SO 2016
UC

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Service 1

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PERENNIAL 20ᵀᴴ
SOFTWARE ANNIVERSARY
Makers of SedonaOffice and AlarmBiller®

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Service 1

This session will cover best practices in reviewing/auditing, invoicing and closing Service and Inspection Tickets. Since this is an advanced user course, we assume you already know the operational basics of creating and processing tickets.

Note: This will be an interactive session, so plenty of space is being provided for taking notes as your presenter walks-through and reviews each Ticket through to the closing process.

Tickets Overview

There are two basic types of Tickets in SedonaOffice – Service Tickets and Inspection Tickets.

Service Tickets are manually created one by one and may be defaulted to an internal service company or an external company, which is referred to as a Service Provider. Tickets assigned to a Service Provider are referred to and labeled as *Vendor Tickets*.

Inspection Tickets are generated in bulk, typically one month prior to the inspection due date. Inspection tickets may also be defaulted to an internal service company or an external company, which is referred to as a Service Provider. Inspection Tickets assigned to a Service Provider are referred to and labeled as *Vendor Inspection Tickets*.

Over the years we have seen SedonaOffice customers develop creative uses of Service Tickets and Inspection Tickets to automate internal company processes.

- Internal technical support (code changes, downloads, troubleshooting)
- Customer Service Issues (the need for this will be replaced by the new *SedonaEvents*)
- Contract Expiration/Renewal Reminders (using Inspection Tickets)

When using Tickets for purposes other than servicing a customer's system, new Service Companies are setup so that Tickets may be filtered in the Ticket Queue by the different departments using Tickets.

Ticket Processing Flow

Servicing your customers on a timely basis is the job of your company; providing the tools to automate, optimize efficiency and gather data to provide reliable reporting is the job of SedonaOffice.

Over the years, the Service module has been enhanced to provide a set of tools to better process tickets. Thanks to the input of our customers, the Service module (SedonaSchedule) has continuouly been enhanced and improved to provide options for processing tickets in the most efficient and effective manner possible.

One of the main keys to success when using SedonaSchedule, is to have clear policies and procedures in place so that each individual involved in ticket processing, has a clear understanding of how to use the tools provided and how what they do affects other Users and other areas of the software.
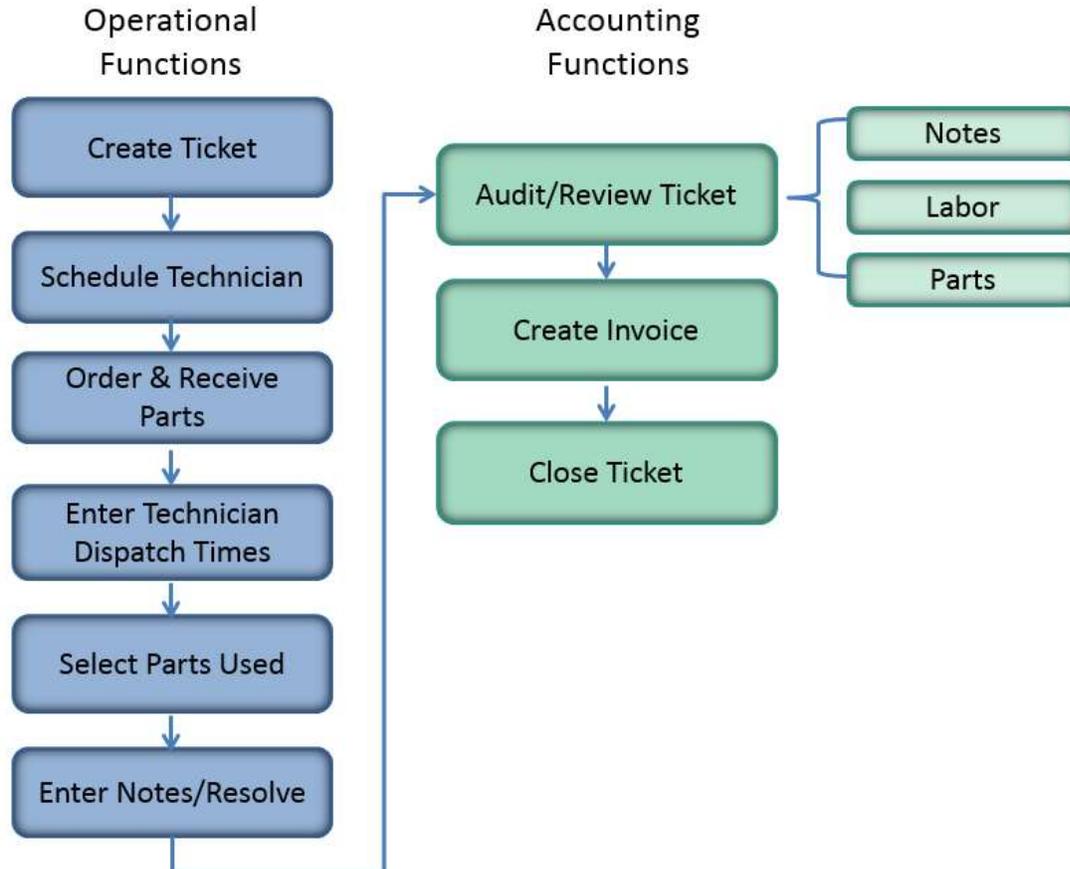
Notes

Ticket Audit/Review

The processing of Service Tickets and Inspection Tickets is identical. The only difference is how the ticket is created.

Review Notes

Notes

Review Purchase Orders

Make certain all Purchase Orders have been received. If the number in parenthesis on the Purchase Orders button is zero – this indicates no purchase orders are attached to the ticket.

Notes

Review Parts

Notes

Review Labor

Notes

Review Other Items

Notes

Review Billable Charges

If the charges are correct, click the Create Invoice button.

Notes

Closing Inspection Tickets

Prior to version 5.7.26, the Next Inspection Date would be updated when the Ticket was closed. This meant that if inspections were done frequently on a system, it was critical to complete and close the ticket on time so that the next inspection ticket would be generated on time.

With the release of version 5.7.26, a new option is available that lets you determine when you want the Next Inspection Date (on the Inspection Setup record) to be advanced.
The choices are:

- When the Ticket is Closed
- When the Ticket is Created
- When the Ticket is Scheduled
- When the Ticket is Resolved

When setting up new Inspection Records, the default "Next Inspection At" is set to your company default, which is a new field in SedonaSetup/Service Setup Defaults.

Notes