

SedonaOffice

13TH ANNUAL USERS CONFERENCE

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SedonaOffice 101

Job Management I

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Job Management I Overview

Job Management I will focus on creating a new Job and some basic processing functions. Topics included during this session:

- Creating a new Job
 - Work Order
 - Job System Information
 - Install Charges
 - Recurring Charges
 - Materials List
 - Capture Original Parts List
 - Commissions
 - Review of / Managing the Job Task List
- Job Purchase Orders
- Job Parts
 - Issue from Stock
 - Return to Stock
- Job Appointments
 - Scheduling
 - Dispatching

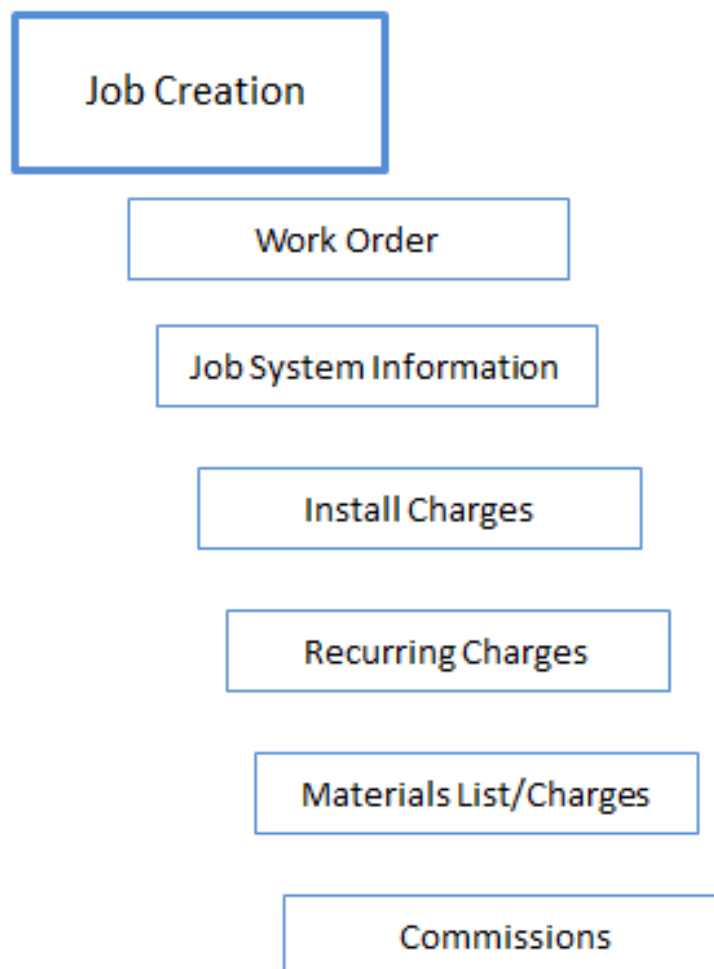
Notes

Creating a New Job

There are three methods of creating a new Job in SedonaOffice; this class will focus on manually creating a Job.

- Creating a Job when converting a Prospect Opportunity into a Customer/Job
- Creating a Job from a QuoteWerks or WeEstimate Quote
- Creating a Job manually

Your company should plan the process flow on which staff members will be creating new Jobs and how the processing of Jobs will flow through to various departments within your company.



Notes

Work Order

Default New Work Order form

The screenshot shows the 'New Job' window with the 'Work Order' tab selected. The form is titled 'New Work Order' and contains the following fields:

Job	Customer 1001	Site
Job Number: 2004	Johnson, Alexis 25165 Derby Circle Laguna Hills, CA 92653 (949) 910-2230	Johnson, Alexis 25165 Derby Circle Laguna Hills, CA 92653 (949) 910-2230

Work Order Entry

Job Information Locked

Job Number: 2004

Job Type: [Dropdown]

Description: [Text]

Tax Group: Mission Viejo

Branch: OC

HoldBack %: [Text]

Install Company: [Dropdown]

Installer: [Dropdown]

Prevailing Wage: [Text]

Project Manager: [Dropdown]

Salesperson: Oliver.Blais

P.O. Number: [Text]

Sold Date: [Text]

Projected Start: [Text]

Projected End: [Text]

Permits Required:

Permit 1: [Text]

Permit 2: [Text]

Permit 3: [Text]

Notes: [Text Area]

Apply

Completed Work Order form

The screenshot shows the 'New Job' window with the 'Work Order' tab selected. The form is titled 'New Work Order' and contains the following fields:

Job	Customer 1001	Site
Job Number: 2004	Johnson, Alexis 25165 Derby Circle Laguna Hills, CA 92653 (949) 910-2230	Johnson, Alexis 25165 Derby Circle Laguna Hills, CA 92653 (949) 910-2230

Work Order Entry

Job Information Locked

Job Number: 2004

Job Type: Intrusion-Res

Description: Intrusion System - Residential

Tax Group: Mission Viejo

Branch: OC

HoldBack %: 0

Install Company: OC

Installer: [Dropdown]

Prevailing Wage: [Text]

Project Manager: [Dropdown]

Salesperson: Oliver.Blais

P.O. Number: [Text]

Sold Date: 12/15/2014

Projected Start: 12/17/2014

Projected End: 12/17/2014

Permits Required:

Permit 1: Local Alarm-Leave Appl.

Permit 2: [Text]

Permit 3: [Text]

Notes: ****Must wear booties inside residence****

Apply

Notes

Creating a New Job

Job System Information

Default Job System form

The screenshot shows the 'New Job' form with the following data:

Job	Customer 1001	Site
Job Number: 2004	Johnson, Alexis	Johnson, Alexis
Job Type: Intrusion-Res	25165 Derby Circle	25165 Derby Circle
Job Status: Parts	Laguna Hills, CA 92653	Laguna Hills, CA 92653
New System	(949) 910-2230	(949) 910-2230
Labor Units: 0 (0 Used)		

System Information:

- New System
- System Account: 1001
- System Type: [Dropdown]
- Panel Type: [Dropdown]
- Location: [Text]
- Monitored By: [Dropdown]
- Memo: [Text]
- Warranty: One Year P & L
- Service Level: T&M-Com
- Serviced By: SD
- Comments: [Text Area]

Contract Information:

- Contract Form: [Dropdown]
- Contract Number: 1001
- Contract Months: [Text]
- Renewal Months: [Text]

Inspections:

- Frequency: [Dropdown]
- Service Problem Code: [Dropdown]
- Service Level: T&M-Com
- Next Inspection: [Text]
- Notes: [Text Area]

Imported System Information from Customer Setup

The screenshot shows the 'New Job' form with the following data:

Job	Customer 1001	Site
Job Number: 2004	Johnson, Alexis	Johnson, Alexis
Job Type: Intrusion-Res	25165 Derby Circle	25165 Derby Circle
Job Status: Parts	Laguna Hills, CA 92653	Laguna Hills, CA 92653
New System	(949) 910-2230	(949) 910-2230
Labor Units: 0 (0 Used)		

System Information:

- New System
- System Account: 10-03-2201
- System Type: Intrusion
- Panel Type: VISTA 128B
- Location: [Text]
- Monitored By: AMC
- Memo: [Text]
- Warranty: One Year P & L
- Service Level: T&M-Res
- Serviced By: OC
- Comments: [Text Area]

Contract Information:

- Contract Form: 3 Year
- Contract Number: [Text]
- Contract Months: 36
- Renewal Months: 36

Inspections:

- Frequency: ByRequestOnly
- Service Problem Code: N/A
- Service Level: T&M-Res
- Next Inspection: [Text]
- Notes: [Text Area]

Notes

Creating a New Job

Install Charges

Default Installs form

Job
 Job Number 2004
 Job Type Intrusion-Res
 Job Status Parts
 System
 Labor Units 0 (0 Used)

Customer 1001
 Johnson, Alexis
 25165 Derby Circle
 Laguna Hills, CA 92653
 (949) 910-2230

Site
 Johnson, Alexis
 25165 Derby Circle
 Laguna Hills, CA 92653
 (949) 910-2230

Item	Description	Phase	QTY	Unit Price	Extended Price

Total Install Labor Units Installation Totals

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

Buttons: Save, New, Delete, Apply

Completed Installs form

Job
 Job Number 2004
 Job Type Intrusion-Res
 Job Status Parts
 System
 Labor Units 6 (0 Used)

Customer 1001
 Johnson, Alexis
 25165 Derby Circle
 Laguna Hills, CA 92653
 (949) 910-2230

Site
 Johnson, Alexis
 25165 Derby Circle
 Laguna Hills, CA 92653
 (949) 910-2230

Item	Description	Phase	QTY	Unit Price	Extended Price
INST Int Res	Install Intrusion System	Install Devices	1	2100.00	2100.00
Disc-Inst	Discount - Installation	Install Devices	1	-210.00	-210.00

Total Install Labor Units Installation Totals

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

Buttons: Save, New, Delete, Apply

Notes

Creating a New Job

Recurring Charges

Default Recurring form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Recurrings

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle

Total Monthly Amount 0.00 0.00

Recurring Item: [Dropdown]
 Description: [Text] RMR Amount: [Text]
 Sub Item Of: [Dropdown] Cycle Amount: [Text] Enter as Monthly Amt Only:
 Bill Cycle: [Dropdown] Cycle Start: [Text] [Calendar]
 [Save] [New] [Delete] [Apply]

Completed Recurring form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Recurrings

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	M
MON	Monitoring		Quarterly		39.00	117.00	0.00	
RAD	Radio/Cellular Backup		Quarterly		12.00	36.00	0.00	
WEB	Web Access		Quarterly		15.00	45.00	0.00	
RMR Bundle Disc	RMR Bundle Discount		Quarterly		-6.00	-18.00	0.00	

Total Monthly Amount 60.00 0.00

Recurring Item: [Dropdown]
 Description: [Text] RMR Amount: [Text]
 Sub Item Of: [Dropdown] Cycle Amount: [Text] Enter as Monthly Amt Only:
 Bill Cycle: [Dropdown] Cycle Start: [Text] [Calendar]
 [Save] [New] [Delete] [Apply]

Notes

Creating a New Job

Materials

Default Materials form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Materials

Show Phases

Phase	Part	Description	Vendor	Qty	Location	Unit	Ext	Tax	LU	Issued	Stock	PO	PO
*											<input type="checkbox"/>		

Total Material LU 0 Sub Total 0.00 0.00

Documents Apply

Completed Materials form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Materials

Show Phases

Phase	Part	Description	Vendor	Qty	Location	Unit	Ext	Tax	LU	Issued	Stock	PO	PO
▶ Install Devices	V128BP	COMMUNICATOR	ADI	1		0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
▶ Install Devices	6150	KEYPAD 6150 LCC	ADI	1		0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
▶ Install Devices	S894	WIRELESS MOTIC	ADI	1		0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
▶ Install Devices	S894	WIRELESS MOTIC	ADI	1		0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
▶ Install Devices	WAVE2	SIREN WAVE2	ADI	1		0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
*											<input type="checkbox"/>		

Total Material LU 0 Sub Total 0.00 0.00

Documents Apply

Notes

Creating a New Job

Capture Original Parts List

Materials

Show Phases

Phase	Part	Description	Vendor	Qty	Location	Unit Price	Ext Price	Tax	LU	Issued	Stock	PO	PO
Inst	V128BP	COMMUNICATOR VIS	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	6150	KEYPAD 6150 LCD	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	1	Hallway	0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	1	Family Room	0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	WAVE2	SIREN WAVE2	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
*											<input type="checkbox"/>		

Total Material LU: 0 Sub Total: 0.00 0.00

Capture Original Parts Documents Apply

“Captured” Parts List

Materials

Working Part List Original Part List Show Phases

Phase	Part	Description	Vendor	Qty	Location	Unit Price	Ext Price	Tax	LU	Issued	Stock	PO	PO
Inst	V128BP	COMMUNICATOR VIS	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	6150	KEYPAD 6150 LCD	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	1	Hallway	0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	1	Family Room	0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	WAVE2	SIREN WAVE2	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
*											<input type="checkbox"/>		

Total Material LU: 0 Sub Total: 0.00 0.00

Override Parts Capture Documents Apply

Notes

Creating a New Job

Commissions

Default Commissions form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Commissions

Commissionable / Splits

Install Total 1890.00 Salesperson 1 Oliver.Blais 100.00 %
 Commissionable % 100.00 Salesperson 2 0.00 %
 Commissionable 1890.00
 Recurring 60.00

Salesperson	Commission Type	Post Date	Commissionable	Rate	Commission

Total Commission 0.00

Salesperson **Oliver.Blais** Commissionable
 Commission Type Rate
 Posting Date (GL) 12/15/2014 Commission
 Select from all other Salespeople

Completed Commissions form

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

Commissions

Commissionable / Splits

Install Total 1890.00 Salesperson 1 Oliver.Blais 100.00 %
 Commissionable % 100.00 Salesperson 2 0.00 %
 Commissionable 1890.00 Split Sales Production
 Recurring 60.00

Salesperson	Commission Type	Post Date	Commissionable	Rate	Commission
Oliver.Blais	RMR	12/15/2014	60.00	300.00	180.00
Oliver.Blais	Install	12/15/2014	1890.00	10.00	189.00

Total Commission 369.00

Salesperson **Oliver.Blais** Commissionable 60.00
 Commission Type RMR Rate 300.00
 Posting Date (GL) 12/15/2014 Commission 180.00
 Select from all other Salespeople

Notes

Job Task List

The Job Task List is designed to manage the work flow of a Job, determine when a Job may be invoiced, and when a Job will become locked.

Job **Customer 1001** **Site**

Job Number 2004 Johnson, Alexis Johnson, Alexis
 Job Type Intrusion-Res 25165 Derby Circle 25165 Derby Circle
 Job Status Parts Laguna Hills, CA 92653 Laguna Hills, CA 92653
 System (949) 910-2230 (949) 910-2230
 Labor Units 6 (0 Used)

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech
1	Inst	1 Order Parts	Parts	N	N				
2	Inst	2 Sch Install	Scheduling	N	N				
3	Inst	3 Install	Install Equipment	Y	N				
4	Inst	4 CS Activate	CS Activation	N	N				
5	Inst	5 RMR Activate	CS Activation	Y	N				
6	Inst	6 Jobcost	Jobcost	N	N				

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

Job Task: [Dropdown] Sequence Locks Job:

Job Status: [Dropdown] Comments: [Text Area]

Phase Code: [Dropdown]

Labor Days: 0.0

Schedule Date: [Calendar Icon]

Invoice

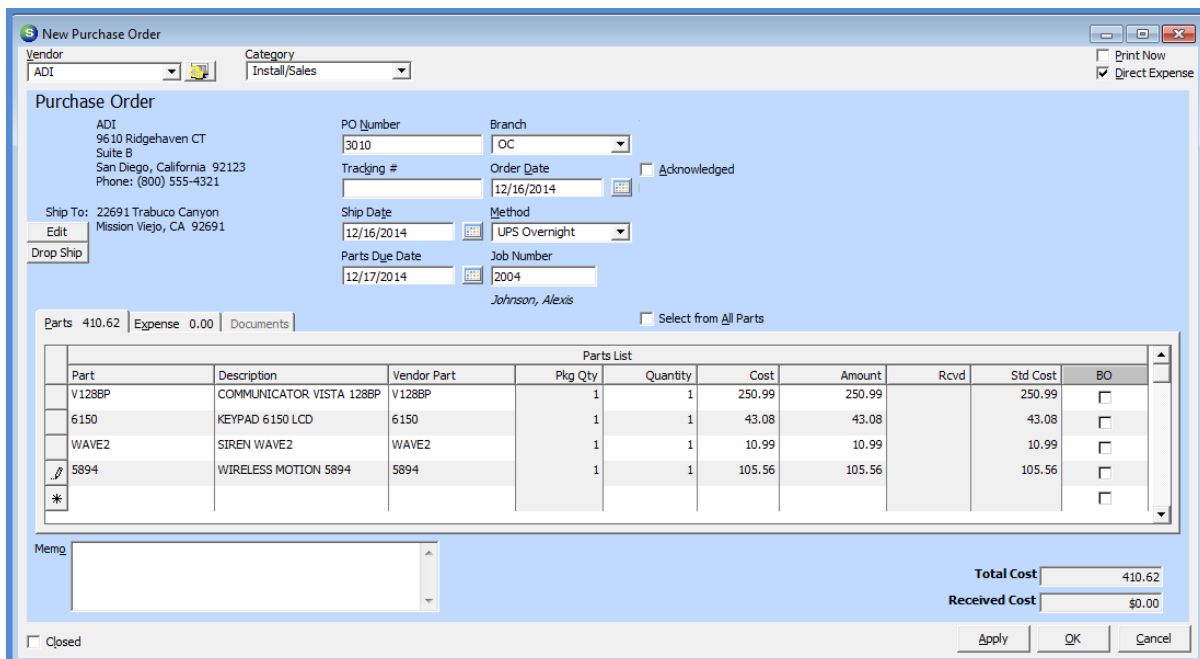
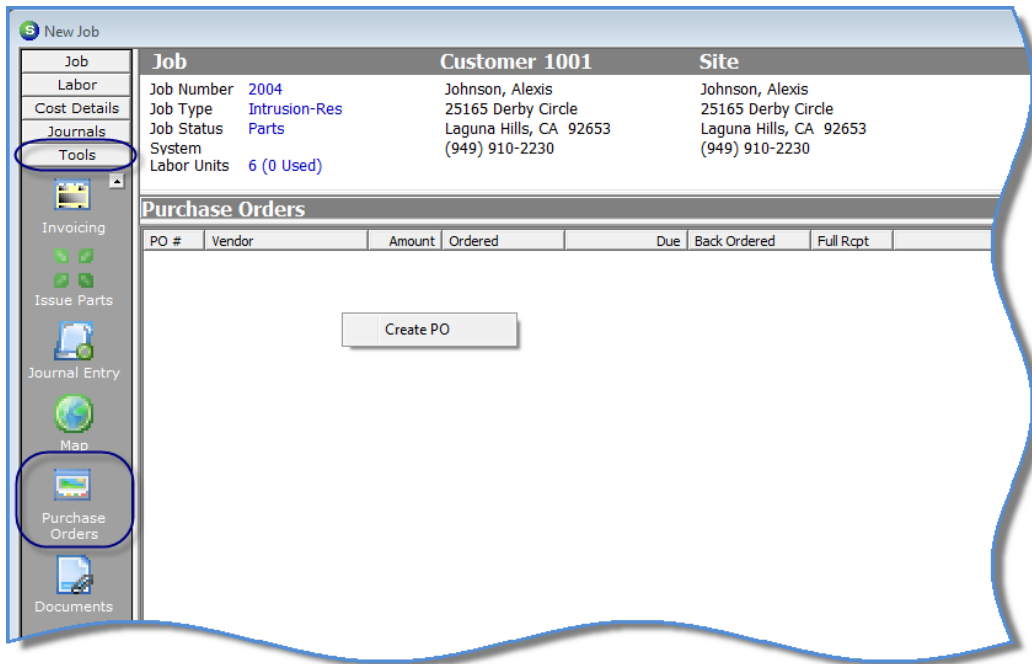
Save New Remove

Apply

Notes

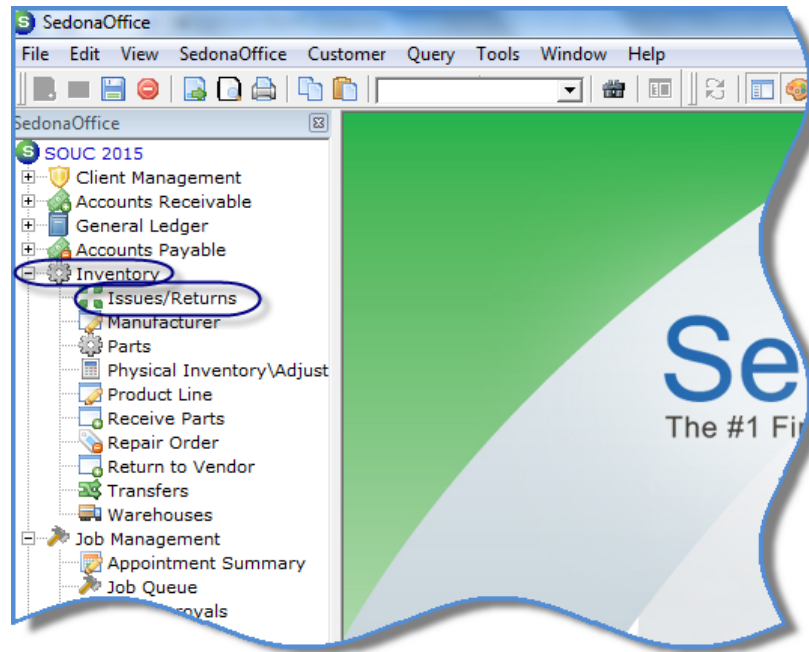
Job Parts

Create Purchase Order for Parts



Notes

Issue Parts to Job from a Warehouse



The 'Issue Parts' dialog box is shown with the following fields and options:

- Job:** Warehouse (OC), Job Number (2004), Phase Code (Inst), Memo (empty)
- Service:** Johnson, Alexis
- Other:** Issue Date (12/19/2014), Category (Install/Sales), In Holding (checkbox), Holding Location (empty)
- Return to Stock
- View Serial/Lot No

Parts List				
Part	Description	Detail	Qty	Location
5894	WIRELESS MOTION 5894	PIR PET IMUNE	1	Hallway

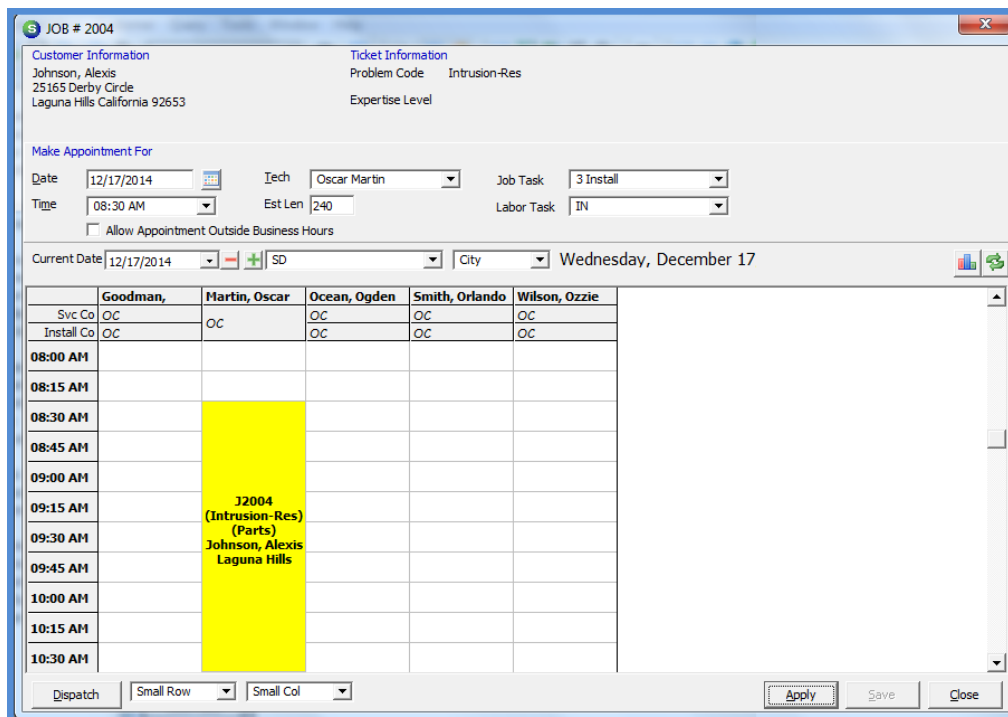
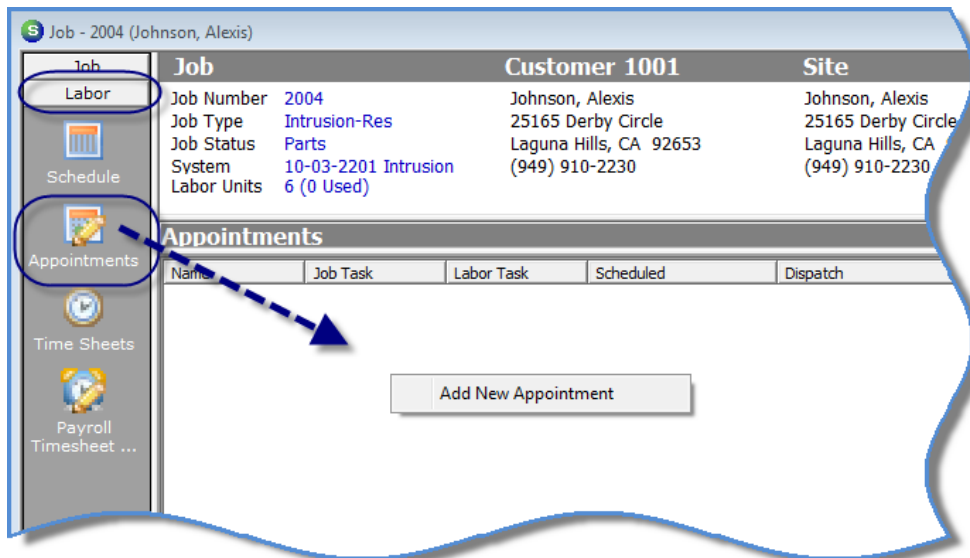
Buttons at the bottom: Set All Qty to 0, Save, New, Close

Notes

Job Appointments

Create an Installer Appointment

Job appointments may be created within the Job from the Labor toolbar or from SedonaSchedule. Job appointments created within a Job record will display on the Schedule Board within SedonaSchedule.



Notes

Dispatch Installer Appointment

Dispatching Job appointments may be performed within the Job or from SedonaSchedule. To dispatch from the Job, double-click on the Job Appointment then click on the Dispatch button (lower left of the form).

JOB # 2004

Customer Information		Ticket Information		Appointment	
Johnson, Alexis 25165 Derby Circle Laguna Hills California 92653		Problem Code: Intrusion-Res Expertise Level:		Scheduled: 12/17/2014 8:30:00 AM Tech: Oscar Martin Est Len: 240 min.	

Change Appointment To

Date: 12/17/2014 | Tech: Oscar Martin | Job Task: 3 Install
 Time: 08:30 am | Est Len: 240 | Labor Task: IN
 Allow Appointment Outside Business Hours

Current Date: 12/17/2014 | SD | City: | Wednesday, December 17,

	Goodman, OC	Martin, Oscar	Ocean, Ogden	Smith, Orlando	Wilson, Ozzie
Svc Co	OC	OC	OC	OC	OC
Install Co	OC	OC	OC	OC	OC
08:00 AM					
08:15 AM					
08:30 AM					
08:45 AM					
09:00 AM					
09:15 AM					
09:30 AM					
09:45 AM					
10:00 AM					
10:15 AM					
10:30 AM					

Dispatch | Small Row | Small Col | Apply | Save | Close

Dispatch

Job 2004

Name: Johnson, Alexis

Address: 25165 Derby Circle
Laguna Hills California 92653

Installer: Oscar Martin
 Job Type: Intrusion-Res
 Estimated Time: 240
 Job Task: 3 Install
 Labor Task: IN

Dispatch Times

Dispatched: 12/17/2014 8:00 AM
 Arrived: 12/17/2014 8:30 AM
 Departed: 12/17/2014 1:30 PM

Save | Close

Notes

Job Parts – Return to Stock

Any un-used parts are returned to a warehouse (the installer or the main warehouse).

The 'Issue Parts' window contains the following fields and values:

- To Warehouse:** OC
- Job Number:** 2004 (Name: Johnson, Alexis)
- Issue Date:** 12/19/2014
- Category:** Install/Sales
- Phase Code:** Inst
- Memo:** part not used on Job
- In Holding:**
- Holding Location:** (empty)
- Return to Stock:**
- View Serial/Lot No:**

Part	Description	Detail	Qty	Location	Serial No	Lot No
5894	WIRELESS MOTION 5894	PIR PET IMMUNE	1	Hallway		

Once un-used parts have been returned to a warehouse, you will need to modify the Working parts list to reduce the part quantity or if the Job is locked, you will need to create a Change Order to make changes to the Materials list. Change Orders will be covered in the Job Management II session.

The 'Materials' window shows the following table:

Phase	Part	Description	Vendor	Qty	Location	Unit Price	Ext Price	Tax	LU	Issued	Stock	PO	PO
Inst	V128BP	COMMUNICATOR VIS	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	6150	KEYPAD 6150 LCD	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	0	Hallway	0.00	0.00	0.00	0	0	<input type="checkbox"/>	0.00	
Inst	5894	WIRELESS MOTION S	ADI	1	Family Room	0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	
Inst	WAVE2	SIREN WAVE2	ADI	1		0.00	0.00	0.00	0	1	<input type="checkbox"/>	0.00	

Summary: Total Material LU: 0, Sub Total: 0.00

Notes