SedonaOffice®

The #1 Financial Software for Security Companies

SedonaService
Group Tickets
Reference Document

2013 SedonaOffice

Users Conference

Presented by

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About this Document

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Document Contents

This document is being provided to explain the new SedonaService Group Tickets feature available for limited release with the SedonaOffice application as of Version 5.6.165.

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SedonaService Group Tickets Overview

This document is designed to describe new functionality contained with SedonaService that is available in SedonaOffice version 5.6.125 and higher. Modifications were made in versions 5.6.159 and greater. This new functionality is not being released to the general population and may only be activated by certain designated SedonaOffice staff members.

Group Tickets were designed primarily to be used with Inspection Tickets, however they may be used with regular Service Tickets as well. The concept for this new feature is to provide the ability to group several tickets together, schedule technician appointments for the group of tickets and also be able to bill the customer for work performed on multiple tickets within the group on a single customer invoice.

Additional functionality allows the User to link an Inspection Setup to a recurring line. Once the Inspection ticket has been completed, it will mark the recurring line to be available for cycle invoicing. Modifications have been made to cycle invoicing to now allow users to perform cycle invoicing for recurring lines linked to inspection records separately from the non-inspection linked recurring.

The Service Level setup has been modified to indicate whether an Inspection Record must be linked to a recurring line when selecting the particular service level on the inspection setup form.

Group Tickets Concepts

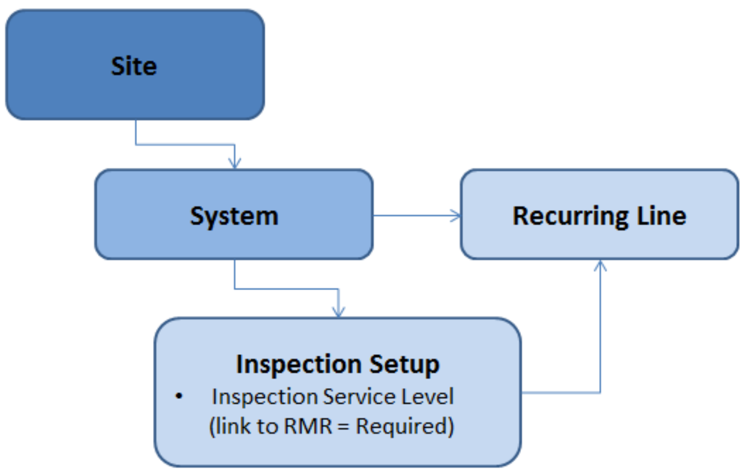
Group Tickets processing was designed primarily for use with Inspections, however this functionality may be used with regular Service Tickets as well. Inspection Ticket Groups are pre-defined within the Inspection Setup records. Once the Inspection Tickets are generated into their pre-defined groups, a User has the option of either removing one or more tickets from the group or adding one or more tickets to an existing group. Both Regular Service Tickets and Inspection Tickets may be manually added to an existing Ticket Group as long as the Tickets are within the same customer site. Regular Service Tickets must be manually grouped if this is desired for the purpose of scheduling, dispatching and invoicing the tickets together as a group.

Inspection Linked to Recurring Item

There are two basic options available when determining how to use Group Inspection Tickets:

- Link an Inspection Record to a Recurring Line
- Setup Inspection without a Link to a Recurring Line

Using the option of linking an Inspection Setup to a Recurring Line will allow you to cycle bill the inspection services separately from other recurring services if desired. Inspections may only be linked to a recurring line if the Service Level selected on the Inspection setup form has been flagged to require a link to a recurring line.

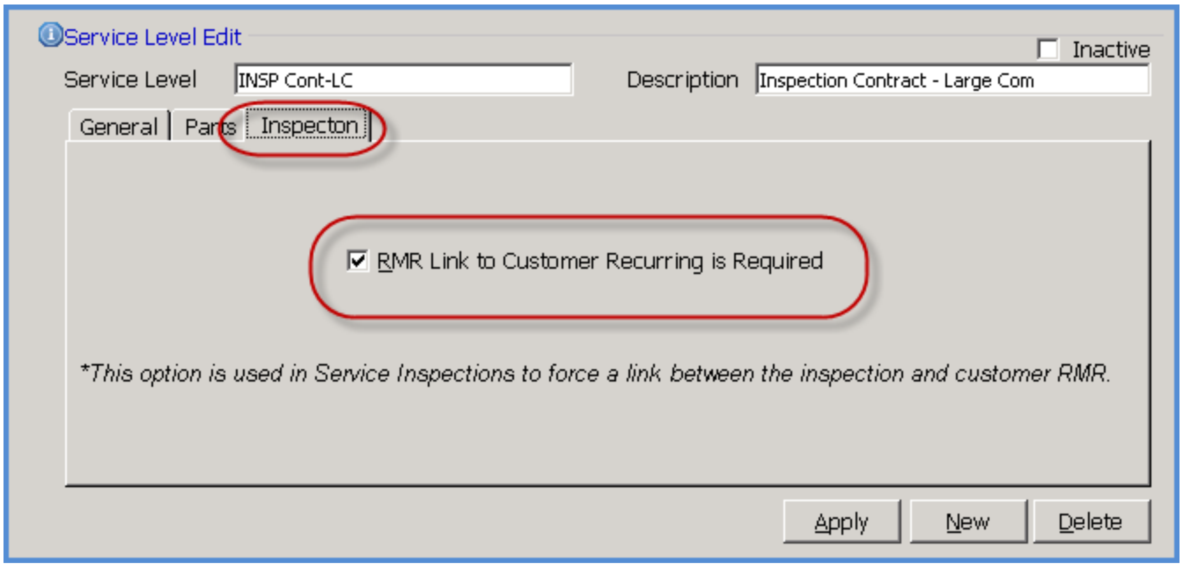


Group Tickets Setup

If you will be linking your Inspection records to a recurring Item, you will have to setup at least one Service Level that requires linking.

Service Level Setup

The Service Level setup is maintained within SedonaSetup. A new tab labeled *Inspection* was added to the Service Level setup form. If the checkbox [RMR Link to Customer Recurring is Required] is selected on this form, then any Inspection created selecting this Service Level will require the User to link a recurring item to the Inspection.

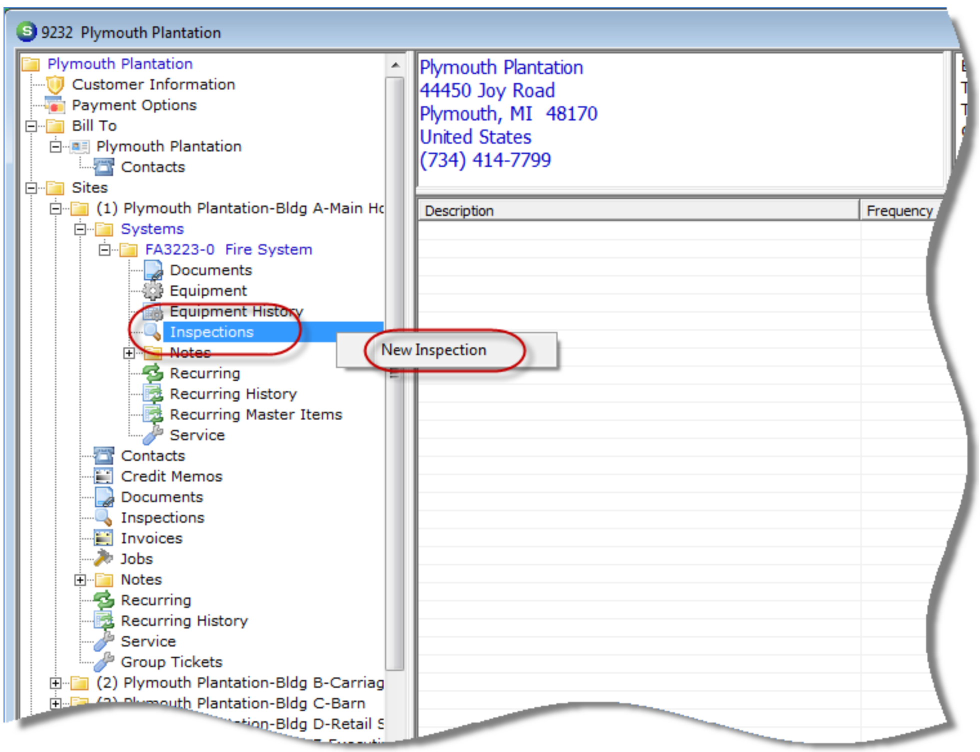


Inspection Setup

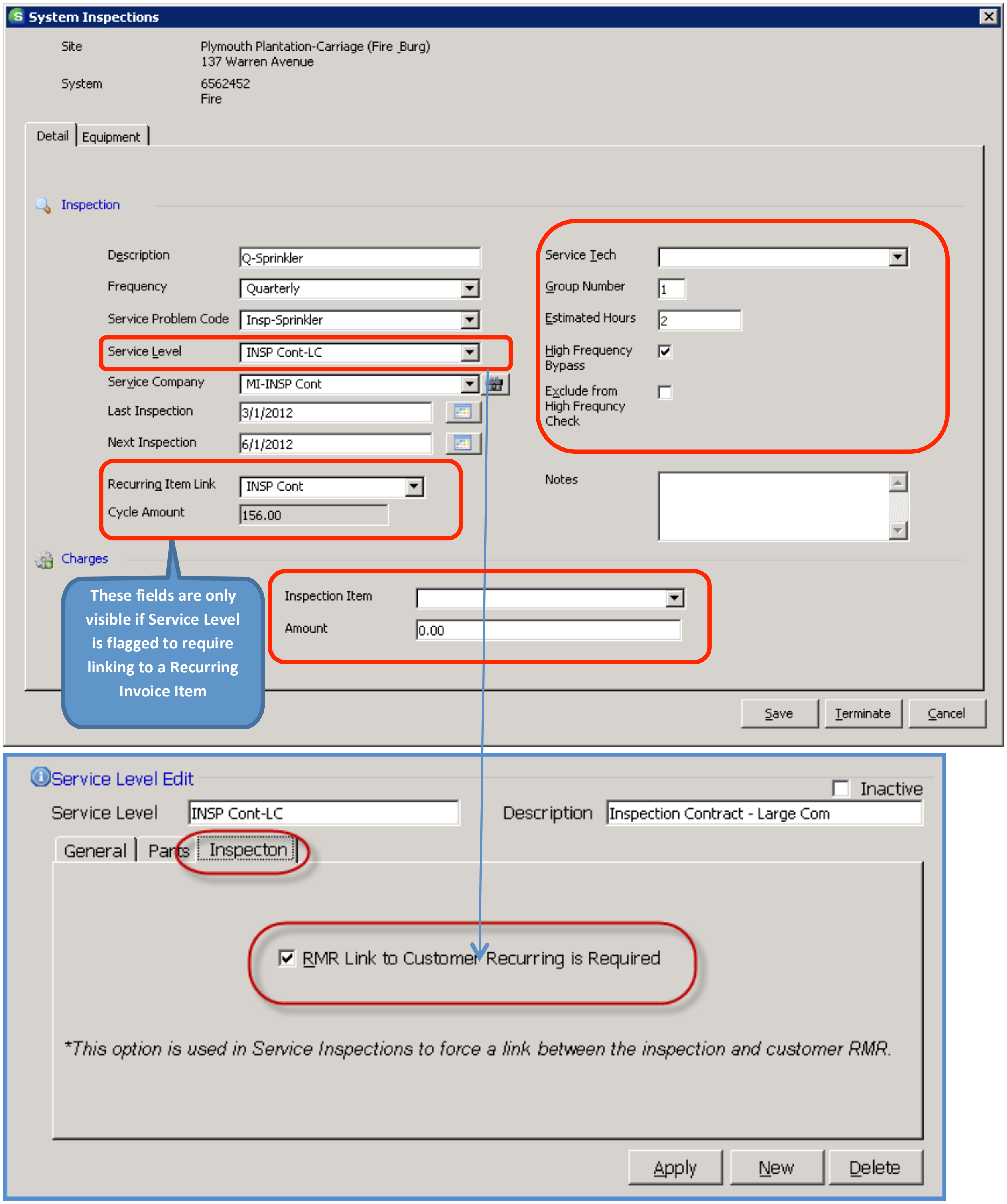
New Inspections are setup from the Customer Explorer within a System record. New fields have been added to the Inspection Setup form to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Item. If you will be linking the Inspection to a Recurring Item, you must first setup the Recurring Line(s).

Creating a New Inspection

From a Customer Explorer record, expand the Customer Tree to the System where the Inspection will be created. Highlight the customer tree option Inspections, right-click and select the option New Inspection.



Additional fields have been added to the Inspection screen to accommodate new functionality and Service Level dropdown display has been modified to include RMR Link.


System Inspections
Site
Plymouth Plantation-Carriage (Fire_Burg)
137 Warren Avenue
System
6562452
Fire
Detail
Equipment
Inspection
Description
Q-Sprinkler
Frequency
Quarterly
Service Problem Code
Insp-Sprinkler
Service Level
INSP Cont-LC
Service Company
MI-INSP Cont
Last Inspection
3/1/2012
Next Inspection
6/1/2012
Recurring Item Link
INSP Cont
Cycle Amount
156.00
Service Tech
Group Number
1
Estimated Hours
2
High Frequency Bypass
Exclude from High Frequncy Check
Notes
Charges
Inspection Item
Amount
0.00
These fields are only visible if Service Level is flagged to require linking to a Recurring Invoice Item
Save
Terminate
Cancel
Service Level Edit
Inactive
Service Level
INSP Cont-LC
Description
Inspection Contract - Large Com
General
Parts
Inspecton
RMR Link to Customer Recurring is Required
*This option is used in Service Inspections to force a link between the inspection and customer RMR.
Apply
New
Delete

Creating a New Inspection Cont.

Enter the description of the inspection and select the frequency from the dropdown.
Select the Service Problem Code from the dropdown.
When selecting the Service Level from the dropdown you will see a column indicating which Service Levels are set up to link to recurring. The recurring must be created prior to the inspection creation. If you want to link the inspection to an existing recurring, you must select a service level where the RMR Link column = "Y".
Select the Service Company from the dropdown.
Select the Last Inspection Date and the Next Inspection Date.
If you have selected a Service Level which is linked to Recurring, the "Recurring Item Link" field will be available and the dropdown will display all active and future recurring invoice items associated with that Site. Choose the corresponding Recurring for that Inspection.
If you would like to request a specific technician for this inspection you may select them from the dropdown.

Inspection Groups

Inspection Groups are used to group multiple Inspections and invoice the group of inspection tickets on a single invoice for charges that are not billed through the cycle billing process. To group 2 or more inspections, assign the same group number (1 thru 9) to the individual inspections.
Select the Estimated Hours for this inspection. If this inspection becomes part of a Group Ticket, the Group Ticket will display the Total Estimated Hours for all inspections in the group as well as the estimated hours for each individual ticket

High Frequency Inspections

A new feature, High Frequency Bypass, manages Inspection Ticket creation where multiple inspections are performed at different frequencies.
For example, your customer has contracted with your company to inspect their monitored fire system. This contract requires that your company perform a quarterly visual and physical test of the fire pump monitored points, a semi-annual test of sprinklers, waterflow switches, and an annual test of all equipment including sprinklers and waterflow switches. You would set up each of these as separate inspections and the quarterly and semi annual inspections would be flagged with High Frequency Bypass checked (Yes). If all Inspections were to begin on June 1, 2012, when you generate your inspection tickets for June, the only ticket created will be the annual inspection since it is the least frequent. The quarterly and semi-annual inspection records will be advanced to the next inspection date based on the frequency. When Inspection Tickets are generated for the month of September, only the quarterly inspection ticket will be created.
Another feature "Exclude from High Frequency Check" enables you to include another inspection for the same system in an Inspection Group where the High Frequency Bypass is being used, and not have this particular inspection bypassed. Using the example above, if you added another Annual Inspection to this inspection group, and you did NOT want it to be bypassed, you would need to check the "Exclude from High Frequency Check".
If an inspection is set to "High Frequency Bypass" and it is linked to a recurring; when this inspection is bypassed, the recurring linked to the inspection will also be bypassed. The next cycle date will be advanced and no invoice will be created. For example:

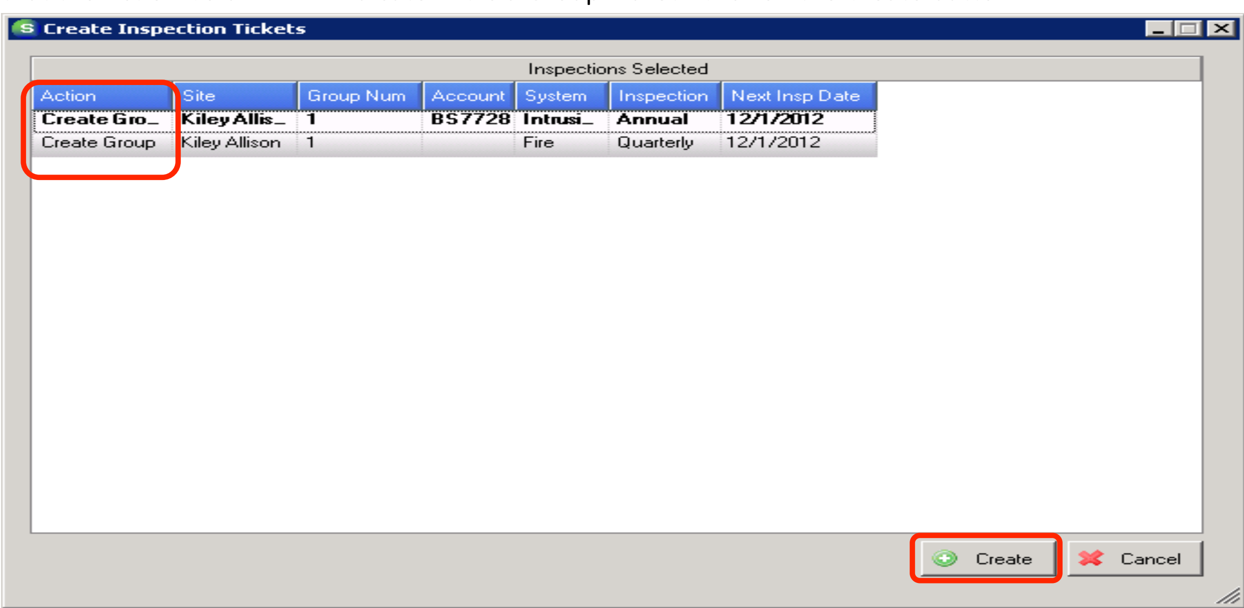
An Annual Inspection with a next inspection date of 1/1/2013, linked to an annual recurring with next cycle date of 1/1/2013 and a Monthly Inspection with next inspection date of 1/1/2013 , linked to a monthly recurring with next cycle date of 1/1/2013; a service ticket will not be created for the monthly inspection and the next inspection date will advance to 2/1/2013. Also the monthly recurring will not be generated and the next cycle date will advance to 2/1/2013.
When using the High Frequency Bypass, and linking the inspections to recurrings, the relationship between the inspections and recurrings must be a one to one.

Inspection Item and Amount

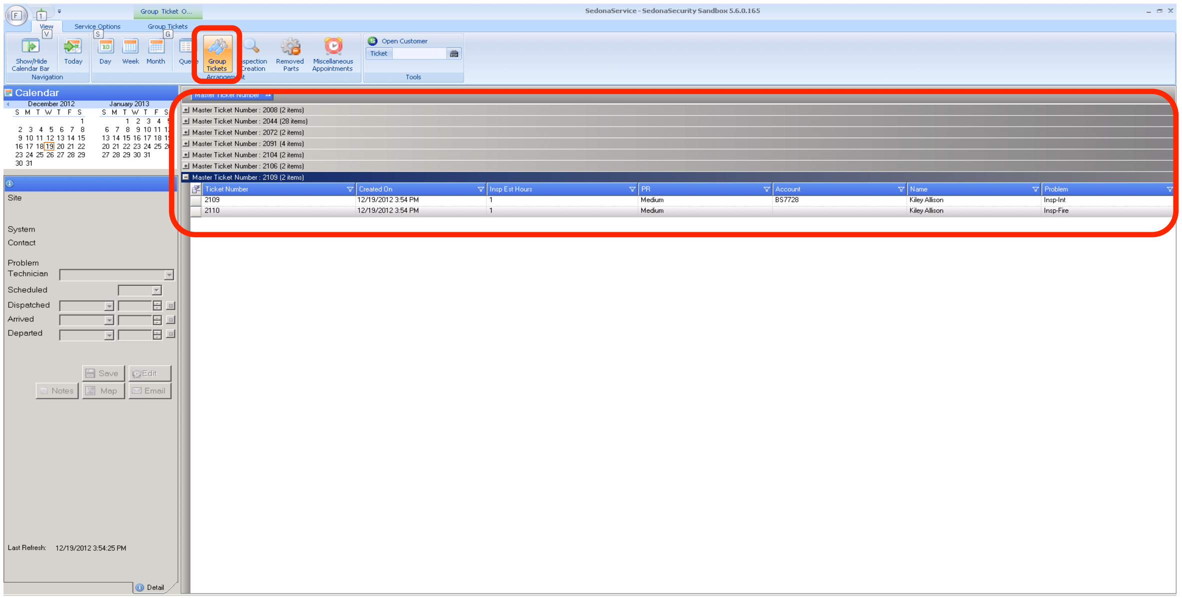
These fields will be used if you bill a flat amount for an inspection. Select the appropriate Inspection Invoice Item and fill in the amount.

Creating Group Inspection Ticket

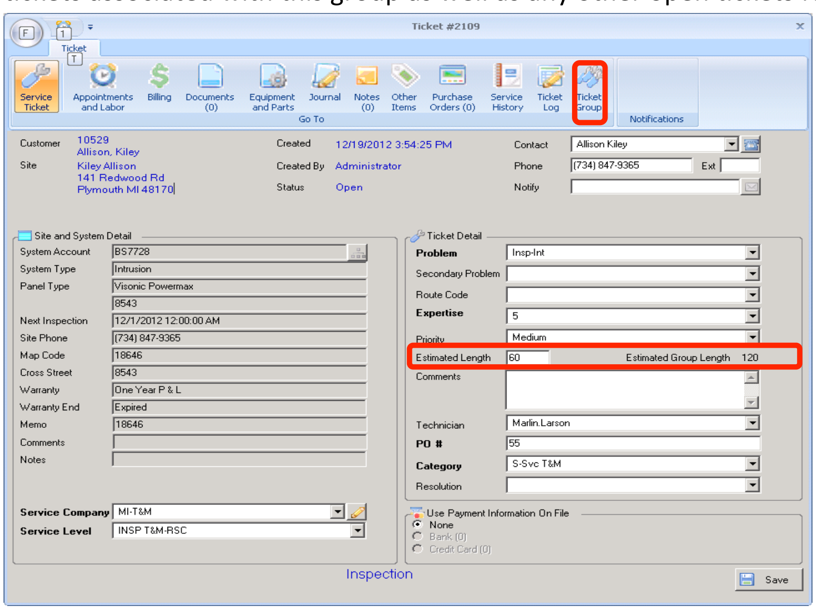
The Process for creating Group Inspection Tickets is the same as creating individual Inspection tickets.
In Service Module, Select “Inspection Creation” and select desired criteria.
Click on the “Get Inspections” button and a list of Inspections which are due, based on the criteria selected, will display. Select the Inspections you would like to create tickets for and click on the “Create Tickets” button. Note that the Action Column will indicate if it is a Group Ticket. Click on the Create button.



A Group Ticket will be created and can be viewed by selecting the “Group Ticket” Icon in the View Tab of the Service Module. When creating the Group Ticket , the application will select the ticket with the lowest number to be the Master Ticket. Clicking on the + sign will display all tickets associated with that Group Ticket.



Double clicking on the Master Ticket will open the Group Ticket. The User can also open the Group Ticket or any of the individual tickets associated with the group by clicking on that ticket number in the dropdown.
When viewing the ticket, the estimated length for that ticket will display as well as the Estimated Group Length. A new Icon "Ticket Group" will display on the open ticket. Clicking on this icon enables the User to view all tickets associated with this group as well as any other open tickets for this Site.

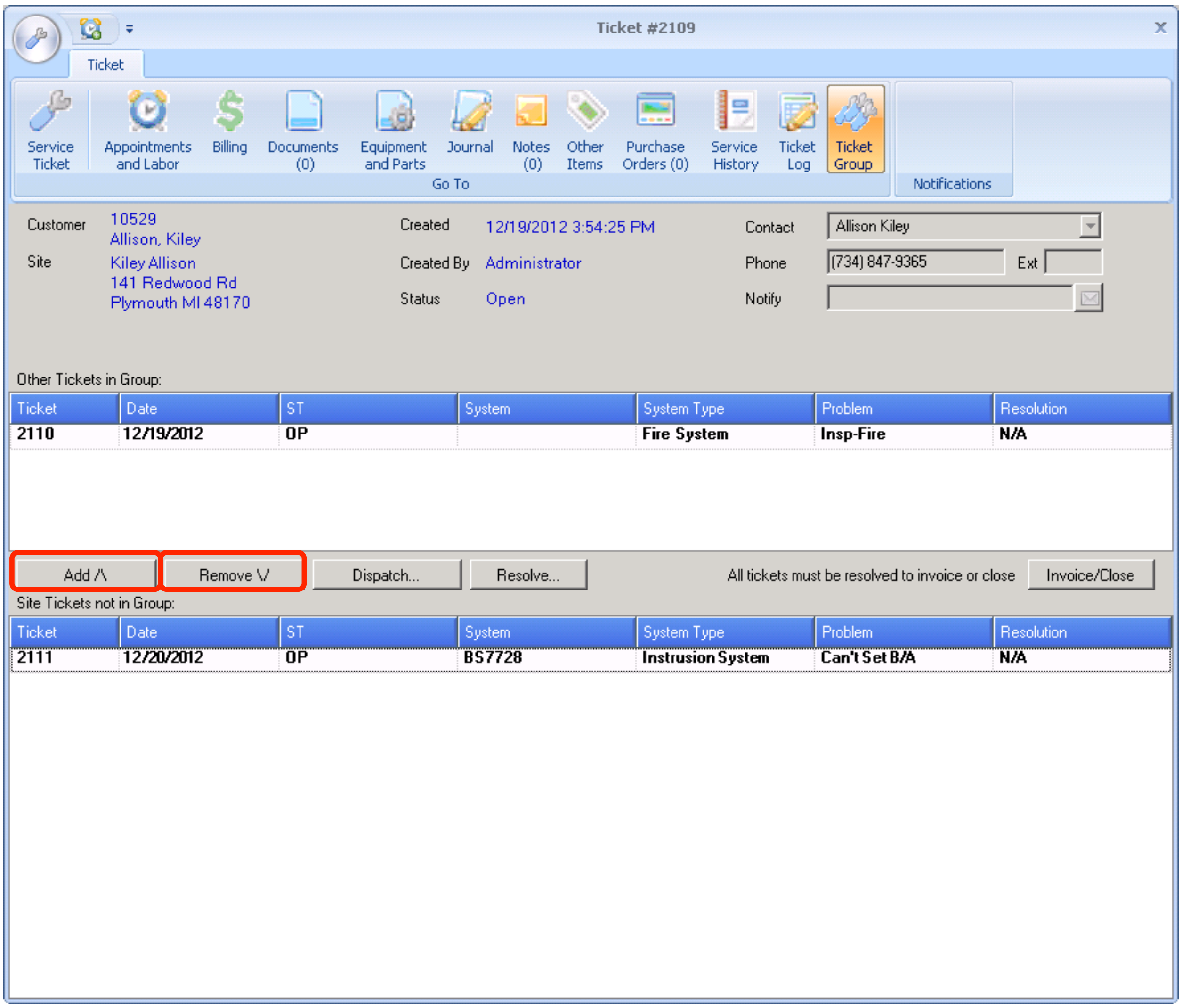


Adding a Ticket to an Existing Group Ticket

Click on the Ticket Group Icon in a Group Service Ticket. Tickets associated with the group will display in the top portion. Any individual ticket for the same Site, not associated with the Group Ticket will display in the bottom portion. To add an individual ticket to the Group, click on the ticket and then click on the "Add" button.

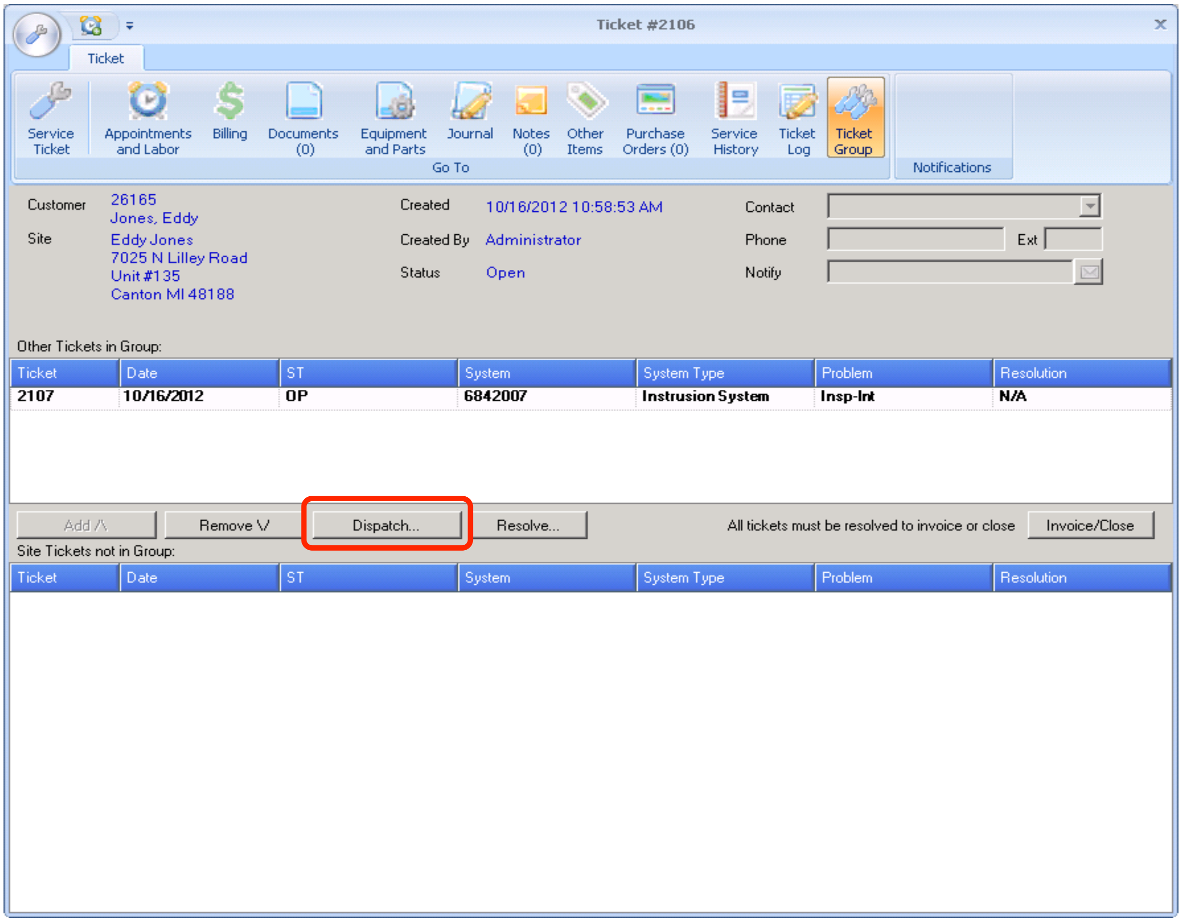
Removing a Ticket from a Group Ticket

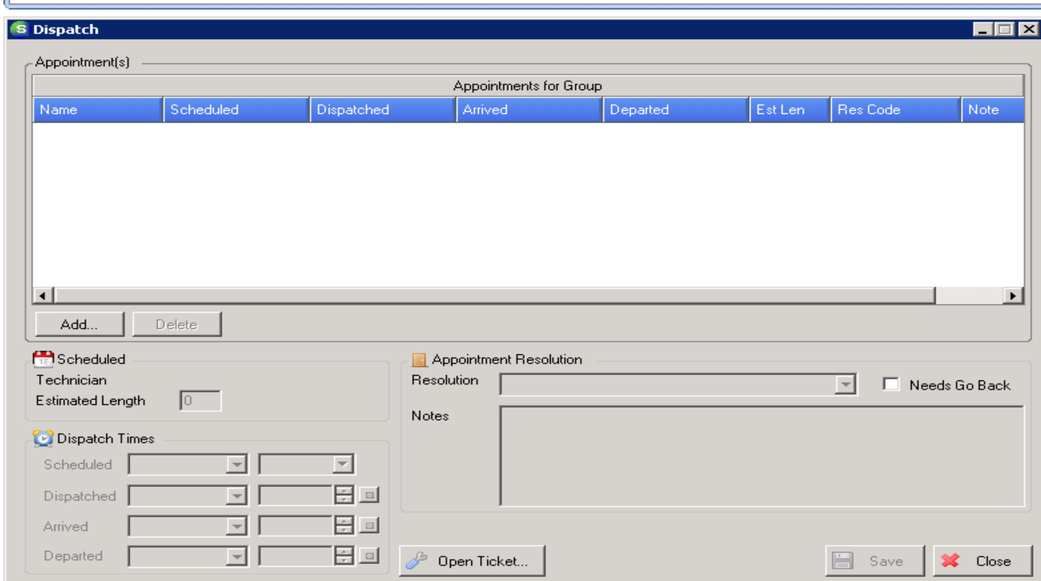
Click on the Ticket Group Icon in a Group Service Ticket. Tickets associated with the group will display in the top portion. Any individual ticket for the same Site, not associated with the Group Ticket will display in the bottom portion. To disassociate a ticket from the Group Ticket, click on the ticket and click on the "Remove" tab.



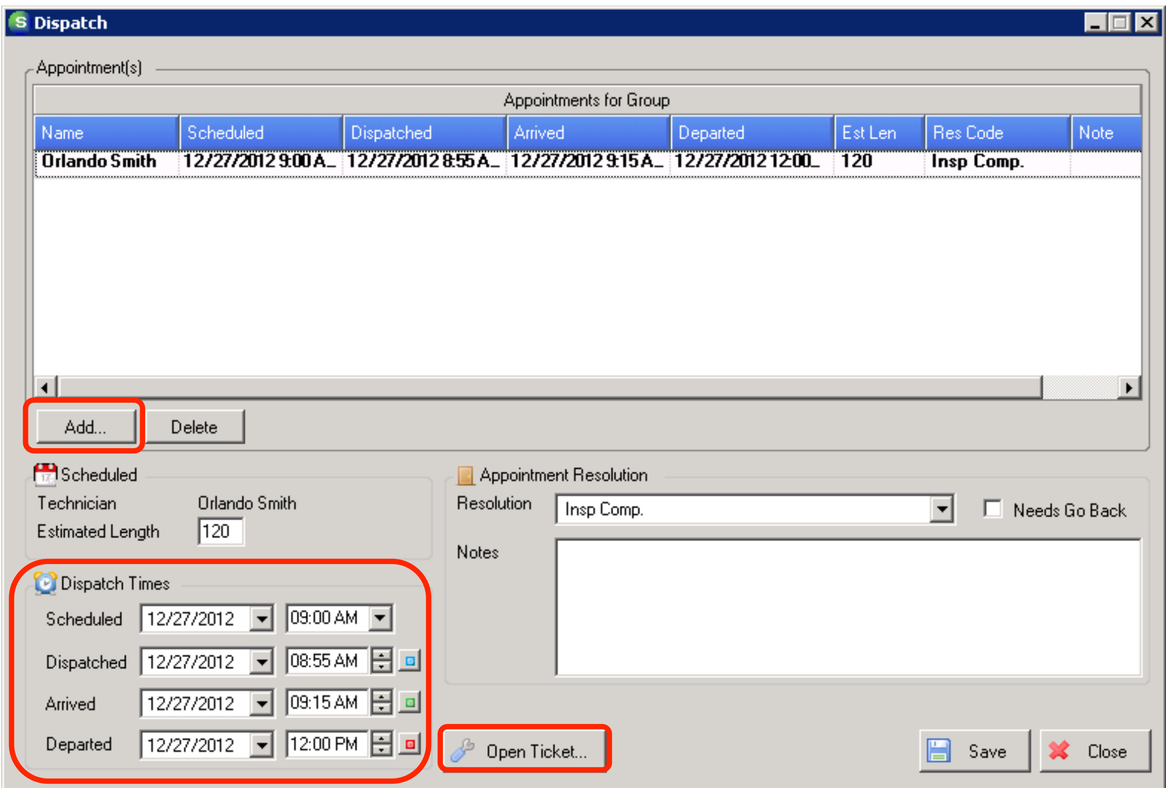
Creating an Appointment in a Group Ticket

Open a Group Ticket and click on "Ticket Group" Icon. Click on "Dispatch"

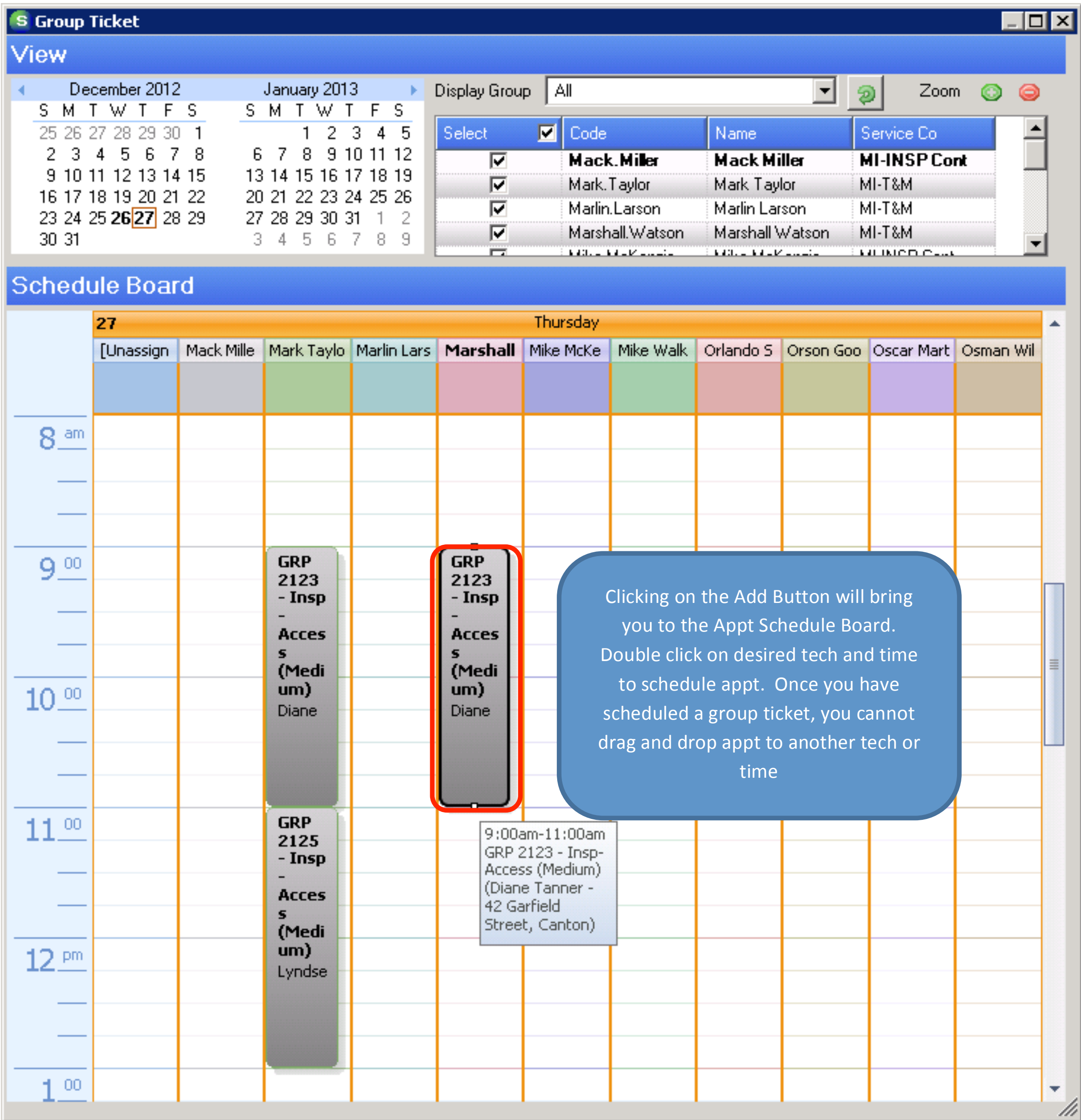




From the Dispatch screen you can view already scheduled appointments or create new appointments by clicking on the "Add" button. Clicking on the "Add" button will open the Appointment Summary Board where you can select the day, time and technician. When creating the appointment, the Estimated Length will automatically default to the total Estimated Length from all of the tickets associated in that group. Note: Once you schedule an appt. for a Group Ticket, you cannot drag and drop the appt. to another tech or time. If you need to change the tech, you must delete the appointment from the Group Ticket Dispatch Screen and create a new appointment. To change just the time, you can do so from the Group Ticket Dispatch Screen.



Group Tickets on the Appointment Summary Board will display as "GRP" and the master group ticket number. Double clicking on the appointment will open the Dispatch screen and enable you to enter Dispatched, Arrived and Departed times as well as resolve the appt. Clicking on the Open Ticket Button enables you to open the ticket from this screen.



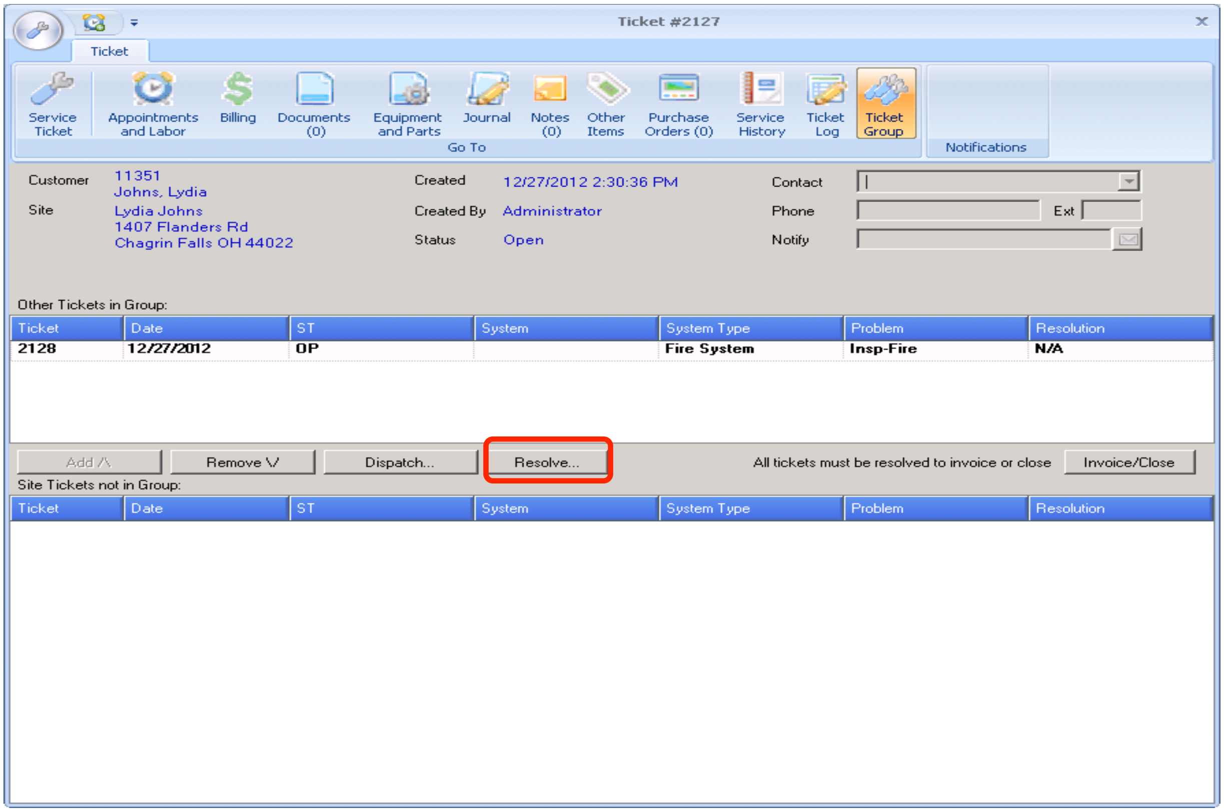
You can also create appointments for the individual tickets. Simply open up the individual ticket and create the appointment in the Appointments and Labor Tab as you would for any other individual ticket not associated with a group.

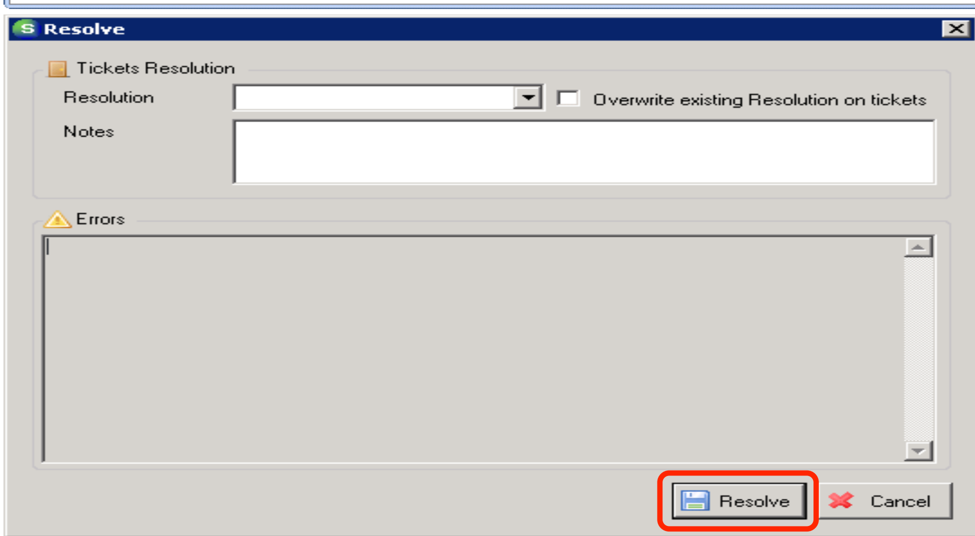
Adding Parts to Group Tickets

Parts must be added to the individual ticket to insure that the equipment list is modified on each system when the ticket is closed. To open an individual ticket from the Group Ticket, click on Ticket Group. From here you can double click on any individual ticket to open it.

Resolving a Group Ticket

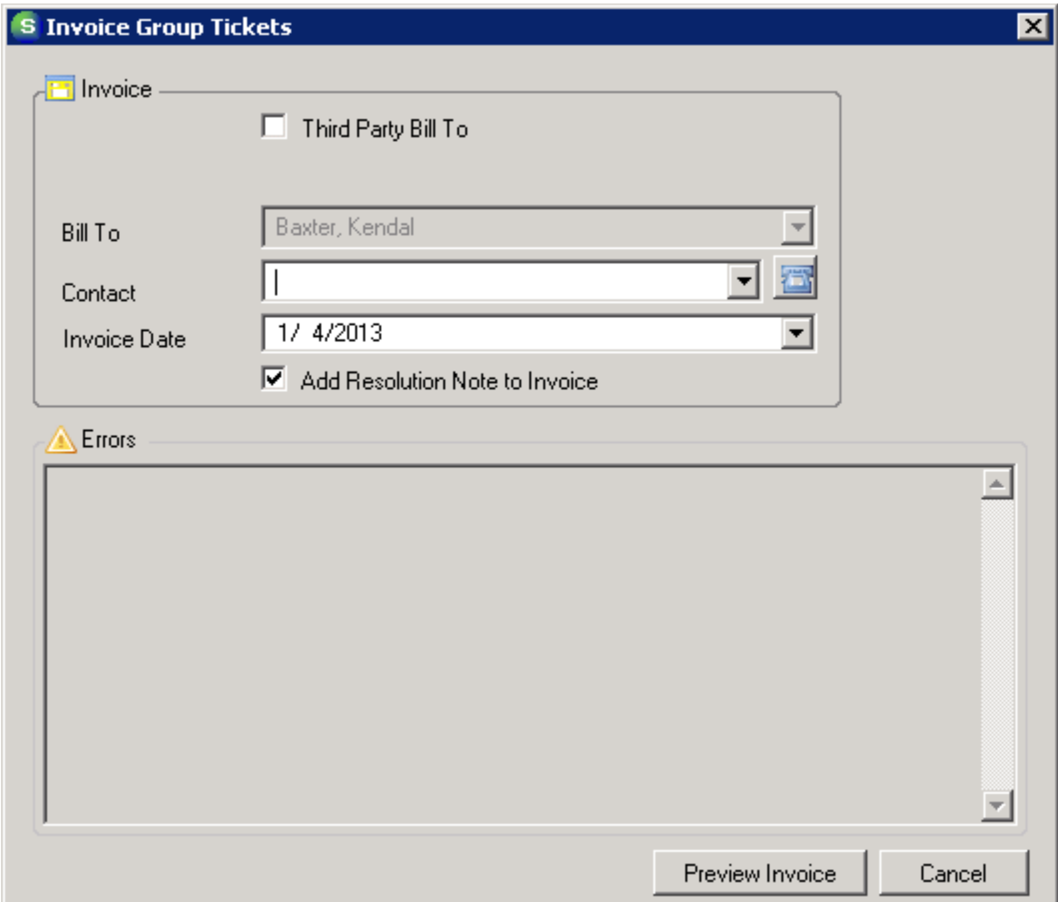
To resolve a group ticket, click on the Resolve Button on the Ticket Group screen. After choosing a resolution code and entering resolution notes, click on the Resolve Button. This will resolve all tickets associated with the group.

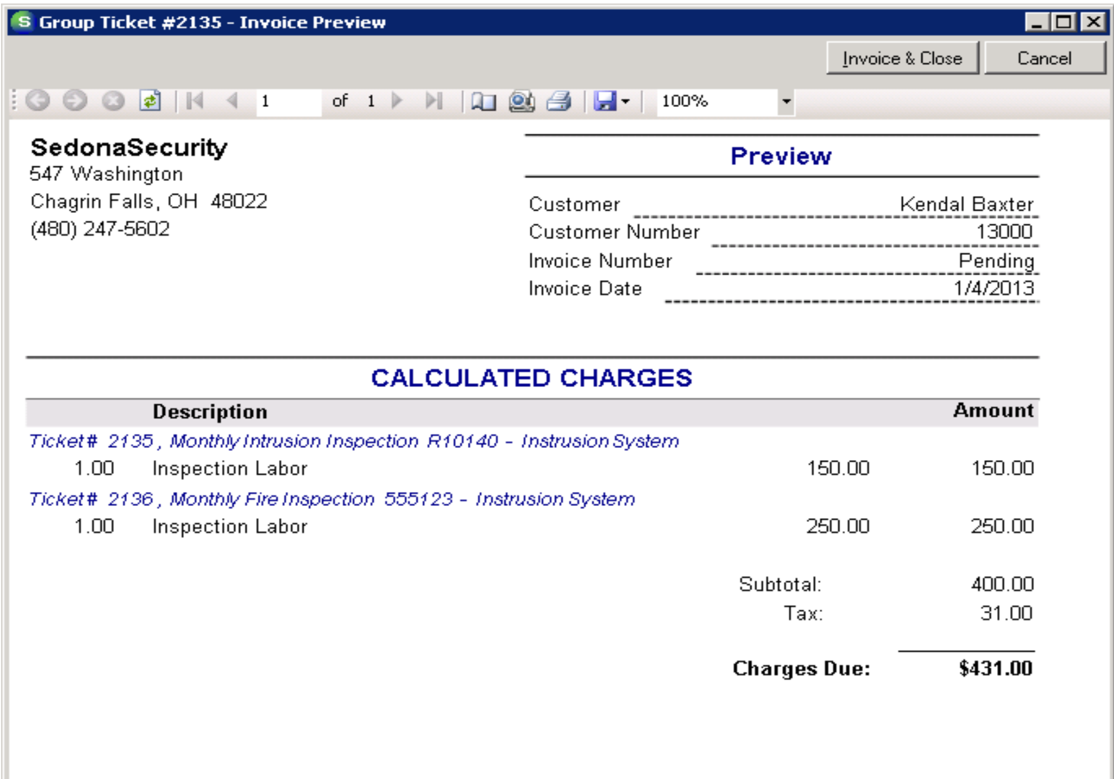


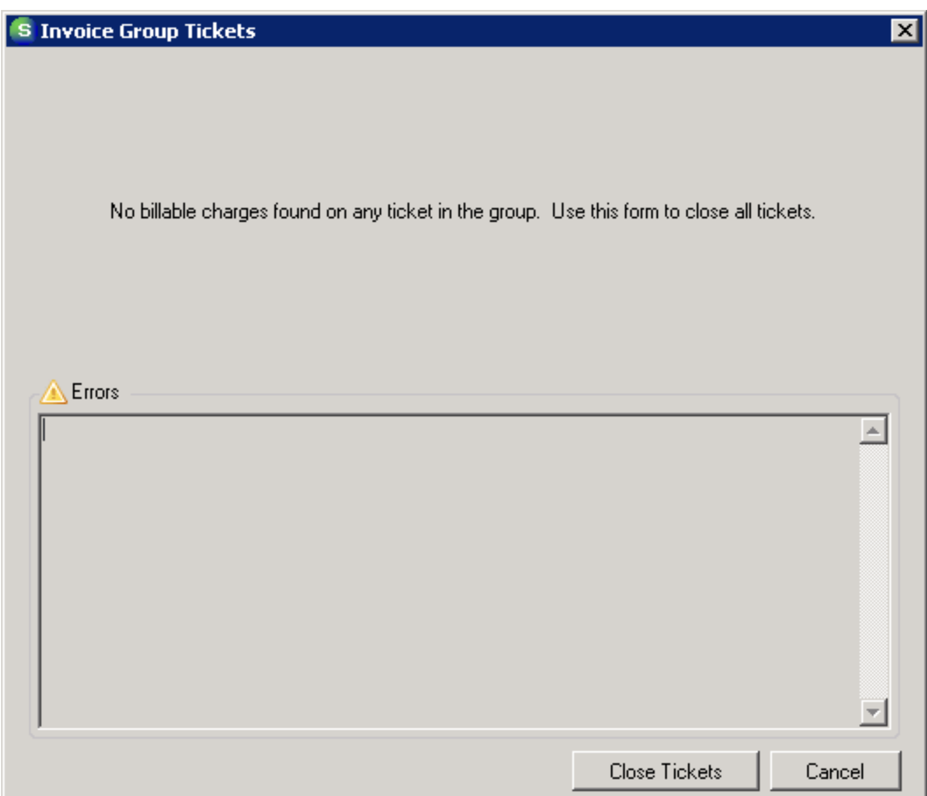


Invoicing a Group Ticket Not Linked to RMR

After resolving a Group Ticket, you can invoice the ticket by clicking on the Invoice/Close Button on the Ticket Group screen. The Preview Invoice button allows you to preview the invoice prior to saving. From the Invoice Preview screen you can invoice and close the ticket from the Invoice & Close button. If there are no billable charges you will receive a message indicating that there are no billable charges and a Close Ticket button is available.

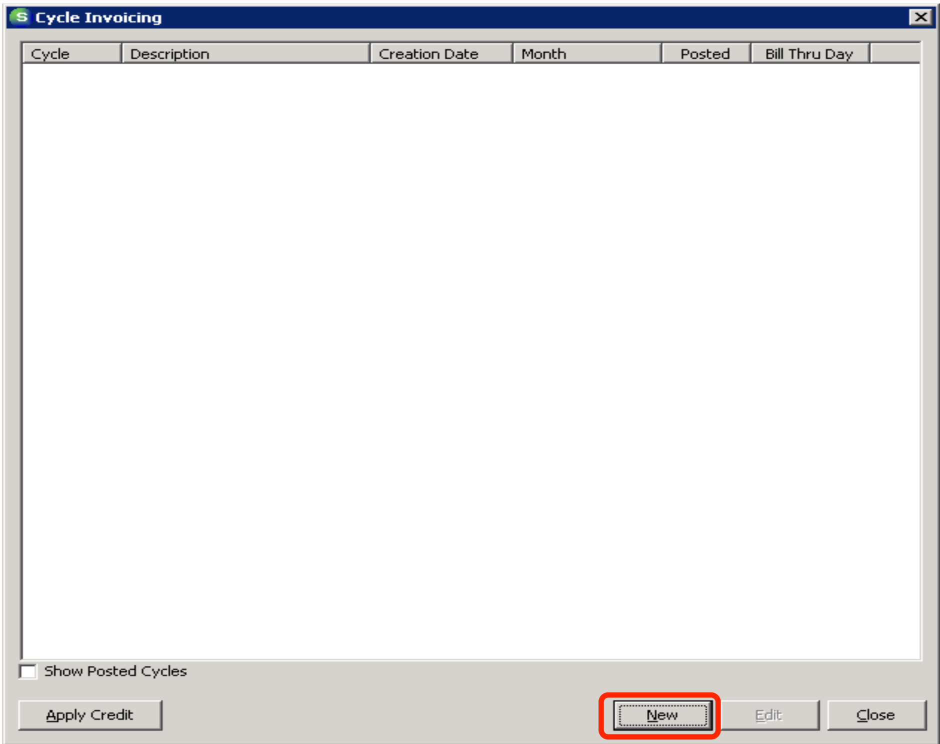



Group Ticket #2135 - Invoice Preview
Invoice & Close
Cancel
1 of 1
100%
SedonaSecurity
547 Washington
Chagrin Falls, OH 48022
(480) 247-5602
Preview
Customer Kendal Baxter
Customer Number 13000
Invoice Number Pending
Invoice Date 1/4/2013
CALCULATED CHARGES
Description
Amount
Ticket# 2135 , Monthly Intrusion Inspection R10140 - Instrusion System
1.00 Inspection Labor 150.00 150.00
Ticket# 2136 , Monthly Fire Inspection 555123 - Instrusion System
1.00 Inspection Labor 250.00 250.00
Subtotal: 400.00
Tax: 31.00
Charges Due: $431.00

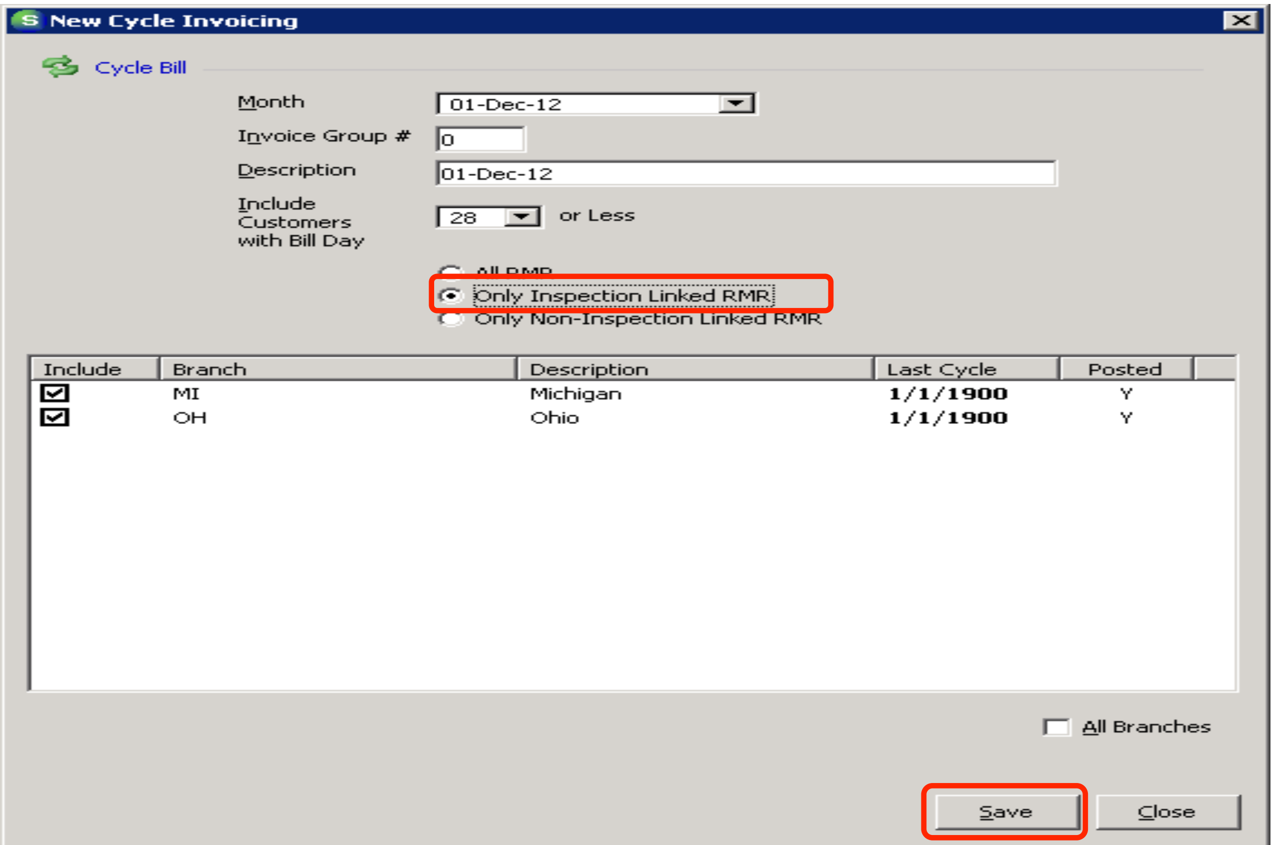

Invoice Group Tickets
No billable charges found on any ticket in the group. Use this form to close all tickets.
Errors
Close Tickets
Cancel

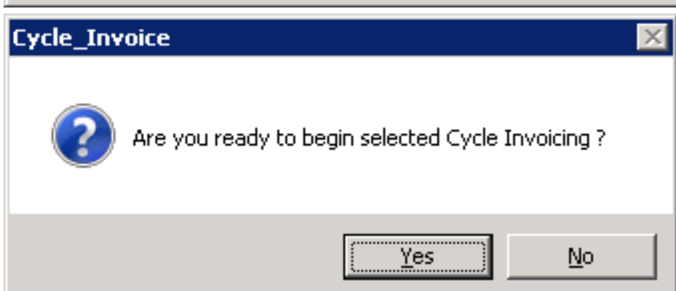
Invoicing a Group Ticket Linked to RMR

Resolve and Invoice/Close the Group Inspection Ticket as previously described. In Main Tree, expand the Accounts Receivable Module and click on Cycle Invoicing. Click on New.

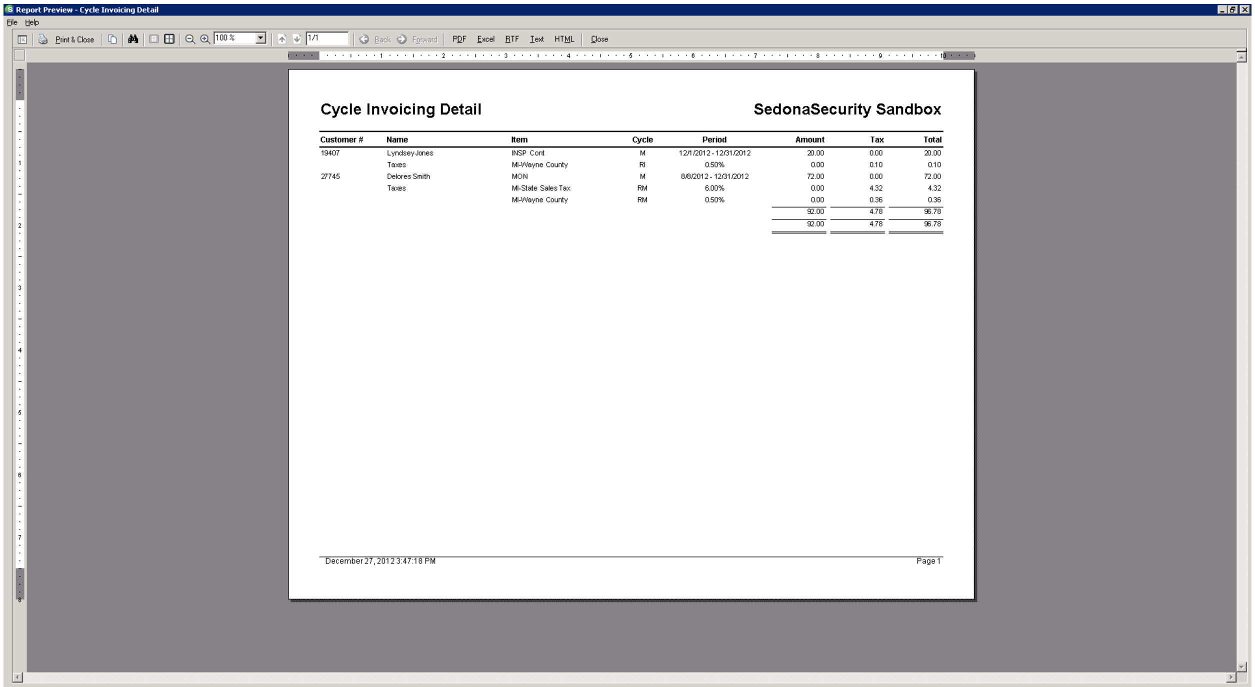


Choose the desired Month and Branches and the option for Only Inspection Linked RMR. Choosing this option will create a cycle invoice for all recurrings tied to a closed inspection ticket that have not already been cycled. Click Save. A pop up screen asking if you are ready to begin selected cycle invoicing will display. Click Yes.





After recurring cycle has been created, highlight the cycle batch and right click. Select Print and Cycle Detail to review the cycle invoices prior to posting.



Cycle Invoicing Detail

SedonaSecurity Sandbox

Customer #	Name	Item	Cycle	Period	Amount	Tax	Total
19407	Lyndsey Jones	INSP Cont	M	12/1/2012 - 12/31/2012	20.00	0.00	20.00
	Taxes	MI-Wayne County	RI	0.50%	0.00	0.10	0.10
27745	Delores Smith	MON	M	8/8/2012 - 12/31/2012	72.00	0.00	72.00
	Taxes	MI-State Sales Tax	RM	6.00%	0.00	4.32	4.32
		MI-Wayne County	RM	0.50%	0.00	0.36	0.36
					92.00	4.78	96.78
					92.00	4.78	96.78

December 27, 2012 3:47:18 PM

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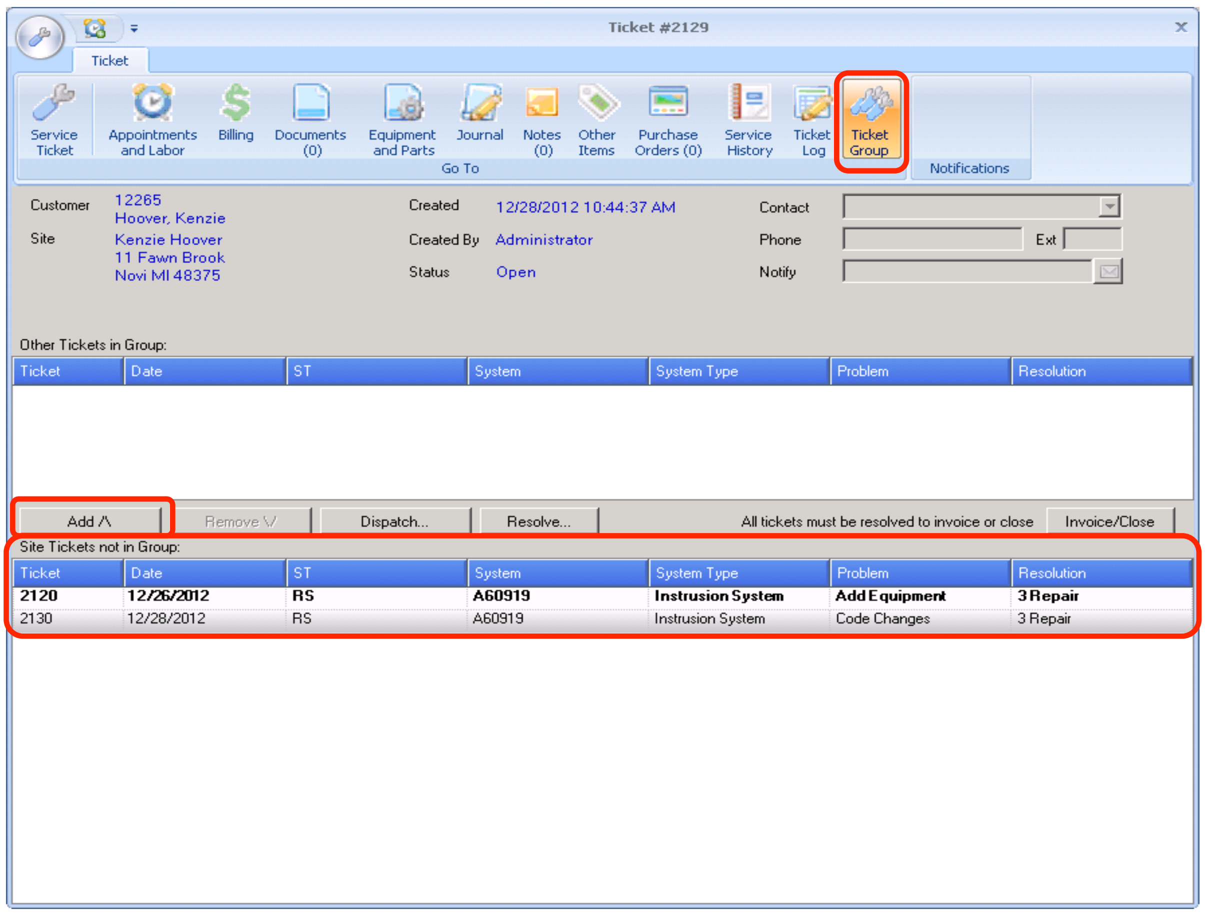
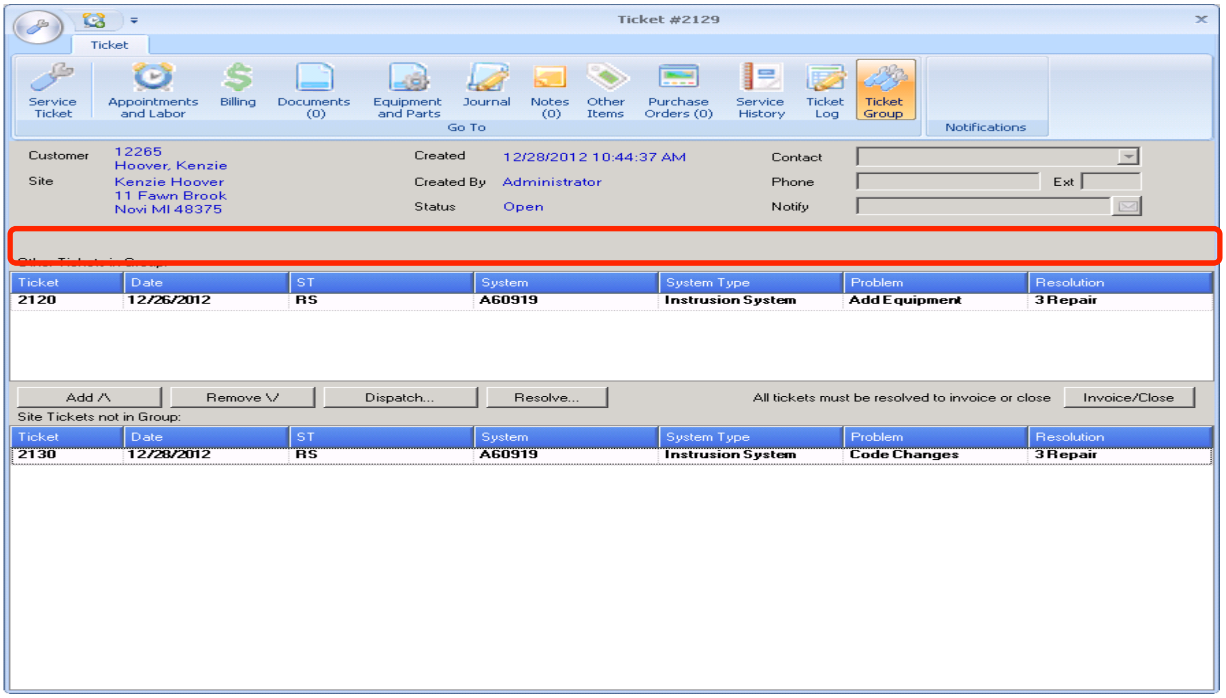
Posting process is the same as with all cycle invoicing.

Grouping Service Tickets

To combine Individual Service Tickets assigned to systems in the same site to a Group, open one of the service tickets and click on the Ticket Group Icon. All tickets associated with that Site which are not part of that Group will appear in the lower portion under “Site Tickets not in Group”.



Click on the line for the ticket you would like to add to the Group and Click on the Add button. The ticket will be added to the Group.



Notes