



Service - Part 1

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SedonaSchedule

SedonaSchedule is comprised of two main elements; the Schedule Board and the Ticket Queue. This session will focus on understanding and configuring the Schedule Board.

SedonaSchedule – Schedule Board

The **Schedule Board** is used to create and manage Technician Appointments. Ticket, Job and Miscellaneous appointments that have been created appear on the Schedule Board.

There are many options and features within the Schedule Board including:

- Creating and Managing Display Groups
- Creating Tickets
- Generating Inspection Tickets
- Scheduling Technician Appointments (Tickets, Jobs, Miscellaneous)
- Dispatching Technician Appointments (Tickets & Jobs)
- Rescheduling Appointments
- Deleting Appointments
- Clock-out & Clock-In on an Appointment

Schedule Board Features/Options

The Schedule Board consists of several components; a Ribbon at the top, the Calendar/Detail Viewer shown on the left and the Display area on the right (Scheduled Appointments). Information that is displayed within Display area is controlled by which option the User clicks on the Ribbon.

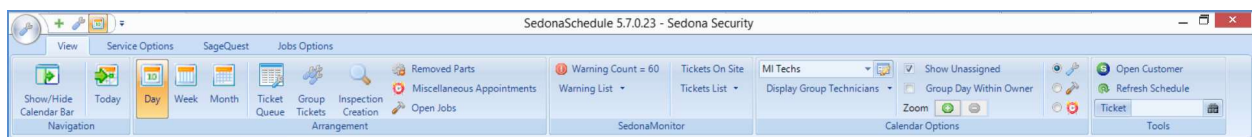
The screenshot displays the SedonaSchedule 5.7.0.23 - Sedona Security application. The interface includes a ribbon at the top with various options like 'View', 'Service Options', 'SageQuest', and 'Jobs Options'. On the left, there is a 'Calendar' view showing a grid for November and December 2015, and a 'Detail' view for 'Tkt 2484(SC)'. The detail view shows site information (Jones Flower Mart #1), system (7812 Intrusion), and technician (Mike McKenzie). The main display area is a grid with columns for technicians: [Unassigned], Jimmy John, Larry Jackson, Mack Miller, Mike McKenzie, Marlin Larson, Marshall Watson, Mark Taylor, and Mike Walker. The rows represent time slots from 12:00 AM to 11:00 PM. Three tickets are visible: 'TKT 2486 - Add Equipment (Medium) Plymouth Johnson, Alexis' at 8:00 AM, 'TKT 2358 - Code Changes (Low) Novi Desire Waldroup @S1' at 10:00 AM, and 'TKT 2484 - Insp-Other (Medium) Plymouth Jones Flower Mart #1' at 11:00 AM.

Terminology

To be able to understand the concepts and instructions provided for SedonaSchedule, It is important to understand the appropriate application terminology. When contacting the SedonaOffice Support Team, it is important to use the correct terminology for faster assistance from a support representative.

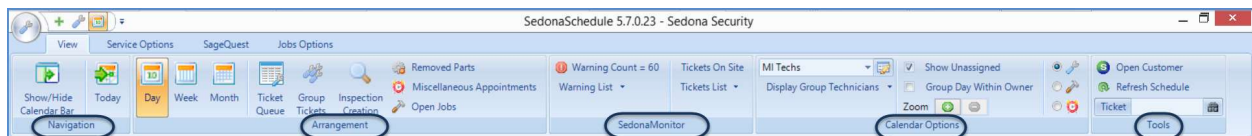
The Ribbon

The Ribbon is located at the top of the SedonaSchedule form; contains options from which the User clicks to activate an option.



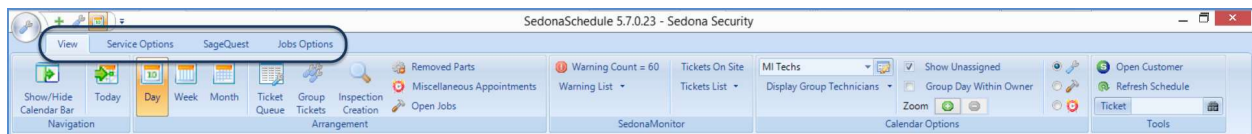
Ribbon Groups

Within the Ribbon are various groups of functions; these are referred to as Ribbon Groups.



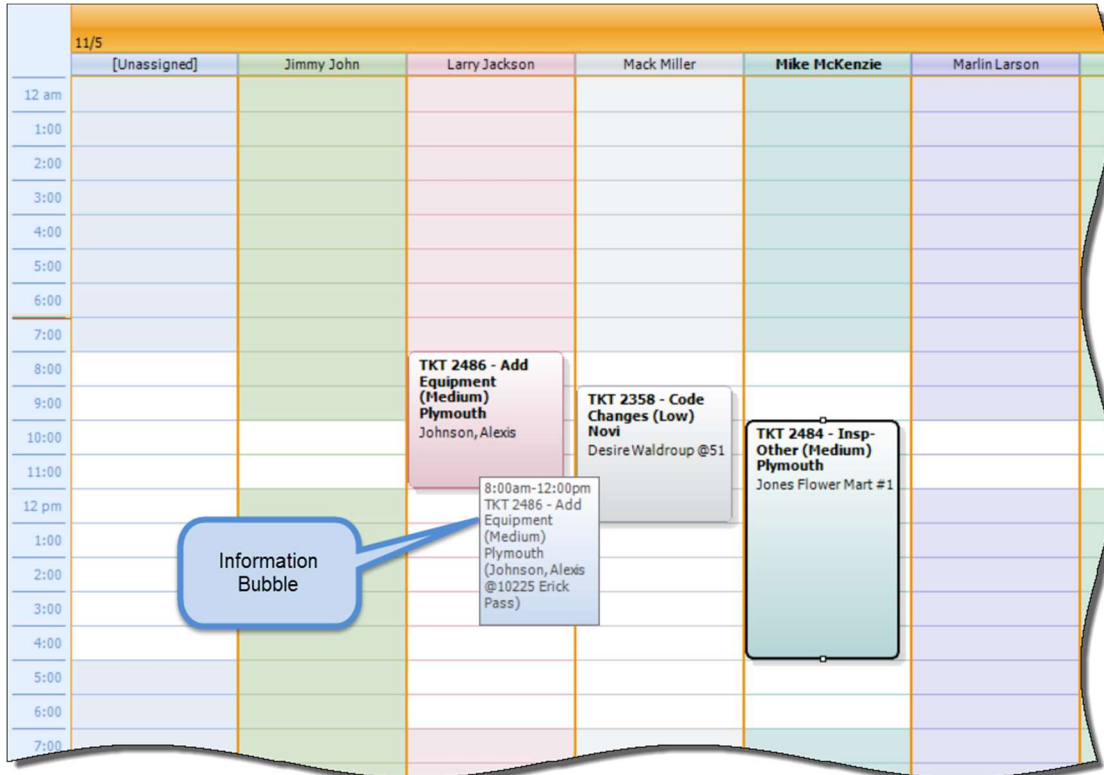
Menu Tabs

Menu Tabs appear throughout the SedonaSchedule application and contain additional options from which to select. The Menu Tabs appear above the Ribbon.



Information Bubble

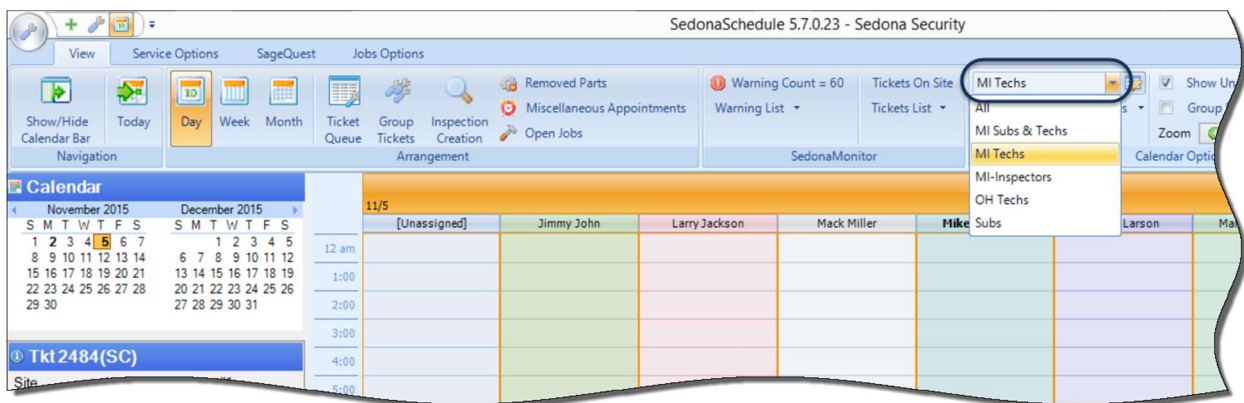
When hovering over an appointment on the Schedule Board, additional information is displayed within the Information Bubble.



Display Group

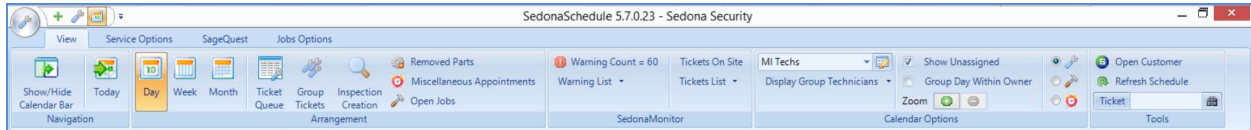
A Display Group is a grouping of one or more Technicians. Within the Schedule Board, you are able to choose to view a single Display Group or all Technicians within the Company. A Technician may be associated with one or multiple Display Groups. Your company creates the Display Groups to which your Users will have access.

A Display Group could contain all or selected Technicians in a Service Company, a geographical area, a service Route or any logical grouping of Technicians to make scheduling easier.



The Ribbon Features

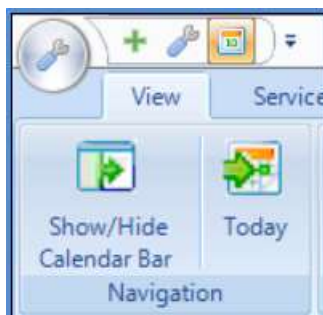
The Ribbon, which is comprised of multiple Ribbon Groups, displays and controls the options for navigating to various functions within SedonaSchedule.



Navigation Ribbon Group

This Ribbon Group contains two options; *Show/Hide Calendar Bar* and *Today*.

- **Show/Hide Calendar Bar** – This is a toggle button which will display or remove the Calendar Bar from view.
- **Today** – selecting this option will outline the current system date in red on the Calendar.



Arrangement Ribbon Group

This Ribbon Group contains several options as listed below.

- Day, Week, Month - selecting one of these options controls the period of time that is displayed in the Schedule Board.
- Ticket Queue - selecting this option will display the Ticket Queue.
- Group Tickets - selecting this option will display the list of Group Tickets. This feature is not installed unless your company requests activation.
- Inspection Creation - Clicking this button will open options for viewing a list of upcoming or past due inspections. New Inspection Tickets are also generated from this option section.
- Removed Parts - Selecting this option displays a list of parts that were replaced on tickets. By highlighting a single date or date range on the Calendar will display a list of all parts replaced within the selected date range.
- Miscellaneous Appointments - Selecting this option will display a Menu Tab for Miscellaneous Appointments. Selecting this Menu Tab will display a new Ribbon with options for managing, creating, editing and purging Miscellaneous Appointments. Miscellaneous appointments are used to block out time on the Schedule Board where a Technician is not available to be scheduled.
- Open Jobs (**List**) - Clicking this button will display the list of Open Jobs. Job Appointments are created from the Open Jobs List.



SedonaMonitor Ribbon Group

The SedonaMonitor Ribbon Group contains critical information for managing Tickets and Technicians. If your company is Live Dispatching Technicians, then this information will be very valuable.

This ribbon group is comprised of four options; *Warning Count*, *Warning List*, *Tickets on Site* and *Ticket List*.

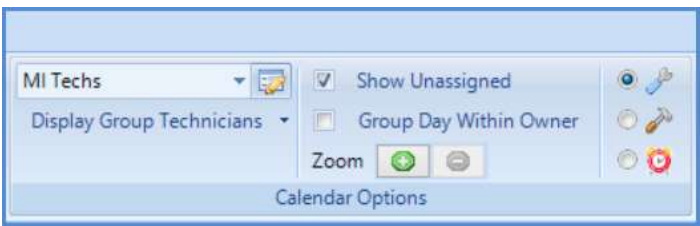
- **Warning Count** – The Warning Count is for Display only; if any scheduled Appointments have not been dispatched by the current date/appointment time, those tickets will be included in the Warning Count. This applies to all types of Tickets.
- **Warning List** – If there is a number displayed to the right of the Warning Count, clicking on the Warning List will display the list of tickets where the Technician has not yet been dispatched by the date/time set for the appointment.
- **Tickets On Site** – This option functions when working in a Ticket Queue or the Schedule Board. When working from a ticket Queue, and highlighting a particular ticket in the list, if there are any other open tickets for the same site, a count of those tickets will display to the right of the Tickets On Site option. When working from the Schedule Board, clicking an appointment within the Schedule Board will display a count of any other open tickets for the same site.
- **Ticket List** – If a count is displayed next to the *Tickets On Site*, clicking on this option will display a list of the other tickets where a Technician is currently on site for the same site.



Calendar Options Ribbon Group

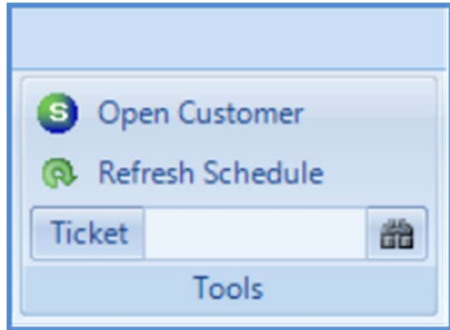
This Ribbon Group contains options for viewing the Schedule Board, as well as shortcut methods for creating new appointments. Several options are contained within this Ribbon Group which are listed below with brief descriptions.

- **Display Group Selector** – Selects which group of Technicians will be displayed within the Schedule Board.
- **Display Group Setup** - Clicking on the icon to the right of the Display Group will open the Display Group setup form; Display Groups are added and maintained from this form.
- **Display Group Technicians** – Displays in a drop-down list, the Technicians that are members of the currently viewed Display Group.
- **Show Unassigned** – Displays or hides the Unassigned Technician as the first column within the Schedule Board.
- **Group Day Within Owner** - Allows you to see multiple dates for Technicians grouped together.
- **Zoom Buttons** - Controls the time slot view within the Schedule Board.
- **New Appointment Radio Buttons**
 - **Wrench** - When selected, double-clicking on a time slot within the Schedule Board will create a new ticket and schedule a Technician Appointment in one step.
 - **Hammer** - When selected, double-clicking on a time slot within the Schedule Board will open the list of open Jobs from which to select for scheduling an Appointment.
 - **Clock** - When selected, double-clicking on a time slot within the Schedule Board will open the Miscellaneous Appointment scheduling form.



Tools Ribbon Group

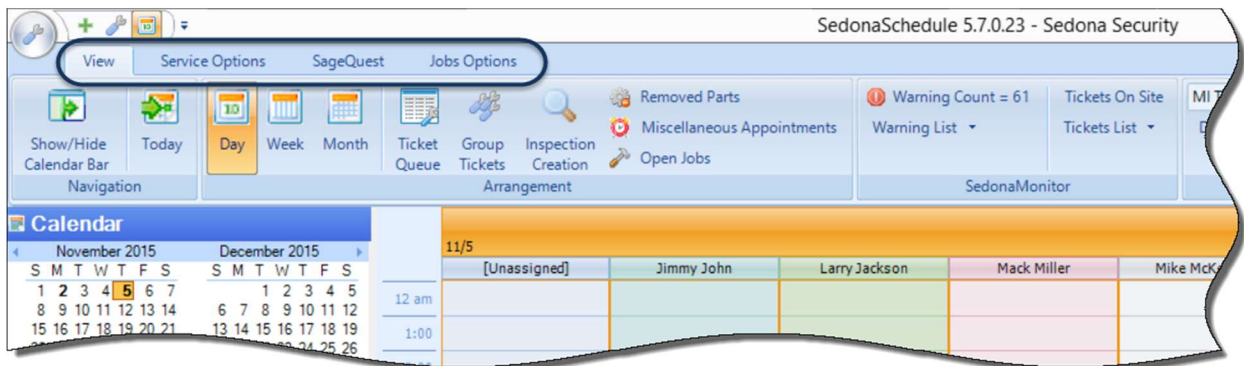
This Ribbon Group contains options to quickly locate a Ticket and to open a customer record when highlighting a particular ticket from the Ticket Queue.



The Menu Tabs

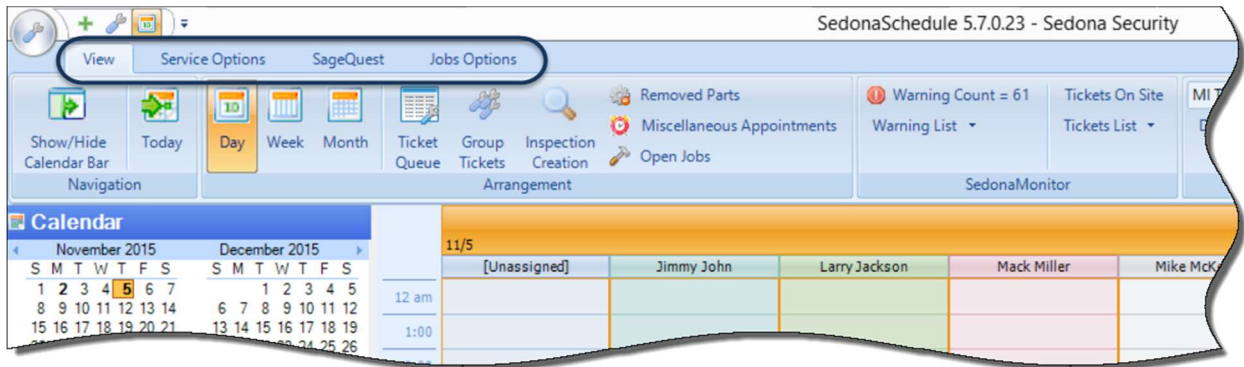
There are four possible Menu Tabs displayed at the top above the Ribbon:

- View
- Service Options
- SageQuest
- Job Options



View Menu Tab

Clicking on the View menu tab will return you to the SedonaSchedule main Ribbon.



Service Options Menu Tab

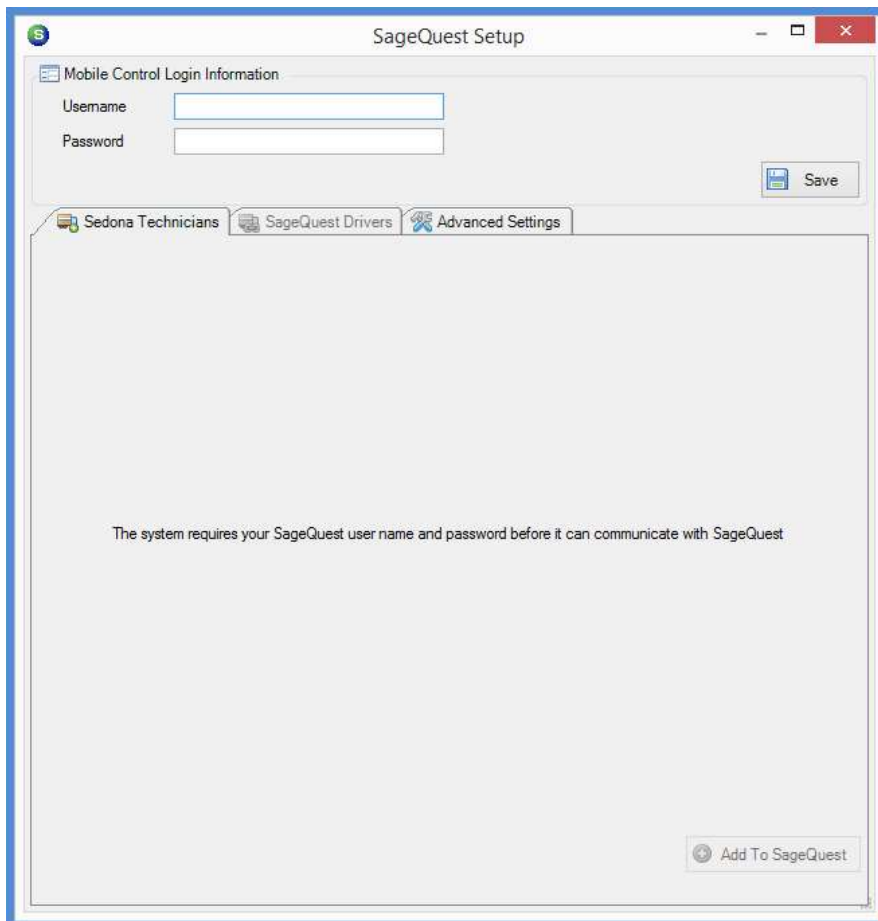
The Service Options Menu Tab opens a new Ribbon which contains various setup options; some that affect all Users globally and some that are unique to the individual User making a selection. User permissions in SedonaSetup are required to have access to some of the options on this ribbon.



- **Appointment Types** – This option opens the Appointment Type setup list. These appointment types are used only when creating or editing a Miscellaneous Appointment on the Schedule Board.
- **Parts Warehouse** – This option toggles whether Parts used on a Ticket will automatically be issued from the Warehouse assigned to the Technician with an appointment on the ticket or the User would be able to select the desired warehouse for the parts issue.
- **Auto Refresh** – This option controls whether information displayed on the Schedule Board will automatically refresh every few seconds or the User will manually refresh the Schedule Board as desired. The setting of this option is User specific.
- **Map Type** – This option allows the individual User to select which web mapping program will be used when plotting a Technician’s route for the day. This setting is User specific.

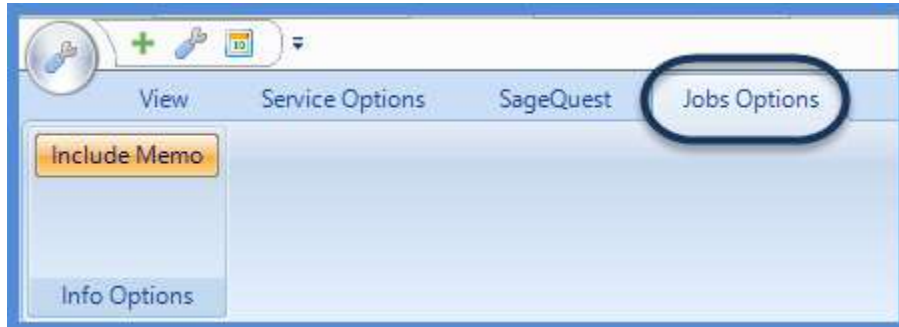
SageQuest Menu Tab

This menu tab is only displayed if your company has subscribed to Fleetmatics GPS tracking (formerly known as SageQuest). The options on this menu tab contain setup options for the Fleetmatics interface.



Job Options Menu Tab

The Job Options Menu Tab opens a new ribbon, Info Options. The only option on this ribbon is Include Memo – this is a toggle button. When the toggle button is illuminated, if any text was entered into the Notes field on the Job Work Order form, that information will be displayed in the Job Appointment on the Schedule Board.



The Calendar/Detail Viewer

The Calendar

The Calendar controls which day or days will be shown in the display area. When highlighting multiple days within the calendar (either consecutive or non-consecutive), the display area will populate with the dates selected.

Any date on the Calendar which is shown with a bold font, indicates there is at least one appointment scheduled for that date; either a Technician Appointment for a Job or Ticket or a Miscellaneous Appointment.

The screenshot displays the SedonaSchedule 5.7.0.23 interface. At the top, there are menu options for View, Service Options, SageQuest, and Jobs Options. Below these are navigation icons for Show/Hide Calendar Bar, Today, Day, Week, and Month. A toolbar includes icons for Ticket Queue, Group Tickets, Inspection Creation, Removed Parts, Miscellaneous Appointments, Open Jobs, Warning Count = 0, and Warning List. The main area is divided into a Calendar view on the left and a Gantt-style chart on the right. The Calendar view shows November 2015 and December 2015, with the 11th of November highlighted. The Gantt chart shows a timeline from 12:00 am to 11:00 pm, with columns for [Unassigned], Larry Jackson, Mark Taylor, and Jimmy Jo. A task titled 'TKT 2486 - Add Equipment (Medium) Plymouth Johnson, Alexis' is scheduled for 8:00 AM on 11/12. A note for 'JOB 1118 - R-Intrusion (Parts) Plymo' is also visible. The bottom left shows the site information for Tkt 2486(SC): Johnson, Alexis, 10225 Erick Pass, Plymouth MI 48170. The technician is Larry Jackson, and the problem is 'Add Equipment(Medium)'. The scheduled time is 08:00 AM. The bottom status bar indicates the page was refreshed on 11/12/2015 at 4:21:11 AM and shows 0 unscheduled items.

The Detail Viewer

The Detail Viewer contains two tabs (at the bottom); Detail and Unscheduled (Tickets).

Detail Tab

When clicking on an appointment within the display area, summary information for the Ticket or Job appointment is shown in the Detail tab.

Five option buttons are available on the Detail tab when clicking on an Appointment:

- **Save** – you are able to change the Technician or appointment time, then click the Save button to reschedule the appointment.
- **Edit** – this button will open the Dispatch form for viewing or making changes.
- **Notes** – this button will display any notes entered for the Job or Ticket (view only mode)
- **Map** – this button will the Technician’s route for the day.
- **Email** – if an email or text address was setup on a Technician’s setup (SedonaSetup), an email will open with Job to Ticket information that you may send to the Technician.

Unscheduled Tab

The Unscheduled tabs displays Tickets that do not have an appointment scheduled. The three checkboxes at the top of the list control which types of unscheduled tickets are displayed within the list. Tickets may be dragged and dropped directly onto the schedule board to create an appointment.

Calendar

November 2015							December 2015						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7		1	2	3	4	5	
8	9	10	11	12	13	14	6	7	8	9	10	11	12
15	16	17	18	19	20	21	13	14	15	16	17	18	19
22	23	24	25	26	27	28	20	21	22	23	24	25	26
29	30						27	28	29	30	31		

Include Service Inspection Vendor

Tkt	Branch	Cust	Name
2487	MI	13524	Johnson, Gino
2488	MI	10004	Anabel Christen...
2428	MI	12641	Canton Board Of...
2430	MI	12641	Canton Board Of...
2311	MI	31705-24	Plymouth Planta...
2334	MI	31705-1	Plymouth Planta...
2338	MI	31705-1	Plymouth Planta...
2413	MI	31705-1	Plymouth Planta...
2414	MI	31705-4	Plymouth Planta...
2415	MI	31705-13	Plymouth Planta...
2416	MI	31705-13	Plymouth Planta...
2426	MI2	158	Jones Jewelers...
2427	MI2	158	Jones Jewelers...

11/12

	[Unassigned]	Larry Jackson	Mark Taylor
12 am			
1:00			
2:00			
4:00			
5:00			
6:00			
7:00			
8:00			
9:00			
10:00			
11:00			
12 pm			
1:00			
2:00			
3:00			
4:00			
5:00			
6:00			
7:00			
8:00			
9:00			
10:00			
11:00			

TKT 2486 - Add Equipment (Medium) Plymouth Johnson, Alexis

JOB 1118 - R-Intrusion (Parts) Plymouth Memo: Must wear booties while working in home. Johnson, Alexis

Unscheduled (13) Detail