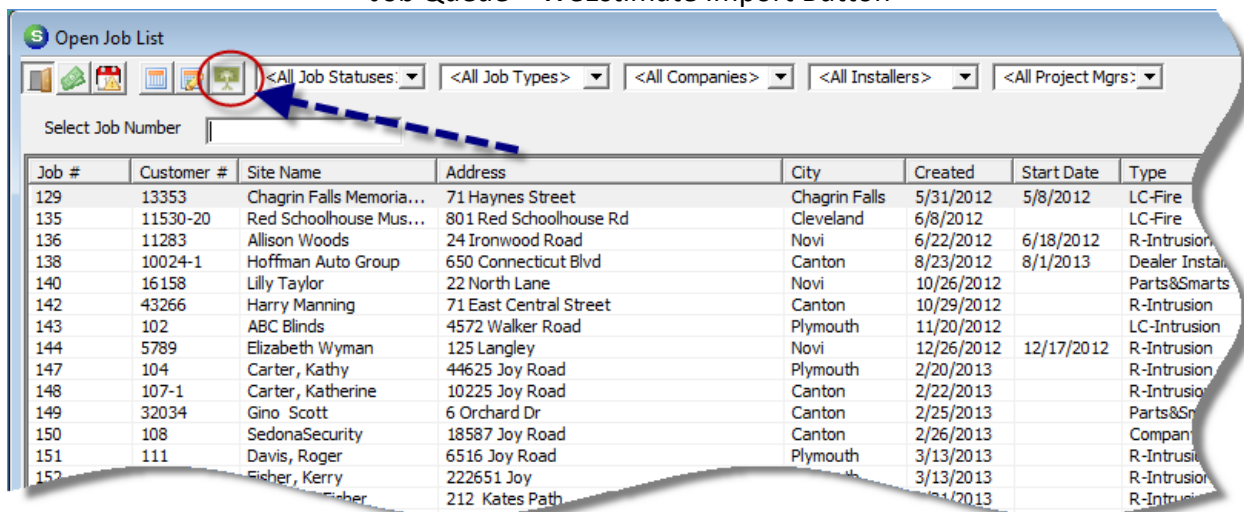
New Job – New Customer from QW or WE

The process for creating a new Job for a new Customer from a quote from QuoteWerks or WeEstimate is the same. The only difference is the icon that is displayed for Job Importing within the Job Queue.

Job Queue – QuoteWerks Import Button

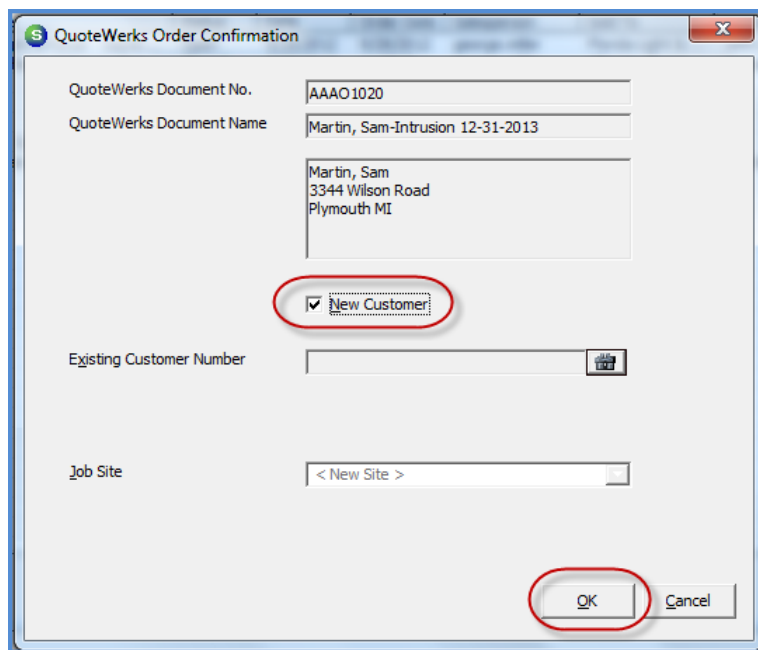
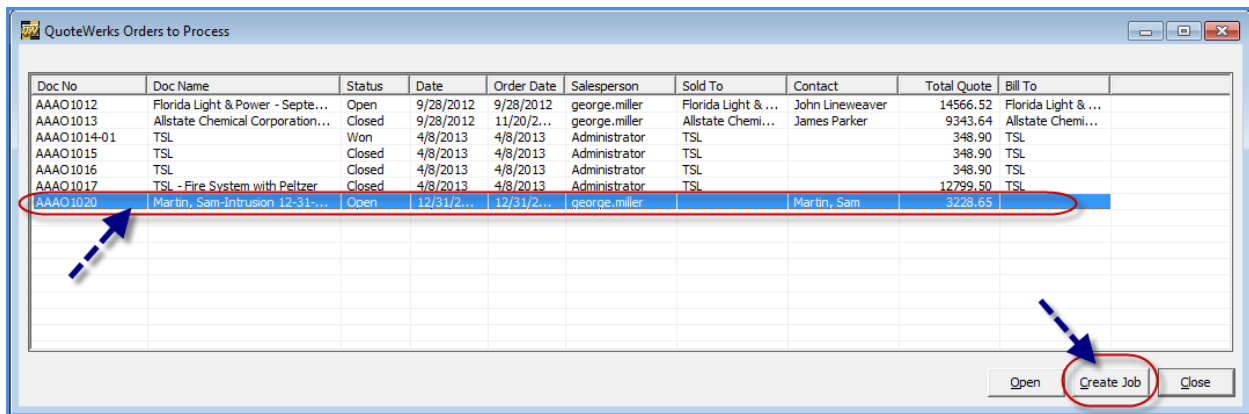


Job Queue – WeEstimate Import Button



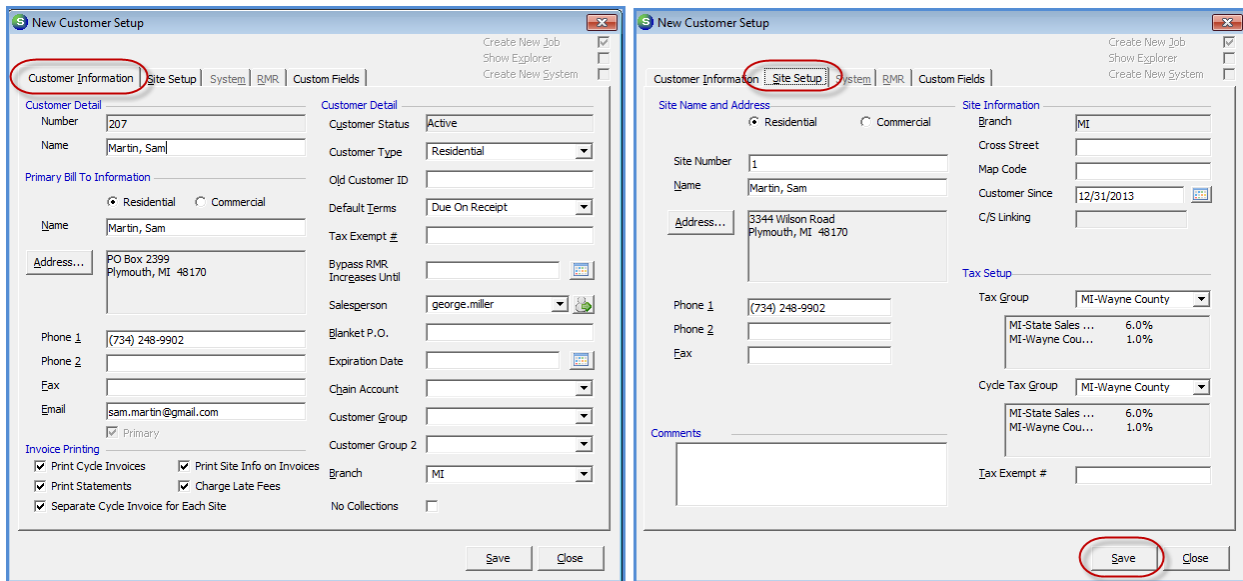
Notes

Clicking on the Import Button will display a listing of all Quotes ready to process; highlight the Quote to be imported from the list, and click on the Create Job button.



Notes

The Customer Information form will be displayed; once data is reviewed and adjusted as necessary, proceed to the Site Setup form. When finished click on the Save button.



Notes

The Job Work Order form will be displayed; the four required fields must be selected to be able to save: Job Type, Install Company, Salesperson and Sold Date.

New Job

Job	Customer 207	Site
Job Number 175	Martin, Sam	Martin, Sam
Job Type	PO Box 2399	3344 Wilson Road
Job Status Parts	Plymouth, MI 48170	Plymouth, MI 48170
New System	(734) 248-9902	(734) 248-9902
Labor Units		

Work Order Entry

Locked

Job Information

Job Number: 175

Job Type: R-Intrusion

Description: Intrusion - Residential

Tag Group: MI-Wayne County

Branch: MI

HoldBack %: 0

Install Company: MI

Installer: [Dropdown]

Prevailing Wage: [Field]

Project Manager: [Dropdown]

Salesperson: George.Miller

P.O. Number: [Field]

Sold Date: 12/31/2013

Projected Start: [Field]

Projected End: [Field]

Permits Required

Permit 1: [Field]

Permit 2: [Field]

Permit 3: [Field]

Notes: [Text Area]

Apply

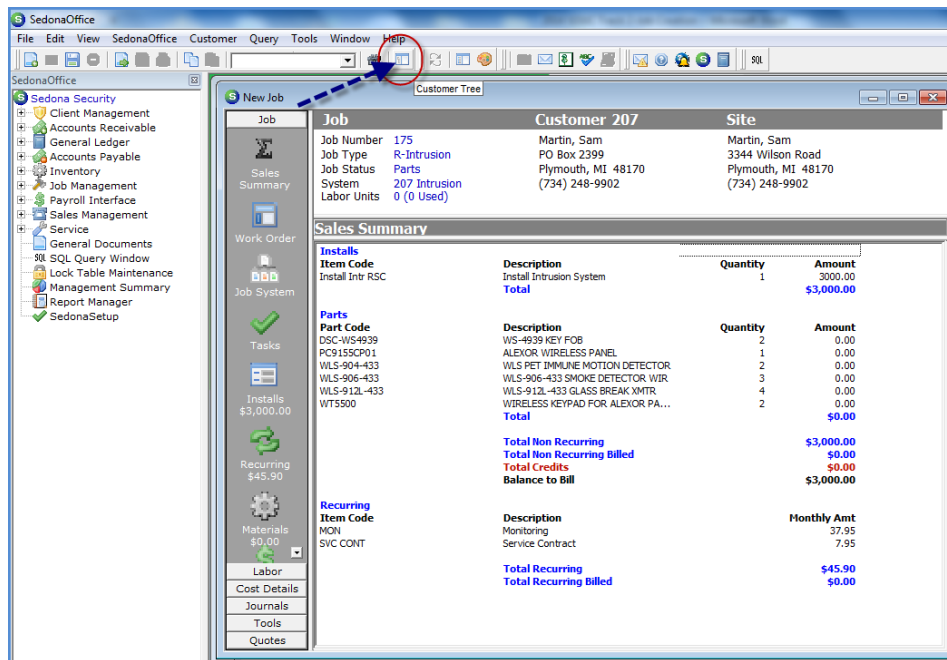
Notes

The Job System form will be displayed. Select a System Type, and click on the Apply button to save. At this point you will navigate to the Customer Explorer record for this Job and create the System record. Once finished, you will return to the Job System form to import the System that was created within the Customer Explorer.

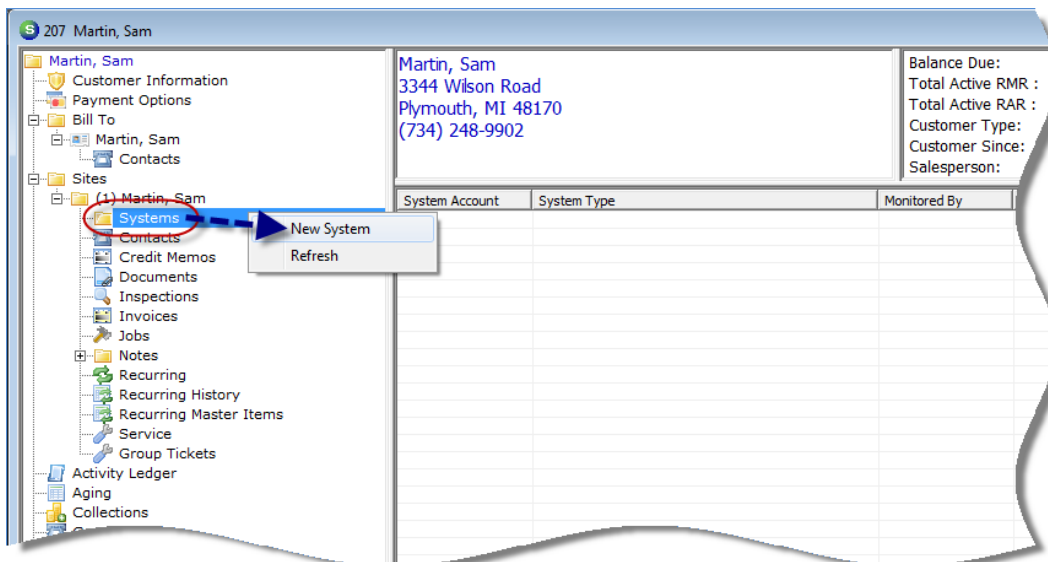
The screenshot shows the 'New Job' window with a sidebar on the left containing 'Work Order' and 'Job System' icons. The 'Job System' icon is highlighted with a blue dashed arrow. The main window is divided into three sections: 'Job', 'Customer 207', and 'Site'. The 'Job' section contains fields for Job Number (175), Job Type (R-Intrusion), Job Status (Parts), New System, and Labor Units (0 (0 Used)). The 'Customer 207' section contains contact information for Martin, Sam. The 'Site' section contains address information for Martin, Sam. Below these is the 'System' form, which is divided into 'System and Service Information' and 'Contract Information'. The 'System and Service Information' section includes a 'New System' checkbox, 'System Account' (207), 'System Type' (Intrusion), 'Panel Type', 'Location', 'Monitored By', 'Memo', 'Warranty' (Full Warranty), 'Service Level' (T&M-RSC), 'Serviced By' (MI-T&M), and 'Comments'. The 'Contract Information' section includes 'Contract Form', 'Contract Number' (207), 'Contract Months', 'Renewal Months', 'Cycle Purchase Order', 'Cycle P.O.', 'Inspections', 'Frequency', 'Service Problem Code', 'Service Level' (T&M-RSC), 'Next Inspection', and 'Notes'. The 'Apply' button at the bottom right of the 'System' form is circled in red and pointed to by a blue dashed arrow.

Notes

On the main application toolbar, click on the Customer Tree button to open the Customer Explorer.



From the Customer Tree, you will highlight *Systems*, right-click and select the *New System* option.



Fill out the System Information and click on Save when finished. Close the Customer Explorer to return to the Job record.

207 New System

Customer: 207 Martin, Sam Address: 3344 Wilson Road Plymouth, MI 48170

System | Custom Fields | Recurring | Equipment | Inspections | Central Station Tracking | Notes & Comments

System Information

System Account: 25-2071
System Type: Intrusion
Panel Type: DSC 1550
Location:
Monitored By: SedonaSecurity
Mem:
CS System Link:
Contract Form: 5 Year
Contract Number:
Contract Date: 12/31/2013
Contract Length: 60 Renewal Months: 12
OK to Rate Increase After: 1/1/2015
Cycle P.O.:
Cycle PO Expires:
 Inactive

Secondary Information

System Account:
Panel Type:
Transmission Format:
Service Information

Warranty: 90 P&L
Warranty Start:
Service Level: T&M-RSC
Primary Service Co: MI-T&M
Alt Service Co 1:
Alt Service Co 2:
Require PO:

Critical Message

Expires On:

Save Close

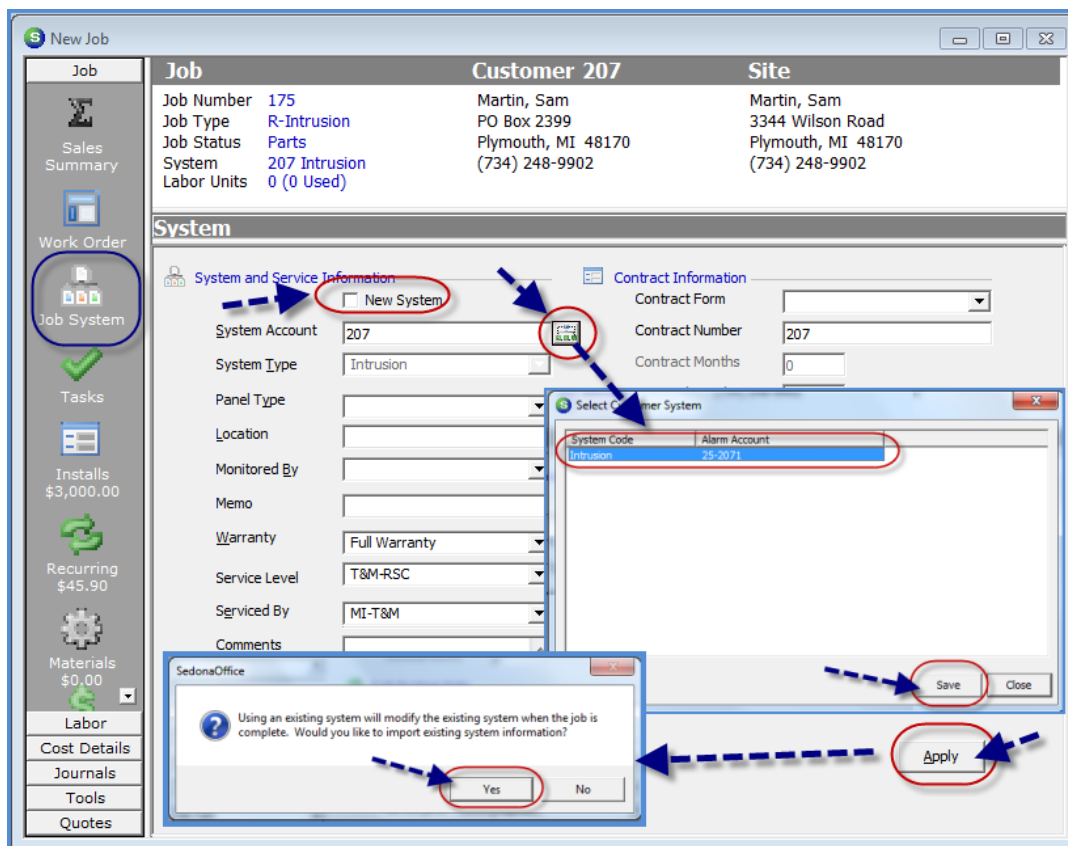
Notes

On the Job System form, un-check the *New System* checkbox. To the right of System Account field, click on the *System lookup* button, highlight the System record within the list then click on the *Save* button. Click on the *Apply* button on the Job System form. A message box will be displayed confirming you want to import the System Information into the Job System form; click on the *Yes* button to proceed.



If any information entered on the System form was incorrect, make certain to update the Job System form as well as the System record on the Customer Explorer. If a Service Ticket needs to be created prior to the closing of the Job, the Service Ticket will have the most accurate System information.

When the Job is closed, the System information on the Customer Explorer will be replaced with the System information from the Job.



The next step will be to review the items imported from the quote (Install Charges, Parts and Recurring) and review/enter the Job Costing Estimate.

New Job – Existing Customer from QW or WE

The process for creating a new Job for an existing Customer from either QuoteWerks or WeEstimate is similar to a new Customer; the only difference is the *Order Confirmation* form. This will display the existing Customer Number and information. If the quote was for an existing Site, that information will also be displayed.

QuoteWerks Order Confirmation

QuoteWerks Document No. AAAO1023

QuoteWerks Document Name ABC Blinds -CCTV

ABC Blinds
Walter White
4572 Walker Road
Plymouth MI

New Customer

Existing Customer Number 102

ABC Blinds
4572 Walker Road
Plymouth MI

Job Site < New Site >

OK Cancel

Notes

New Job – Manual Setup

Once a Customer, Site and System have been created, the new Job will be manually created. There are five basic steps in Job Setup:

- Job Work Order
- Job System
- Install Charges
- Recurring Charges
- Parts List
- Job Costing Estimate

Work Order

Depending on your company policies and procedures, fill in the Job Work Order form as completely as possible.

The screenshot shows a software interface for creating a new job. The top section, titled 'New Job', is divided into three columns: 'Job', 'Customer 210', and 'Site'. The 'Job' column contains: Job Number 180, Job Type, Job Status Parts, New System, and Labor Units. The 'Customer 210' column contains: Johnson, Sammy, 129 Starkweather Drive, Plymouth, MI 48170, and (734) 351-2209. The 'Site' column contains: Johnson, Sammy, 129 Starkweather Drive, Plymouth, MI 48170, and (734) 351-2209.

Below this is the 'Work Order Entry' section, which includes a 'Job Information' tab and a 'Locked' checkbox. The 'Job Information' section contains several input fields:

- Job Number: 180
- Job Type: R-Intrusion
- Description: Intrusion - Residential/Small Co
- Tax Group: MI-Wayne County
- Branch: MI
- HoldBack %: 0
- Install Company: MI
- Installer: [dropdown]
- Permits Required: [checkbox] with Permit 1, Permit 2, and Permit 3 fields.
- Prevailing Wage: [input]
- Project Manager: [dropdown]
- Salesperson: George.Miller
- P.O. Number: [input]
- Sold Date: 1/2/2014
- Projected Start: 1/3/2014
- Projected End: 1/3/2014
- Notes: **Call customer 10 minutes prior to arrival**
HOA rules: no power equipment prior to 9am or after 7pm.

An 'Apply' button is located at the bottom right of the form.

Job System

Import the System information by clicking on the lookup button to the right of the System Account field.

The screenshot shows the 'New Job' form in SedonaOffice. The form is divided into several sections: 'Job', 'Customer 210', and 'Site'. The 'Job System' section is highlighted with a blue circle in the left sidebar. The 'System' section contains the following fields:

System and Service Information	Contract Information
<input type="checkbox"/> New System	Contract Form: 5 Year
System Account: 25-2101	Contract Number: []
System Type: Intrusion	Contract Months: 60
Panel Type: VISTA 128BP	Renewal Months: 12
Location: Entry Closet	Cycle Purchase Order
Monitored By: SedonaSecurity	Cycle P.O.: []
Memo: []	Inspections
Warranty: Full Warranty	Frequency: ByRequestOnly
Service Level: T&M-RSC	Service Problem Code: N/A
Sgrviced By: MI-T&M	Service Level: T&M-RSC
Comments: []	Next Inspection: []
	Notes: []

An 'Apply' button is located at the bottom right of the form.

Install Charges

The screenshot displays the 'Job - 180 (Johnson, Sammy)' window. The top section shows job details for Job Number 180, Job Type R-Intrusion, Job Status Parts, System 25-2101 Intrusion, and Labor Units 6 (0 Used). Customer 210 is Johnson, Sammy, and Site is Johnson, Sammy, 129 Starkweather Drive, Plymouth, MI 48170, (734) 351-2209.

The 'Installs' section contains a table with the following data:

Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Units	Cost Type	Cost
Install Intr Res	Install Intrusion System	Phase 01	1	995.00	995.00	69.65	6	L	0.00

Below the table, 'Total Install Labor Units' is 6 and 'Installation Totals' are 995.00 and 69.65.

The bottom section has input fields for Item (Install Intr Res), Description (Install Intrusion System), Phase Code (Phase 01), Qty (1), Unit Price (995.00), Labor Units (6), Cost Type (L), and Cost (0.00). Buttons for Save, New, Delete, and Apply are present.

The left sidebar contains navigation options: Job, Sales Summary, Work Order, Job System, Tasks, Installs (\$995.00), Recurring (\$0.00), Materials (\$0.00), Job Costing, Labor, Cost Details, Journals, Tools, and Quotes. The 'Installs' option is highlighted with a blue circle and a blue arrow pointing to the main table.

or

Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Units	Cost Type	Cost
Install Intr Res	Install Intrusion System	Prewire	1	398.00	398.00	27.86	3 L		0.00
Install Intr Res	Install Intrusion System	Final	1	597.00	597.00	41.79	3 L		0.00

Total Install Labor Units Installation Totals

Item: Qty:
 Description: Unit Price:
 Phase Code: Labor Units:
 Final
 Cost Type:
 Cost:

Notes

Recurring Charges

Job - 180 (Johnson, Sammy)

Job	Customer 210	Site
Job Number 180	Johnson, Sammy	Johnson, Sammy
Job Type R-Intrusion	129 Starkweather Drive	129 Starkweather Drive
Job Status Parts	Plymouth, MI 48170	Plymouth, MI 48170
System 25-2101 Intrusion	(734) 351-2209	(734) 351-2209
Labor Units 6 (0 Used)		

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	Maste
Monitoring	Monitoring Services		Quarterly	12:00:00 AM	25.00	75.00	1.75	N
Maint Agr	Maintenance Agreement		Quarterly		18.00	54.00	0.18	N

Total Monthly Amount: 43.00 1.93

Recurring Item: Monitoring
 Description: Monitoring Services RMR Amount: 25.00
 Sub Item Of: Cycle Amount: 75.00
 Bill Cycle: Quarterly Enter as Monthly Amt Only
 Cycle Start: Save New Delete Apply

Notes

Or

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	Master
Monitoring	Monitoring Services	Monitoring	Quarterly	12:00:00 AM	25.00	75.00	1.75	N
Maint Agr	Maintenance Agreement	Monitoring	Quarterly	12:00:00 AM	18.00	54.00	0.18	N

Total Monthly Amount: 43.00 1.93

Recurring Item: Monitoring
Description: Monitoring Services
Sub Item Of: Monitoring
Bill Cycle: Quarterly
Cycle Start: []
RMR Amount: 25.00
Cycle Amount: 75.00
 Enter as Monthly Amt Only

Buttons: Save, New, Delete, Apply

Notes

Parts

The screenshot shows the SedonaOffice interface for Job 180. The top section displays job information: Job Number 180, Job Type R-Intrusion, Job Status Parts, System 25-2101 Intrusion, and Labor Units 6 (0 Used). Customer and site information for Johnson, Sammy is also shown. Below this is a 'Materials' section with a table listing various parts and their costs. A red circle highlights the 'Phase' column in the table. The 'Materials' table includes columns for Phase, Part, Description, Vendor, Qty, Location, Unit, Ext, Tax, LU, Issued, Stock, PO, and PO Description. At the bottom of the window, there are buttons for 'Documents' and 'Apply', and a 'Total Material LU' field showing 0.

Phase	Part	Description	Vendor	Qty	Location	Unit	Ext	Tax	LU	Issued	Stock	PO	PO Description
Prewire	VISTA128BP	VISTA128	ADI	1		0	0.00	0.00	0		<input checked="" type="checkbox"/>	43.46	
Final	5817	Wireless Transmitter	ADI	2		0	0.00	0.00	0		<input checked="" type="checkbox"/>	50.42	
Final	5853	Wireless Glassbreak	ADI	4		0	0.00	0.00	0		<input checked="" type="checkbox"/>	65.00	
Final	5881ENH	Wireless Receiver	Tri-f	1		0	0.00	0.00	0		<input checked="" type="checkbox"/>	34.45	
Final	6160	ALPHA ENGLISH KEYPAD	ADI	2		0	0.00	0.00	0		<input checked="" type="checkbox"/>	00.87	
Final	995	Recessed Motion Detector	Tri-f	2		0	0.00	0.00	0		<input checked="" type="checkbox"/>	38.79	
Final	WAVE2	TWO TONE SIREN	ADI	1		0	0.00	0.00	0		<input checked="" type="checkbox"/>	8.72	

Notes

Job Costing Estimate

Job - 180 (Johnson, Sammy)

Job	Customer 210	Site
Job Number: 180	Johnson, Sammy	Johnson, Sammy
Job Type: R-Intrusion	129 Starkweather Drive	129 Starkweather Drive
Job Status: Parts	Plymouth, MI 48170	Plymouth, MI 48170
System: 25-2101 Intrusion	(734) 351-2209	(734) 351-2209
Labor Units: 6 (0 Used)		

Costing

Estimated Costs		Actual Costs		WIP	
Income		Income			
Install Charge	\$995.00	Install Charge	\$0.00	Material 1	\$0.00
Change Orders	\$0.00			Material 2	\$0.00
Costs		Costs		Labor	\$0.00
Parts	\$1,026.79	Parts	\$0.00	Overhead	\$0.00
Labor	240.00	Labor	\$0.00	Commissions	\$0.00
Overhead	0.00	Overhead	\$0.00	Misc Other	\$0.00
Other	\$75.00	Other	\$0.00	Total WIP	\$0.00
Sub Total	\$1,341.79	Sub Total	\$0.00		
Sub Profit/Loss	(\$346.79) -35%	Sub Profit/Loss	\$0.00 100%		
Commissions	\$0.00	Commissions	\$0.00		
Total	\$1,341.79	Total	\$0.00		
Profit/Loss	(\$346.79) -35%	Profit/Loss	\$0.00 100%		
Recurring	\$43.00	Recurring	\$0.00		
Payback Period	8.06 Months				
Hold Back	\$0.00				

Include WIP Amounts

Notes

Itemizing Labor Cost Estimate

The screenshot displays the SedonaOffice interface for Job - 180 (Johnson, Sammy). The main window is divided into several sections:

- Job Information:** Job Number 180, Job Type R-Intrusion, Job Status Parts, System 25-2101 Intrusion, Labor Units 6 (0 Used).
- Customer 210:** Johnson, Sammy, 129 Starkweather Drive, Plymouth, MI 48170, (734) 351-2209.
- Site:** Johnson, Sammy, 129 Starkweather Drive, Plymouth, MI 48170, (734) 351-2209.
- Costing:** A table showing income and costs. Income includes Install Charge (\$995.00) and Change Orders (\$0.00). Costs include Parts (\$1,026.79), Labor (240.00), Overhead (\$0.00), and Other (\$75.00). Sub Total is \$1,341.79, Sub Profit/Loss is (\$346.79) (-25.8%), Total is \$1,341.79, Profit/Loss is (\$346.79) (-25.8%), Recurring is \$43.00, and Payback Period is 8.06 Months.
- Job Labor Tasks:** A modal window showing a table of labor tasks. The table has columns for Labor Task, Description, Phase, Estimated Units, and Est Unit Cost. It lists two tasks: PW (Prewire) and *Trim-Out (Trim-Out), both with 3 estimated units and an estimated unit cost of 40.00. A Totals row shows 6 estimated units and a total cost of 240.00. Below the table are dropdown menus for Labor Task (*Trim-Out) and Phase Code (Trim-Out), and input fields for Estimated Units (3) and Est Unit Cost (40.00). Buttons for Save, New, Delete, Apply, and Close are at the bottom.

Red annotations highlight the 'Apply' button in the Job Labor Tasks window and the 'Apply' button in the Costing section. A blue arrow points from the 'Apply' button in the Job Labor Tasks window to the 'Apply' button in the Costing section.