SedonaOffice

The #1 Financial Software for Security Companies

SedonaService

2013 SedonaOffice

Users Conference

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Overview

This document is being provided primarily to explain the basics of SedonaService which includes terminology, definitions and general navigation within the application.

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SedonaService Module Overview

The Service Module which is being introduced with SedonaOffice Version 5.6 has been completely redesigned; this document will explain the new layout and functionality of each option within the new Service Module.

The new Service Module is activated within SedonaSetup. Access to this new module is controlled by a new User Group security option. Once permission is granted, when a User logs into SedonaOffice, the Main Menu Tree will only display the options of Service and Print Service Tickets. Clicking on the Service menu option launches the new Service Module. If a User has been granted permission to the new Service Module, they may only work in the new Service Module; the legacy Service Module will no longer be accessible.

The new Service Module incorporates the Schedule Board, Technician Dispatching, Ticket Queues, Inspection Ticket Generation, Technician Dispatching, and new Ticket creation into one application.

A new feature of the new Service Module is Display Groups. Display groups are groupings of Technicians. When viewing the SedonaService Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

The new SedonaService Schedule Board has been designed to be able to view appointments for one day, a week or a month at a time. Multiple tickets may now be assigned to the same Technician for the same timeslot on the same day.

Another new feature of the new Service Module is *Miscellaneous Appointments*; this new feature replaces the Technician Absence option that was available in the legacy Service module.

A new option, the *Unassigned Technician* is also available. This will allow you to schedule an appointment to the "Unassigned Technician" then drag to the appropriate Technician at a later time.

No More Right-Click – this new module was designed so that options and functions are viewable and selectable from the Ribbon or a Context menu.
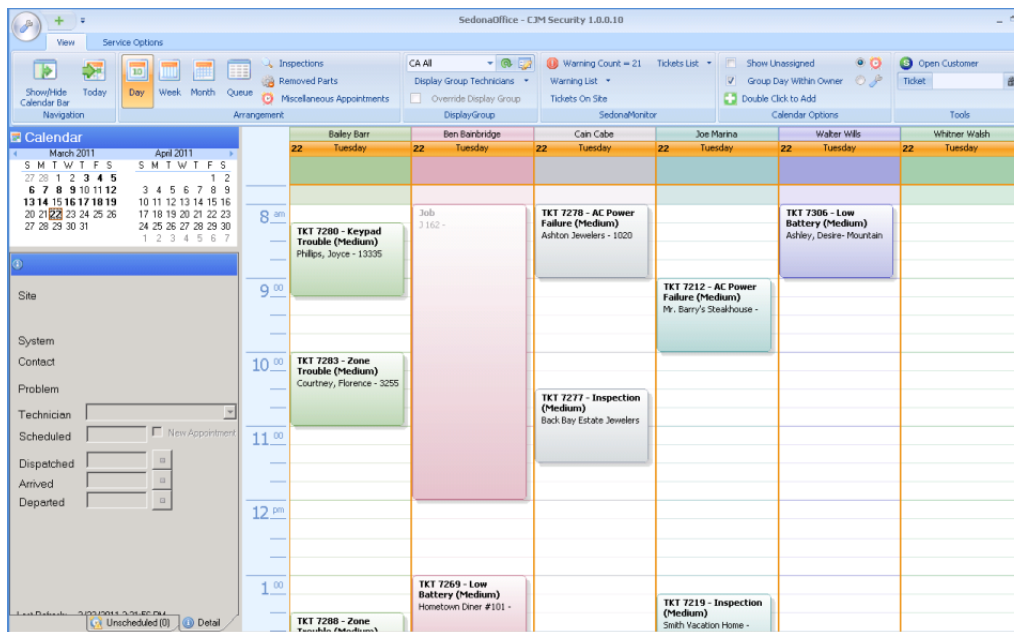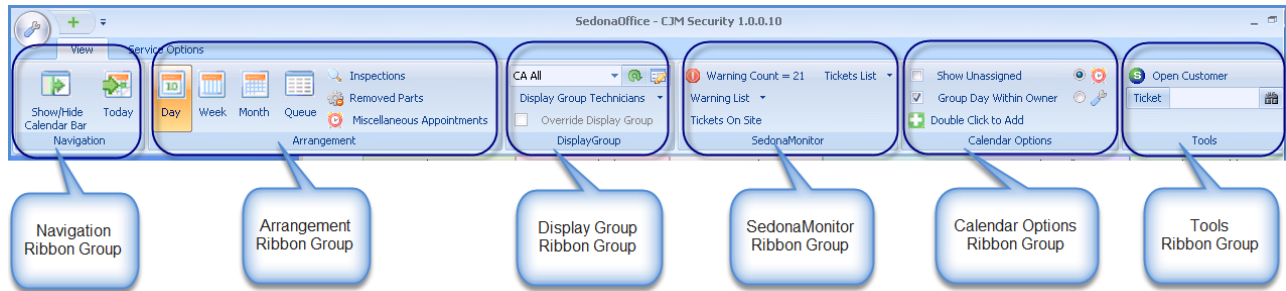
Terminology

Several new terms are being introduced with the New Service Module. This list of terms will assist in understanding the contents of this document.

- **Ribbon** – The Ribbon is located at the top of the SedonaService form; contains options from which the User clicks to activate an option.
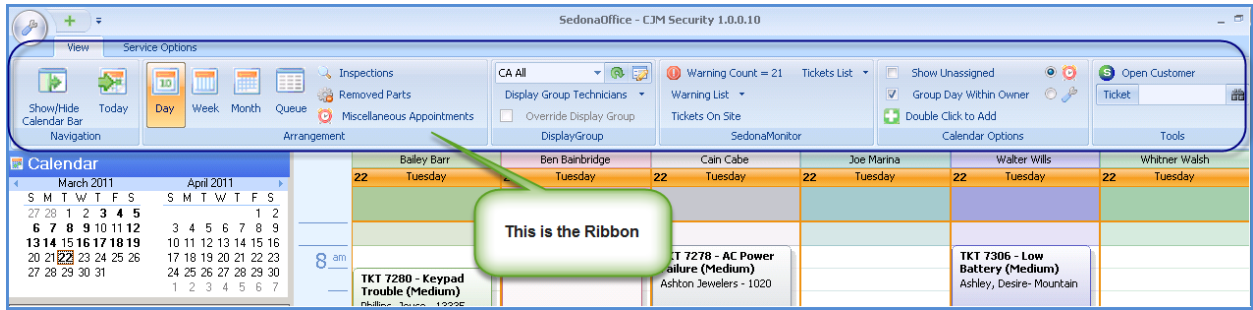
- **Ribbon Group** – Within the Ribbon are various groups of functions; these are referred to as Ribbon Groups.


- **Context Menu** – Context Menus appear throughout the SedonaService application and contain additional options from which to select. A context menu appears as a tab above the Ribbon.
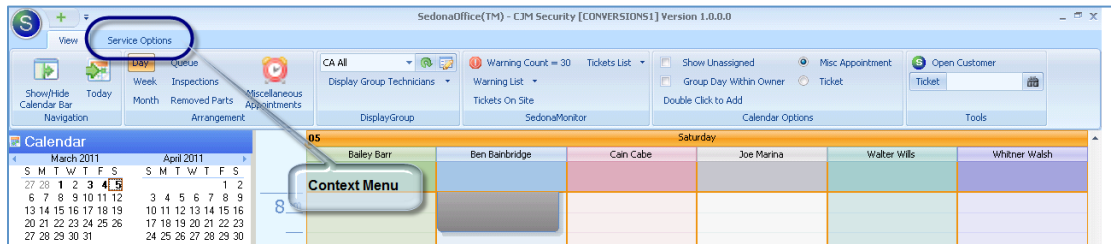
Terminology (continued)

- **Information Bubble** – When hovering over an appointment on the SedonaService Schedule Board, additional information is displayed within the Information Bubble.
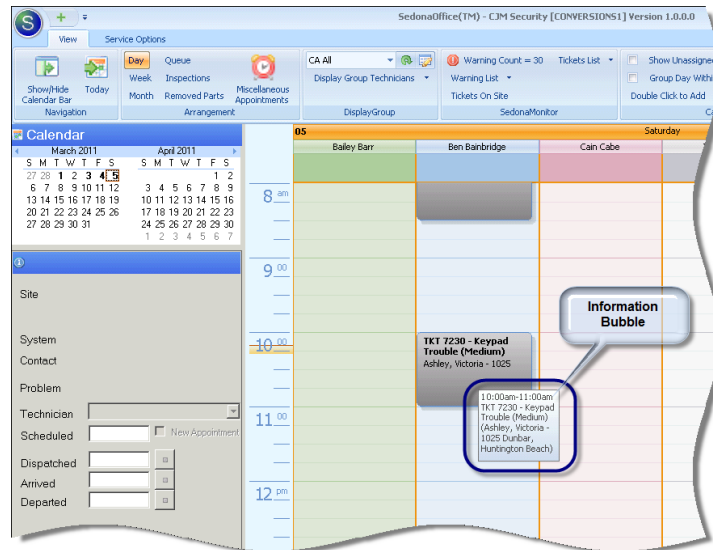
- **Display Group** – A Display Group is a grouping of one or more Technicians. Within the SedonaService Schedule Board, the User is able to choose to view a single Display Group or all Technicians within the Company. A Technician may be associated with one or multiple Display Groups. Your company creates 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.
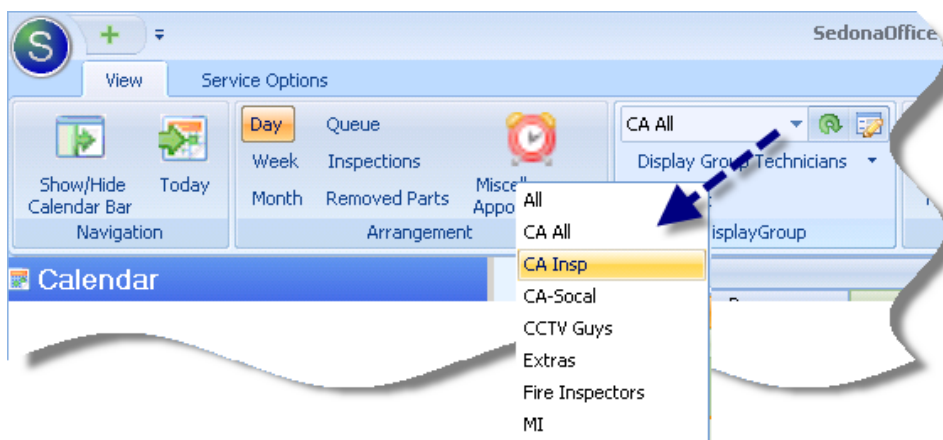
SedonaService 101

This section will describe the various components which make up the new SedonaService Module along with information on how to navigate within this module.

When the new Service Module is first accessed from the main application by selecting the Service option, *SedonaService* will be displayed which consists of several components; a Ribbon Bar at the top, the Calendar and Ticket Information list on the left and the Display area on the right. Information that is displayed within Display area is controlled by which option the User clicks on the Ribbon Bar. The following pages will describe each major component of SedonaService.
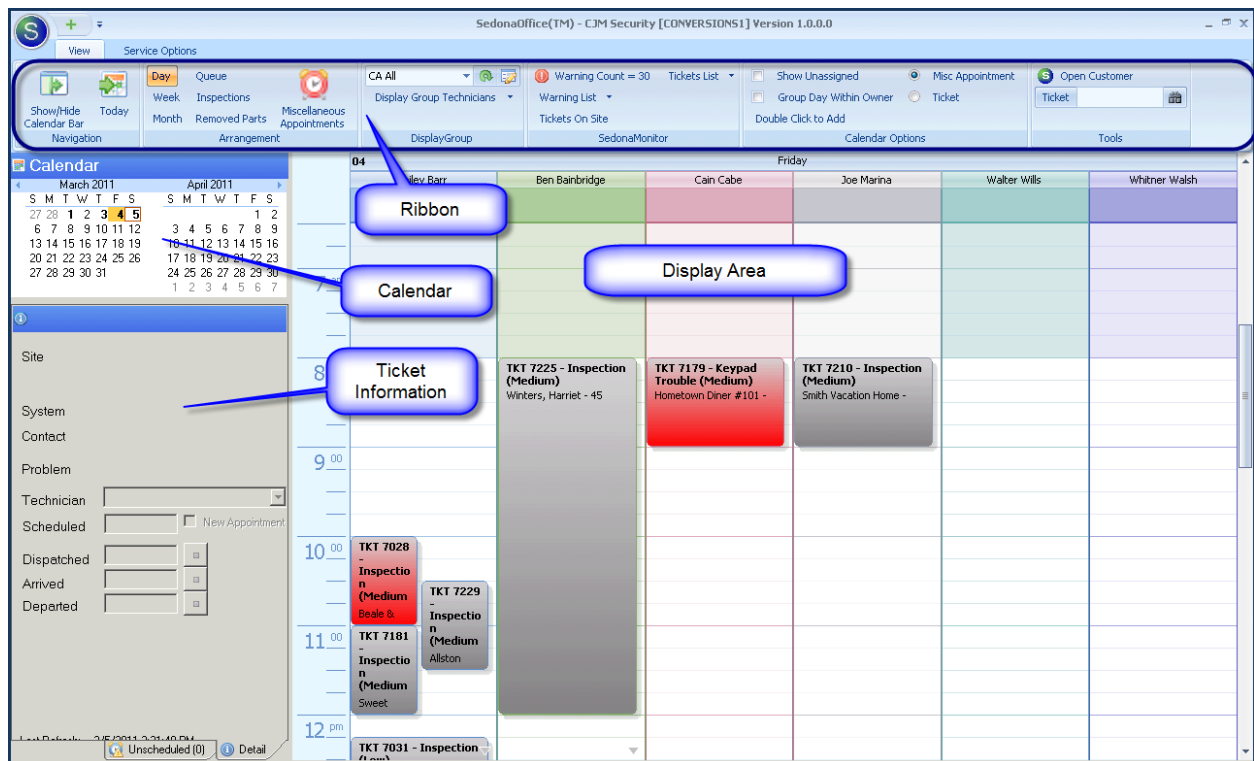
Ribbon

The Ribbon displays and controls all the options for navigating to various functions of SedonaService. Each option within each Ribbon Group of the Ribbon will be covered under this topic.

Wrench Icon – Clicking on the Wrench icon will open ribbon group with two options; New Service Ticket and Exit. Selecting the New Service Ticket option will open the Customer Lookup form to locate the customer for which a Service Ticket will be created. Selecting the Exit option will close SedonaService. The main SedonaOffice application will still be running after exiting SedonaService.
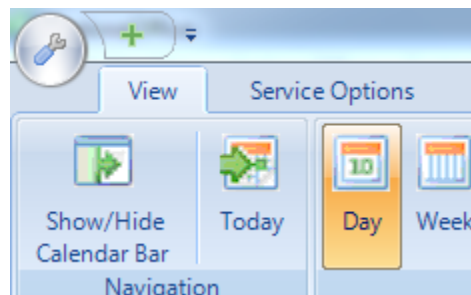
Plus Symbol – This option is used to create a new Service Ticket. Clicking on the Plus Symbol will open the Customer Lookup form to locate the customer for which a Service Ticket will be created.
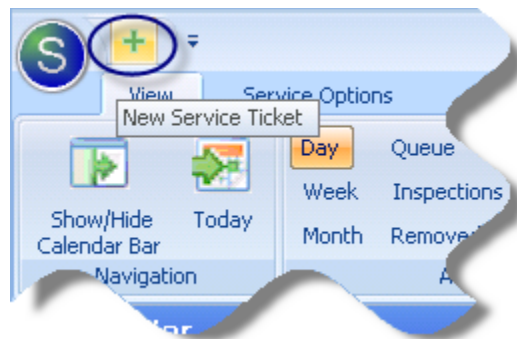
SedonaService 101 (continued) - *The Ribbon (continued)*

Ribbon Control – Selecting this option displays a drop-down menu with two options; *Show Below the Ribbon* and *Minimize the Ribbon*. These two options are described below.

- o *Show Below the Ribbon* - When selecting this option, the Plus Symbol (create new service ticket) and Ribbon Control options will be displayed below the Ribbon.
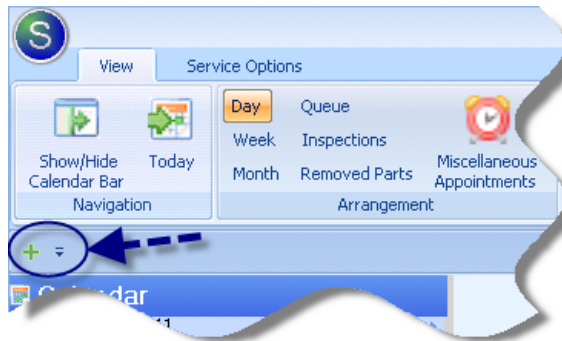
- o *Minimize the Ribbon* – Selecting this option will remove the Ribbon from display. If you want to re-display the Ribbon, click on the Ribbon Control option and de-select the Minimize the Ribbon option.

SedonaService 101 (continued) - *The Ribbon (continued)*

Service Options *Context Menu* – Selecting this context menu will display a new Ribbon with four Ribbon Groups; *Service Setup Tables , Parts Warehouse, Auto Refresh and Map Type.*

o **Service Setup Tables** Ribbon Group – There is one option available within this ribbon group, *Appointment Types*. Appointment Types are used when creating a Miscellaneous Appointment for a Technician; this defines the reason for the Miscellaneous Appointment. You may add additional Appointment Types to this setup table.
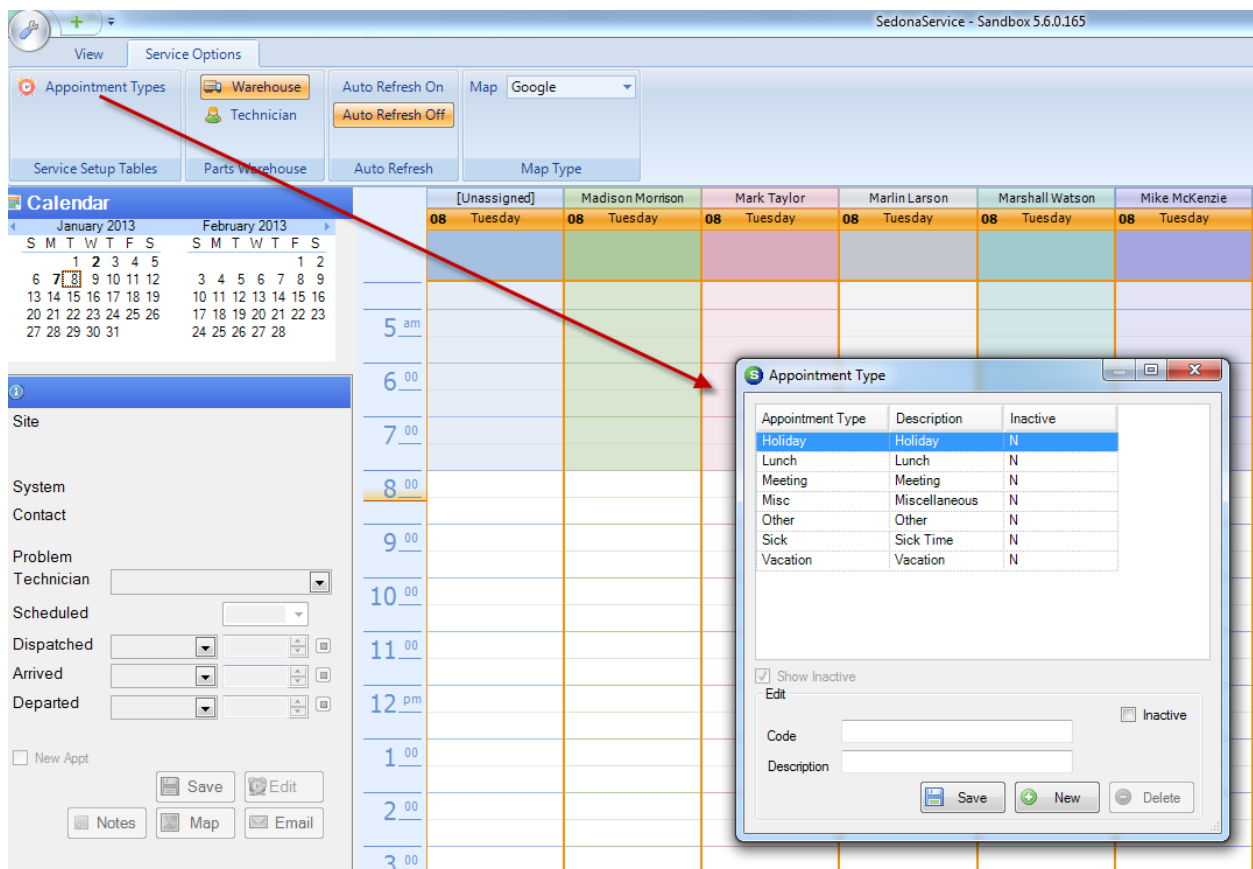
SedonaService 101 (continued) - *The Ribbon (continued)*

- o *Parts Warehouse* Ribbon Group – There is are two options available within this ribbon group, *Warehouse* and *Technician*.   These options control which warehouse parts used on a ticket will be removed. If the Technician option is selected, parts will always be relieved from the Warehouse linked to the Technician on the Ticket. If the Warehouse option is selected, the User may then choose to relieve parts inventory from either the Technician warehouse or any other warehouse.

  If the Warehouse option is selected, when adding a part to the Ticket, if a Technician appointment was scheduled for the Ticket, the warehouse will default to that of the Technician; however the User may override this and select a different warehouse if desired.
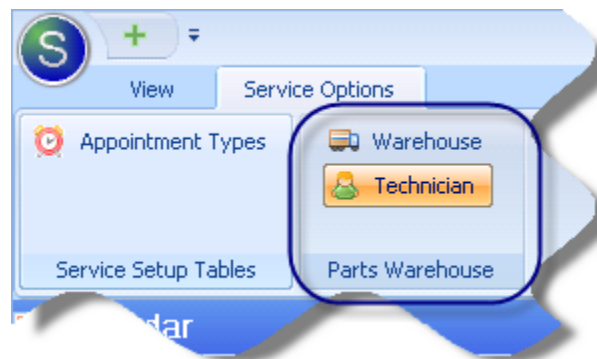
- o **Auto Refresh** Ribbon Group – There are two options available: Auto Refresh On and Auto Refresh Off
- o **Map Type** Ribbon Group - From the dropdown you can select which web portal you would like to use for mapping.

SedonaService 101 (continued) - *The Ribbon (continued)*

Navigation Ribbon Group – This Ribbon Group contains two options; *Show/Hide Calendar Bar* and *Today*.
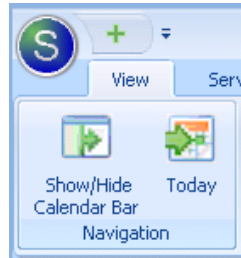
o **Show/Hide Calendar Bar** – selecting this option will remove the Calendar Bar from view.
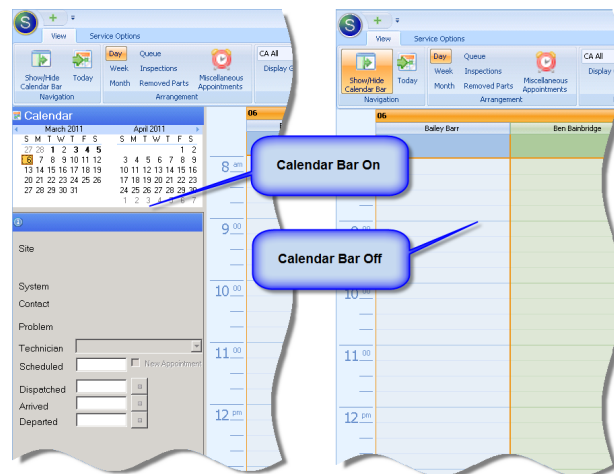
o **Today** – selecting this option will outline the current system date in red on the Calendar.
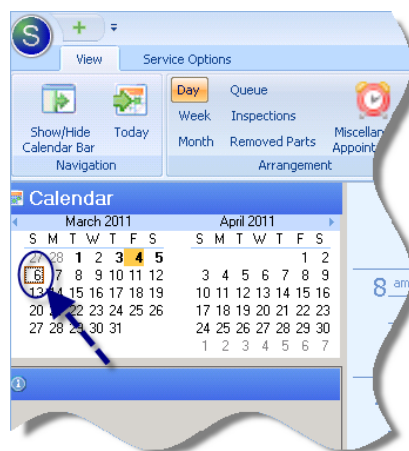
SedonaService 101 (continued) - *The Ribbon (continued)*

Arrangement Ribbon Group – This Ribbon Group contains several options; *Day, Week, Month, Queue, Group Tickets, Inspections, Removed Parts, and Miscellaneous Appointments.*
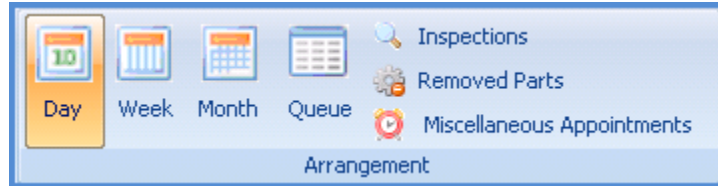
- o **Day, Week, Month** – selecting one of these options controls the period of time that is displayed in the Schedule.
- o **Queue** – selecting the Queue option will display the Ticket Queue. The Queue that is displayed is the last ticket queue that was viewed; i.e. Service Tickets, Inspection Tickets, Vendor Service Tickets or Vendor Inspection Tickets. Also when selecting the Queue option, a new Context Menu labeled Queue, will be displayed above the Ribbon. Selecting the Queue context menu will open a new Ribbon.
- o **Group Tickets** – This is a new feature which enables you to group multiple Inspection and Service Tickets together, schedule appointments for the group and create one invoice for the customer.

Queue Context Menu

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SedonaService 101 (continued) - *The Ribbon (continued)* - *Arrangement Ribbon Group (continued)*

- **Queue** Context Menu – Selecting this context menu will display the Queue View Ribbon. This ribbon has several options that control which tickets are displayed within the Queue list. There is a drop-down option to select the ticket queue to be viewed.


- o **Inspections** – Selecting the Inspections option will open a new Ribbon which is used to view your Inspections and generate Inspection Tickets.
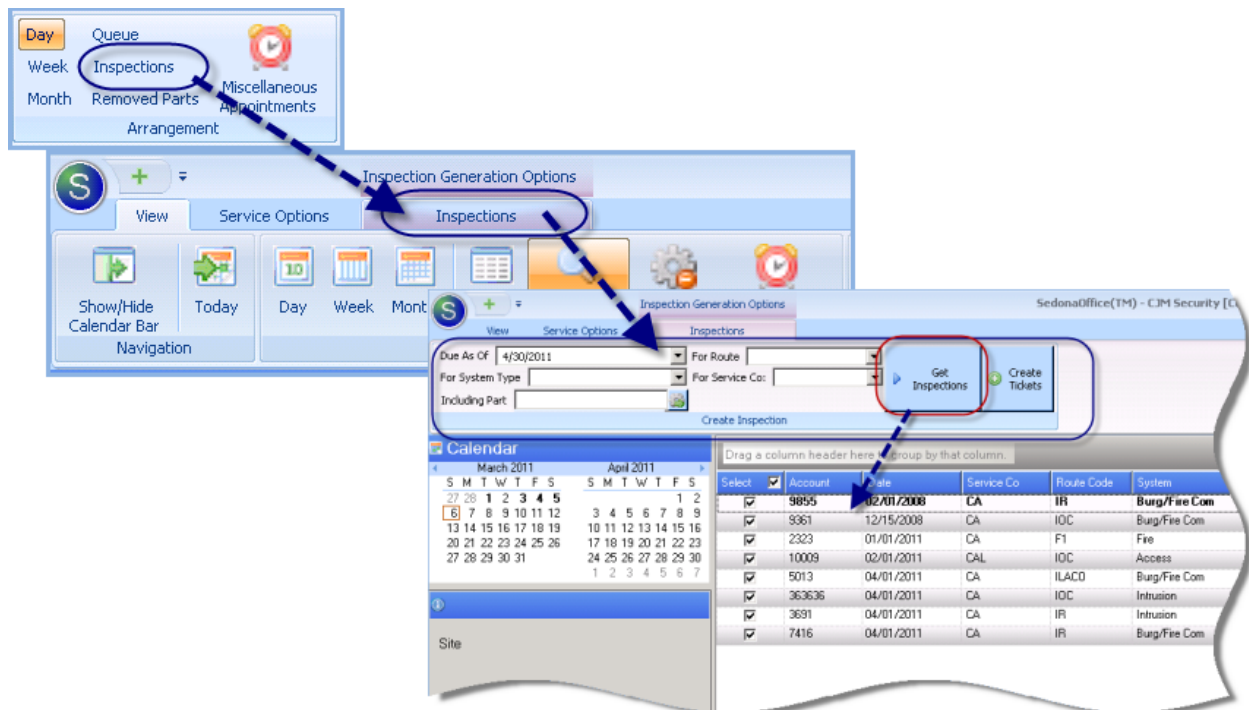
SedonaService 101 (continued) - *The Ribbon (continued)* - *Arrangement Ribbon Group (continued)*

- o **Removed Parts** – Selecting this option allows you to view 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 date(s) selected.

  This new feature provides you with a list of parts to obtain from Technician which were removed during a service call so that they may be returned to the Vendor for credit or repair if applicable.
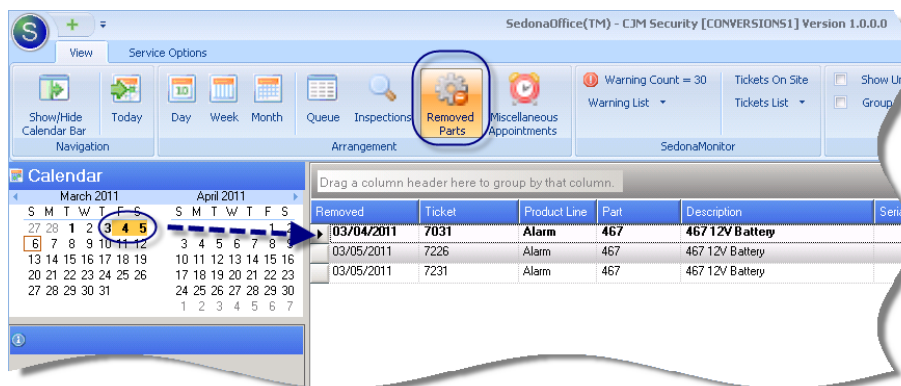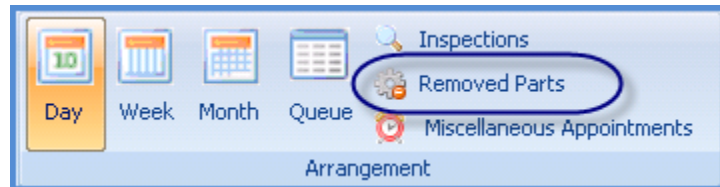
SedonaService 101 (continued) - *The Ribbon (continued) - Arrangement Ribbon Group (continued)*

o **Miscellaneous Appointments** – Selecting this option will display a Context Menu for Miscellaneous Appointments. Selecting this context menu 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 SedonaService Schedule Board where a Technician is not available to be scheduled for Service or Inspection Tickets. Miscellaneous Appointments replace the Technician Absence option that was available in the legacy Service Module.
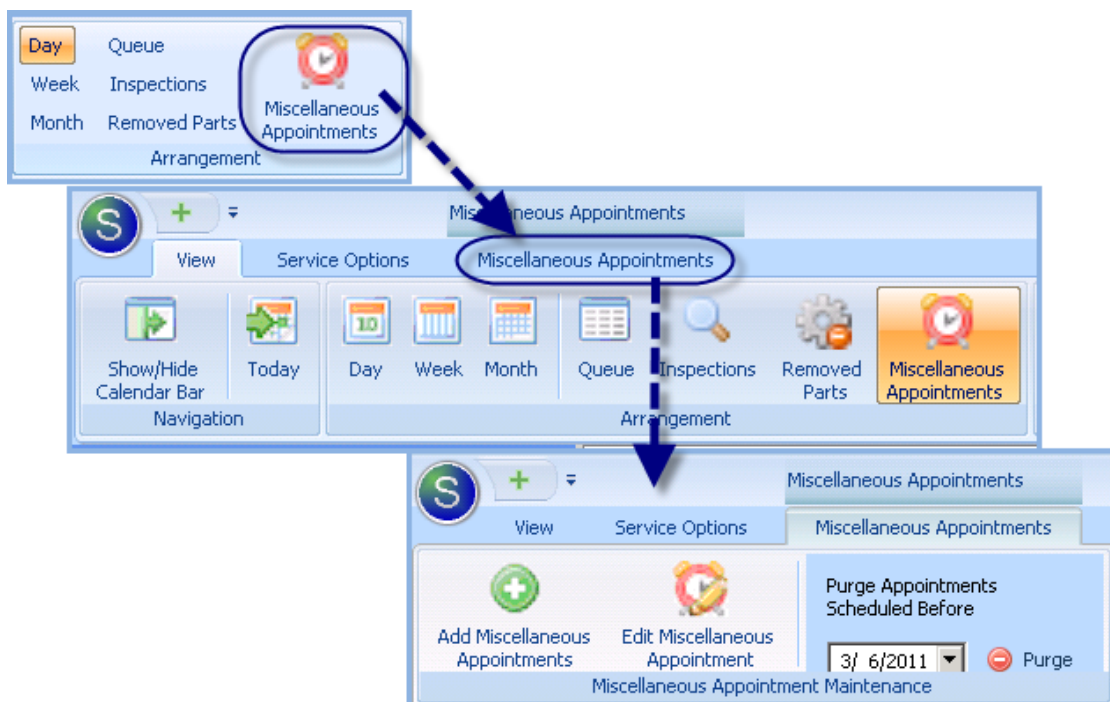
SedonaService 101 (continued) - *The Ribbon (continued)*

Display Group Ribbon Group – This Ribbon Group contains options for selecting the currently viewed Display Group, Editing and Creating Display Groups and Refreshing the SedonaService Schedule Board. Creating and managing Display Groups will be covered in depth later in this document.
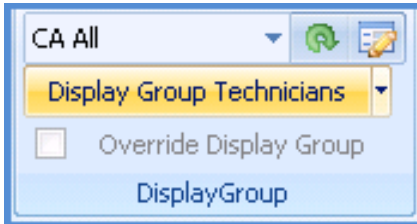
- o **Display Group Drop-Down List –** Clicking on the arrow will display a list of all available Display Groups from which the User may select. Selecting a Display Group will display all the Technicians linked to that group within the SedonaService Schedule Board.

- o **Refresh Button –** Clicking on the Refresh option will immediately update the list of Technicians displayed in SedonaService Schedule Board.

SedonaService 101 (continued) - *The Ribbon (continued) - Display Group Ribbon Group (continued)*

- o ![icon] **Display Group Edit** – Clicking on this option displays the Display Group form. This form is divided into an upper and lower tier. The upper tier displays all current Display Groups. The lower tier displays a list of the Technicians. When clicking on a Display Group in the upper tier, Technicians assigned to that Display Group will have a checkmark to the left of their name in the lower tier.

  New Display Groups may be created, modified or deleted from this form.
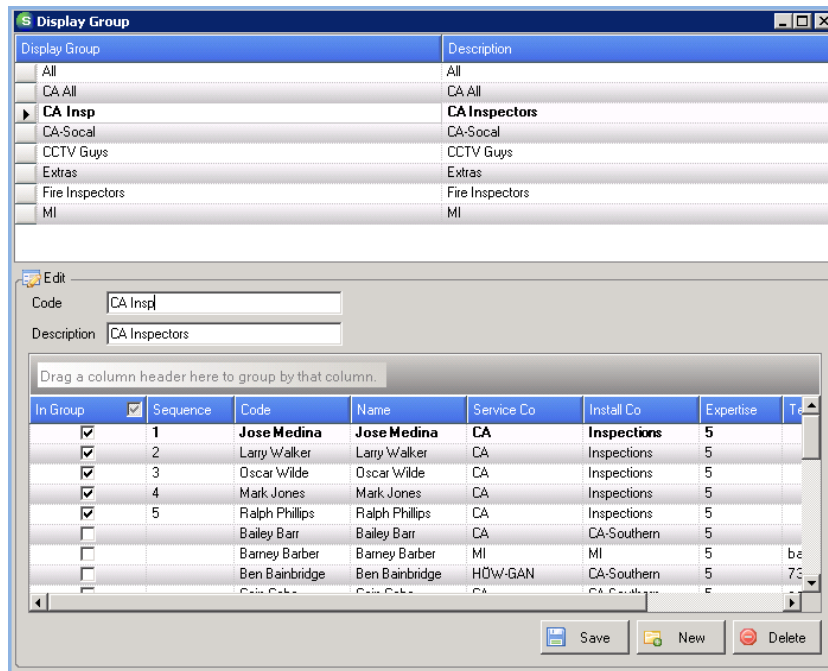
- o **Display Group Technicians** – Clicking on this option displays a list of all Technicians currently displayed in the SedonaService Schedule Board. The User may un-check one or more Technician names if they do not want to include them in SedonaService Schedule Board currently being viewed.
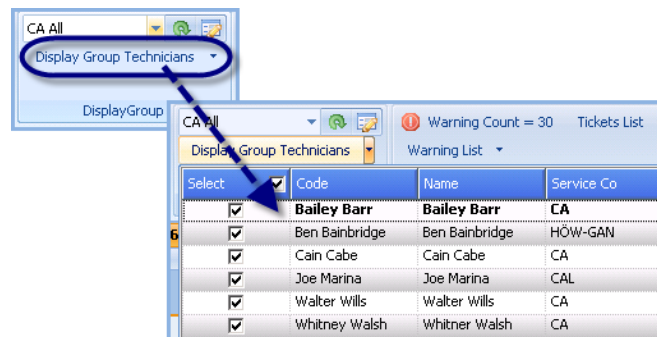
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SedonaService 101 (continued) - *The Ribbon (continued) - Display Group Ribbon Group (continued)*

- o **Override Display Group** – While working in one of the Ticket Queues, if this checkbox is selected, all Tickets in process for the entire company will be displayed. When this option is not selected, Tickets are displayed which are related to the Service Company to which the Technicians are assigned contained within the current Display Group.
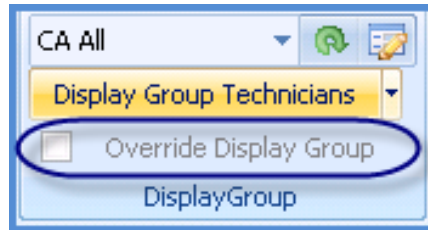
SedonaService 101 (continued) - *The Ribbon (continued)*

SedonaMonitor Ribbon Group – The SedonaMonitor Ribbon Group contains critical information for managing Tickets and Technicians. This ribbon groups is comprised of four options; *Warning Count, Warning List, Tickets on Site and Ticket List*. Each of these options will be described below.

- o **Warning Count** – The Warning Count is for Display only; if any scheduled Appointments have not been dispatch by the current date/appointment time, those tickets will be included in the Warning Count. This applies to all types of Tickets.
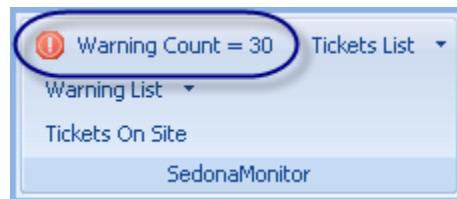
- o **Warning List** – If there is a number displayed to the right of the Warning Count, clicking on the Warning List will display the list of tickets where the Technician has not yet been dispatched by the date/time set for the appointment.

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SedonaService 101 (continued) - *The Ribbon (continued)* - *SedonaMonitor Group Ribbon Group (continued)*

- o **Tickets On Site** – This option functions when working in a Ticket Queue or the SedonaService Schedule Board. When working from a ticket Queue, and highlighting a particular ticket in the list, if there are any other open service 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 SedonaService Schedule Board, highlighting an appointment on the schedule will display a count of any other open tickets for the same site.
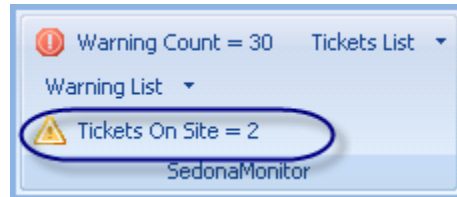
- o **Ticket List** – If a count is displayed next to the *Tickets On Site*, clicking on this option will display a list of the other tickets where a Technician is currently on site for the same site.

SedonaService 101 (continued) - *The Ribbon (continued)*

Calendar Options Ribbon Group – This Ribbon Group contains options that control the configuration of the SedonaService Schedule Board and also provides quick tools for creating a new Ticket and Appointment and Miscellaneous Appointments.
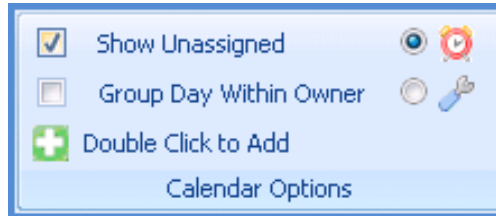
- ○ **Show Unassigned** – If this option is selected, the" Unassigned Technician" will be displayed as the first column in the SedonaService Schedule Board. Appointments may be scheduled with the Unassigned Technician, and then dragged to a company Technician at a later time. This option may be toggled on or off at any time. Multiple appointments within the same time slot may be created for the Unassigned Technician.
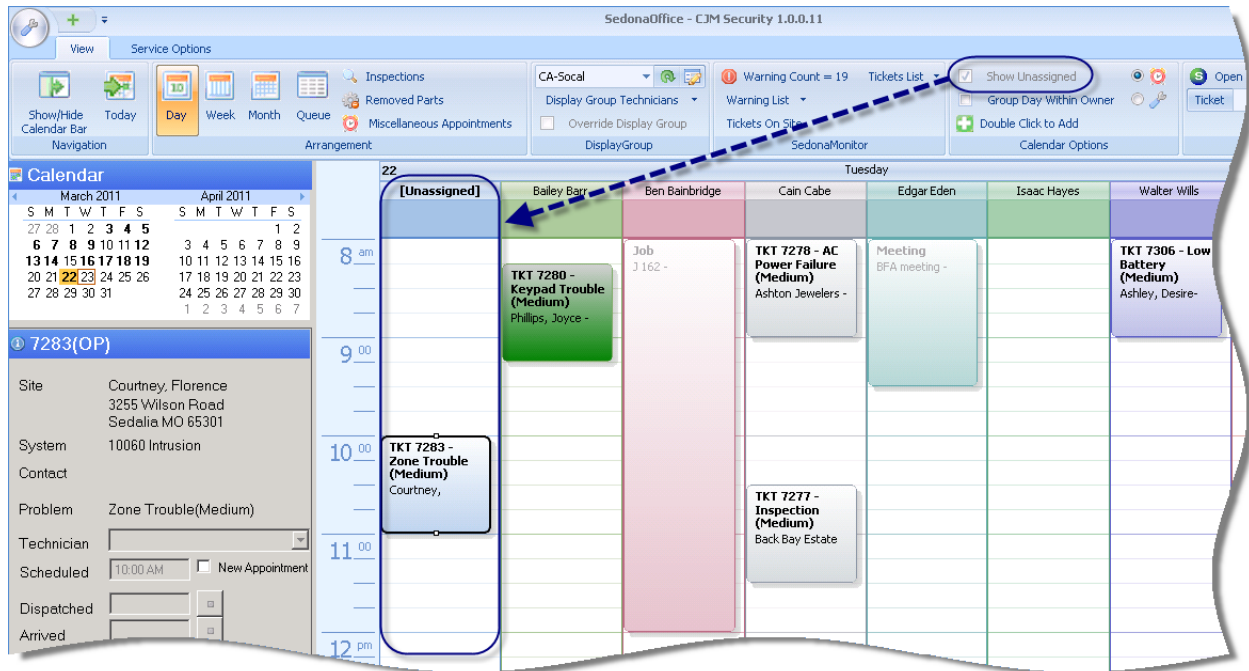
SedonaService 101 (continued) - *The Ribbon (continued)* - *Calendar Options Group Ribbon Group (continued)*

- ○ **Group Day With Owner** – This option allows you to see multiple dates for Technicians grouped together. The dates displayed within each Technician are determined by the dates highlighted on the Calendar. Dates selected for display in the SedonaService Schedule Board may be consecutive or non-consecutive. This option is available when viewing the SedonaService Schedule Board in Day view.
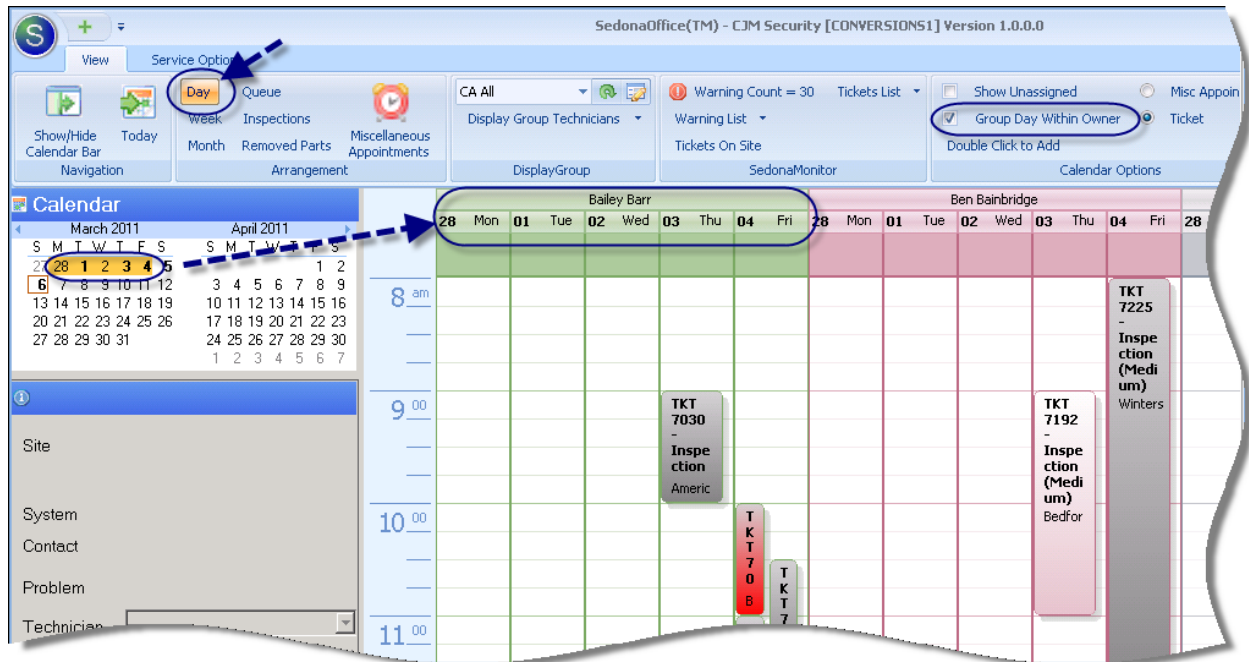
SedonaService 101 (continued) - *The Ribbon (continued)* - *Calendar Options Group Ribbon Group (continued)*

- o **Double Click to Add** – Double Click to Add is instructional information for the next two options; Misc Appointment and Ticket. When selecting the Misc Appointment option, then double clicking on an area within a particular Technician's column on the SedonaService Schedule Board, the Miscellaneous Appointment form will be displayed. When selecting the Ticket option then double clicking on an area within the SedonaService Schedule Board, the Customer Lookup form will be displayed for locating a customer for which a new Service Ticket will be created.

- o **Misc Appointment** – When selecting the Misc Appointment option then double clicking on an area within a particular Technician's column on the SedonaService Schedule Board, the Miscellaneous Appointment form will be displayed. Miscellaneous Appointments may only be created for one day at a time.

SedonaService 101 (continued) - *The Ribbon (continued) -* Calendar Options Group Ribbon Group (continued)

o **Ticket** – This option is use to create a new Service Ticket and schedule an appointment for a particular Technician on the fly. When selecting the Ticket option then double clicking on an area within a particular Technician's column on the SedonaService Schedule Board, the Customer Search form will be displayed for locating the Customer for which the Ticket is being created. Once a Problem Code is selected and the ticket is saved, an appointment will be created for the Technician you selected on the SedonaService Schedule Board for the time where your mouse was positioned when the double click was performed. The length of time for the appointment created is determined by the Estimated amount of minutes entered on the Ticket.
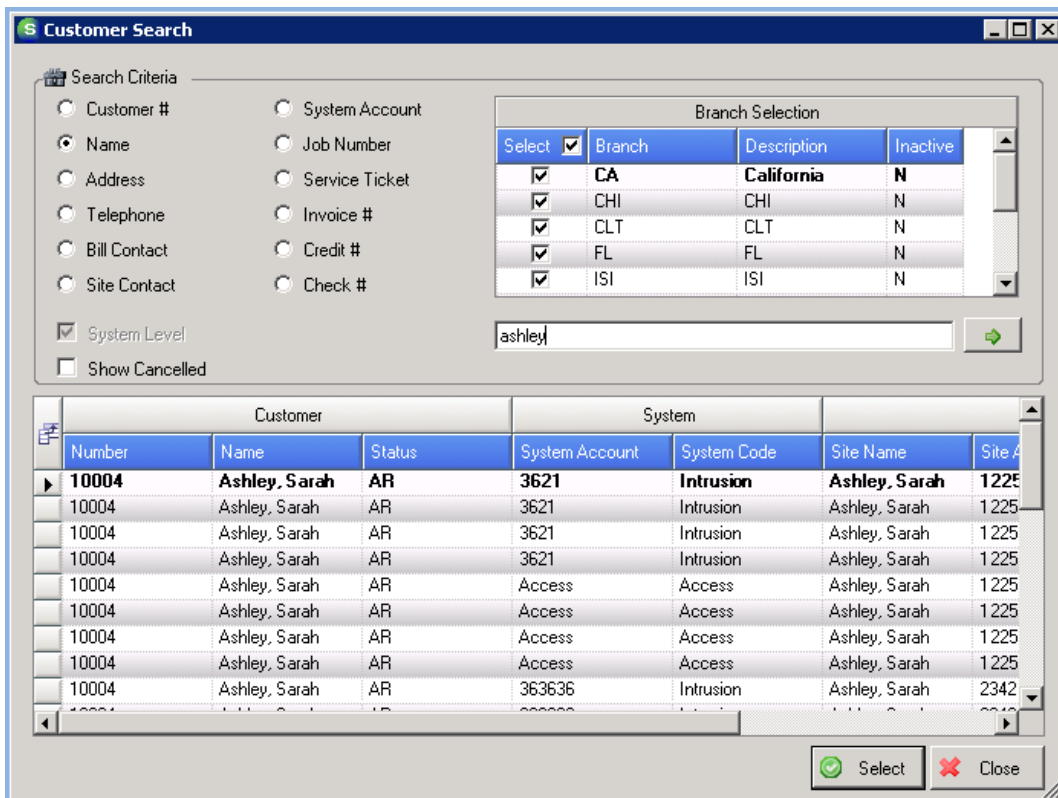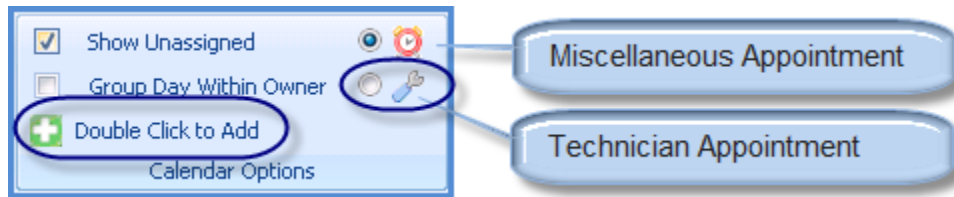
SedonaService 101 (continued) - *The Ribbon (continued)*

Tools Ribbon Group – This Ribbon Group contains two options; *Open Customer* and *Ticket*. Each option will be explained below.
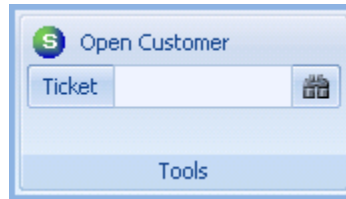
○ **Open Customer** – This option works while working within the SedonaService Schedule Board or within a Ticket Queue. When working within the SedonaService Schedule Board, clicking on a particular Technician Appointment then clicking on the Open Customer will open the customer associated with the Ticket in the main SedonaOffice application. When the Open Customer option is clicked, the main application will be highlighted on your Windows Tray; double click on the main application button to view the Customer Explorer for the Ticket.
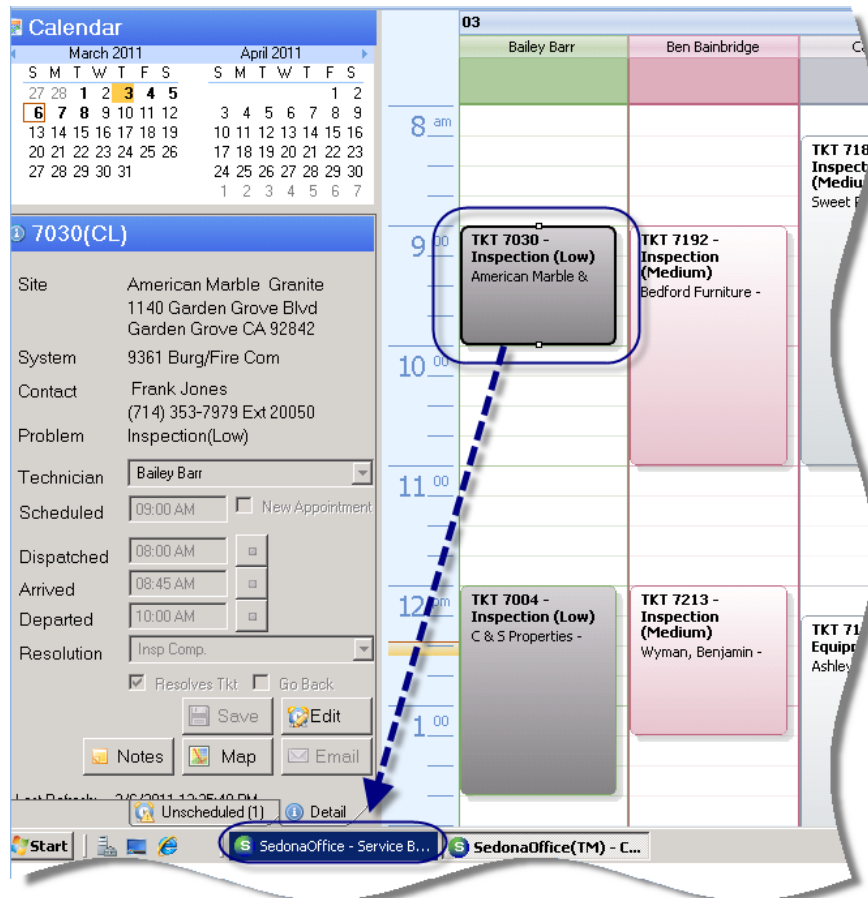
SedonaService 101 (continued) - *The Ribbon (continued)* - *Tools Ribbon Group (continued)*

o **Ticket Search** – This option is used to quickly open a ticket if you already know the Ticket Number.

After entering the Ticket Number then clicking on the search button ⊞, that Ticket [if it exists] will be displayed. The Ticket Search may be used to locate both open and closed tickets.

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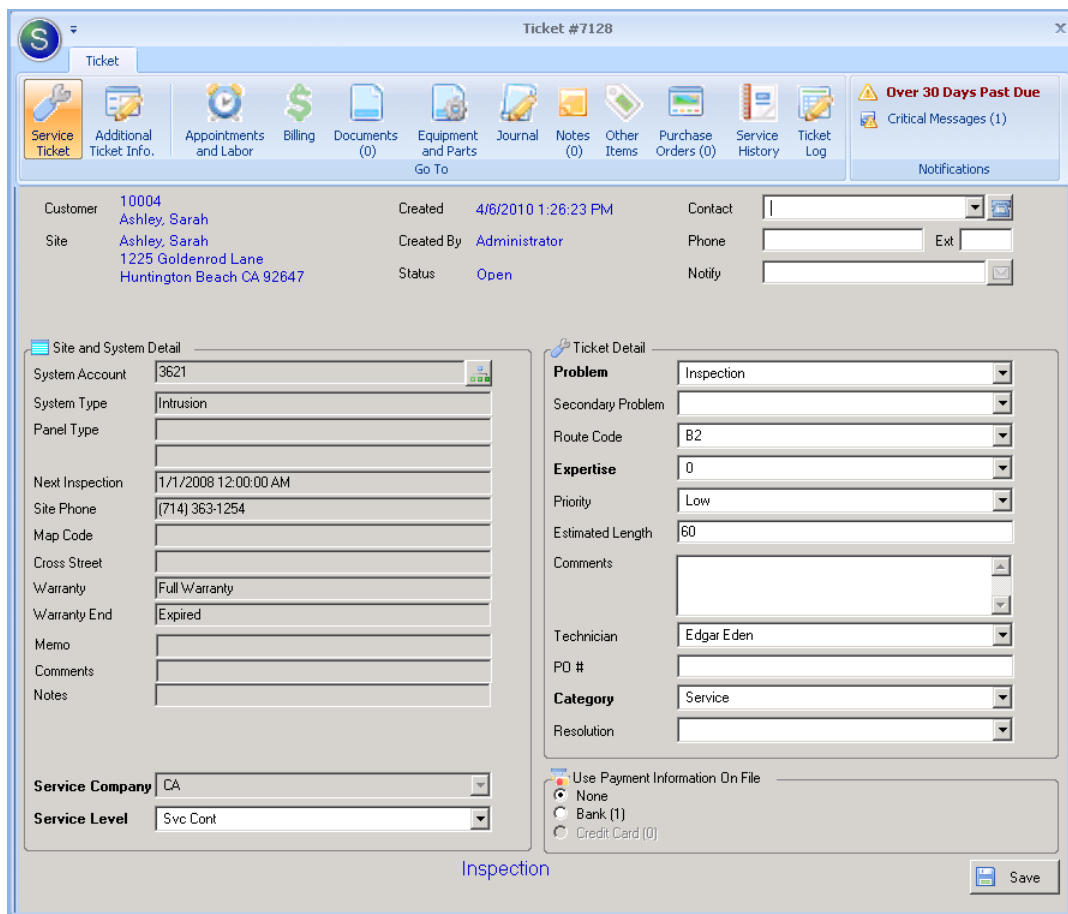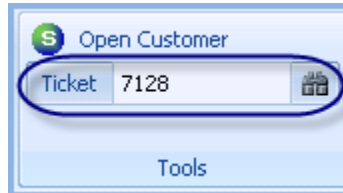
SedonaService 101 (continued)

Calendar Bar

The Calendar Bar is comprised of two components; the *Calendar* and the *Ticket Information Viewer*. The Calendar may be used when working in the SedonaService Schedule Board or within a Ticket Queue.
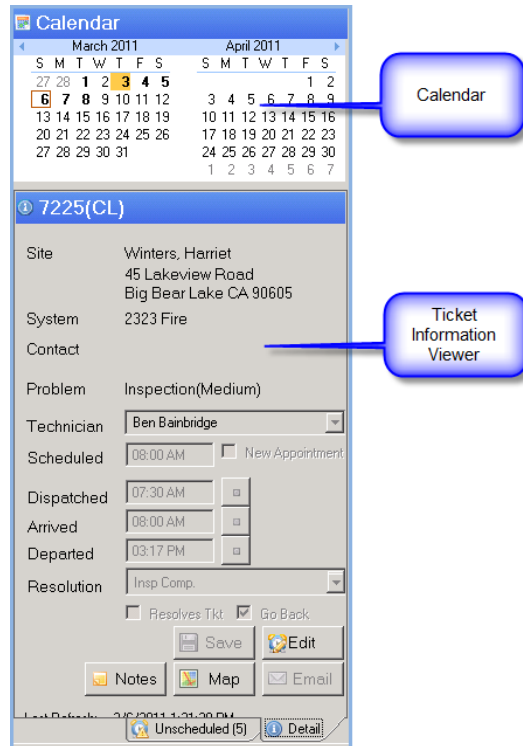
SedonaService 101 (continued) - *The Calendar Bar (continued)*

Calendar

When working in the SedonaService Schedule Board, the date or dates highlighted on the *Calendar* controls which dates are displayed in the SedonaService Schedule Board.
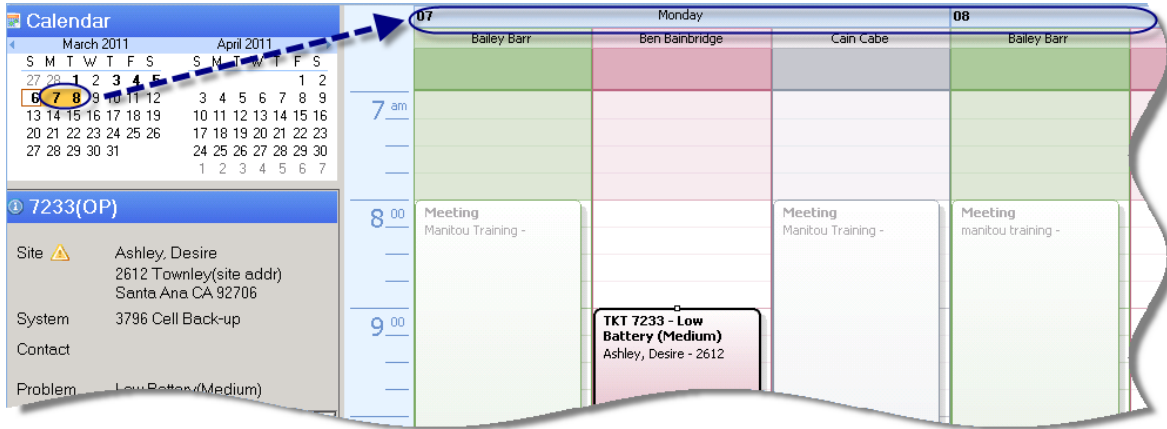
SedonaService 101 (continued) - *The Calendar Bar (continued)*

Ticket Information Viewer

The Ticket Information Viewer is used while working in either the SedonaService Schedule Board or in one of the Ticket Queues. When in Calendar mode, this viewer is comprised of two tabs located at the bottom of the viewer; Unscheduled and Detail. The Unscheduled tab displays a list of all unscheduled tickets. The Detail tab will display the information of the ticket that is currently highlighted within the SedonaService Schedule Board.

Detail Tab

Appointments may be viewed, created, edited or dispatched from the Detail tab. If no appointment has been scheduled for the Ticket, the Detail tab will display certain pieces of information for Site, System and Contact.

SedonaService 101 (continued) - *The Calendar Bar (continued) - Ticket Information Viewer (continued)*

Unscheduled Tab

When clicking on the Unscheduled tab, a list will be displayed of any unscheduled Service Tickets that have not been resolved. You may choose to include Inspection and/or Vendor Tickets in the unscheduled list by selecting the Inspection and/or Vendors checkbox at the top of the form. A refresh button is also available to immediately refresh the display.

Tickets in this list may be dragged onto the SedonaService Schedule Board to create and appointment.
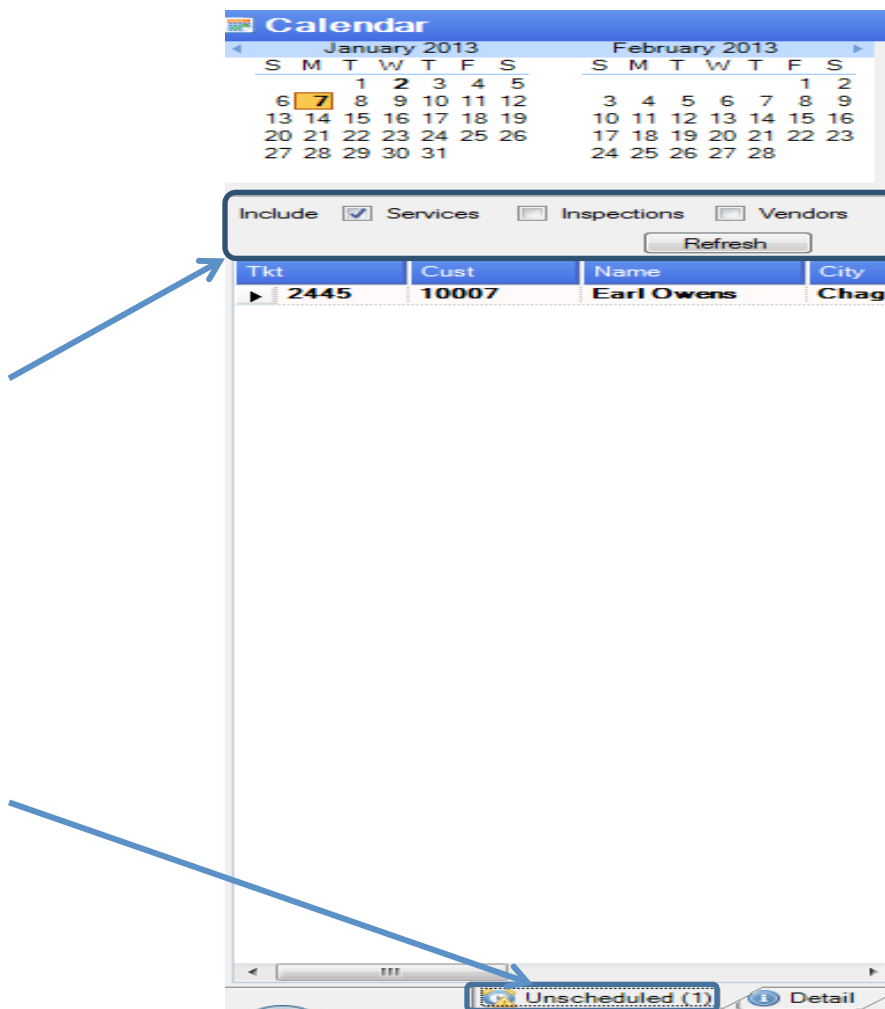
SedonaService 101 (continued)

Display Area

The information that populates the Display Area depends on which option is selected from the Arrangement Ribbon Group. Shown below is the view of the Display Area when selecting the *Queue* from Arrangement Ribbon Group. There are eight possible views that may populate the Display Area; the Schedule Board in Day, Week, or Month view, the Ticket Queue, Group Tickets, Inspections, Removed Parts or the Miscellaneous Appointments list.
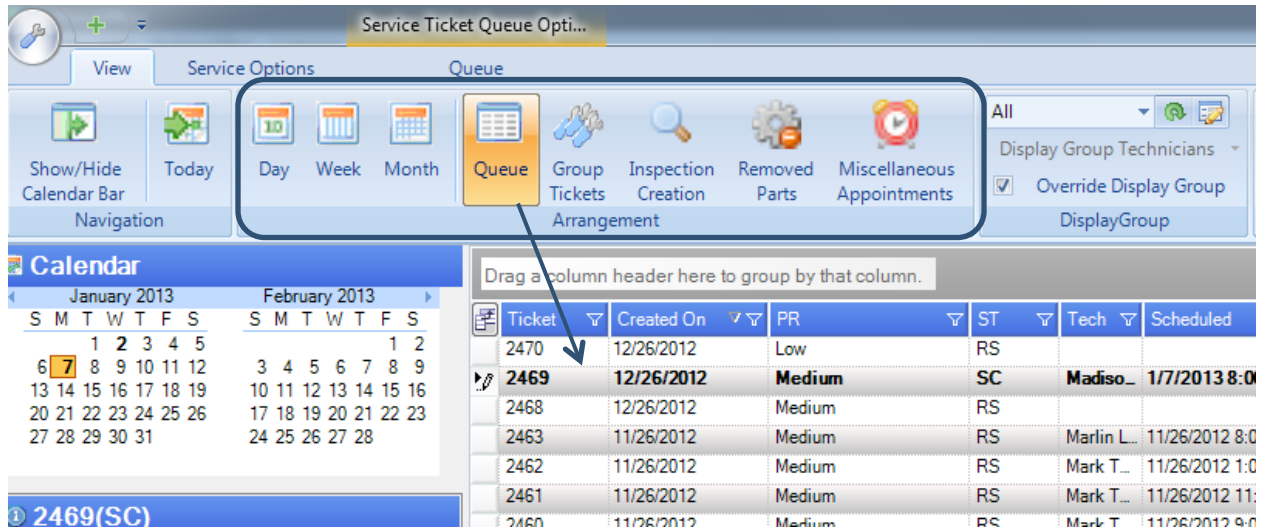
New Customer Search

The Customer Search form has incorporated some much asked for features by our SedonaOffice customers. New features include:

- **User Configurable Field Selection** - The ability to select which fields are displayed on the search results list. These settings are saved to each User's preference.
- **User Configurable Column Arrangement** - The ability to re-arrange the columns displayed on the search results. These settings are saved to each User's preference.
- **Branch Selector** – The User may now select all Branches by selecting the checkbox in the header of the Branch Selection section or un-check and select the individual branches desired.

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New Customer Search (continued)

User Configurable Columns

Each User has the option of configuring the Customer Search Results columns that are displayed in the grid area. The User is able to select from a list of which columns of information they want to display in the search results grid. Once a customer search is executed, the User will be able to customize their desired list of columns to be displayed in the grid area.

Then next time the User performs a Customer Search is performed, the column selections will be remembered.
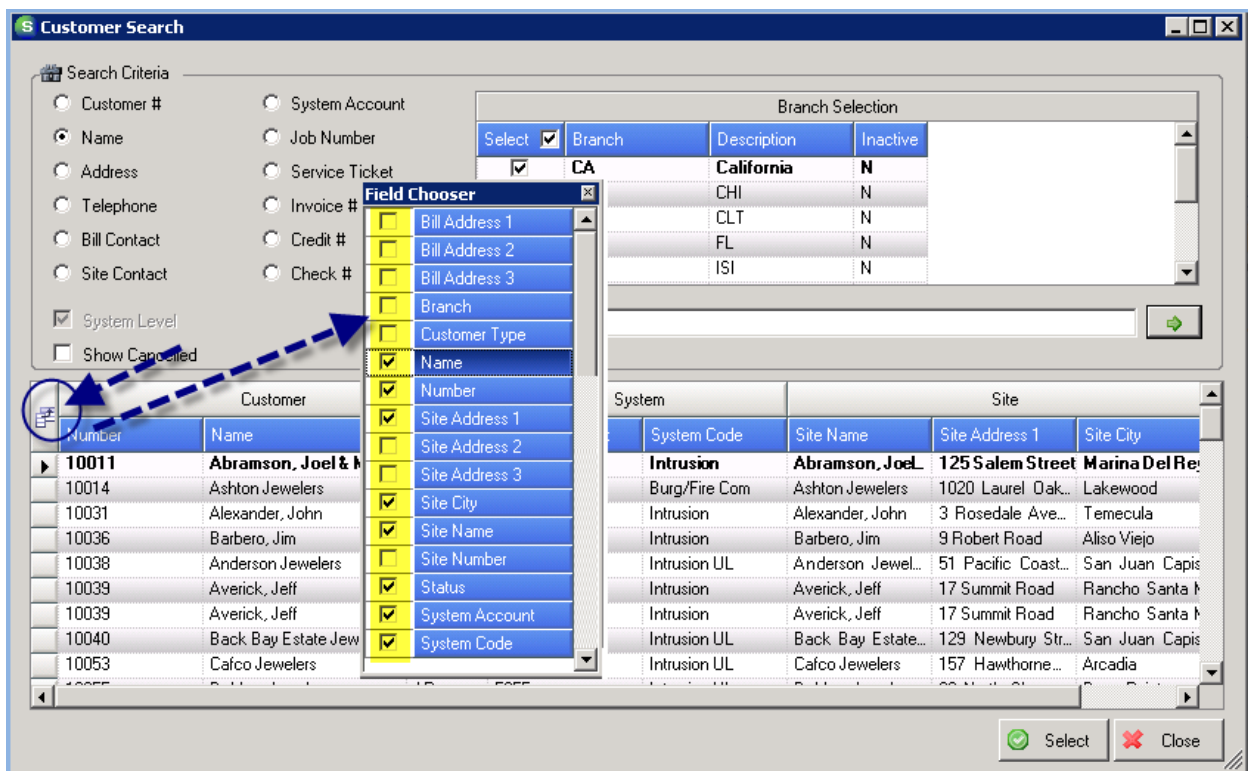
New Customer Search (continued)

User Configurable Column Arrangement

Each User has the option of configuring the order in which the Customer Search Results columns are displayed in the grid area. Once a customer search is executed, the User will be able to customize their desired order of columns to be displayed in the grid area by dragging the column header to the desired location.

Then next time the User performs a Customer Search, the column order selections will be remembered.
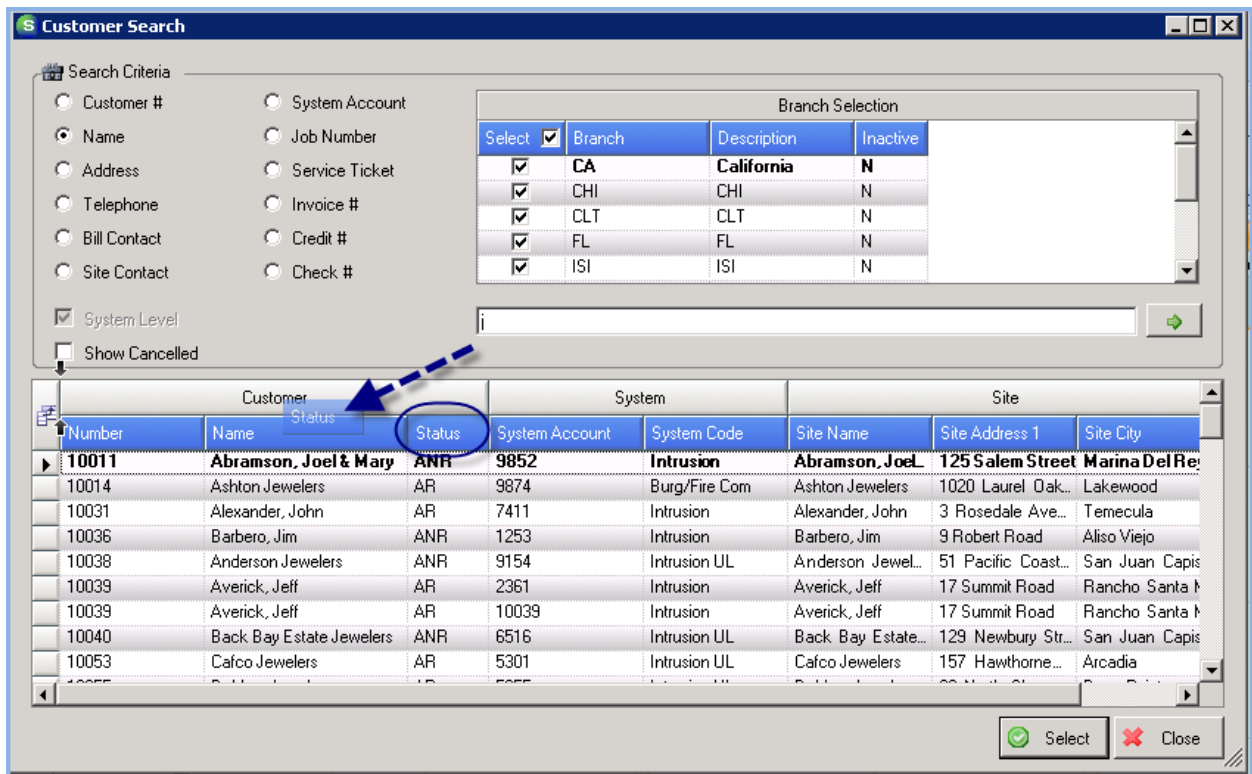
New Customer Search (continued)

Branch Selector

A change has been made to the Branch Selector in the Customer Search window. To the right of the *Select* column header is a checkbox; by checking this box, all branches in the list are selected. Conversely, when un-checking this box all branches are de-selected. To select individual branches, simply check the box to the left of the desired branch.

The *System Level* checkbox is grayed-out; this is by design since a Service Ticket is linked to a System record. Only Customers with one or more Systems are displayed in the search results.
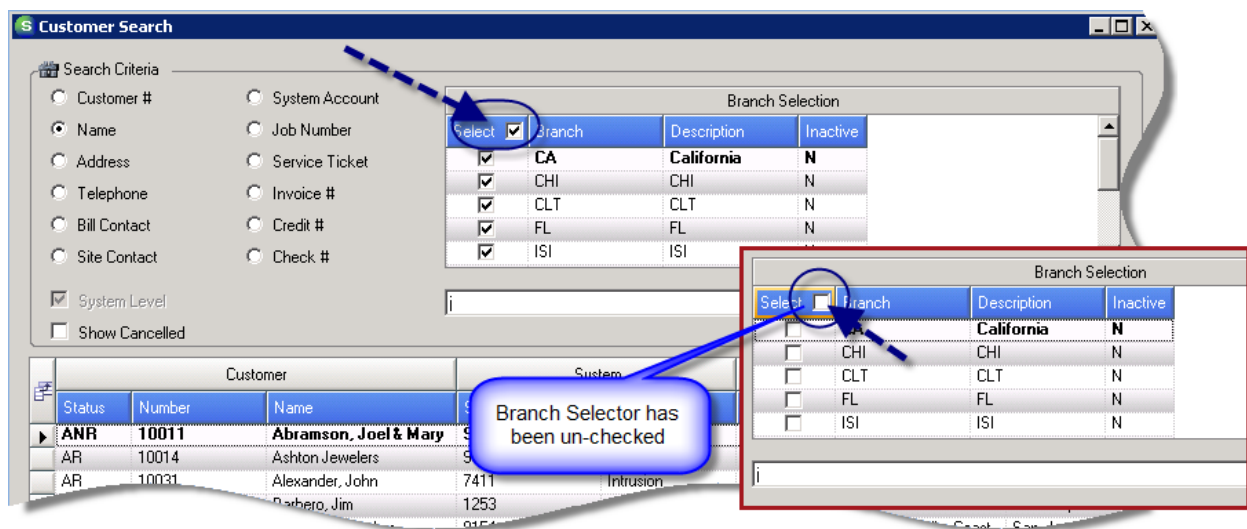
New Ticket Design

The Ticket format has been re-designed and has some new features added and changes made to the previous functionality. All areas of the Ticket will be discussed in this section.

Ticket Layout

The Ticket is comprised of a Ribbon at the top of the form and an informational/data entry section below. As buttons on the Ribbon are clicked, the form will be displayed for the option button selected. There are some buttons when clicked, will display Context Menus for additional functions. Each button on the Ribbon will be described within this section.

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Ticket Layout (continued)

Ticket Notifications

When creating a new ticket or opening an existing ticket, the first form that may be displayed is the Notifications form. This form will only be displayed if there are any Critical Messages related to the ticket; Critical Message types that are displayed are entered and saved on the Customer, System, or the Service Company.
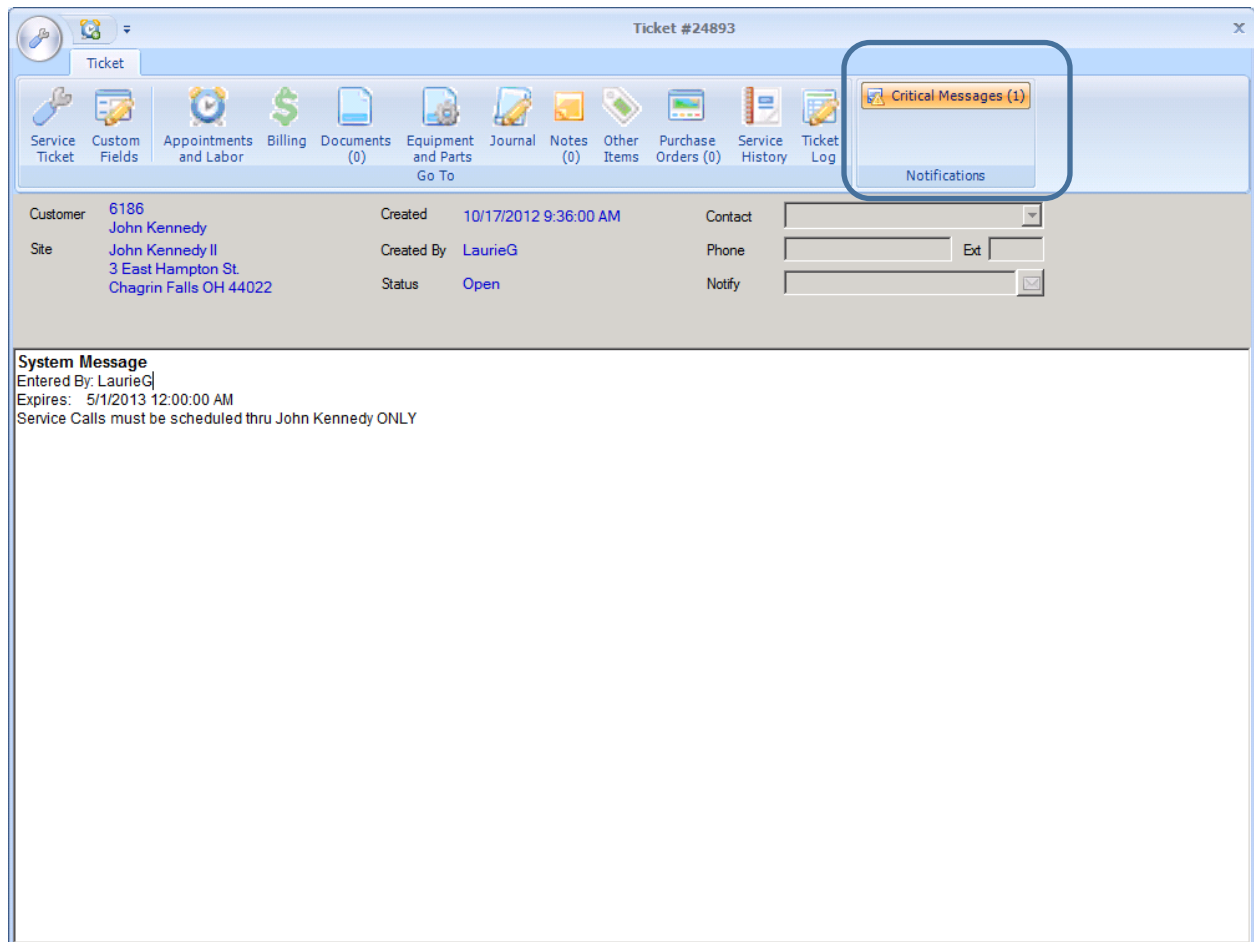
Ticket Layout (continued)

Service Ticket

The Service Ticket form contains all the same fields that were present in the legacy service ticket. Two new fields and an option button have been added to the new Service Ticket.

- **Ext** – If an extension exists for the Telephone field of the Contact selected for the ticket, that information will be displayed in this field.
- **Notify** – If an email address exists for the Contact selected for the ticket, that information will be displayed in this field. There is a button to the right of this field; this is intended for future functionality to be able to send an email.
- **System Lookup button** – A great new feature has been added which allows the User to select a different System for the ticket; this button will only be illuminated if there is more than one System for the Site.
- **Comments** – This field was previously labeled Customer Comments in the old Service Ticket form. Once the ticket is initially saved, a Note (previously referred to as Field Notes) will automatically be created containing any information that was typed into this field.
- **Service Company** – A change has been made to the functionality of this field. Once an appointment has been scheduled with a Technician, the Service Company may not be changed.
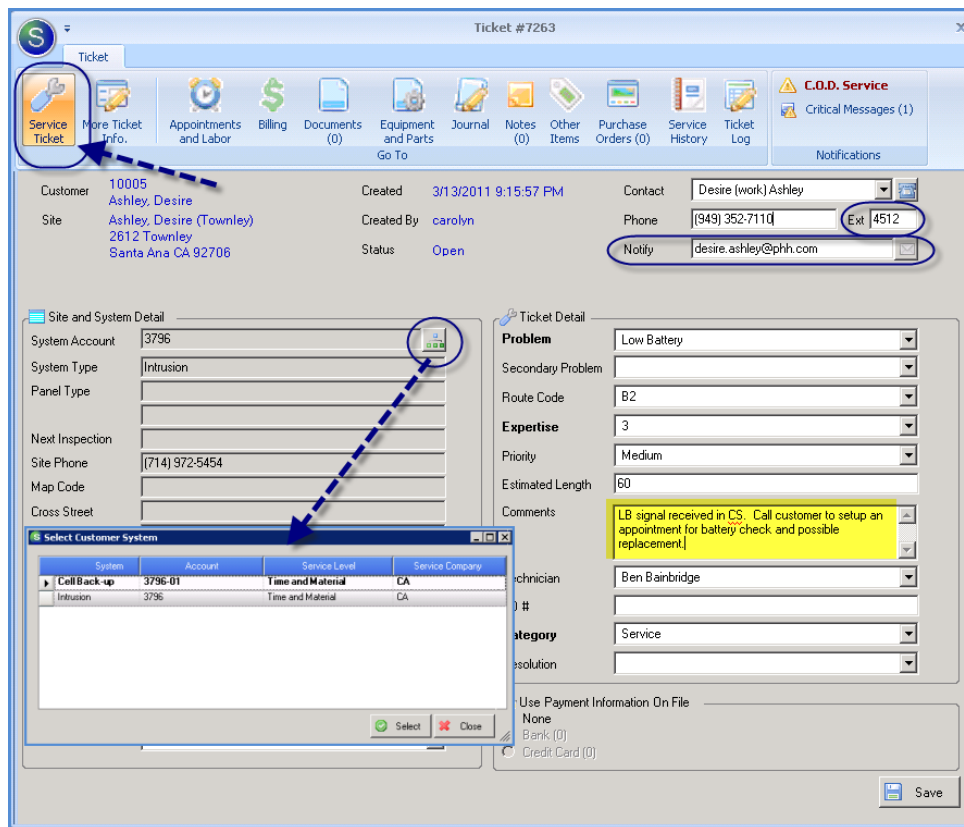
Ticket Layout (continued)

Custom Fields

The Custom Fields form contains all the same fields as were available in the legacy ticket. A change has been made to any field that was flagged as a Required Field; previously required fields would have the data entry box highlighted in yellow. Now the field label will be bolded for any required fields.

Ticket Layout (continued)

Appointments and Labor

The Appointments and Labor form is now a combination of the legacy Technician Appointment form and the Labor form. This form contains access to a Context Menu labeled Dispatch. From the Dispatch context menu, you are able to schedule a new appointment, edit an existing appointment or dispatch a technician.

Ticket Layout (continued) - *Appointments and Labor* (continued)

Dispatch Context Menu

Clicking on the Dispatch Context Menu will open a new Ribbon with two Ribbon Groups; Dispatch and Appointments. Here you may schedule a new appointment. If an existing appointment was highlighted prior to clicking on the Dispatch context menu, then options will be available to Edit the appointment, Dispatch the appointment or send a Text Message to the Technician.

Ticket Layout (continued) - *Appointments and Labor* (continued)

Manual Dispatch

If an existing appointment was highlighted prior to clicking on the Dispatch context menu, then option will be available to Edit the appointment or Dispatch the appointment.
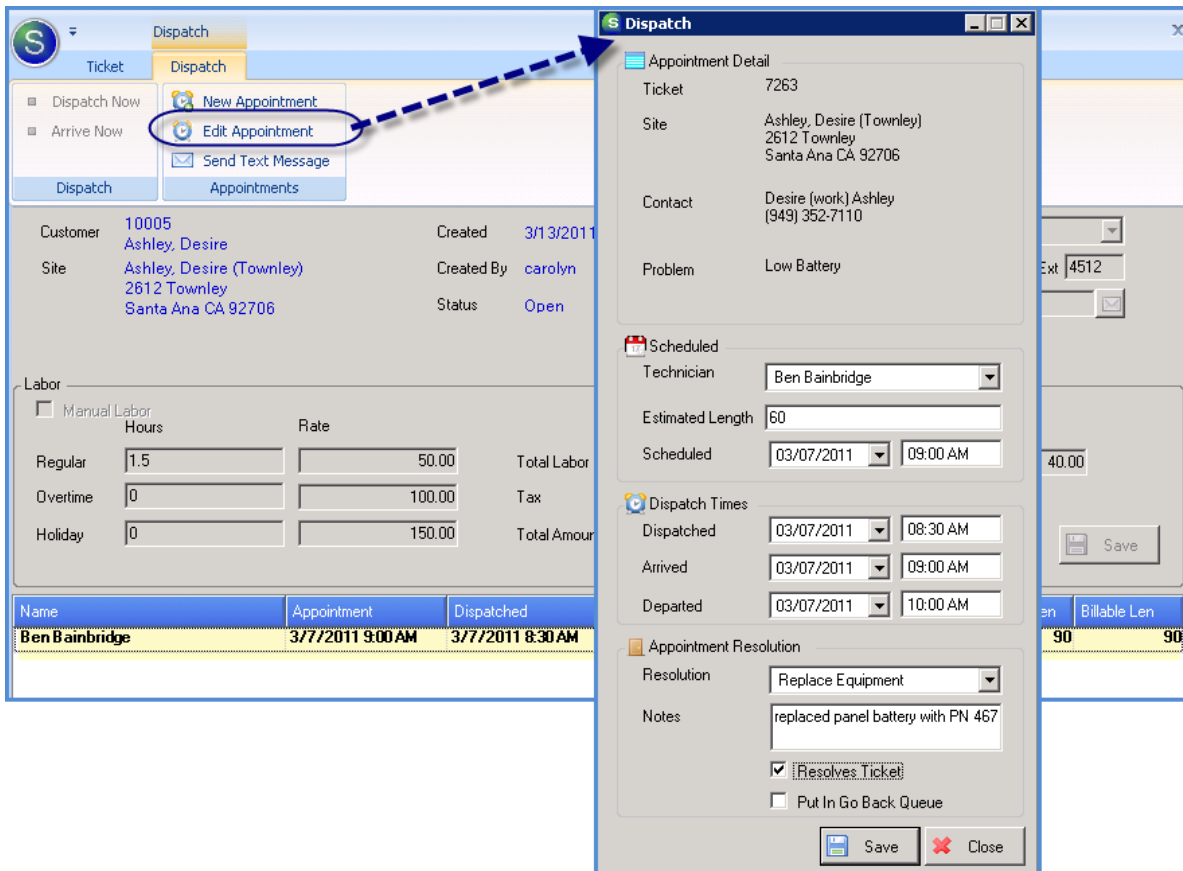
Ticket Layout (continued)

Billing

The Billing form contains all the same fields and most of the same functionality of the legacy Service Ticket. Two changes have been made to the functionality of the Billing form:

- The Create Invoice button will not be displayed until a billable resolution code has been selected on the Service Ticket form.
- Once an invoice has been created, it may not be edited from SedonaService. Any changes that may be necessary must be done by opening the invoice from the customer explorer. The ability to edit saved invoices is still controlled by User Group Security.

Also note, the checkbox to "Add Resolution Note to Invoice" as well as the checkbox to "Close Ticket After Invoicing".

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Ticket Layout (continued)

New Invoice Form
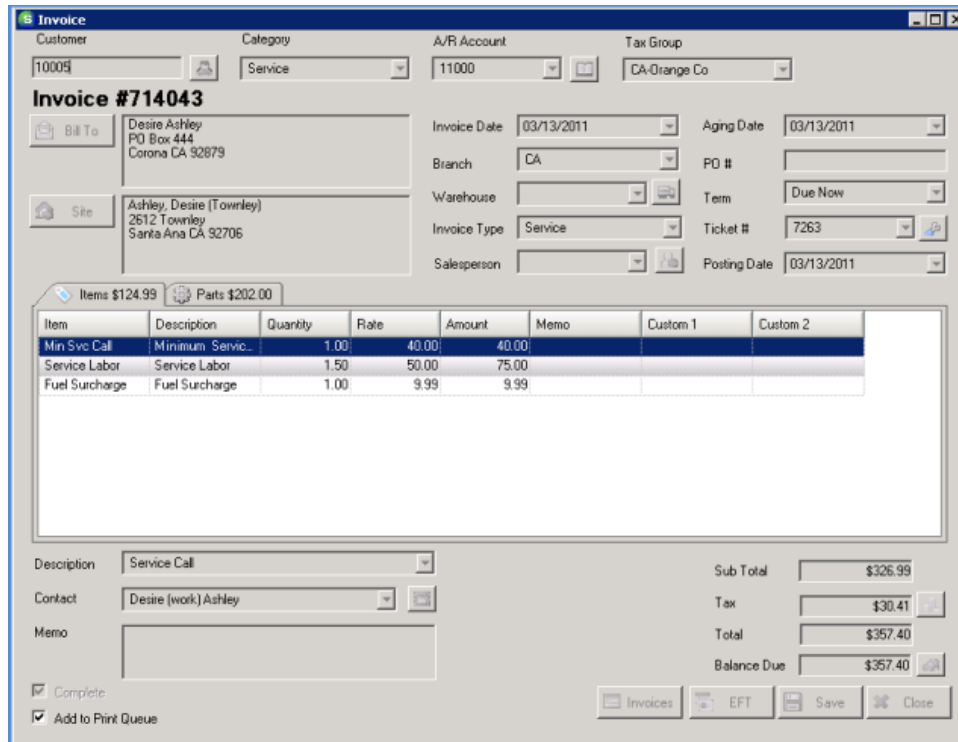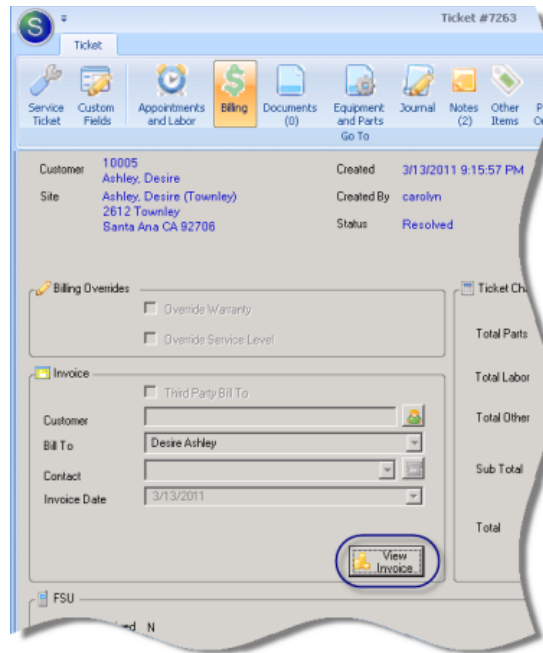
Ticket Layout (continued)

Documents

The Documents form is used to add documents to the Ticket. With the initial release of the new Service Module, you may only add previously saved documents and may not scan in new documents from this form. The ability to scan documents into a Ticket will be a Phase II item.

If documents need to be scanned into a Ticket, the User may open the legacy Ticket from the Customer Explorer and scan in documents. Those scanned in documents will appear in the new Ticket Documents list.
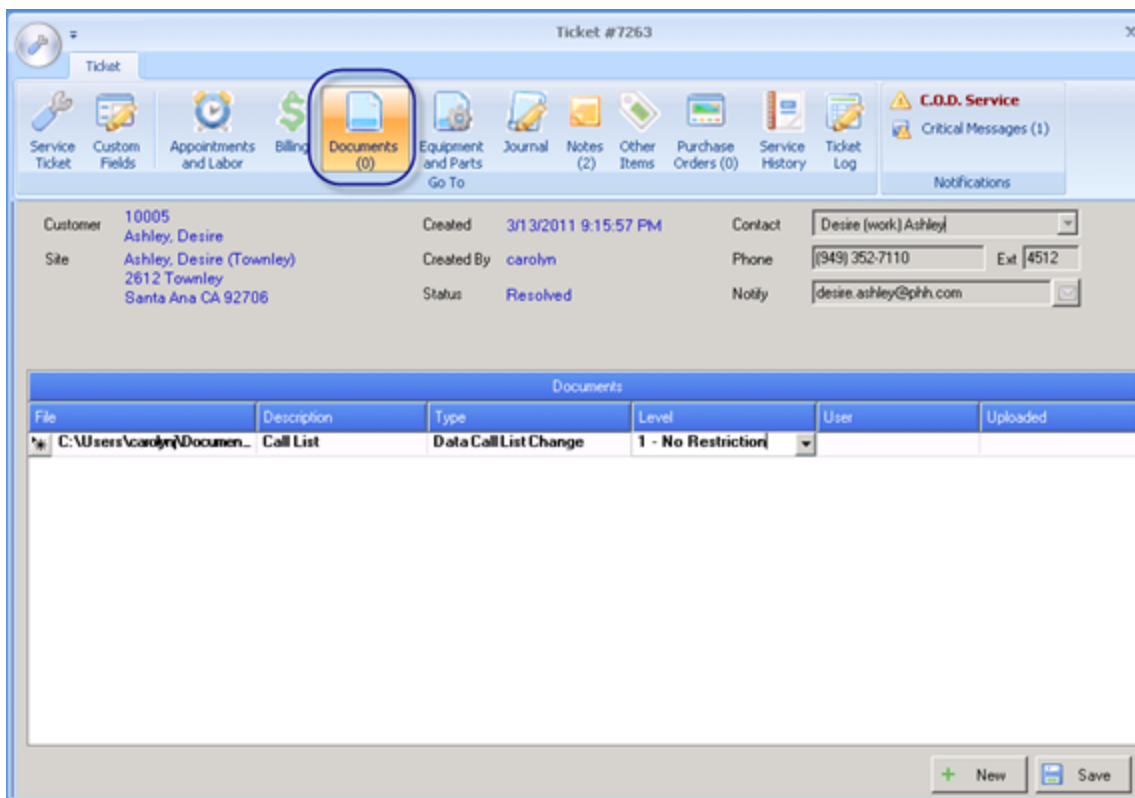
Ticket Layout (continued)

Equipment and Parts

The Equipment and Parts form is now a combination of the legacy Parts form and the Equipment List form. This form is divided into two tiers; the upper tier will display existing equipment for the system and the lower tier is where parts used by a Technician on the Ticket are added. This form is also used to indicate whether the part(s) installed by the Technician are replacing an existing part in the equipment list.

To add a new part, click on the "New" button. If Service Option is set to "Warehouse, select the Warehouse you would like to use and enter the part code or click on the part code field to use the Parts Search and select required part. If Service Option is set to "Technician" you will be selecting only those parts which are assigned to that Technician's warehouse.

To remove a part, click on the red "X".

Ticket Layout (continued)

Journal

The Journal form displays any transactions recorded to the general ledger that are associated with the Ticket. A context menu, Journal, is displayed above the ticket ribbon when accessing this form.
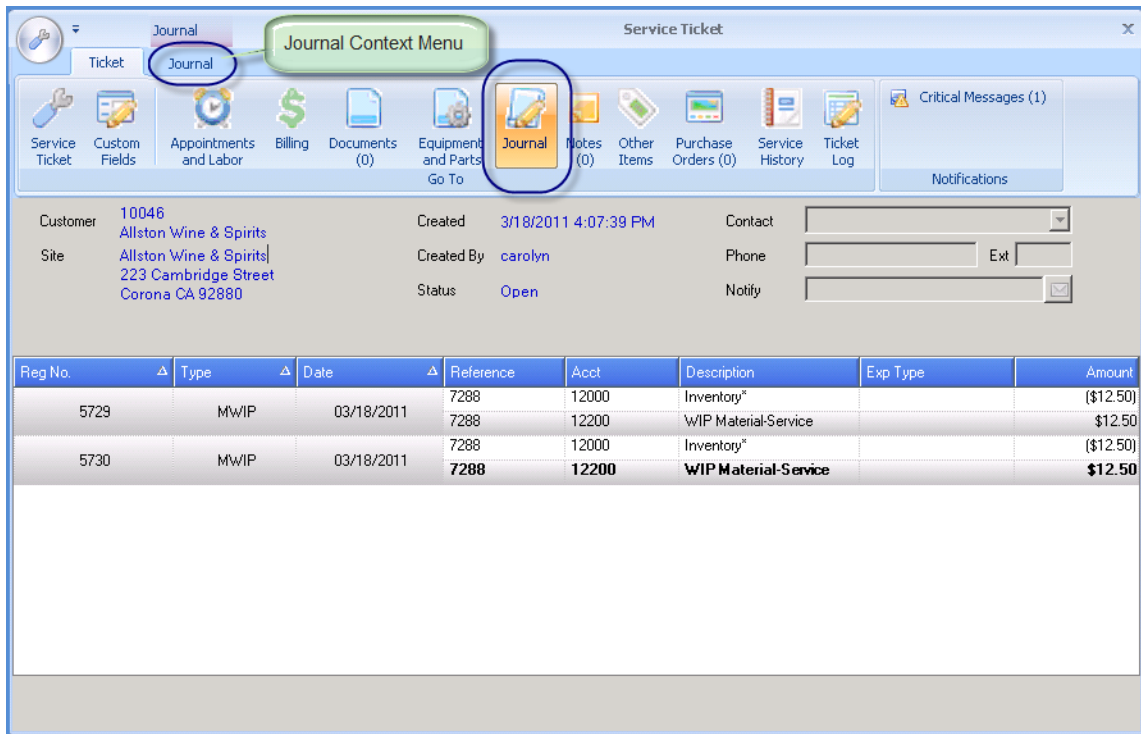
Journal Context Menu

Clicking the Journal context menu will display the View ribbon. Two options are available; Detail or Summary. Depending on which option is selected will change the view of the information displayed in the Journal form.
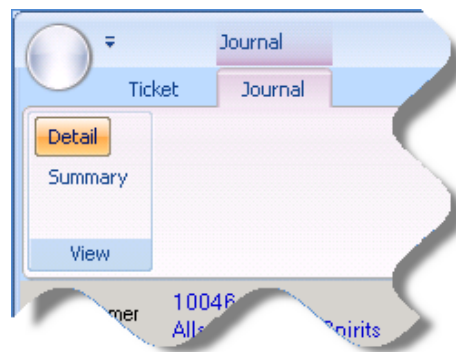
Ticket Layout (continued)

Notes

The Notes form functions the same as in the legacy ticket form. The upper ties displays previously save notes, and the lower tier is used to enter and save new notes to the ticket.

When creating Notes, the Access Level assigned to the note will determine who can view that particular note. A Resolution Note can be assigned to any one note within a ticket. When creating the invoice, you can select to include this note on the invoice.

Ticket Layout (continued)

Other Items

The Other Items form, which was previously labeled Other in the legacy service ticket, has been redesigned. Invoice Items are selected from a drop-down list. Quantities/prices are modified within the line.

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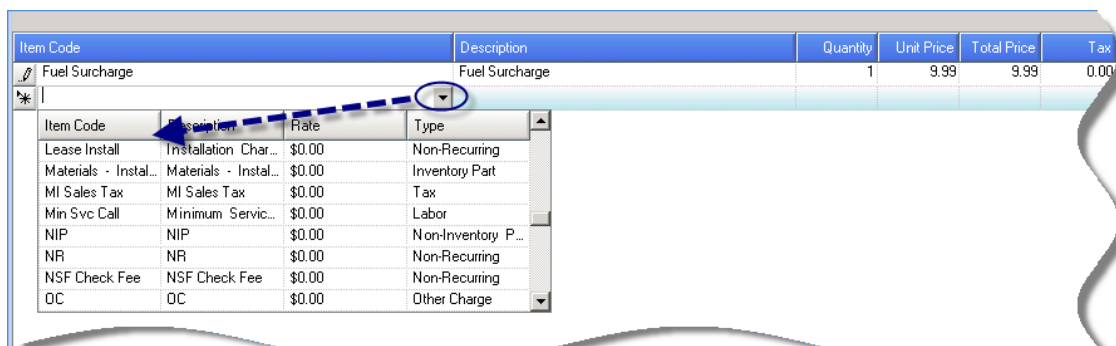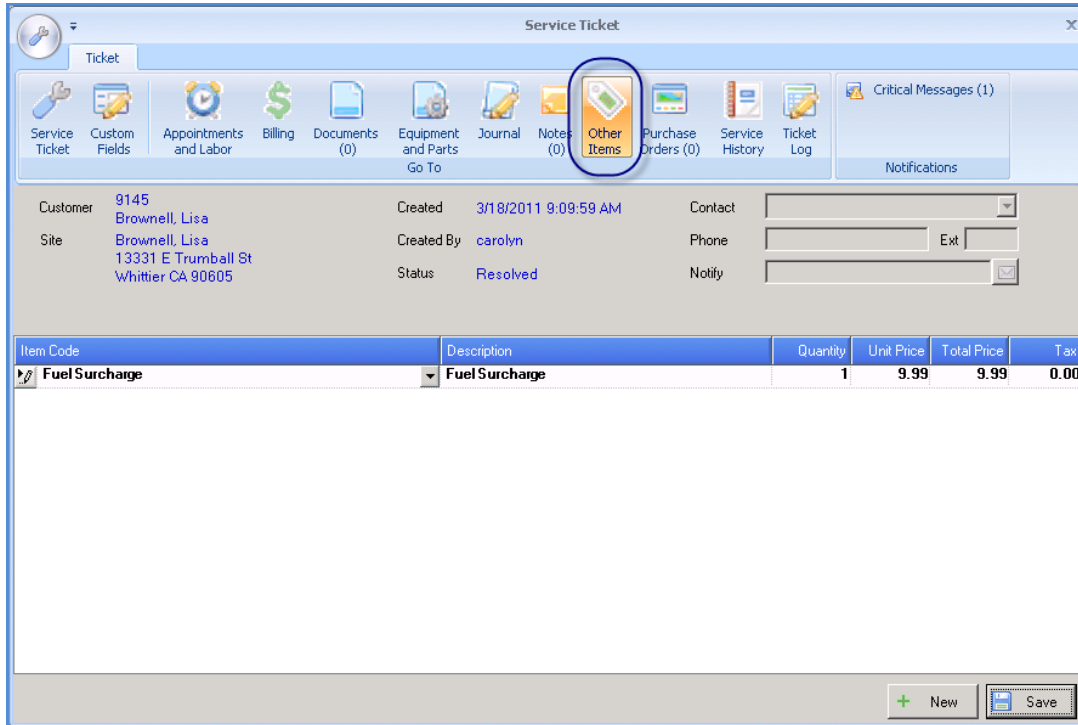
Ticket Layout (continued)

Purchase Orders

The Purchase Orders form, which was previously labeled PO in the legacy service ticket, displays Purchase Orders associated with the Ticket. You may also create new Purchase Orders from the Purchase Order Context Menu displayed above the Ribbon.

New functionality has been added which allows a User to create a Purchase Order even if no parts have been added to the Equipment and Parts form.
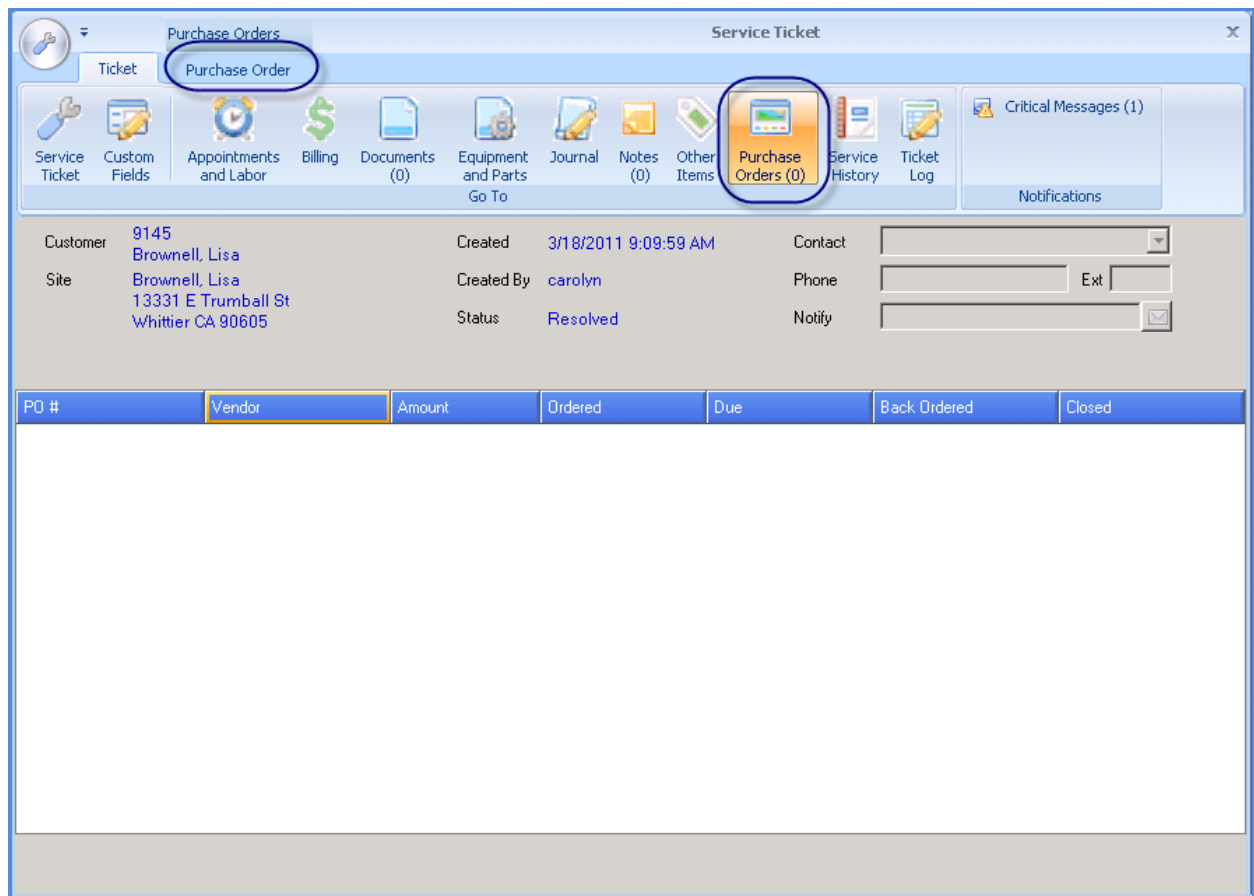
Ticket Layout (continued)

Purchase Order Context Menu

Clicking the Purchase Order context menu will display the Create Purchase Order Ribbon; this ribbon contains only one button; Create Purchase Order.

If no parts have been added to the Equipment and Parts form, a blank Purchase Order will be displayed for the User to select any Vendor from which to order parts and/or expense items.

Ticket Layout (continued)

Service History

The Service History form, which was previously labeled History in the legacy service ticket, displays any other tickets for the site of the current ticket. Double-clicking on a ticket displayed in the list will open that ticket for viewing.

Ticket Layout (continued)

Ticket Log

The Ticket Log form, which was previously labeled Log in the legacy service ticket, displays a history of changes made to the Ticket.

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