



14th ANNUAL USERS CONFERENCE
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Service 1

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Table of Contents

Tickets Overview 5

 Ticket Processing Flow 6

Ticket Audit/Review..... 8

 Review Notes 8

 Review Purchase Orders 10

 Review Parts 12

 Review Labor 14

 Review Other Items..... 16

 Review Billable Charges 18

 Closing Inspection Tickets 20

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)

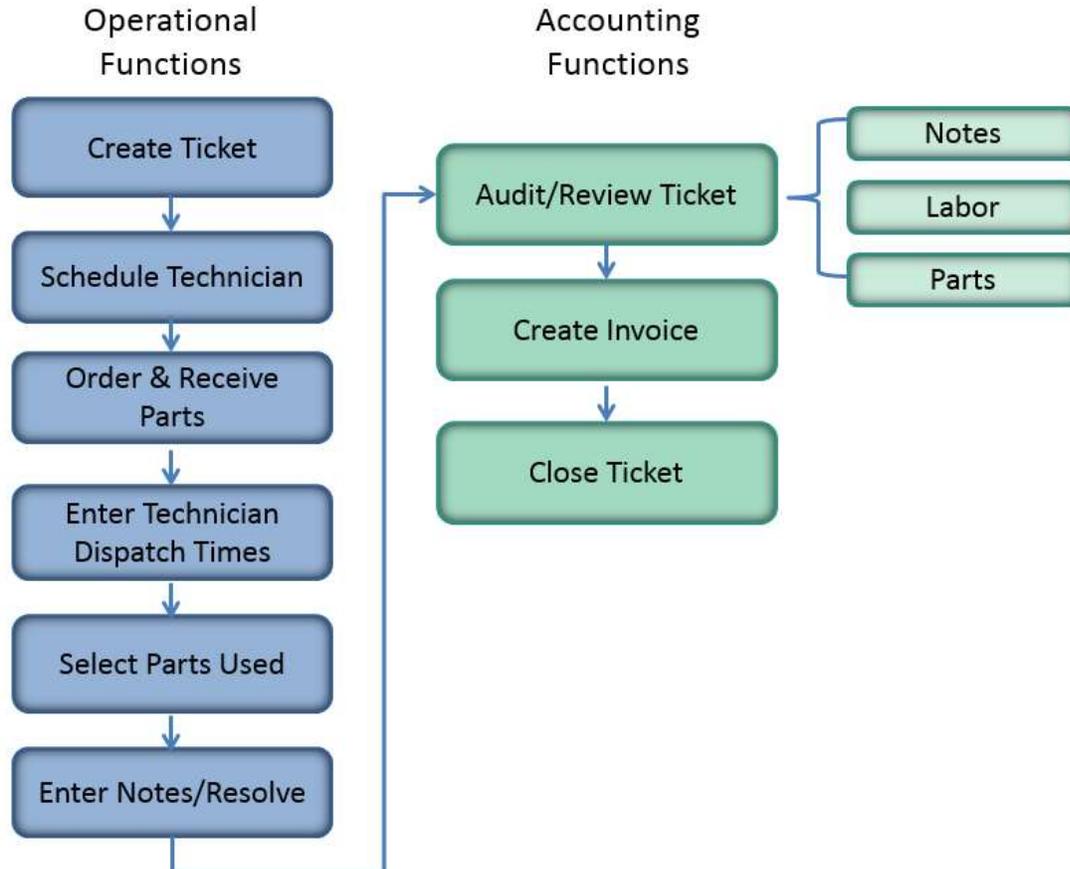
When using Tickets for purposes other than servicing a customer's system, new Service Companies are setup so that Tickets may be filtered in the Ticket Queue by the different departments using Tickets.

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 continuously 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

The screenshot displays a software interface for reviewing a ticket. The main window is titled "Ticket #1007" and features a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (2), Other Items, Purchase Orders (0), Service History, Ticket Log, and Ticket Group. Below the navigation bar, the ticket details are shown, including Customer (1015 Fegan, Maxwell), Site (Fegan, Maxwell, 15688 Indian Creek Tr, Riverside CA 92506), Created (12/18/2015 7:56 AM), Created By (Administrator), Contact (Max Fegan), Phone ((949) 758-7963), Status (Resolved), and Notify (general.maxwell.fegan@gmail.com).

A table of notes is displayed below the details:

Notes	Level	Resolution	Entered	By	Edited	Edited By
Multiple false alarms received in centr...	1 - No Restriction	<input type="checkbox"/>	12/18/2015 7:56...	Administrator	12/18/2015 7:56...	Administrator
Panel damaged during storm and panel...	1 - No Restriction	<input checked="" type="checkbox"/>	1/11/2016 10:15...	Administrator	1/11/2016 10:16...	Administrator

The detailed view of the note "Panel damaged during storm and panel is un-repairable. Replace with V128BP, customer insurance company." is shown in a separate window titled "Ticket #1007 - Notes List". This window contains the text of the note and an "OK" button. A blue arrow points from the "List" button in the main window to the detailed note window.

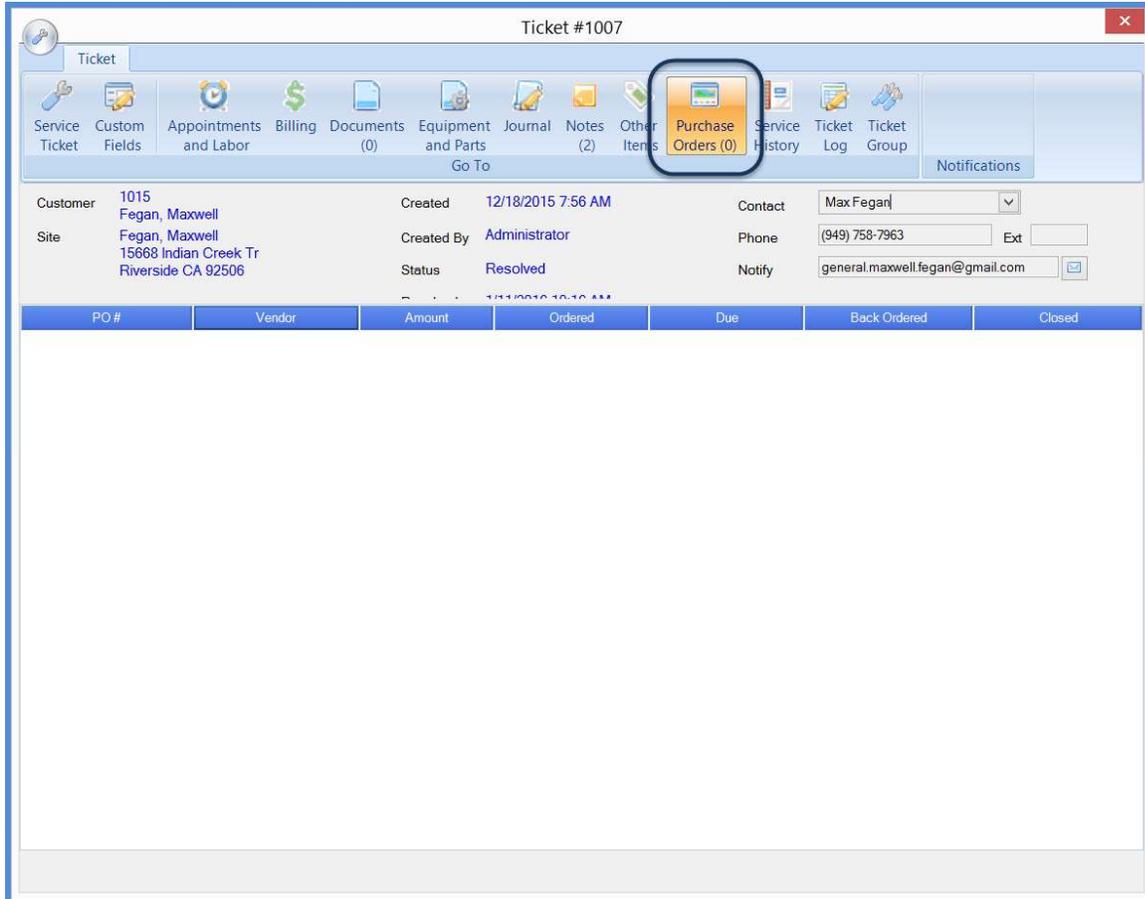
At the bottom of the main window, there is a section for "Access Level" (1 - No Restriction) and a checked "Resolution Note" checkbox. Below this are buttons for "List", "Instructions", "New", and "Save".

Notes

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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

Ticket #1007

Service Ticket | Custom Fields | Appointments and Labor | Billing | Documents (0) | **Equipment and Parts** | Journal | Notes (2) | Other Items | Purchase Orders (0) | Service History | Ticket Log | Ticket Group

COGS Account: 520101

Customer: 1015 Fegan, Maxwell
 Site: Fegan, Maxwell, 15668 Indian Creek Tr, Riverside CA 92506
 Created: 12/18/2015 7:56 AM
 Created By: Administrator
 Status: Resolved
 Contact: Max Fegan
 Phone: (949) 758-7963
 Notify: general.maxwell.fegan@gmail.com

Customer Equipment Detail					Installed				Removal	
Part	Description	Qt	Location	Local Zone	Date	Type	Desc	Serial-Lot	Date	Remov
V128FBP-24	V128FBP-24 FIRE...	1			04/02/2015	Other	J 1015			✖
5894	WIRELESS MOTIO...	1			04/02/2015	Other	J 1015			✖
5894	WIRELESS MOTIO...	1			04/02/2015	Other	J 1015			✖
6150	KEYPAD 6150 LCD	1			04/02/2015	Other	J 1011			✖
WAVE2	INDOOR SIREN	1			04/02/2015	Other	J 1011			✖
IM-1270	IM-1270 12V 7AMP...	1			04/02/2015	Other	J 1011			✖

Service Ticket Parts										
Stock	Warehouse	Part	Description	Location	Qty	Unit Pric	Total Pri	Est Ta	Costing	Serial-
▶	✓ R-102 Reggie	V128BP	COMMUNICATOR		1	439.23...	439.23	35.14	Standa...	

Remove Equipment

? Do you want to replace V128FBP-24 with V128BP?

Notes

Review Labor

Ticket #1007

Service Ticket Custom Fields Appointments and Labor Billing Documents Equipment and Parts Journal Notes (2) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Customer: 1015 Fegan, Maxwell
Site: Fegan, Maxwell, 15668 Indian Creek Tr, Riverside CA 92506
Created: 12/18/2015 7:56 AM
Created By: Administrator
Status: Resolved
Contact: Max Fegan
Phone: (949) 758-7963
Notify: general.maxwell.fegan@gmail.com

Labor

Manual Labor Service Fee

Hours	Rate	Amounts	Amount
Regular: 3.25	60.00	Total Labor: 195.00	60.00
Overtime: 0.0	90.00	Tax: 0.00	
Holiday: 0.0	120.00	Total Amount: \$195.00	

Save

Name	Appointment	Dispatched	Arrived	Departed	Firm	Est Len	Act Len	Billable Len
Reggie Smith	12/22/2015 8:00 AM	12/22/2015 7:45 AM	12/22/2015 8:00 AM	12/22/2015 11:45 AM	<input type="checkbox"/>	120	225	195

Notes

Review Other Items

Ticket #1007 X

Service TicketCustom FieldsAppointments and LaborBillingDocuments (0)Equipment and PartsJournalNotes (2)Other ItemsPurchase Orders (0)Service HistoryTicket LogTicket Group

Notifications

Customer	1015 Fegan, Maxwell	Created	12/18/2015 7:56 AM	Contact	Max Fegan
Site	Fegan, Maxwell 15668 Indian Creek Tr Riverside CA 92506	Created By	Administrator	Phone	(949) 758-7963 Ext
		Status	Resolved	Notify	general.maxwell.fegan@gmail.com <input checked="" type="checkbox"/>

Item Code	Description	Qty	Unit Price	Total Price	Tax

New Save

Notes

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Review Billable Charges

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

Ticket #1007

Service Ticket Custom Fields Appointments and Labor **Billing** Documents (0) Equipment and Parts Journal Notes (2) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Go To Notifications

Customer: 1015 Fegan, Maxwell
Site: Fegan, Maxwell, 15668 Indian Creek Tr, Riverside CA 92506
Created: 12/18/2015 7:56 AM
Created By: Administrator
Status: Resolved
Contact: Max Fegan
Phone: (949) 758-7963
Notify: general.maxwell.fegan@gmail.com

Billing Overrides: Override Warranty, Override Service Level

Invoice: Third Party Bill To

Contact: [Dropdown]
Invoice Date: 1/11/2016

Add Resolution Note to Invoice
 Close Ticket After Invoicing

Ticket Charges

	Cost	Tax
Total Parts	439.23	35.14
Total Labor	195.00	0.00
Total Other	60.00	0.00
Sub Total	694.23	35.14
Total		\$729.37

Bill to Cycle: Bill to Cycle, Next Cycle Date: 2/1/2016
 Close Ticket After Adding to Cycle

Buttons: Create Invoice, Add to Next Cycle, Save

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

The screenshot shows the 'System Inspections' application window. The 'Inspection' tab is active, displaying various fields for configuring an inspection. The 'Next Inspection At' dropdown menu is open, showing the following options: Ticket Created, Ticket Closed, Ticket Scheduled, Ticket Resolved, and Ticket Created (highlighted). The form includes fields for Description, Frequency, Service Problem, Service Level, Service Company, Last Inspection, Next Inspection, Service Tech, Group Number, Estimated Hours, High Frequency Bypass, Exclude from High Frequency Check, and Notes. There are also 'Save', 'Terminate', and 'Cancel' buttons at the bottom.

Site	Johnson Furniture #05 2859 E Broadway		
System	95-2285 Intrusion/Fire		
Detail Equipment Inspection Items Reports			
Inspection			
Description	Semi-Annual Intrusion/Fire	Service Tech	
Frequency	Semi-Annual	Group Number	0
Service Problem	Insp-Int/Fire	Estimated Hours	4
Service Level	INSP T&M-Com	High Frequency Bypass	<input type="checkbox"/>
Service Company	Service First Fire	Exclude from High Frequency Check	<input type="checkbox"/>
Last Inspection	1/31/2016	Notes	
Next Inspection	7/31/2016		
Next Inspection At	Ticket Created Ticket Closed Ticket Scheduled Ticket Resolved Ticket Created		
Charges			
Inspection Item			
Amount	0.00		
Save Terminate Cancel			

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.

Service Setup

General Setup | GL Setup | GL Accounts for Misc Expense

General

Default Service Co. RIV-Commercial

Next Ticket # 1033

Ticket Printing Print the System Account on Service Tickets

When Printing Tickets, break out the Trip Charge on the Summary

Note Access Level 1 - No Restriction

Schedule By Technician Expertise Level Routes

Next Inspection At Ticket Created

Warning Message Setup

3 or more dispatches within the last 90 days

Maintenance Contracts

Warranty Type 90 P&L

Service Level T&M-Com

Invoice Defaults

Invoice Category Service

Invoice Description Service Call

Parts Item Code SVC Part-Com

Auto-Create Invoice Number

Prospect Defaults

Lead Source Technician

Lead Source 2

Status New-Resign

Sales Department Sales

Apply

Notes