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SedonaOffice New Features in 2015

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New Features in SedonaOffice

Last year many new features and enhancements were made to the SedonaOffice application. This session will cover the most significant changes to the software and is grouped by the various modules of the application.

Accounts Payable

ADI Integration

SedonaOffice has developed an interface with ADI which enables purchase orders to be submitted with real time price checking, the ability to download acknowledgements, receive shipment tracking information, pickup locations, the ability to download and view invoices, and other data.

Current On-Hand Quantities – CTRL-Q

A new feature has been added where the user can place the cursor on a part line within a purchase order and press CTRL+Q. The on-hand quantity for the part in all warehouses will be displayed. This option is available when creating or viewing a purchase order for parts from:

- The Accounts Payable menu
- Within a Ticket
- Within a Job
- A Parts Explorer
- A Warehouse Explorer
- A Vendor record

The screenshot shows a 'Purchase Order 1405' window. The 'Purchase Order' section includes fields for Vendor (ADI), Category (S-Svc T&M), PO Number (1405), Branch (MI), Warehouse (*Main-MI), Order Date (10/27/2015), and Ship Date. A 'Parts Dye' section is visible with a table of parts. A callout box points to the part line for '995 Recessed Motion Detect' with the text 'Highlight Part line, then press CTRL-Q'. A 'Current On Hand - 995' dialog box is open, showing a table of on-hand quantities for various warehouses.

Warehouse	On Hand	On Order	Committed
*Main-MI	1	20	0
A&S	0	0	0
Bourque Fire	0	0	0
CA	0	0	0
Cust Repair MI	0	0	0
M100	0	0	0
M101	0	0	0
M102	0	0	0
Main-OH	0	0	0
MI Job Returns	0	0	0
O200	0	0	0
O201	0	0	0
RTV-MI	0	0	0
RTV-OH	0	0	0
Used-MI	0	0	0
Used-OH	0	0	0

Accounts Receivable

Cycle Invoice Date

The invoice date field has been moved from the Cycle Invoice Posting form to the New Cycle Invoicing (batch) form. The date of the invoice now determines which tax rate should be applied to the charges on the invoice.

New Cycle Invoicing

Cycle Bill

Month: 01-Dec-15

Invoice Date: 12/1/2015 * Used for Tax Calculation

Invoice Group #: 0

Description: 01-Dec-15

Include Customers with Bill Day: 28 or Less

All RMR
 Only Inspection Linked RMR
 Only Non-Inspection Linked RMR

Include	Branch	Description	Last Cycle	Posted
<input checked="" type="checkbox"/>	CA	CA	10/1/2015	Y
<input checked="" type="checkbox"/>	MI	Michigan	10/1/2015	Y
<input checked="" type="checkbox"/>	MI2	MI South	10/1/2015	Y
<input checked="" type="checkbox"/>	OH	Ohio	10/1/2015	Y

All Branches

Save Close

Reversing a Credit Card Payment

Customer credit card payments may now be reversed in SedonaOffice. Reversing a credit card payment that was made to an invoice will create a negative payment directly to that invoice and subtract the payment towards the invoice.

To reverse a payment, navigate to EFT History on the Customer Explorer; highlight the payment to be reversed, right-click then select the option *Reverse Transaction*.

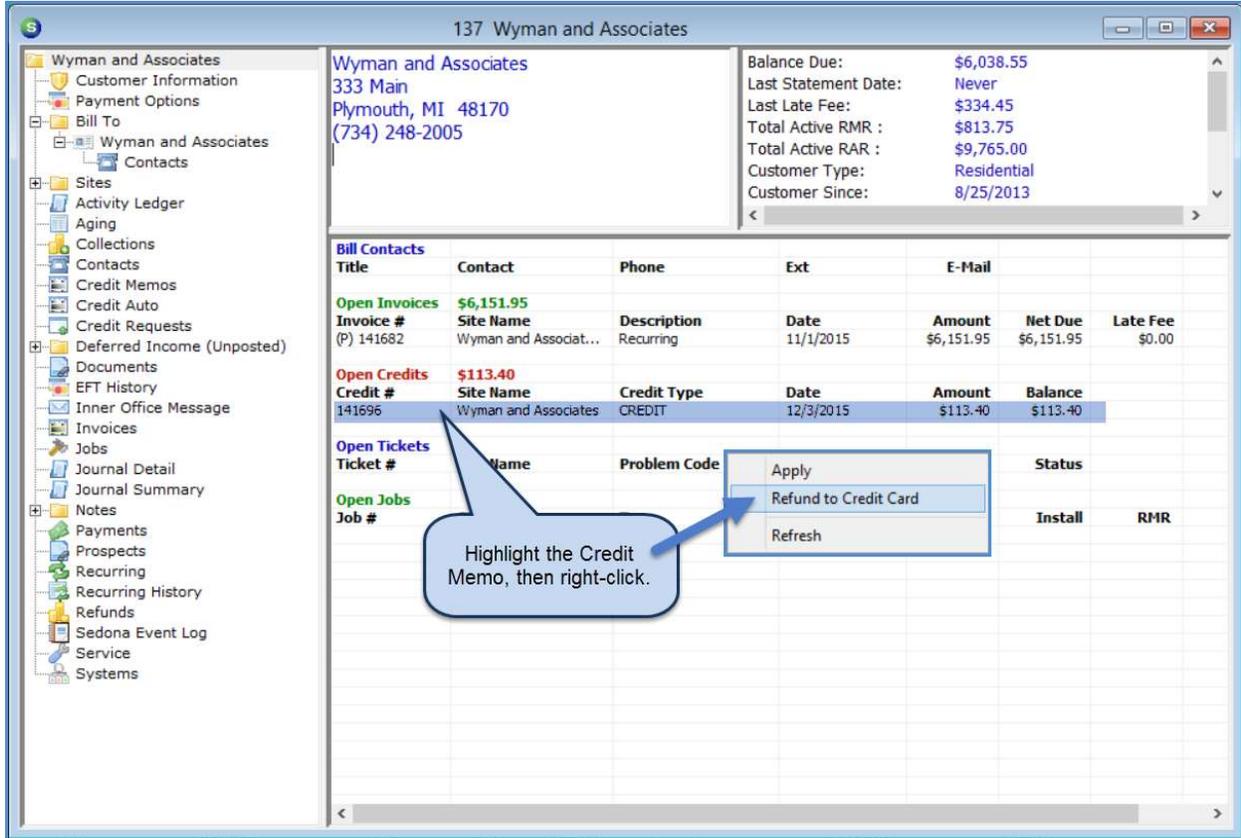
A confirmation message will be displayed; clicking the Yes button will create a Live Transaction credit in the list of EFT transactions (Accounts Receivable) which will need to be captured the same as any other Live Transaction.

The screenshot shows the SedonaOffice interface for 'Wyman and Associates'. The left sidebar contains a navigation tree with 'EFT History' selected. The main window displays a table of EFT transactions. One transaction is highlighted in blue, and a callout box points to it with the text 'Highlight the transaction, then right-click'. A 'Process Credit' dialog box is open in the foreground, asking 'Do you wish to process a \$2,511.00 credit directly to the Customer's Credit Card Account?' with 'Yes' and 'No' buttons.

Date	Description	Amount	Submit Date	Batch Code	Funded	Posted	Type
11/16/2015	Cycle Invoice	\$6,151.95	Not Submitted		N	N	B
4/3/2015	Cycle Invoice	\$2,511.00	4/22/2015	042215142355	Y	Y	B
4/3/2015	Cycle Invoice	\$837.00	4/22/2015	042215142355	Y	Y	B
2/11/2015	Cycle Invoice			42355	Y	Y	B
8/21/2014	Cycle Invoice			42355	Y	Y	B
6/17/2014		\$829.25	8/7/2014	080714052849	Y	Y	B
6/17/2014		\$214.00	6/17/2014	061714181316	Y	Y	B
6/17/2014		\$214.00	6/17/2014	061714181316	Y	Y	B
6/17/2014		\$214.00	6/17/2014	061714181316	Y	Y	B
6/17/2014		\$214.00	6/17/2014	061714181316	Y	Y	B

Credit Memo Refund to a Credit Card

A Credit Memo may now be applied as a customer refund and the funds returned to a customer’s credit card on file.



Payments Declined

When an EFT payment has been declined that was linked to a particular invoice, the customer's invoice will automatically be placed into the print queue.

EFT Transactions

Authorization codes and trace numbers can now be tracked behind the scenes for batch submissions within the SedonaOffice database.

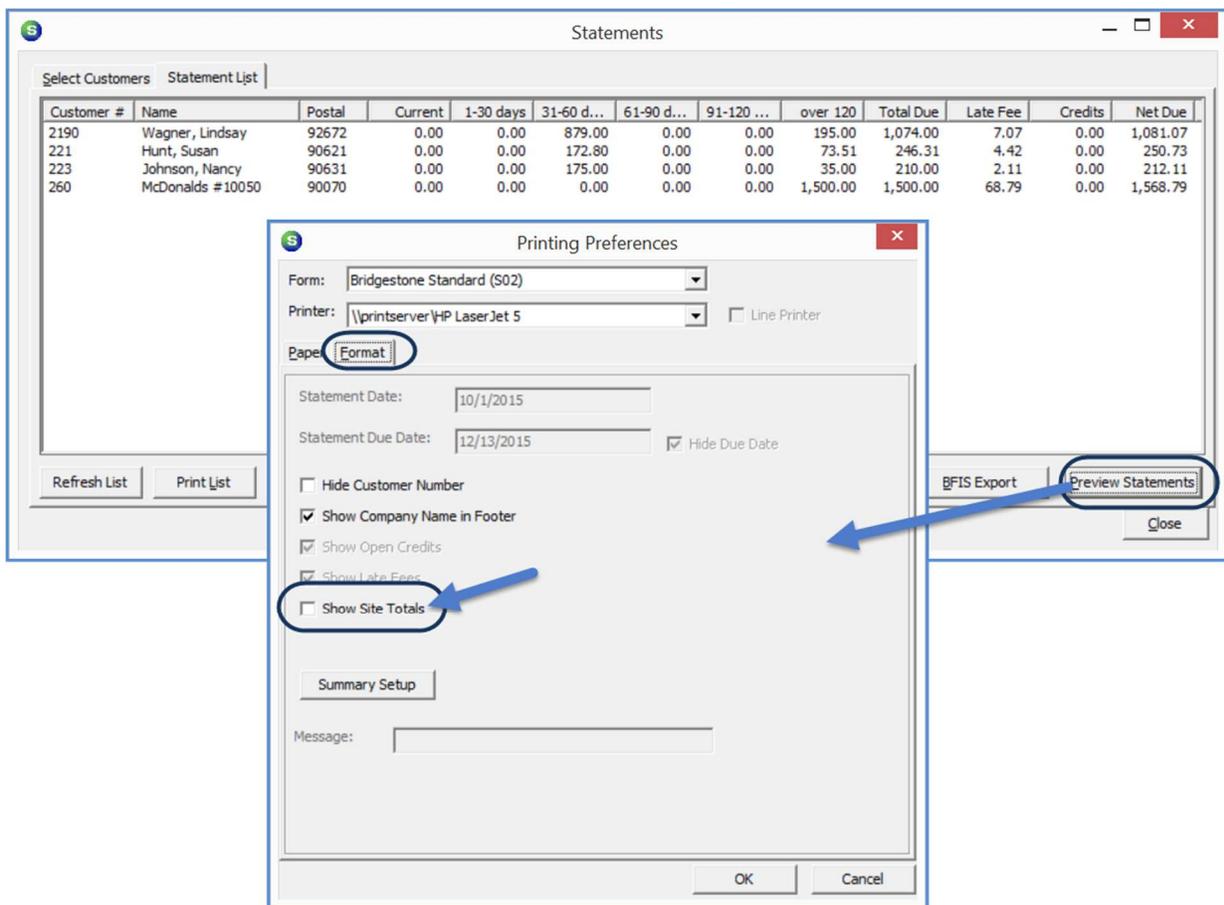
Statements

A new checkbox, *Show Site Totals*, has been added to the Format tab of the Statement Printing Preferences form. Selecting this option will print a total of all open invoices for each Site on the Statement.

This option is available when selecting either the Standard form (S01) or Bridgestone Standard form (S02) for in-house printing and may be used when generating Statements from the Accounts Receivable module (bulk statements) or when generating a statement for an individual customer from a Customer Explorer record.

Note:

The Site totals option is not available when using the BFIS export.



Sample Statement using Show Site Totals Option



Sedona Security
 45165 Joy Road
 Canton, MI 45187
 (734) 414-0760
www.sedonasecurity.com

STATEMENT

Customer	Jones Jewelers
Customer Number	158
Statement Date	12/1/2015
 Total Due	 2,421.02
Due Date	

OPEN INVOICES

Date	Invoice #	Description	Amount	Balance Due
<i>Jones Jewelers #1, 2 Main Street Plymouth, MI</i>				
9/1/2015	141625	Recurring	101.47	101.47
			101.47	101.47
<i>Jones Jewelers #31, 252 Main Plymouth, MI</i>				
7/1/2015	141612	Recurring	951.97	951.97
8/1/2015	141620	Recurring	1,217.92	1,217.92
			2,169.89	2,169.89
		Late Fee		\$149.66

Print Invoices

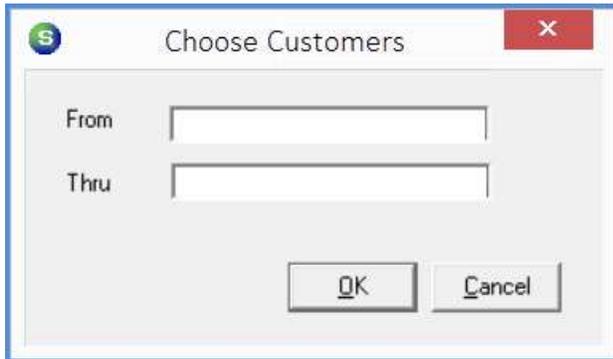
The layout of the Select Invoices form has been re-designed to accommodate three new printing options:

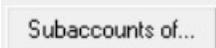
- Type of Customer.
- Invoices for a single customer number or a range of customer numbers.
- Invoices for all Subaccounts associated with a single Master Account or Multiple Master Accounts.

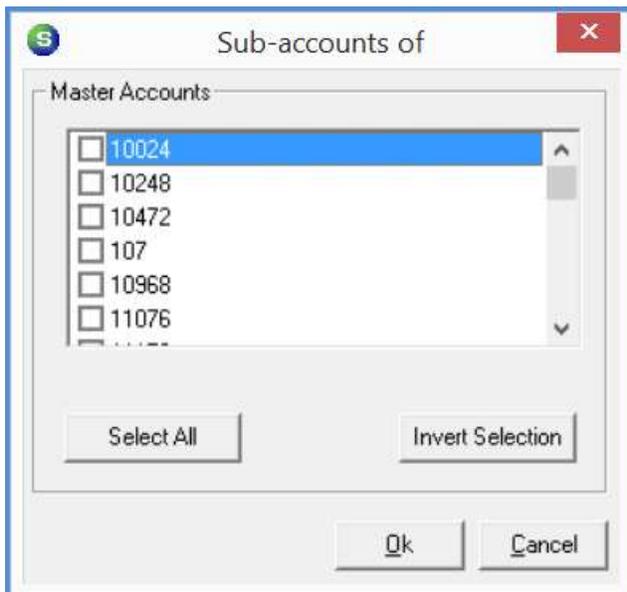
The screenshot shows the 'Select Invoices' dialog box with the following sections and options:

- Branch:** A list box containing '3rd Party Billing Dealers', 'CA', 'MI South', 'Michigan', and 'Ohio'. Below it are 'Hide Inactive Branches' (unchecked), 'Select All', and 'Invert Selection' buttons.
- Dates:** A section with 'From' and 'Thru' input fields, and an unchecked 'Dates' checkbox.
- Invoice Numbers:** A section with 'From' and 'Thru' input fields, and an unchecked 'Invoice Numbers' checkbox.
- Customer Group:** An empty list box with 'Hide Inactive Customer Groups' (unchecked), 'Select All', and 'Invert Selection' buttons.
- Invoice Type:** A section with checkboxes for 'Cycle', 'Job', 'Service', and 'Other', all of which are checked.
- Bill-to Type:** A section with checkboxes for 'Commercial' and 'Residential', both of which are checked.
- Type of Customer:** A list box containing 'Church', 'Commercial', 'Education', 'Residential', 'Restaurant', and 'Retail'. Below it are 'Hide Inactive Branches' (unchecked), 'Select All', and 'Invert Selection' buttons. This section is highlighted with a blue border.
- Filter Options:** A section with checkboxes for 'Show Master Cycle Invoices', 'Only Show Invoices in Print Queue', 'Show ACH Pending Invoices', 'Show BFIS Pending Invoices', 'Hide Invoices with \$0 Balance Due', and 'Filter for Emailing'. The 'Only Show Invoices in Print Queue' checkbox is checked.
- Sort By:** A dropdown menu currently set to 'Customer Number'.
- Buttons:** At the bottom, there are buttons for 'Export List', 'Print Setup...', 'Customers ...', 'Subaccounts of...', 'Create List', and 'Cancel'. The 'Customers ...' and 'Subaccounts of...' buttons are highlighted with a blue border.

When clicking on the *Customers* button,  the *Choose Customers* form will be displayed where the User will type in a range of customer numbers. If you want to print all the open invoices for just one specific customer number, you would enter the same customer number in both the From and Thru text boxes.



When clicking on the *Subaccounts of* button,  the *Sub-accounts of* form will be displayed where the User may use the *Select All* button if you want to print all the open invoices associated with all Master Accounts. If you want to print all the open Subaccount invoices associated with just one or selected Master Accounts, you would check the box to the left of each Master Account desired.



Client Management

Time Zones

The time zone of a Customer's Site is now automatically recorded through a new zip code lookup feature. This enables a time zone to appear on a service ticket appointment for that location. Time zone information is recorded on the Site record using the UTC hour designation assigned to the specific time zone:

Time Zone	UTC Hour Designation
Atlantic Standard Time	-4
Eastern Standard Time	-5
Central Standard Time	-6
Mountain Standard Time	-7
Pacific Standard Time	-8
Alaska Standard Time	-9
Hawaiian Time	-10

Address Verification

A new address verification feature has been added and will be made available to Users that have paid an annual licensing fee for use of this feature. This feature will validate addresses within the United States.

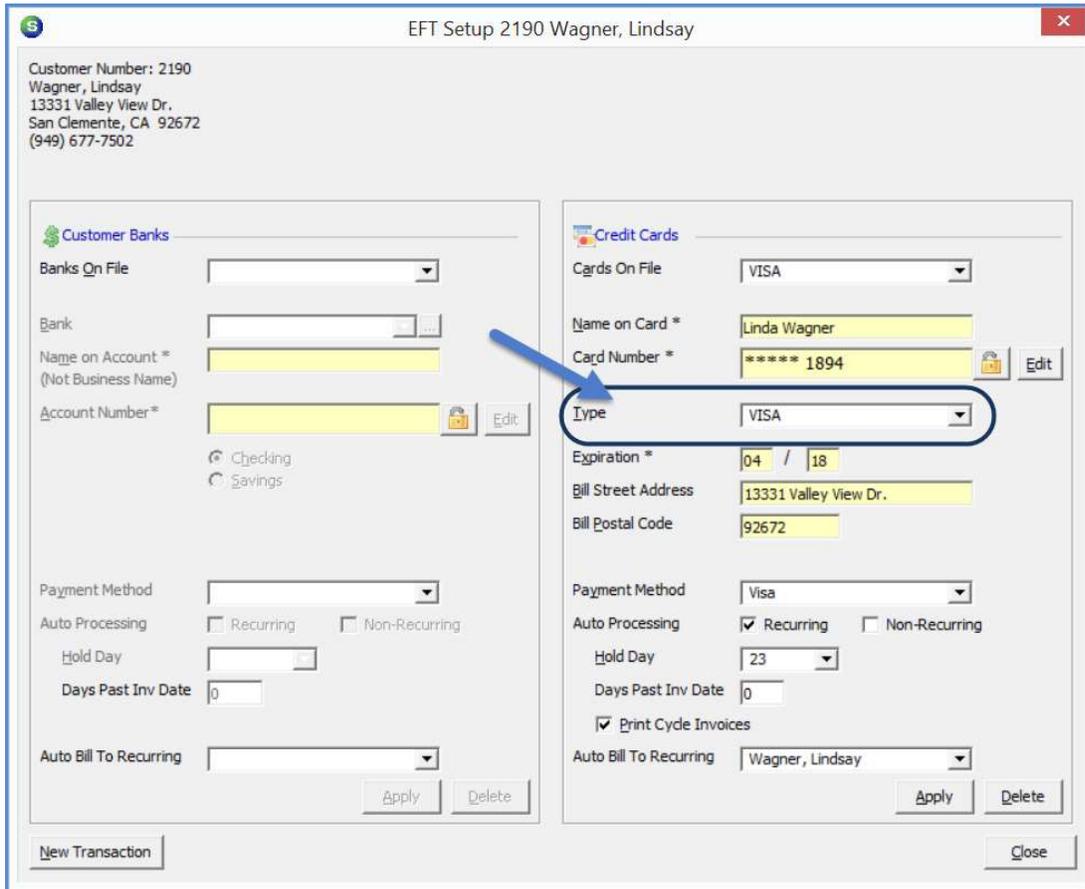
- If a street address and zip code are entered by the User, the city, state, zip plus 4, and time zone fields will automatically be populated.
- If a street address, city and state are entered by the User, the zip code, zip plus 4, and time zone fields will automatically be populated.

In addition to the above, the verification process will check the Residential/Commercial setting on the Site or Customer record being entered/edited, and will make the correction if necessary.

The screenshot shows the SedonaOffice software interface. The main window is titled "2190 (1) Lindsay Wagner" and displays customer information. The "Customer # 2190" and "Name Wagner, Lindsay" are visible. The address is "Wagner, Lindsay, 13331 Valley View Dr., San Clemente, CA 92672". The "Site Name and Address" section shows "Residential" selected and "Commercial" unselected. The "Address..." field is highlighted with a red circle, and a blue arrow points to the "Edit Address" dialog box. The "Edit Address" dialog box is open, showing fields for Country (United States), Line 1 (35 Gaviota), Line 2, Line 3, City (Rancho Santa Margarita), State (California), Zip Code (92688), Plus 4 (1610), County (Orange), Township, and Timezone (-8). The "Verify" button is highlighted with a red circle.

Credit Card Payment Options

When a new credit card is added to Payment Options on a customer’s account, the validity of the card number as an actual credit card number will be checked and the *Type* field will auto populate based on the credit card number entered.



Subaccounts of Master Accounts

In previous versions of SedonaOffice, on the Master Account setup information form, a checkmark in the box labeled “All subaccount Invoices Billed to Primary Master” dictated that all non-recurring invoices were to be sent to the Master Account for all of the subaccounts associated with the Master Account.

It is now possible to set the option on an individual subaccount to have non-recurring invoices either invoice to the subaccount or invoice to the Master Account. On the customer setup information form of the Subaccount, a new checkbox has been added labeled, “Bill This Sub to Master Account”. When the checkbox is selected, all non-recurring invoices for the subaccount will invoice to the Master Account. When a checkmark is not in the box, all non-recurring invoices will invoice to the Bill To address on the Subaccount.

Customer Setup 10024-2

Customer # 10024-2 Hoffman Auto Group
700 Connecticut Blvd
Canton, MI 48188

Customer Name Hoffman Auto Group
Additional Name

Setup Information | Cust Custom Fields | Bill To | Master Account Setup | Items

Customer Status AR Blanket P.O.
Customer Type Commercial P.O. Expire Date
Old Customer ID Customer Since 2/26/2004
Terms Due On Receipt Chain Account
Tax Exempt # Customer Group MI
OK to Increase Customer Group 2
Salesperson Matt.Miller Branch MI
No Collections
Part Pricing Level None

Master Account Information Invoice Printing

Master Acct 10024 Hoffman Auto Group
 Bill This Sub to Master Account

Critical Message
Expires On

Print Cycle Invoices
Print Statements
Print Site Info on Invoices
Separate Cycle Invoice for Each Site
Charge Late Fees

Save Close

Customer Equipment List

When parts are added to the customer's equipment list after the close of a job, the equipment edit form on each part will automatically be updated with the manufacturer's warranty end date based on the term of the warranty as defined on the part's detail screen, and the start date of the warranty entered on the Job closing form.

The screenshot shows a software window titled "Equipment Edit 12882-5". It is divided into two main sections: "Customer Information" and "Equipment Detail".

Customer Information:

- Site: Nationwide Of Michigan
- System: 3468 N. Main Street
CCTV-12882-5
CCTV

Equipment Detail:

- Part Code: ARV2155DN
AV2155DN IP COLOR D/N VANDAL DOME CAMERA
- Quantity: 1
- Price: \$1,673.10
- Location: [Empty text box]
- Local Zone: [Empty text box]
- Serial Number: [Empty text box]
- Lot Number: [Empty text box]
- Manuf Warranty: Ninety Day (dropdown menu)
- Warranty Start: 10/14/2015 (calendar icon)
- Manuf Exp Date: 1/12/2016 (calendar icon)
- Other Warranty: [Empty dropdown menu]
- Covered By Contract

At the bottom right of the window are "Save" and "Close" buttons.

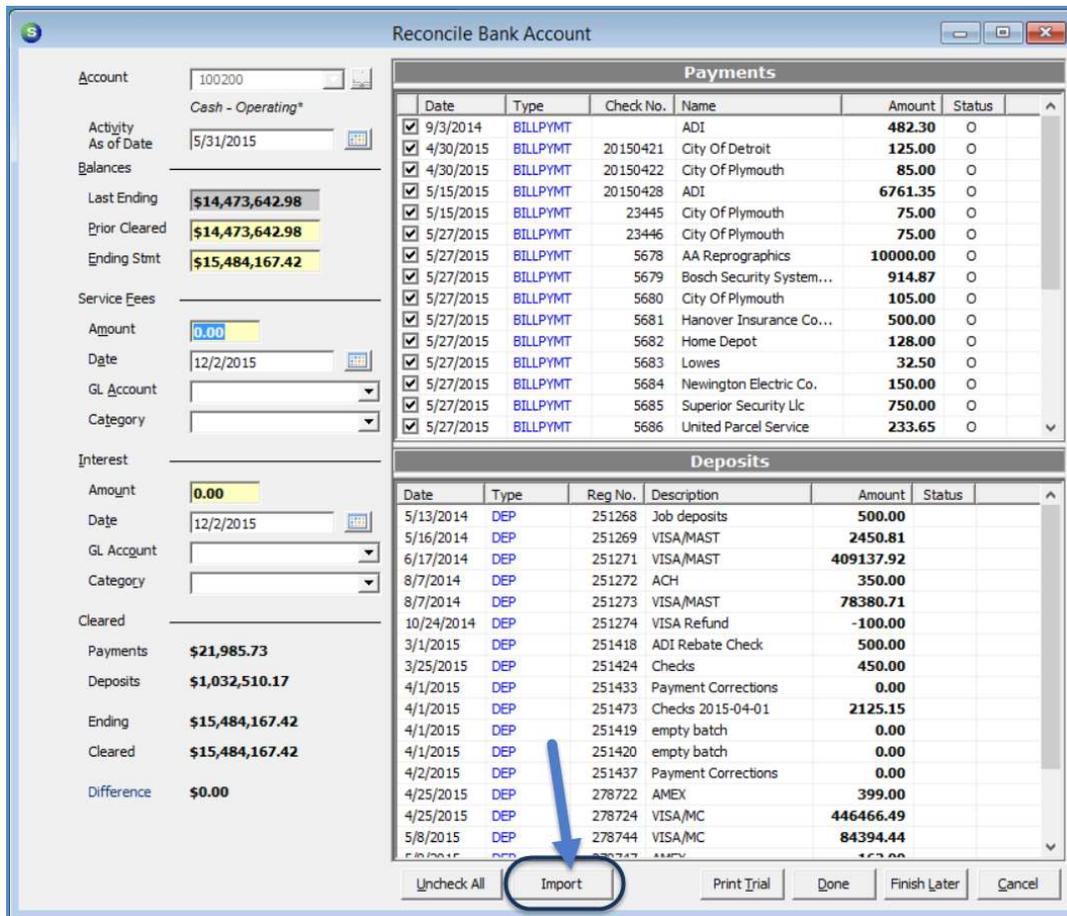
Notes

General Ledger

Bank Reconciliation

Bank statements that are downloaded from a bank’s website in a QuickBooks format (.QBO extension-version 102) may be imported for reconciliation into SedonaOffice. Checks containing numeric numbers will be automatically marked off at the time of import. Transfers between accounts, use of a debit card, or checks where the check number has been replaced by alpha text (e.g. Refund by CC) will not be recognized and must be manually marked as reconciled by the user.

Clicking on the new **Import** button located at the bottom of the Reconcile Bank Account form will open the User’s file explorer to locate the bank file to be imported.



Notes

Inventory

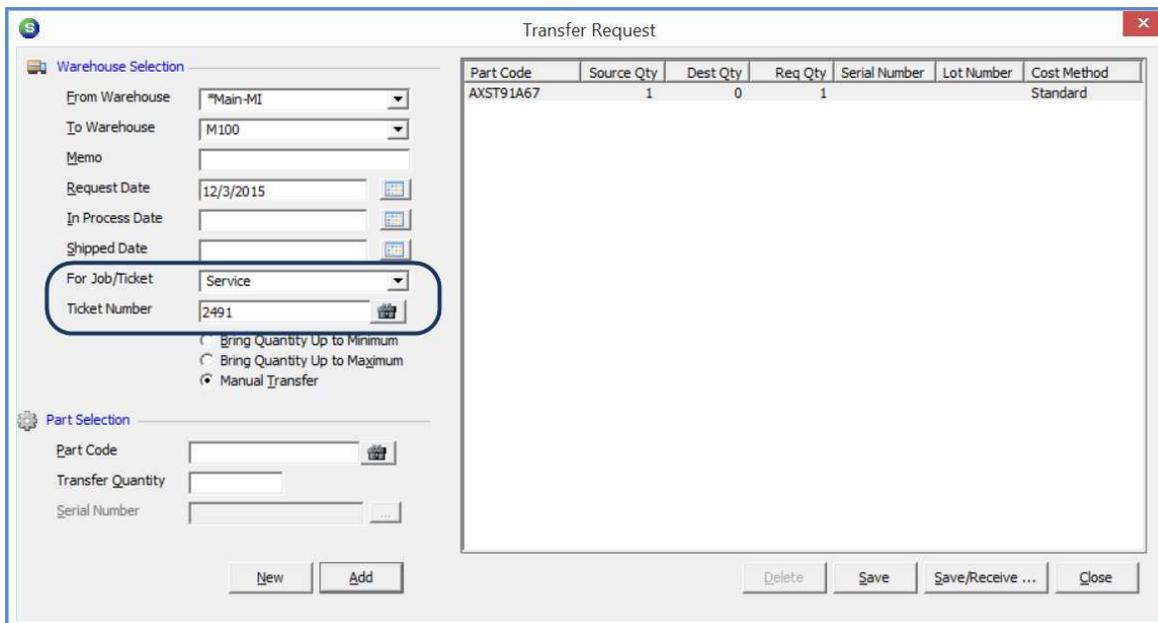
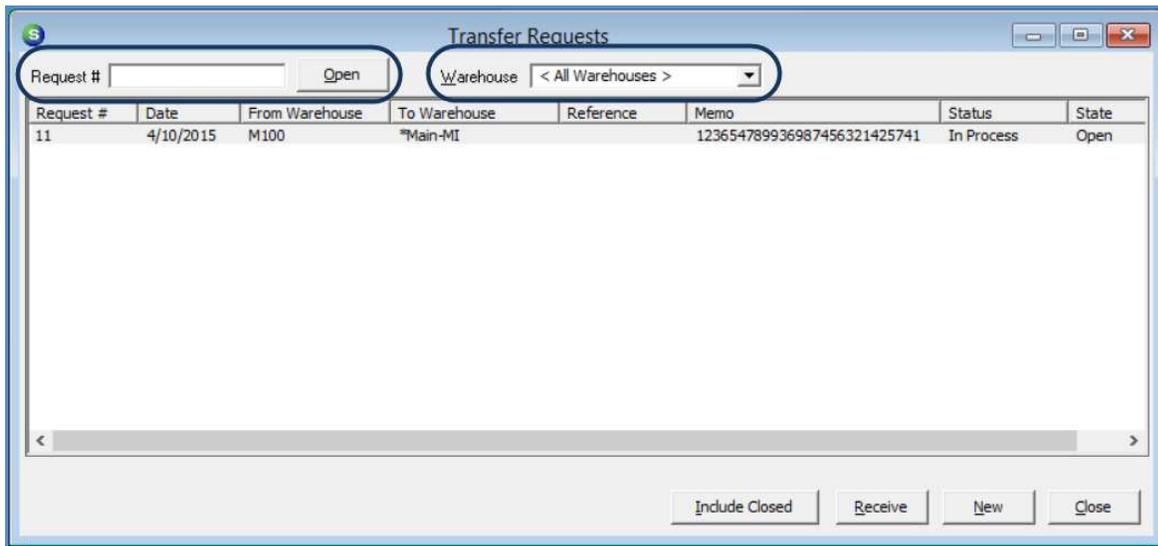
Return Serial Part

It is now possible to return a Serial Part back to the warehouse from which it was previously issued. To return a Serial Part, while in the Part Explorer, select the specific warehouse into which the part will returned. Expand the warehouse tree and highlight the Serial Number menu option. Locate the Serial Number to be returned, right-click on the specific Serial Number and select the *Return Serial Part* option.

Part Transfers

Three new features have been added to the Transfer Request List/Transfer Request Form:

- On the Transfer Request form, the User may enter a Job or Ticket number to specify a reference by exact match.
- The Transfer Requests List now provides a filter to view Transfer Request by an individual Warehouse.
- A new text box and button, Open, has been added to the header area of the Transfer Request List which provides the ability to manually type in a Transfer Request Number and open that specific transaction.



Job Management

Job Templates

It is now possible to create a list of equipment, install items, RMR, and Job Tasks which can be saved as a job template. This prevents the user from having to retype all items which are standard on specific job types whenever a new job is created.

Notes

Custom Fields

New functionality has been added to ensure that a job cannot be closed until all custom fields marked as required (in SedonaSetup) have had entries made into them. A message will be displayed to the User and not allow the closing of the Job until all required have an entry made.

Receiving a Purchase Order within a Job

Purchase Orders may now be received directly within a job. Within a Job record, navigate to Tools/Purchase Orders; highlight the specific purchase order to be received and right-click then select the option "Receive PO".

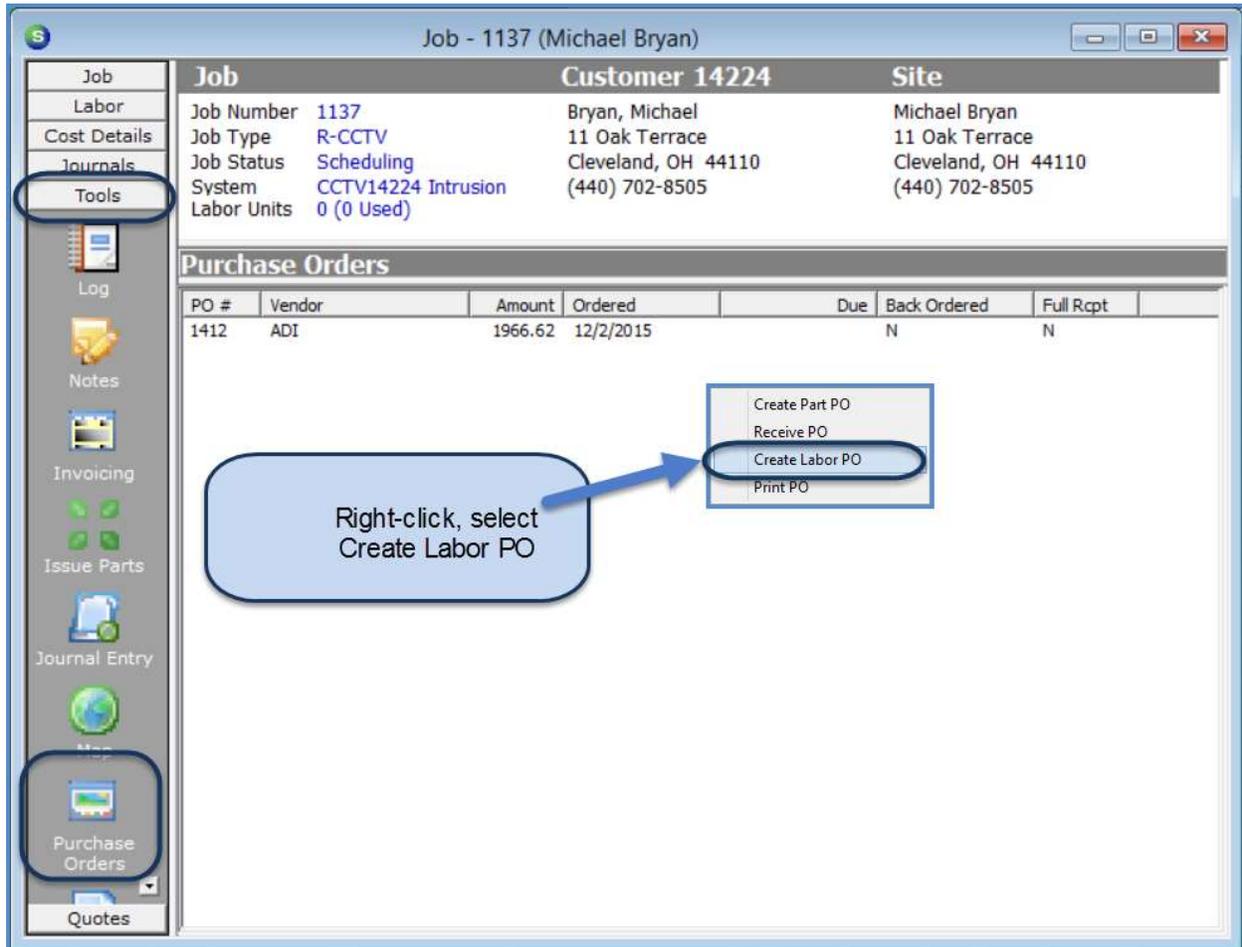
The screenshot shows the software interface for Job - 1137 (Michael Bryan). The sidebar on the left contains navigation options: Job, Labor, Cost Details, Journals, Tools, Log, Notes, Invoicing, Issue Parts, Journal Entry, Map, Purchase Orders, and Quotes. The main area displays Job details and a table of Purchase Orders.

PO #	Vendor	Amount	Ordered	Due	Back Ordered	Full Rcpt
1412	ADI	1966.62	12/2/2015		N	N

A callout box with the text "Highlight PO, then right-click" points to the first row of the Purchase Orders table. A right-click context menu is open over this row, showing options: Create Part PO, Receive PO, Create Labor PO, and Print PO. The "Receive PO" option is highlighted.

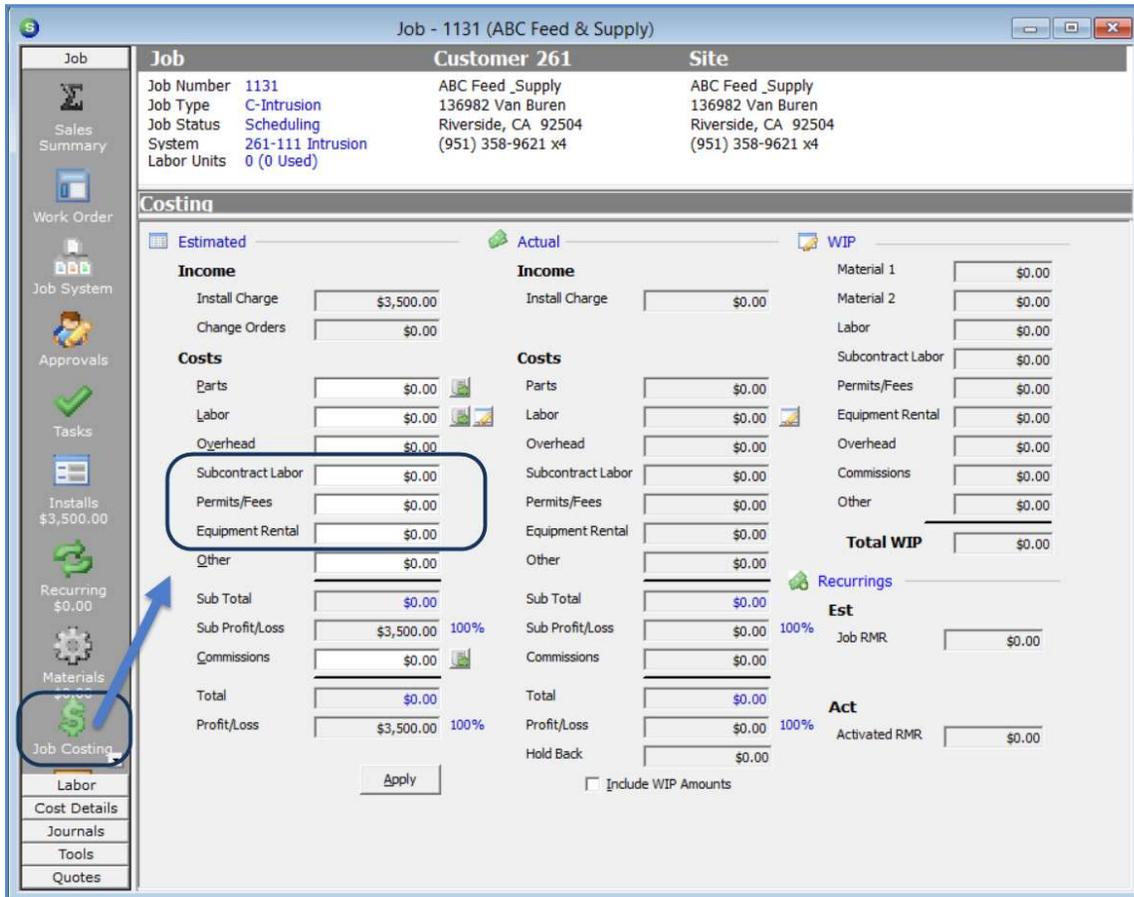
Purchase Orders

It is now possible to create a purchase order for subcontract labor within a job. When selecting this option, a blank purchase order will appear where a specific vendor may be chosen for the services required.



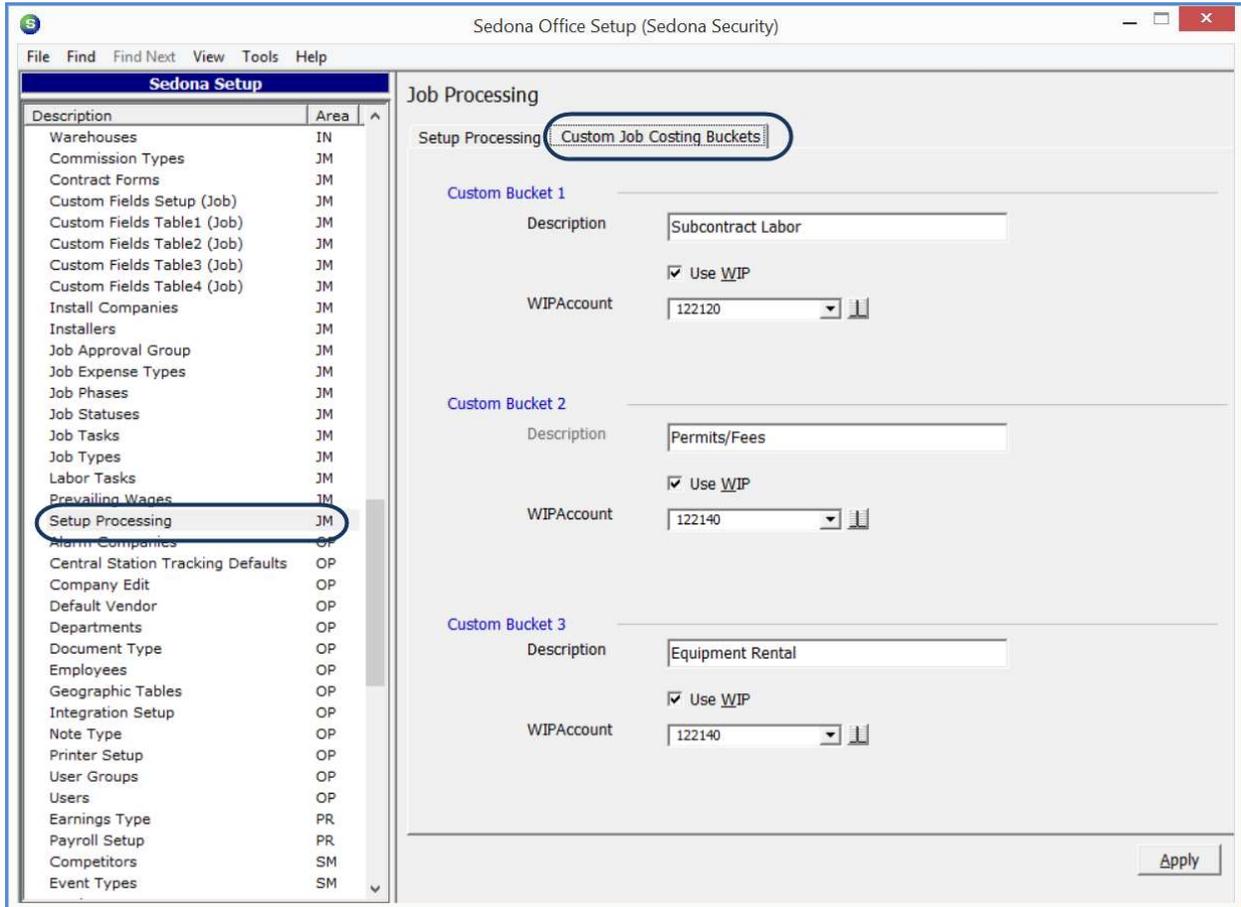
Custom Job Costing Buckets

Prior to this version, the job costing buckets had been pre-defined as Material, Labor, Overhead, Commissions, and Other. You may now break-down the “Other” bucket in up to 3 Custom Job Costing Buckets. Expenses that do not fall into these groupings will still show in the Job Costing “Other” bucket on the job costing screen.



Custom Job Costing Buckets Setup

A new tab labeled *Custom Job Costing Buckets* has been added to the Job Management Setup Processing form. On this form you may assign labels for one, two or all three available costing buckets. For SedonaOffice customers using WIP, you have the ability to mark which Job Costing Buckets will post expenses through WIP and select the desired WIP account for each custom job costing bucket.



Notes

Point of Sale

A Point of Sale module has been added to SedonaOffice, and has been written to the specifications of the SedonaOffice Customer who commissioned Perennial Software for this enhancement. SedonaOffice Customers interested in receiving a demonstration of this product may contact Sales@SedonaOffice.com. When attempting to access this module from the main SedonaOffice application menu, Users will receive a notification that their installation has not been setup to utilize this feature of the program. This feature must be activated by the SedonaOffice support team.

Notes

Sales Management

Prospects

It is now possible to have a new Prospect automatically created in Sales Management based upon the selection of the Ticket resolution code. Two setup tables have been enhanced with new options to accommodate this new option; SV Resolution Codes, and SV Setup Defaults.

A new checkbox, *Create Prospect*, has been added to the Service Resolution Code setup table. If this option is checked, when a Ticket is closed using this resolution code, a new Prospect record will be created using the Customer and Site information on the Ticket being closed. Required fields on the Prospect form will default to the values entered in a new setup area on the Service Setup Default form in SedonaSetup.

SV Resolution Codes

The screenshot shows a web-based form titled "Resolution" with a sub-section "Resolution Edit". The form contains the following fields and controls:

- Resolution Code:** Text input field containing "De-Program Panel".
- Description:** Text input field containing "De-Program Panel".
- Billable:** Checkable field, currently unchecked.
- Create Prospect:** Checkable field, currently checked.
- Inactive:** Checkable field, currently unchecked.
- Buttons:** "Apply", "New", and "Delete" buttons are located at the bottom right of the form.

A new area labeled *Prospect Defaults*, contains fields that will be used when a new Prospect is automatically created when selecting a Ticket Resolution Code flagged as Create Prospect.

Service Setup Defaults

Service Setup

General Setup | GL Setup | GL Accounts for Misc Expense

General

Default Service Co. MI-T&M

Next Ticket # 2492

Ticket Printing Print the System Account on Service Tickets
 When Printing Tickets, break out the Trip Charge on the Summary

Note Access Level 2 - Customer Restricted

Schedule By Technician Expertise Level
 Routes

Warning Message Setup
2 or more dispatches within the last 60 days

Maintenance Contracts

Warranty Type Full Warranty

Service Level T&M-RSC

Invoice Defaults

Invoice Category S-Svc T&M

Invoice Description Service Call

Parts Item Code SVC Part

Prospect Defaults

Lead Source Technician

Lead Source 2

Status New

Sales Department Sales

Apply

New Prospect Record

The new Prospect record created will be linked to the original Customer and reference the Ticket Number from which the Prospect was created.

The Salesperson field will automatically default to the name of the Technician shown on the Service Ticket form of the Ticket. If no Technician was assigned to the Ticket, the Salesperson field will be left blank and would need to be manually selected by the User.

The Name and Title fields on the Prospect Entry form are left blank and would need to be manually filled in with the appropriate information for the Prospect.

Prospect
Carolyn Steele
128 Run Pond Rd
Plymouth, MI 48170
Source: Technician
Status: New
Sales Dept: Sales
Salesperson: Mark Taylor
Follow Up: # Days Open 0

Prospect Entry
Existing Customer (23792)
 Residential Commercial
Entered By: Administrator, 12/6/2015

Name: []
Title: []
Address: 128 Run Pond Rd, Plymouth, MI 48170
Status: New
Pri. Source: Technician
Sec. Source: []
 Re-Flag

Phone 1: []
Phone 2: []
Mobile: []
Pager: []
Fax: []
Email: []
Sales Department: Sales
Salesperson: Mark.Taylor
2nd Salesperson: []
Next Follow Up: []
Resolution Date: []

Resolution: []
Comments: []

[Service Ticket #2391](#) Inactive

Notes

SedonaSchedule

Site Time Zones

Service Tickets will now automatically display the time zone of the Site based on the zip code of the site.

New Ticket

Customer 2190 **Created** 12/2/2015 6:27 AM **Contact** [Dropdown]

Site Wagner, Lindsay **Created By** Administrator **Phone** [Input] **Ext** [Input]

Lindsay Wagner **Status** Open

35 Gaviota **Notify** [Input] [Check]

Rancho Santa Margarita CA 92688-1610 **Pacific Time**

Site and System Detail

System Account A10321 [Dropdown]

System Type Intrusion [Dropdown]

Panel Type UNKNOWN [Dropdown]

Location 192 [Input]

Next Inspection [Input]

Site Phone (949) 677-7502 [Input]

Map Code 2281 [Input]

Cross Street 192 [Input]

Warranty One Year P & L [Dropdown]

Warranty End Expired [Dropdown]

Memo 2281 [Input]

Comments [Text Area]

Notes [Text Area]

Timezone PT [Dropdown]

Service Company OH-T&M [Dropdown]

Service Level T&M-RSC [Dropdown]

Ticket Detail

Problem Can't Set B/A [Dropdown]

Secondary Problem [Dropdown]

Route Code [Dropdown]

Expertise 3 [Dropdown]

Priority Medium [Dropdown]

Estimated Length 60 [Input]

Comments [Text Area]

Service Coordinator [Dropdown]

Technician [Dropdown]

PO # [Input]

Category S-Svc T&M [Dropdown]

Resolution [Dropdown]

Use Payment Information On File

None

Bank (0)

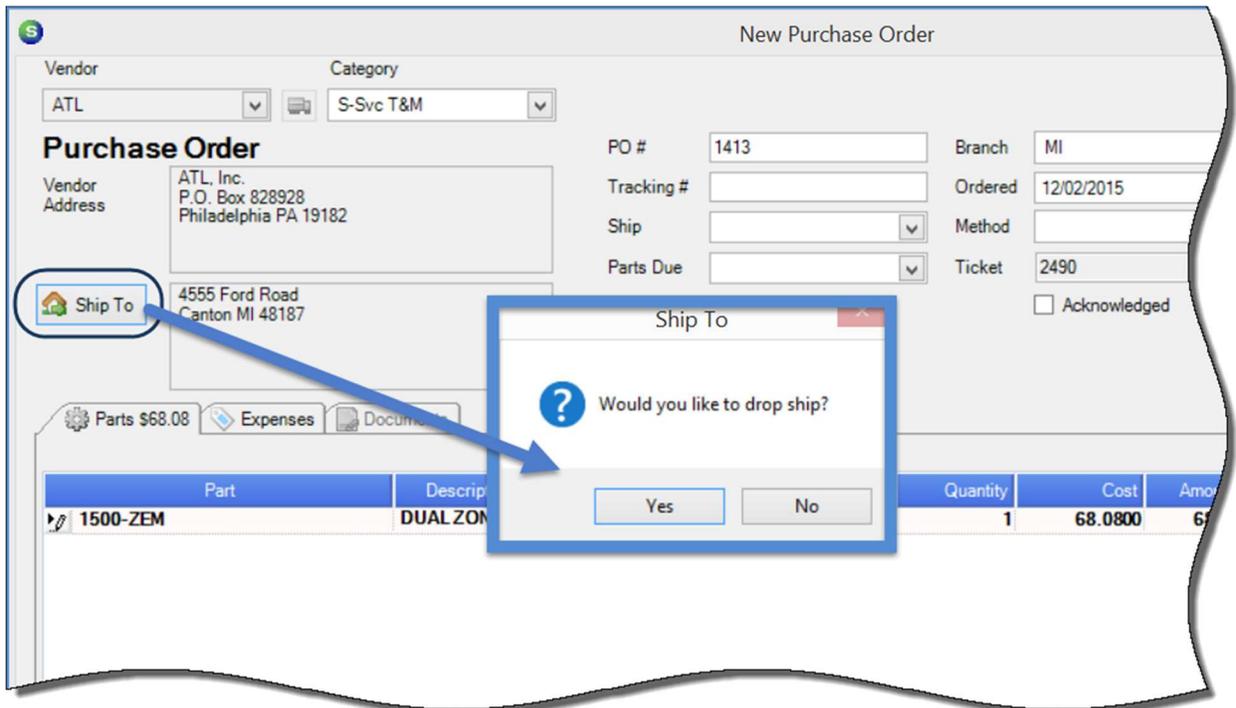
Credit Card (1)

Save

Drop Ship on Purchase Orders

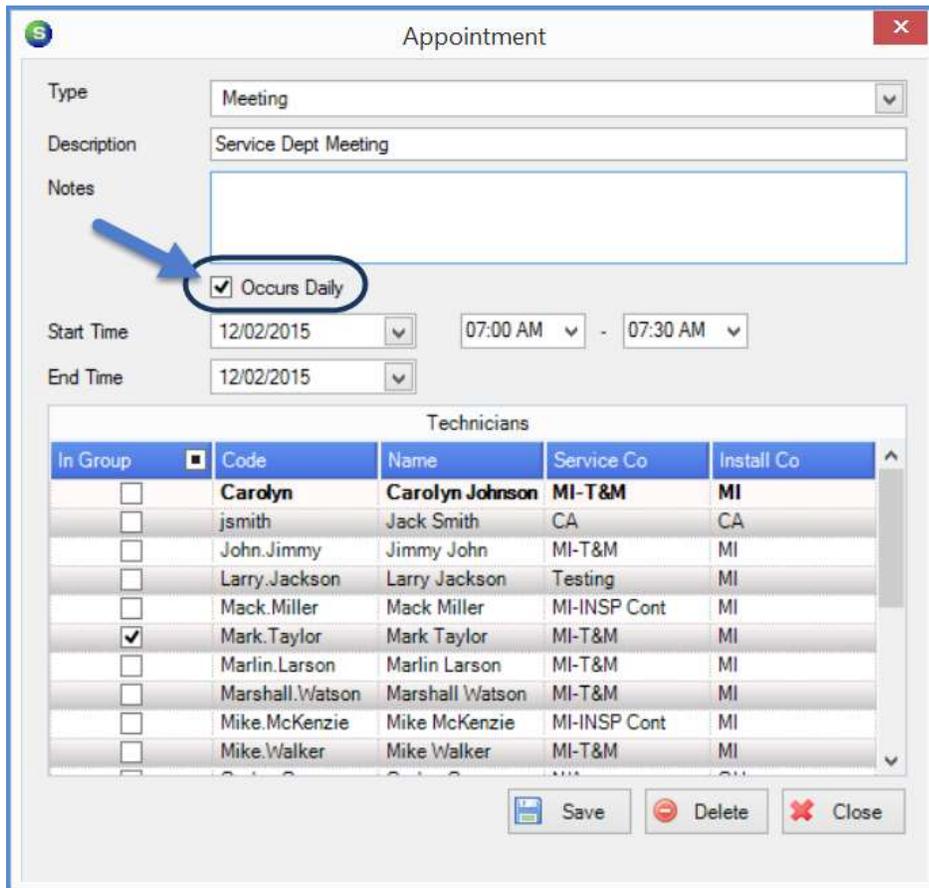
The Purchase Order form within a Ticket now provides the ability to drop ship directly to the Site address associated with the Ticket, lookup an address using the customer search tool, or manually type in any other ship to address.

Before saving the Purchase Order, if you click on the *Ship To* button, a message will displayed asking “Would you like to drop ship?”. If the Yes button is selected, the Site address for the Site of the Ticket will auto fill into the Ship To address box. If you select the No button, the Ship To field will be available to edit manually with the desired shipping address, or you may leave the existing warehouse address if the Ship To button was accidentally clicked.



Miscellaneous Appointments

The Miscellaneous Appointments box now contains a new checkbox “Occurs Daily.” This checkbox will be pre-checked. This option will allow for a range of consecutive days to be selected eliminating the need to schedule individual miscellaneous appointments for each day.



The screenshot shows the 'Appointment' dialog box with the following fields and controls:

- Type: Meeting
- Description: Service Dept Meeting
- Notes: (Empty text area)
- Occurs Daily (highlighted with a blue arrow)
- Start Time: 12/02/2015, 07:00 AM - 07:30 AM
- End Time: 12/02/2015
- Technicians table:

In Group	Code	Name	Service Co	Install Co
<input type="checkbox"/>	Carolyn	Carolyn Johnson	MI-T&M	MI
<input type="checkbox"/>	jsmith	Jack Smith	CA	CA
<input type="checkbox"/>	John.Jimmy	Jimmy John	MI-T&M	MI
<input type="checkbox"/>	Larry.Jackson	Larry Jackson	Testing	MI
<input type="checkbox"/>	Mack.Miller	Mack Miller	MI-INSP Cont	MI
<input checked="" type="checkbox"/>	Mark.Taylor	Mark Taylor	MI-T&M	MI
<input type="checkbox"/>	Marlin.Larson	Marlin Larson	MI-T&M	MI
<input type="checkbox"/>	Marshall.Watson	Marshall Watson	MI-T&M	MI
<input type="checkbox"/>	Mike.McKenzie	Mike McKenzie	MI-INSP Cont	MI
<input type="checkbox"/>	Mike.Walker	Mike Walker	MI-T&M	MI

Buttons: Save, Delete, Close

Ticket Serial/Lot Number Column for Customer Equipment

A new column has been added to the Customer Equipment Detail to display the serial/lot number of equipment that has already been installed for the system linked to the Ticket.

The screenshot shows a software window titled "Ticket #2491". At the top, there is a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents, Equipment and Parts (highlighted), Journal, Notes, Other Items, Purchase Orders, Service History, Ticket Log, and Ticket Group. A "Final Demand LTR" warning is visible with a COGS Account of 520100.

Below the navigation bar, customer information is displayed: Customer 2190 (Wagner, Lindsay), Site Lindsay Wagner (35 Gaviota, Rancho Santa Margarita CA 92688-1610, Pacific Time), Created 12/2/2015 1:23 PM, Created By Administrator, Status Open, and Contact details.

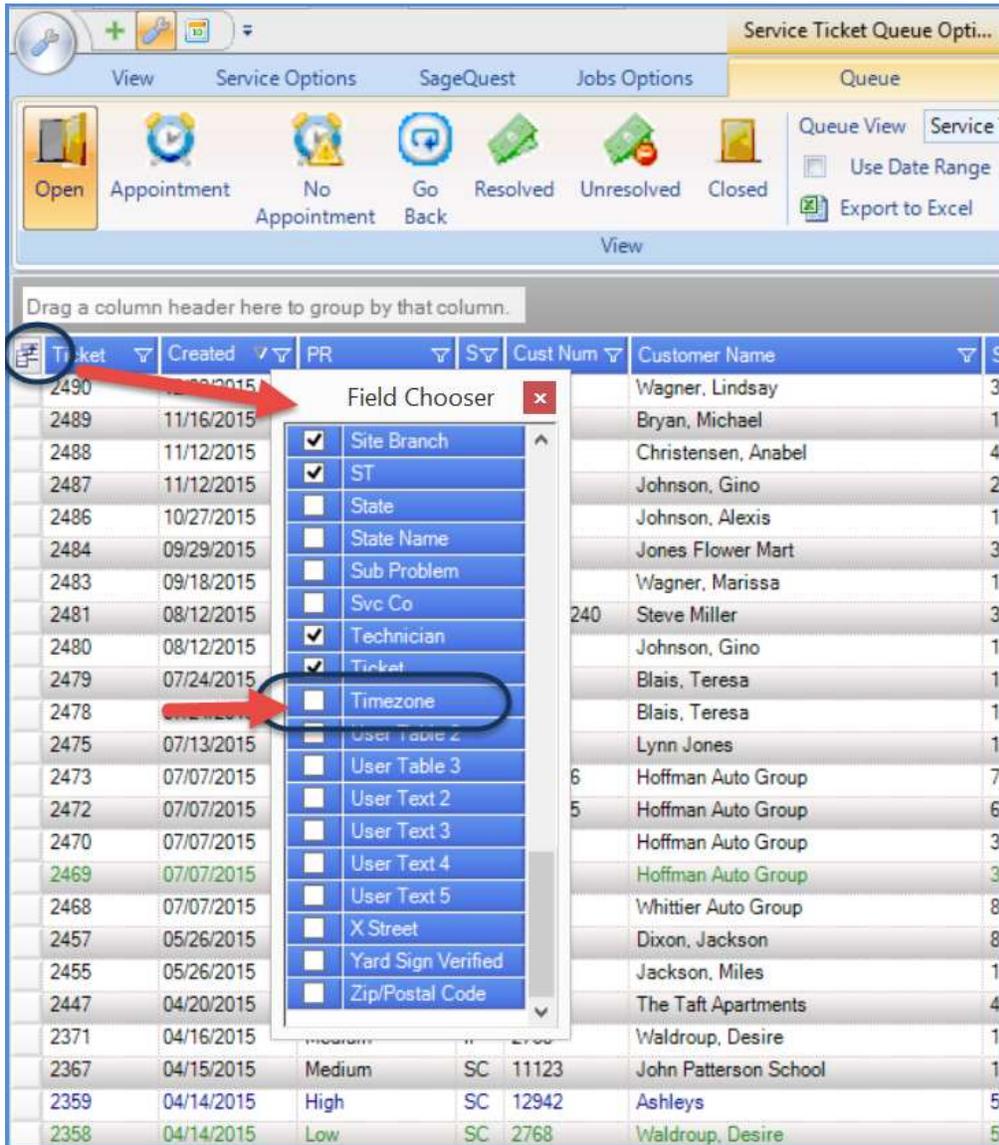
The main section is titled "Customer Equipment Detail" and contains a table with columns: Part, Description, Qty, Location, Local Zone, Date, Type, Desc, Serial-Lot, Date, and Remove. Two rows of equipment are listed:

Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Serial-Lot	Date	Remove
1500-ZEM	DUAL ZONE E...	1			12/02/2015	Service	2490			✖
CRD-999	CRD3698741	1			12/02/2015	Service	2490	45622		✖

The "Serial-Lot" column in the second row is circled in blue, and a blue arrow points to it from below. Below this table is a section for "Service Ticket Parts" with a table that has columns: Stock, Warehouse, Part, Description, Location, Qty, Unit Price, Total Price, Est Tax, Costing, and Serial-Lot. At the bottom right, there are "New" and "Save" buttons.

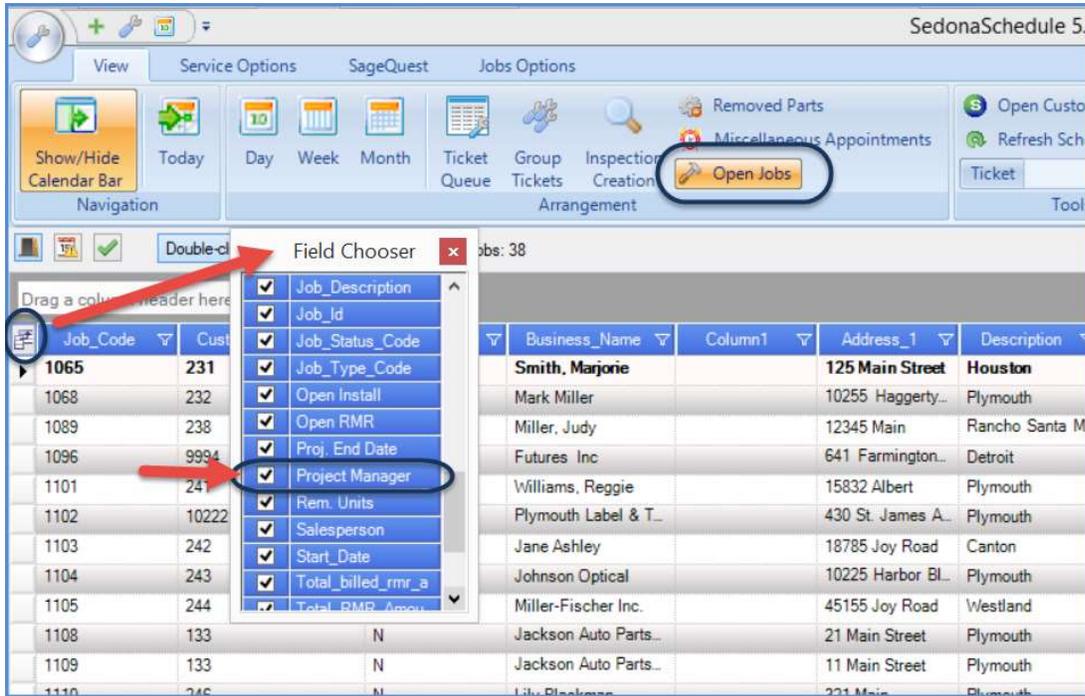
Ticket Queue Field Chooser

A new field, "Time zones" has been added to the Ticket Queue Field Chooser. Information in the Time zone field will only be available if the SedonaOffice server has been setup to utilize the new time zone feature.



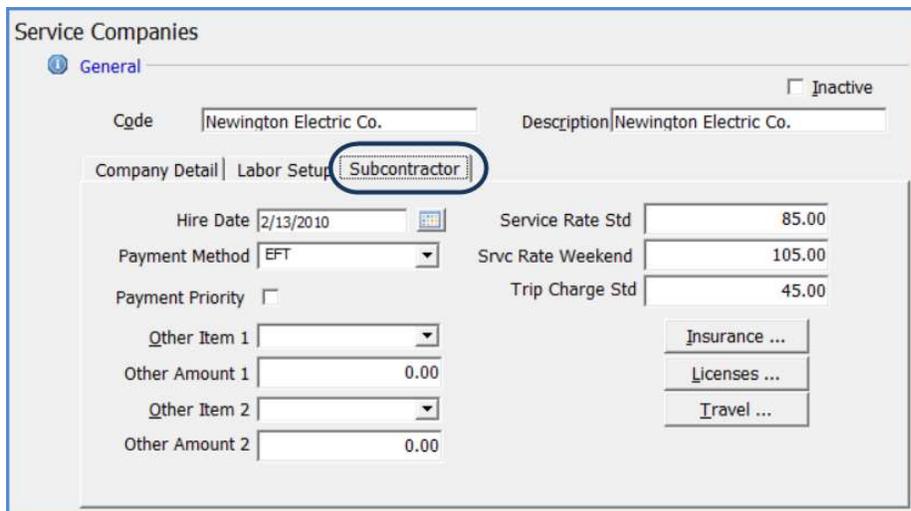
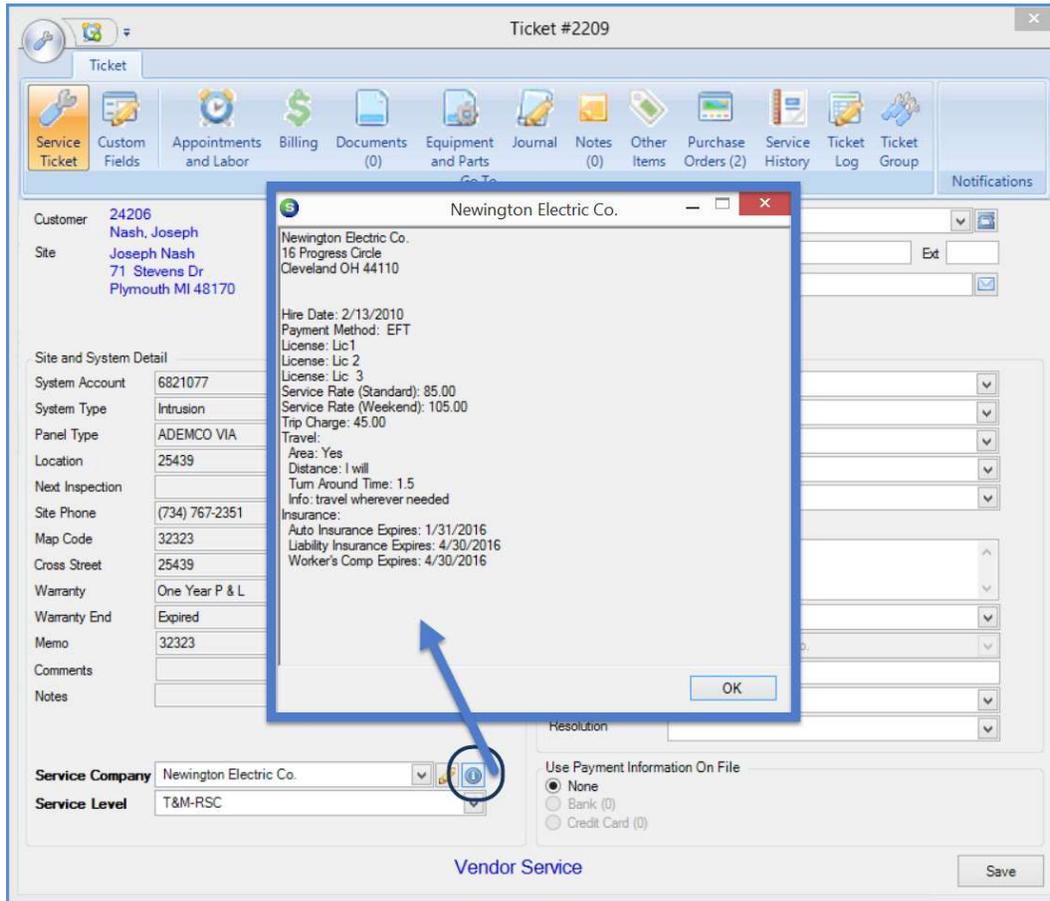
Job List Field Chooser

A new field, "Project Manager" has been added to the Job List Field Chooser.



Vendor Service Providers

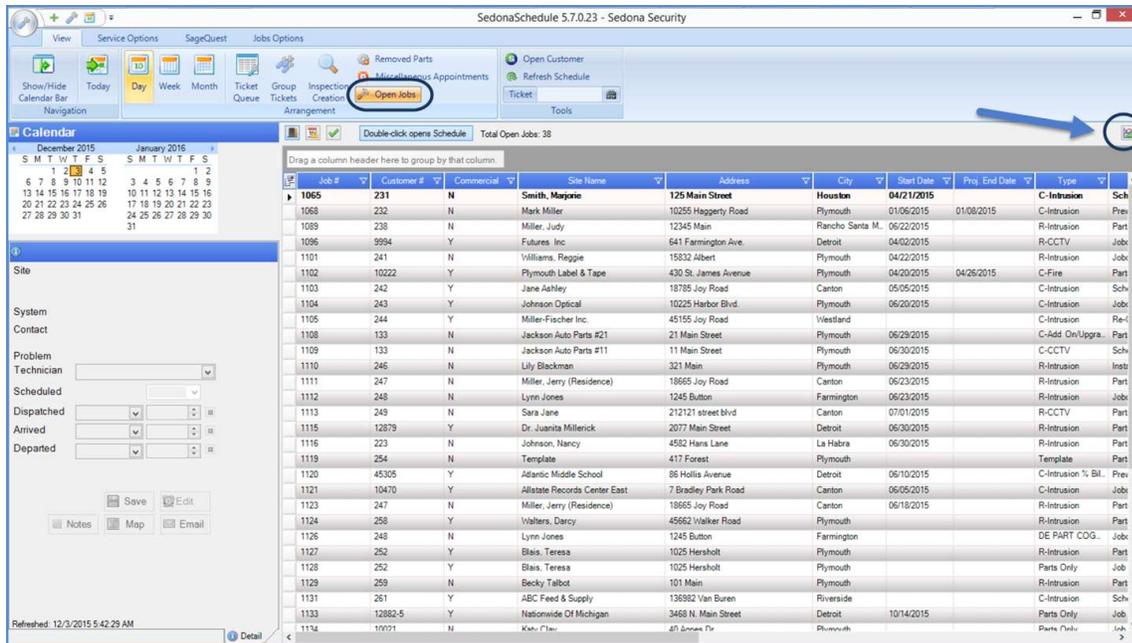
A new information button has been added to show information about vendor service providers. The information displayed is entered and maintained on the Subcontractor tab on the Service Company setup table within SedonaSetup.



Job Planner

A new feature, *Job Planner*, is available to assist in planning large scale projects. The Job Planner will be turned on (by request only) by SedonaOffice Support.

Once turned on, the new feature is accessed by clicking on a new button  located in the banner area within the Open Job List area of SedonaSchedule.



The screenshot shows the SedonaSchedule 5.7.0.23 - Sedona Security interface. The 'Open Jobs' button in the top navigation bar is circled in red. A new 'Job Planner' icon, represented by a small globe, is circled in blue in the bottom right corner of the main window, with a blue arrow pointing to it from the text above. The main window displays a calendar on the left and a table of job entries on the right.

Job #	Customer #	Commercial	Site Name	Address	City	Start Date	Proj. End Date	Type	Sch
1065	231	N	Smith, Marjorie	125 Main Street	Houston	04/21/2015		C-Intrusion	Sch
1068	232	N	Mark Miller	10255 Hegerty Road	Plymouth	01/06/2015	01/08/2015	C-Intrusion	Pre
1089	238	N	Miller, Judy	12345 Main	Rancho Santa M.	05/22/2015		R-Intrusion	Part
1096	8994	Y	Futures Inc.	641 Farmington Ave.	Detroit	04/02/2015		R-CCTV	Job
1101	241	N	Williams, Reggie	1532 Albert	Plymouth	04/22/2015		R-Intrusion	Job
1102	10222	Y	Plymouth Label & Tape	430 St. James Avenue	Plymouth	04/20/2015	04/26/2015	C-Fire	Part
1103	242	Y	Jane Ashley	18785 Joy Road	Canton	05/05/2015		C-Intrusion	Sch
1104	243	Y	Johnson Optical	10225 Harbor Blvd.	Plymouth	06/20/2015		C-Intrusion	Job
1105	244	Y	Miller-Fischer Inc.	45155 Joy Road	Westland			C-Intrusion	Re-
1108	133	N	Jackson Auto Parts #21	21 Main Street	Plymouth	06/29/2015		C-Add On/Uppr.	Part
1109	133	N	Jackson Auto Parts #11	11 Main Street	Plymouth	06/30/2015		C-CCTV	Sch
1110	246	N	Lily Blackman	321 Main	Plymouth	06/29/2015		R-Intrusion	Intr
1111	247	N	Miller, Jerry (Residence)	18665 Joy Road	Canton	06/23/2015		R-Intrusion	Part
1112	248	N	Lynn Jones	1245 Button	Farmington	06/23/2015		R-Intrusion	Job
1113	249	N	Sara Jane	212121 street blvd	Canton	07/01/2015		R-CCTV	Part
1115	12879	Y	Dr. Juanita Millerick	2077 Main Street	Detroit	06/30/2015		R-Intrusion	Part
1116	223	N	Johnson, Nancy	4582 Hans Lane	La Habra	06/30/2015		R-Intrusion	Part
1119	254	N	Template	417 Forest	Plymouth			Template	Part
1120	45305	Y	Adaric Middle School	86 Hollis Avenue	Detroit	06/10/2015		C-Intrusion % Bil.	Pre
1121	10470	Y	Allstate Records Center East	7 Bradley Park Road	Canton	06/05/2015		C-Intrusion	Job
1123	247	N	Miller, Jerry (Residence)	18665 Joy Road	Canton	06/18/2015		R-Intrusion	Part
1124	258	Y	Walters, Darcy	45662 Walker Road	Plymouth			R-Intrusion	Part
1126	248	N	Lynn Jones	1245 Button	Farmington			DE PART COG...	Job
1127	252	Y	Blais, Teresa	1025 Hersholt	Plymouth			R-Intrusion	Part
1128	252	Y	Blais, Teresa	1025 Hersholt	Plymouth			Parts Only	Job
1129	259	N	Becky Talbot	101 Main	Plymouth			R-Intrusion	Part
1131	261	Y	ABC Feed & Supply	136982 Van Buren	Riverside			C-Intrusion	Sch
1133	12882-5	Y	Nationwide Of Michigan	3468 N. Main Street	Detroit	10/14/2015		Parts Only	Job
1134	10771	N	Kath. Cler...	401 James Pl	Plymouth			Parts Only	Job

Inspection Creation

The site city and inspection service level have been added to the inspection creation grid.

The screenshot displays the 'Inspection Creation' grid in the SedonaSchedule 5.7.0.23 - Sedona Security application. The grid contains the following data:

Account	Service Co	System	Site	Address	Date	Route Code	City	Service Level
Z52423A	MI-INSP T&M	Fire	Canton Board Of Edu...	7 West Main Street	07/01/2015	N/A	Lansing	INSP T&M-LC
Z52423A	MI-INSP T&M	Fire	Canton Board Of Edu...	7 West Main Street	07/01/2015	N/A	Lansing	INSP T&M-LC
L2423A	MI-INSP T&M	Intrusion	Canton Board Of Edu...	7 West Main Street	07/01/2015	N/A	Lansing	INSP T&M-LC
Z50647	MI-INSP T&M	Fire	Webster St Apartments	63-65 Webster Street	07/01/2015	N/A	Detroit	INSP T&M-LC
8495	MI-T&M	Intrusion	Jones Jewelers #1	2 Main Street	07/01/2015	N/A	Plymouth	INSP T&M-LC
Z50681	MI-INSP T&M	Fire	The Taft Apartments	414 Chapel Street	10/01/2015	N/A	Lansing	INSP T&M-LC
Z50647	MI-INSP T&M	Fire	Webster St Apartments	63-65 Webster Street	10/01/2015	N/A	Detroit	INSP T&M-LC

Resolved Ticket Information

The date and time the Ticket was resolved now appears in the ticket header after a note marked as a “resolution” note is saved to the ticket, and a resolution code has been selected on the Service Ticket form.

Ticket #2475

Service Ticket | Custom Fields | Appointments and Labor | Billing | Documents (0) | Equipment and Parts | Journal | Notes (0) | Other Items | Purchase Orders (0) | Service History | Ticket Log | Ticket Group

Go To | Notifications

Customer: 248 Lynn Jones
Site: Lynn Jones, 1245 Button, Farmington MI 48336
Created: 7/13/2015 8:01 AM
Created By: Administrator
Status: Resolved
Resolved: 7/13/2015 8:10 AM
Contact: [Field]
Phone: [Field] Ext: [Field]
Notify: [Field]

Site and System Detail

System Account: 12345678
System Type: Intrusion
Panel Type: *VISTA 128FBP
Location: [Field]
Next Inspection: [Field]
Site Phone: (313) 454-3214
Map Code: [Field] Timezone: [Field]
Cross Street: [Field]
Warranty: Full Warranty
Warranty End: Expired
Memo: [Field]
Comments: [Field]
Notes: [Field]

Service Company: MI-T&M
Service Level: T&M-RSC

Ticket Detail

Problem: Can't Set B/A
Secondary Problem: [Field]
Route Code: [Field]
Expertise: 3
Priority: Medium
Estimated Length: 60
Comments: [Field]
Service Coordinator: [Field]
Technician: [Field]
PO #: [Field]
Category: S-Svc T&M
Resolution: 4 Replace
Use Payment Information On File:
 None
 Bank (0)
 Credit Card (1)

Save

SedonaSetup

Install Company

A new field labeled Warehouse has been added to the Install Company setup table. The warehouse associated with the Install Company will be the default warehouse selected on all purchase orders created from within a job that are not direct expensed.

Install Company Setup Inactive

Install: ABC Electronics
Description: ABC Electronics

Parts WIP: 122100
Misc WIP: 122140
Warehouse: ABC Electronics

Labor To GL Overhead

Labor Expense Type: Expense at time of entry
 Expense thru WIP

Labor Expense: 511100 *COS - Jobs-Labor*
Labor Deferred: 258100 *Deferred Labor - Jobs*
Labor WIP: 122120 *WIP - Job Labor*

Overhead Debit: 511105 *COS - Jobs Overhead*
Overhead Credit: 258105 *COS - Jobs Overhead*

Appointment Options

Dispatch: Yes No (Completed Only)

Hours: Start 8, End 17

Weekends: Saturday Sunday

Timesheet: Auto Manual

User Group Security

New User Permissions have been created to provide a greater level of control over your data.

Read Only Vendor Access	AP
Hide Vendor Social Security No	AP
ADI Integration	AP
Edit Costs on Purchase Orders	AP
Delete Existing Customer	CM
Edit RMR Next Cycle Date	CM
Job Costing Part Button	JM
Edit Job Sold Date on Jobs	JM
Point Of Sale	PS
Location	PS
Openings	PS
POS Entry	PS
Reconcile Opening	PS
View Totals On Opening	PS
POS Preferences	PS
Select Closed Service Ticket for Costing	SV
Export Ticket Queue	SV
Bill Ticket to Cycle	SV

Notes

Notes

Notes

Notes