SedonaOffice®

The #1 Financial Software for Security Companies

SedonaSchedule

Functionality

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About this Document

This Reference Document is for use by SedonaOffice customers only. This document is not meant to serve as an operating or setup manual, its purpose is to overview the content contained within, and to be used for reference purposes only.

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Document Overview

This document is being provided to explain the basic functionality of SedonaSchedule. This document will cover creating new tickets, scheduling, dispatching, managing tickets, etc. Another document related to SedonaSchedule is available for download from the SedonaOffice website; *SedonaSchedule Navigation Reference Guide*. Please download and read this document prior to reading this document and before beginning the use of SedonaSchedule.

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SedonaSchedule Overview

SedonaSchedule is an application designed for the creating and managing Service and Inspection Tickets and for scheduling Jobs. The SedonaSchedule is accessed from the main SedonaOffice application and runs as a separate application.

All functions related to Service Tickets and Inspection Tickets are performed within SedonaSchedule; from creation of the ticket all the way though invoicing and closing.

Ticket Types

There a four types of Tickets that are created and managed within SedonaSchedule:

- Service Tickets – Service calls performed by company Technicians or in-house troubleshooting tickets.
- Inspection Tickets – Tickets created from the Inspection function within SedonaSchedule and work is performed by company Technicians. Tickets are generated periodically based on information setup on the System record of a customer's Site.
- Vendor Service Tickets – Service calls performed by a Service Provider (subcontractor) on behalf of your company.
- Vendor Inspection Tickets – Inspections performed by a Service Provider (subcontractor) on behalf of your company. Tickets are generated periodically using the Inspection function within SedonaSchedule based on information setup on the System record of a customer's Site.

Scheduling - Appointment Types

Technician and Installer appointments are created and displayed on the Schedule Board within SedonaSchedule. There are various types of appointments that may be created:

- Technician Ticket Appointments – for both Regular Tickets and Inspection Tickets.
- Vendor Ticket Appointments – for Vendor Tickets and Vendor Inspection Tickets.
- Unassigned Appointments – Tickets (all types) and Jobs may be scheduled with the "Unassigned Technician" and then re-assigned to the appropriate individual once that has been determined by the staff member responsible for scheduling.
- Miscellaneous Appointments – Appointments used for blocking out time on the Schedule Board when Technicians/Installers are not available to work on tickets or jobs.

Purchase Orders

Purchase Orders may be created directly from a Ticket. A purchase order may be created for Parts or for Vendor type tickets, a Purchase Order may be created for the services to be performed by the Service Provider.

The document is designed to explain how to use the various functions within SedonaSchedule.

Prior to reading this document and using SedonaSchedule, it is important to first read the SedonaSchedule Navigation Reference Guide. This document provides information on the layout of the application, terminology which is specific to SedonaSchedule and general navigation within the application.

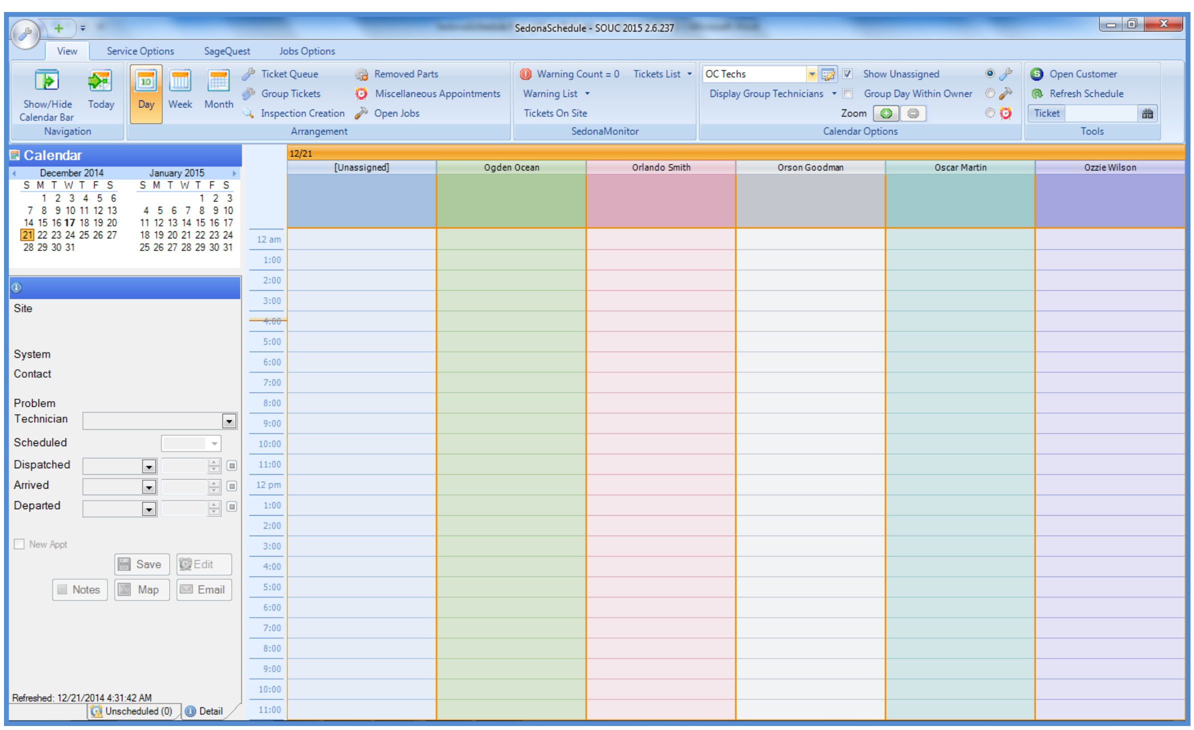
Topics covered in this document include:

- Creating and Processing Service Tickets
  - Attaching Documents (add-on module SedonaDocs required)
  - Scheduling Technician Appointments
  - Adding Parts to a Ticket
  - Ordering Parts for a Ticket
  - Dispatching Technician Appointments
  - Adding Notes to a Ticket
  - Reviewing Ticket Charges
  - Invoicing Ticket
  - Close Ticket
- Vendor Tickets (Service & Inspections) – Creating and Managing
- Inspection Tickets
  - Inspection Setup
  - Inspection Ticket Creation
- Special Features
  - Miscellaneous Appointments
  - "Firm" Appointments
  - Appointment Clock-out & Clock-in
  - Copy & Paste Appointments
- Open Jobs List
  - Scheduling & Managing Job Appointments

Launching SedonaSchedule

SedonaSchedule is launched from the main SedonaOffice application. From the main application menu, click on the *Service* menu option. In a few seconds the SedonaSchedule application will be displayed.

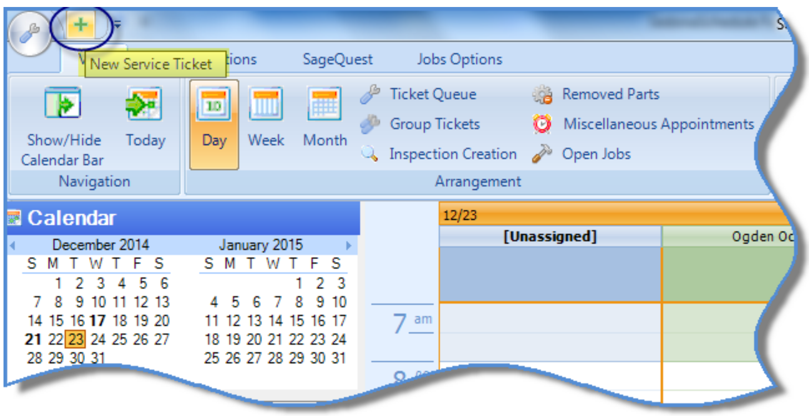
The SedonaSchedule application will open displaying the view last displayed when exiting the application. When opening SedonaSchedule for the first time, the Schedule Board will be displayed.



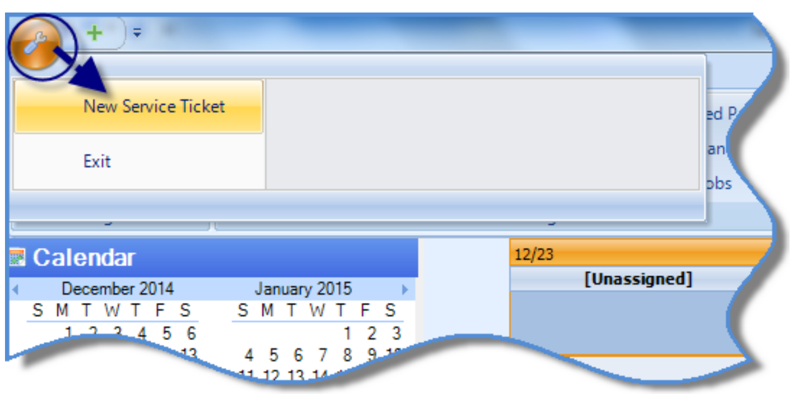
Where to Start a New Service Ticket

There are three different locations within SedonaSchedule where you may begin the creation of a Service Ticket.

1. To create a Ticket but not schedule an appointment at this time, click on the  located at the upper left of the application. The Customer Search form will be displayed to located the account for which the Ticket will be created.



2. To create a Ticket but not schedule an appointment at this time, click on the  icon, then select the New Service Ticket option. The Customer Search form will be displayed to located the account for which the Ticket will be created.

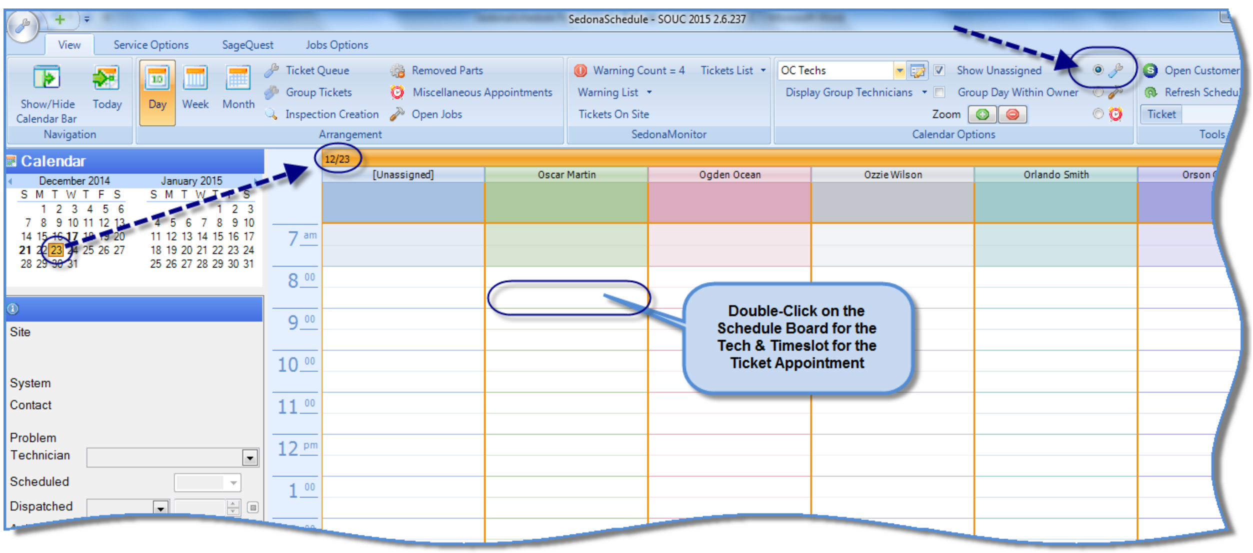


Where to Start a New Service Ticket (continued)

3. To create a Ticket and schedule a Technician for a particular date and time, you would use the "Double-Click to Add" method. First make certain the button to the left of Wrench Icon in the Calendar Options Ribbon group is selected.

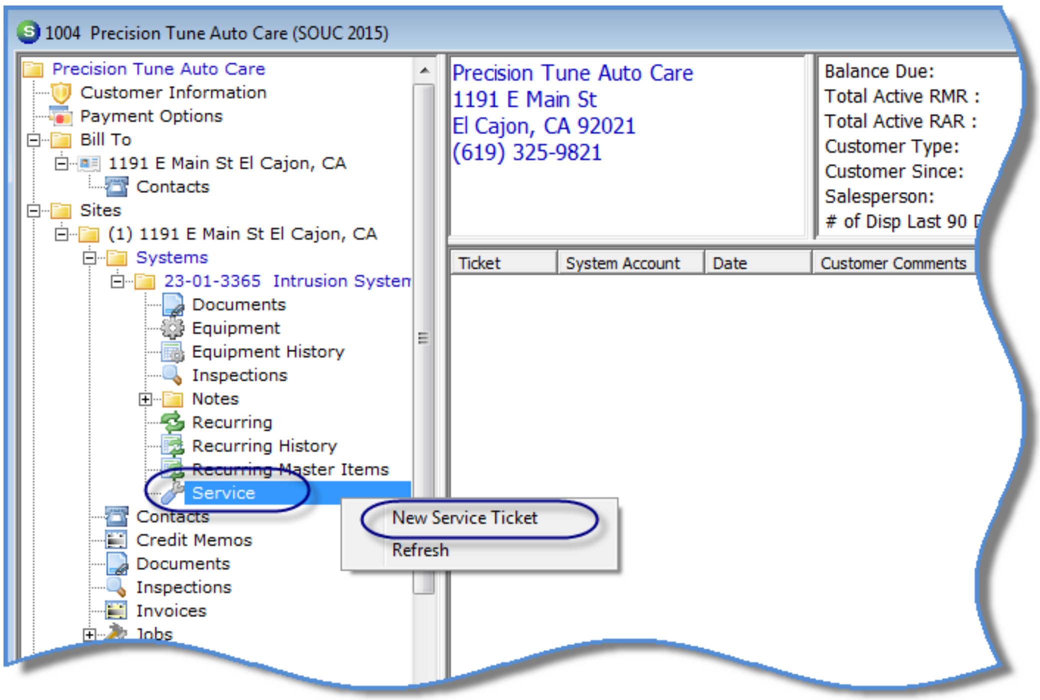
   On the Calendar, click on the date of when the Technician Appointment will be scheduled.

   Within the Schedule Board, located the Technician and timeslot for the Ticket and double-click. The Customer Search form will be displayed for locating the account for which the Ticket/Appointment will be created.



Where to Start a New Service Ticket (continued)

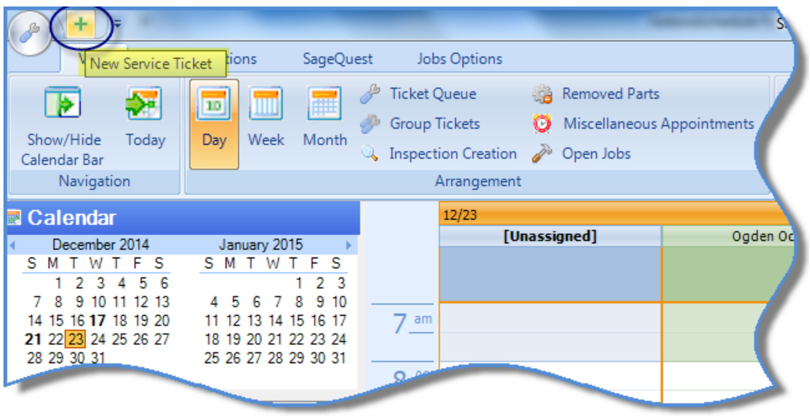
A Ticket may also be started while working in a Customer Explorer record of the main SedonaOffice application. Within the System area of the Customer Tree, highlight the Service menu option, right-click and select the *New Service Ticket* option. The software will re-direct you to the SedonaSchedule application and a blank Ticket form will be displayed to continue processing.



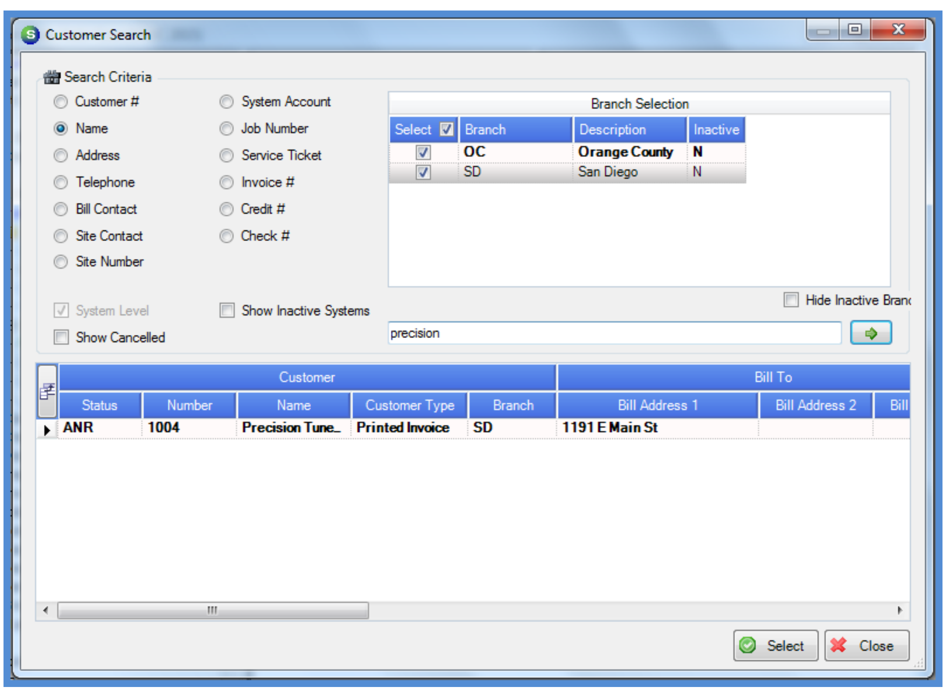
Creating a New Service Ticket from SedonaSchedule

This section will describe how to create a new Service Ticket (but not schedule an appointment) in SedonaSchedule.

1. To create a Ticket but not schedule an appointment at this time, click on the located at the upper left of the application. The Customer Search form will be displayed to located the account for which the Ticket will be created.

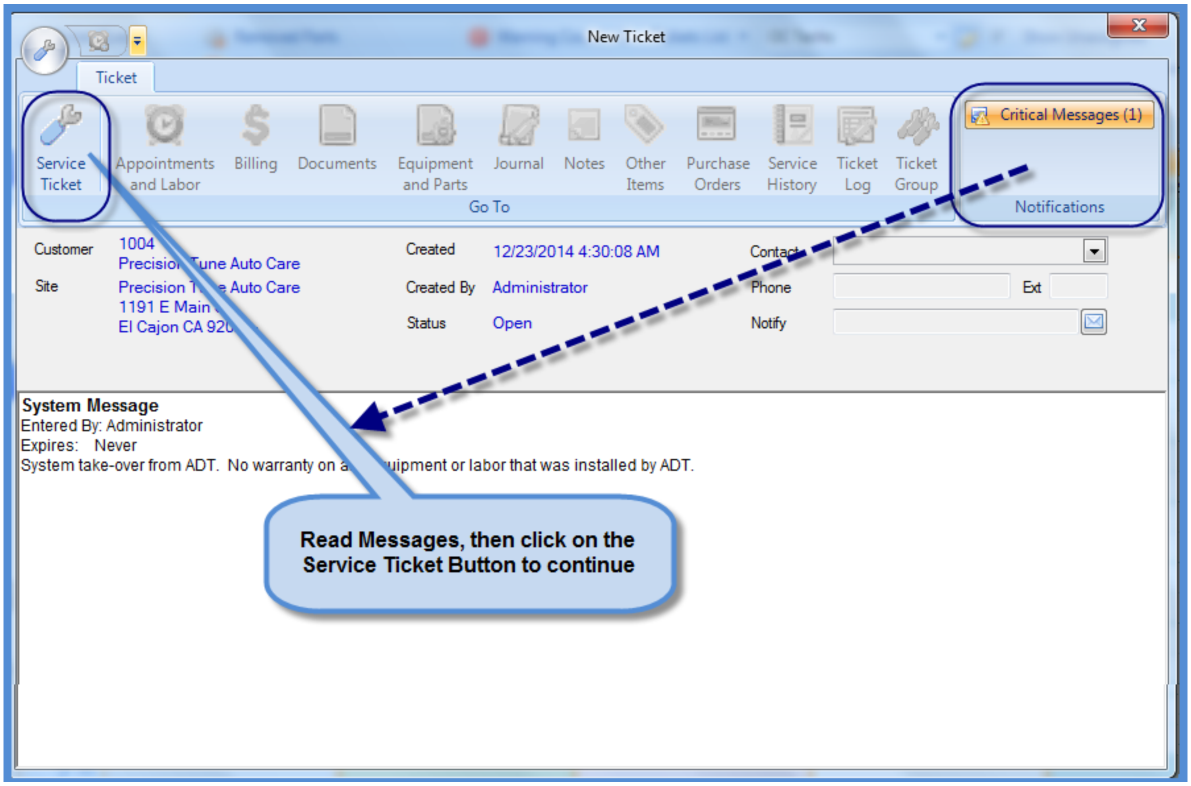


2. The Customer Search form will be displayed to located the account for which the Ticket will be created. Enter the search criteria; once the correct customer system is located within the list, double-click on the row to open the Ticket form.



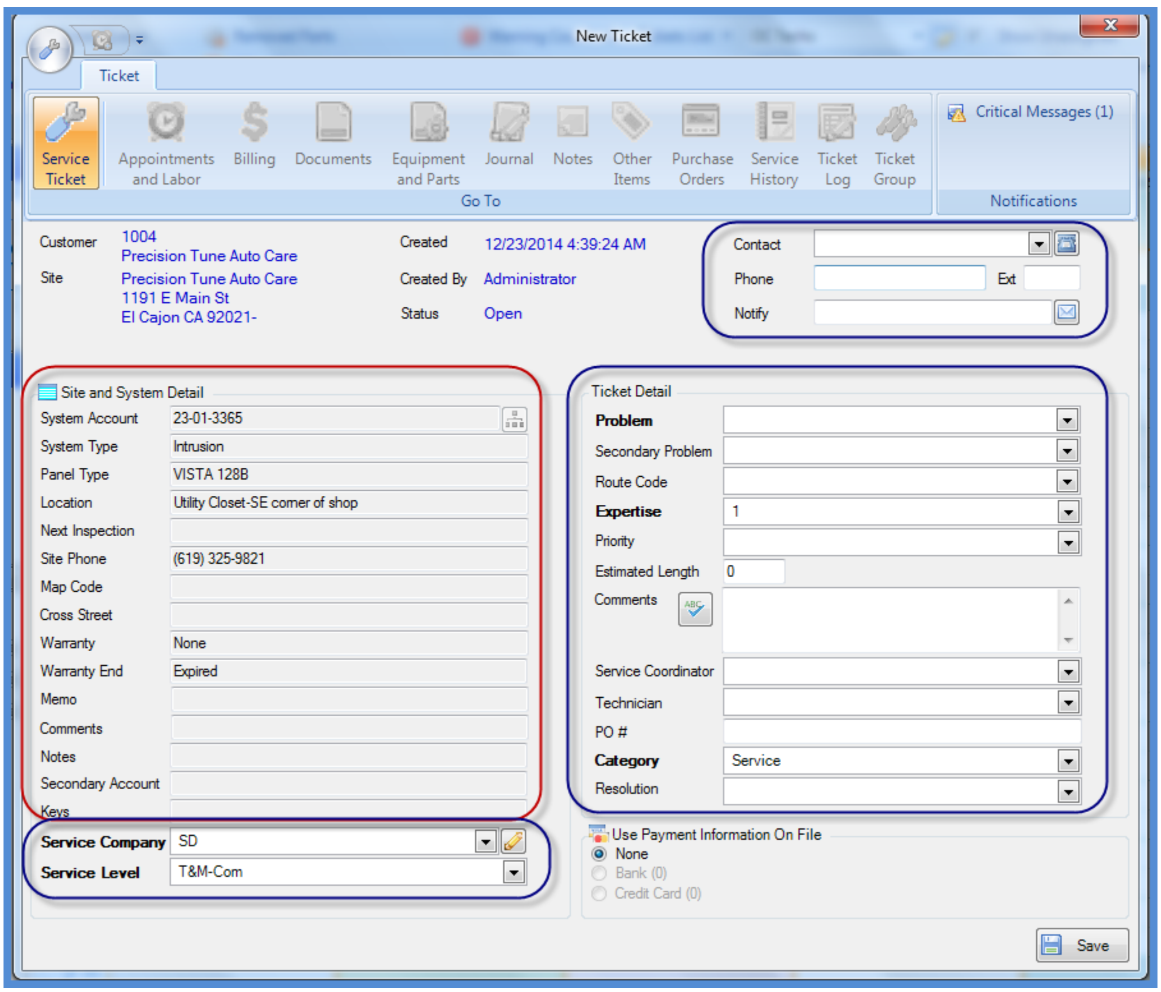
Creating a new service ticket from SedonaSchedule (continued)

3. Typically the first data entry form will be displayed is the Service Ticket form, however, if any "Critical Messages" have been setup for the Customer, the System or the default Service Company associated with the System, the *Notifications* page will first be displayed. Once the messages have been read, click on the *Service Ticket* button on the Ribbon in the header area of the Ticket.



Creating a new service ticket from SedonaSchedule (continued)

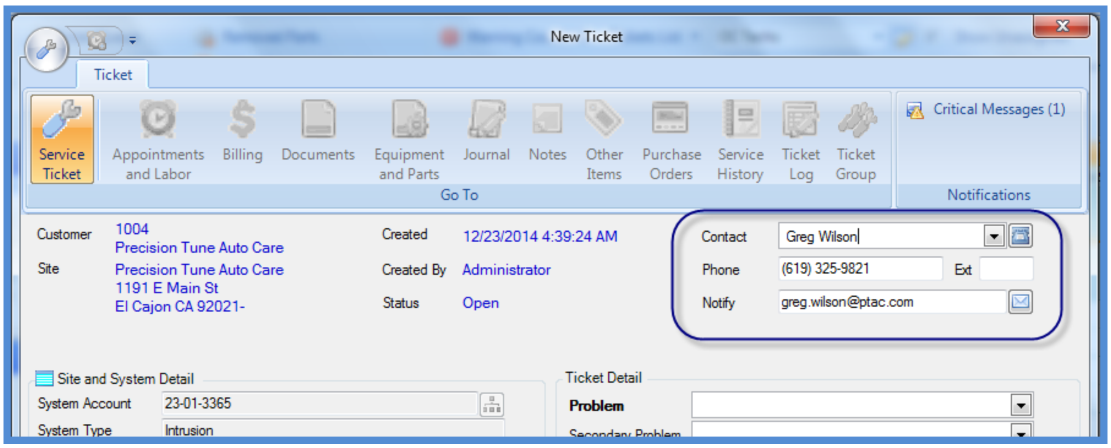
4. **Filling in the Service Ticket Form** - The left side of the Service Ticket form is mainly display-only information related to the System. The Service Company and the Service Level fields located at the lower left side of the form automatically fill with the values setup on the System record. Both of these fields may be overridden if necessary.
   The right side of the form is where most of the data entry is performed. Each data entry field will be explained on the following pages.
   When finished filling in the Service Ticket form, click on the *Save* button located at the lower right of the form to continue processing.



Creating a new service ticket from SedonaSchedule (continued)

a. *Contact Information* – In the Contact field, click on the drop-down arrow to the right of the field to select from Site Contact on file. If no Contacts appear on the drop-down list, you may create a Contact record on the fly by clicking on the telephone icon to the right of the Contact field and filling out the information. This contact will then be saved to the Site Contact list for future use and fill in on the current Service Ticket.

If you do not want to select an existing contact or create a contact record, you may manually type in the Contact Name, phone number, and in the Notify field you may enter the contact's email address. The contact name and phone number will print on a Ticket and be displayed to Technician's using the FSU (field service unit).



b. *Problem Code* – This is a required field – make a selection from the drop-down list that best describes the purpose of the ticket being created.

c. *Secondary Problem* – If there are choices available when clicking on the drop-down list, make the appropriate selection according to your company's policies and procedures.

d. *Route Code* - If there are choices available when clicking on the drop-down list, make the appropriate selection according to your company's policies and procedures.

e. *Expertise Level, Priority and Estimated Length* – These three fields will automatically be filled in based on the Problem Code selected. Each of these field choices may be overridden. The Estimated Length value is used when scheduling a Technician appointment – this is the amount of time required to complete the service call (including drive time to the site).

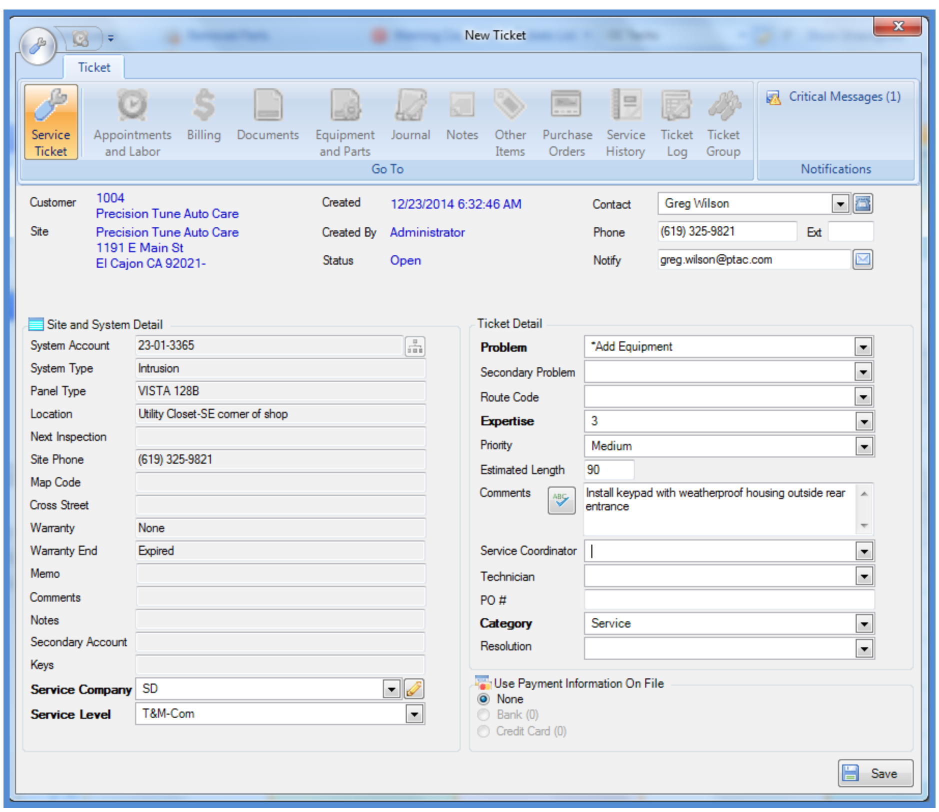
f. *Comments* – This field is used to enter a brief note as to the purpose of the ticket. After saving the ticket, any information entered into this field will create the first Ticket Note which is viewable from the Ticket Notes button on the Ticket. If a comment is not entered into this field prior to the initial save of the Ticket, but information is later entered into this field, the information will not be saved to the Ticket Notes. A maximum of 256 characters are allowed in the Comments field.

Creating a new service ticket from SedonaSchedule (continued)

g. *Service Coordinator* – The staff member for managing this ticket. If your company is using this field, make the appropriate selection from the drop-down list.
h. *Technician* – You may make a selection from the drop-down list if you have a preferred Technician for the Ticket. This will not create or schedule an appointment – just a reminder to the person scheduling appointments.
i. *PO#* - If your customer has provided a purchase order number to be used when invoicing the Ticket, enter that value into this field. If the PO# field label is displayed with a **bold** font, this indicates a PO# is required for the Ticket; the ticket may not be saved without entering information into this field.
j. *Category* – This field typically should not be changed – this is for accounting purposes and the default is coming from setup options.
k. *Resolution* – A User will make a selection in this field once the work has been completed. The choices in the drop-down list define how the Ticket was Resolved.

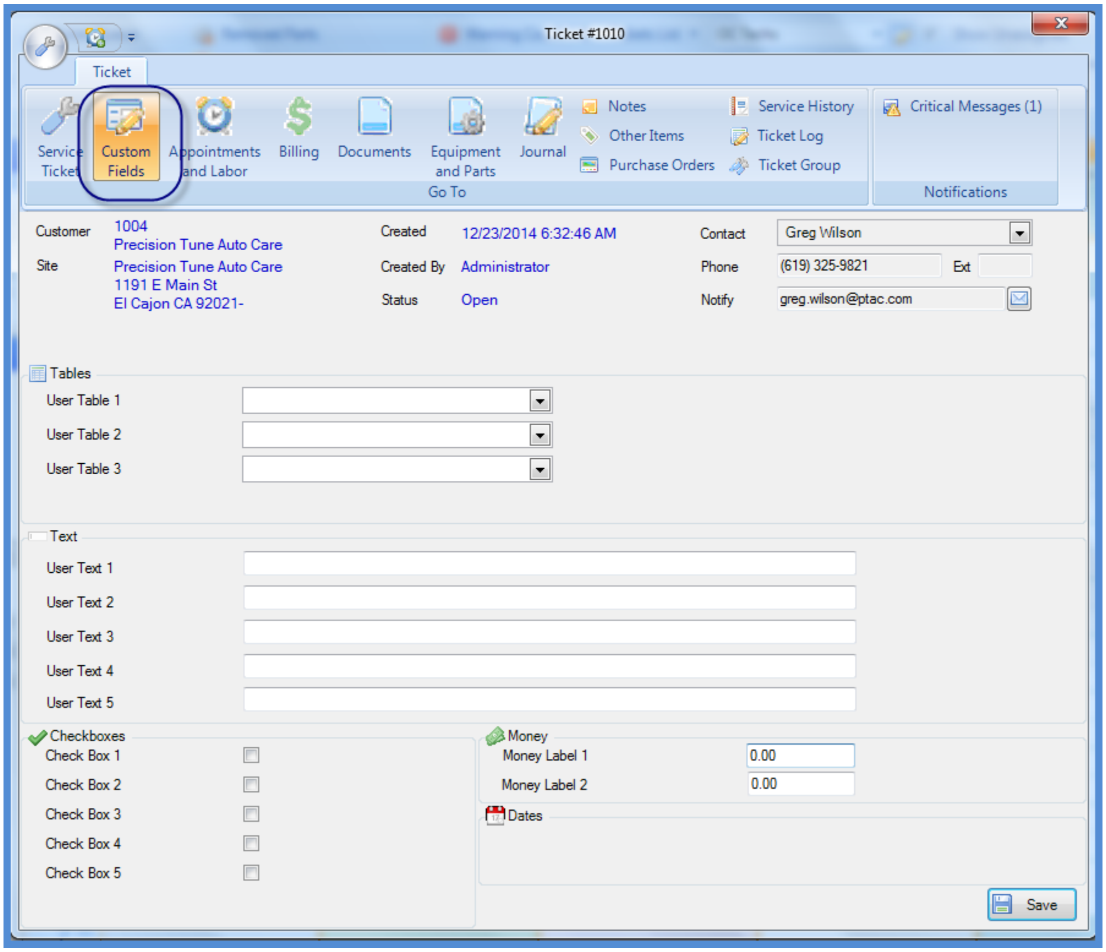
When finished filling in the Service Ticket form, click on the *Save* button located at the lower right of the form to continue processing.

Completed Service Ticket Form



Creating a new service ticket from SedonaSchedule (continued)

5. Custom Fields – Once the Service Ticket form has been saved, the next form to open will be the Custom Fields form. Fill in the fields according your company's policies and procedures. If the Custom Fields form is not displayed, either the User has not been granted permission to this form or your company is not using this form.



The preliminary data entry is now complete. The Ticket will be displayed in list of un-scheduled tickets and appear in the Ticket Queue.

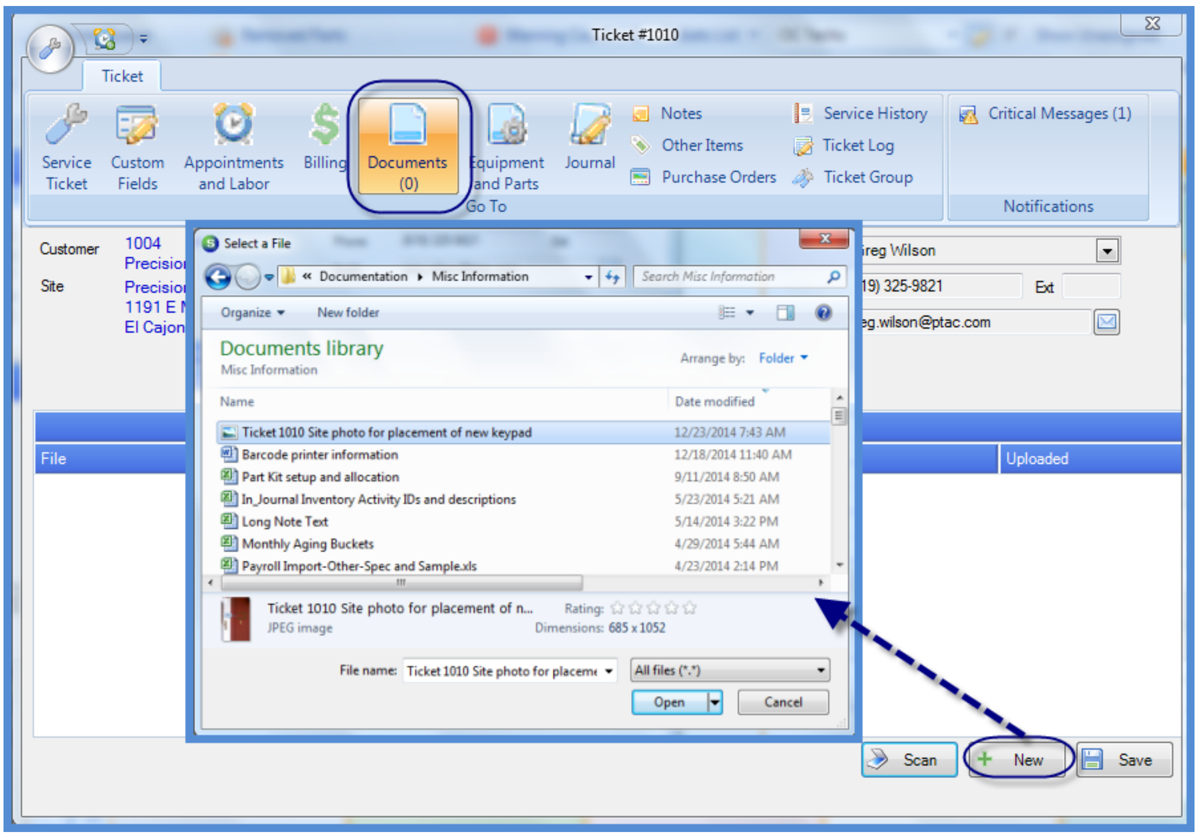
Documents

If your company has purchased the add-on module SedonaDocs, Users with permissions are able to scan in or attach previously saved documents to Tickets.

Add an Existing Document to a Ticket

To add an existing document to a Ticket, open the desired ticket and click on the Documents button from the ribbon. Click on the *New* button located at the lower right of the Documents form.

The *Select a File* window (windows file explorer) will be displayed. Locate the document to be attached to the ticket, then click the *Open* button at the lower right of the *Select a File* window.

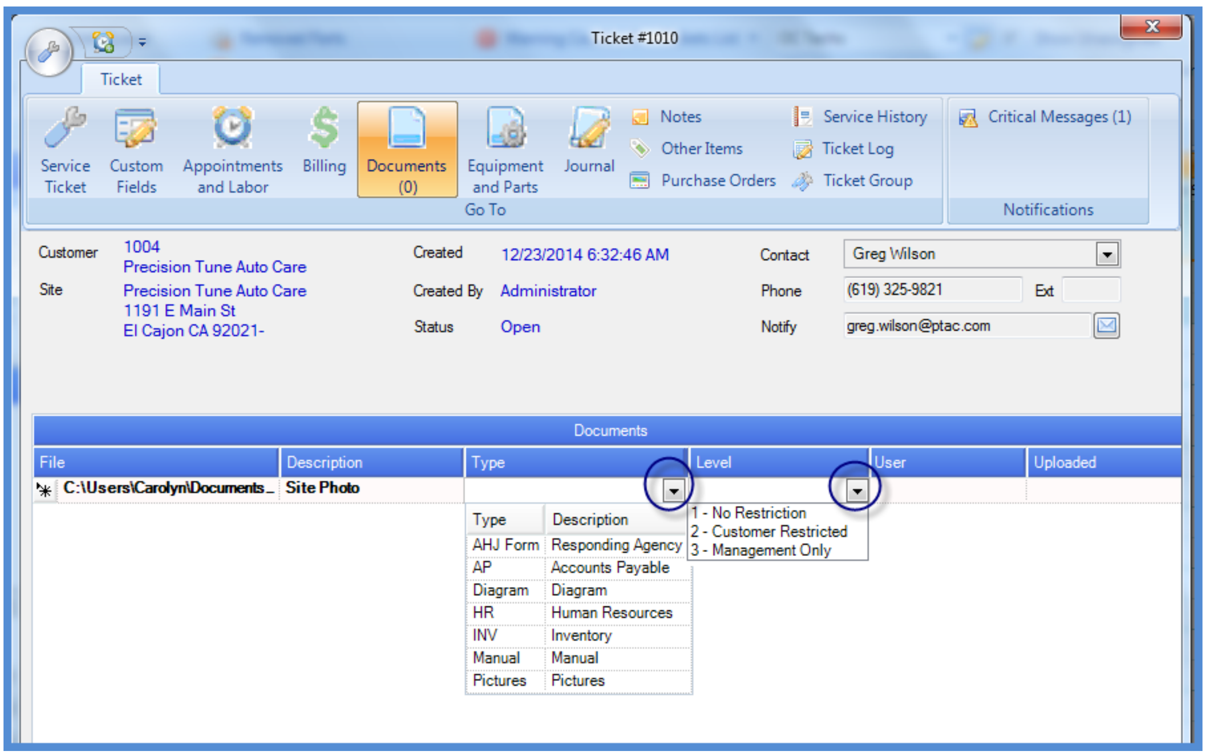


Ticket Documents (continued)

A row will open in Documents [list] area; the File name will fill in (with the name of the document selected from the windows file explorer).

- Type in a Description for the Document (required)
- Select a Document Type from the drop-down list(required)
- Select a Security Level from the drop-down list (required)

Click the *Save* button when finished. The User and Uploaded fields will automatically be populated when clicking on the Save button. Follow the same steps to attach additional documents to the ticket.



Ticket Documents (continued)

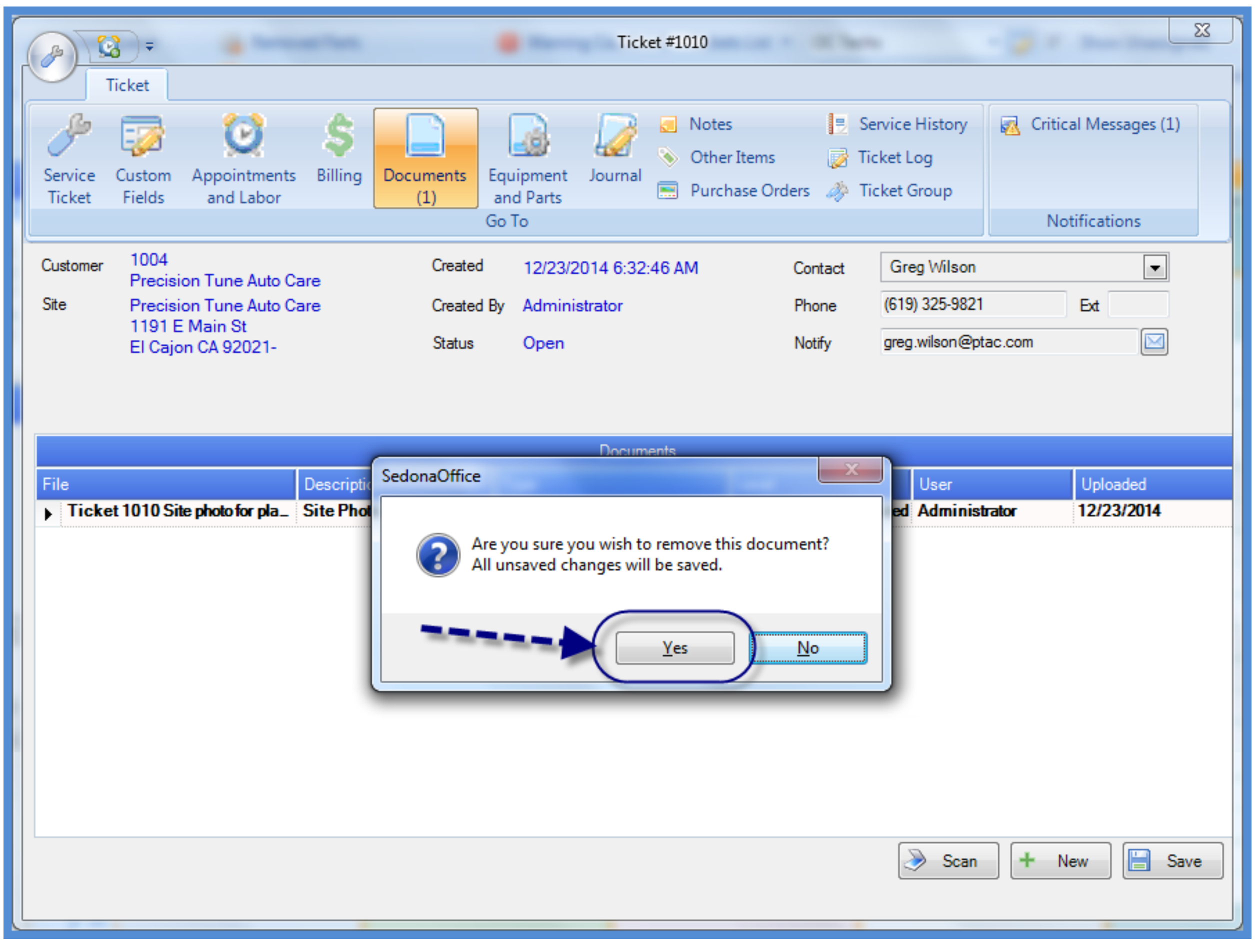
Removing a Document from a Ticket

If a document was attached to a Ticket in error, you may delete the document from the Ticket.

Open the desired ticket and click on the *Documents* button from the ribbon.

Select the document to be deleted by clicking once on the right arrow on the document to be deleted. Press the *Delete* key on your keyboard. A confirmation message will be displayed asking if you are sure you want to remove this document [from the ticket]; click the *Yes* button to confirm.

Note: User Group Permissions are required to be able to delete a document.

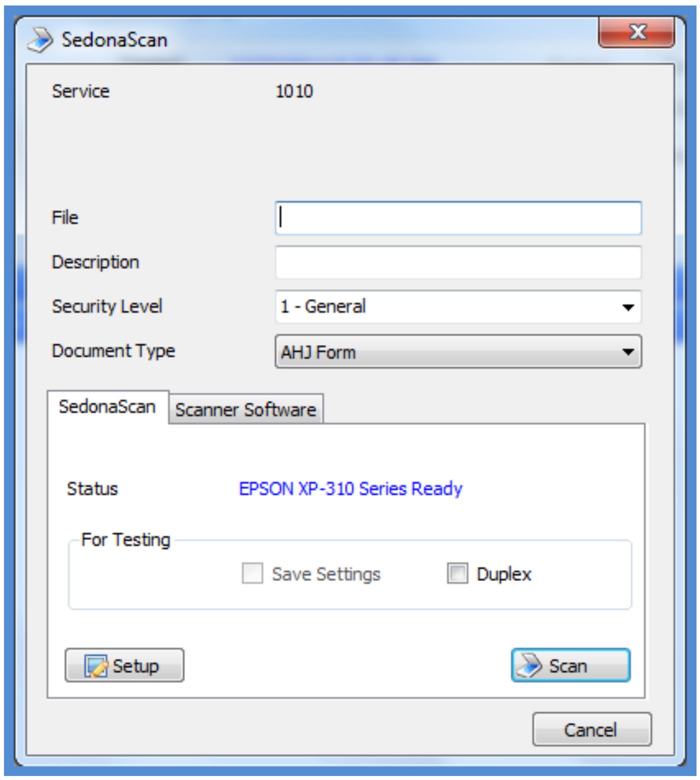


Ticket Documents (continued)

Scanning a Document to a Ticket

To Scan in a document to a Ticket, open the desired ticket and click on the Documents button from the ribbon. Click on the *Scan* button located at the lower right of the Documents form.

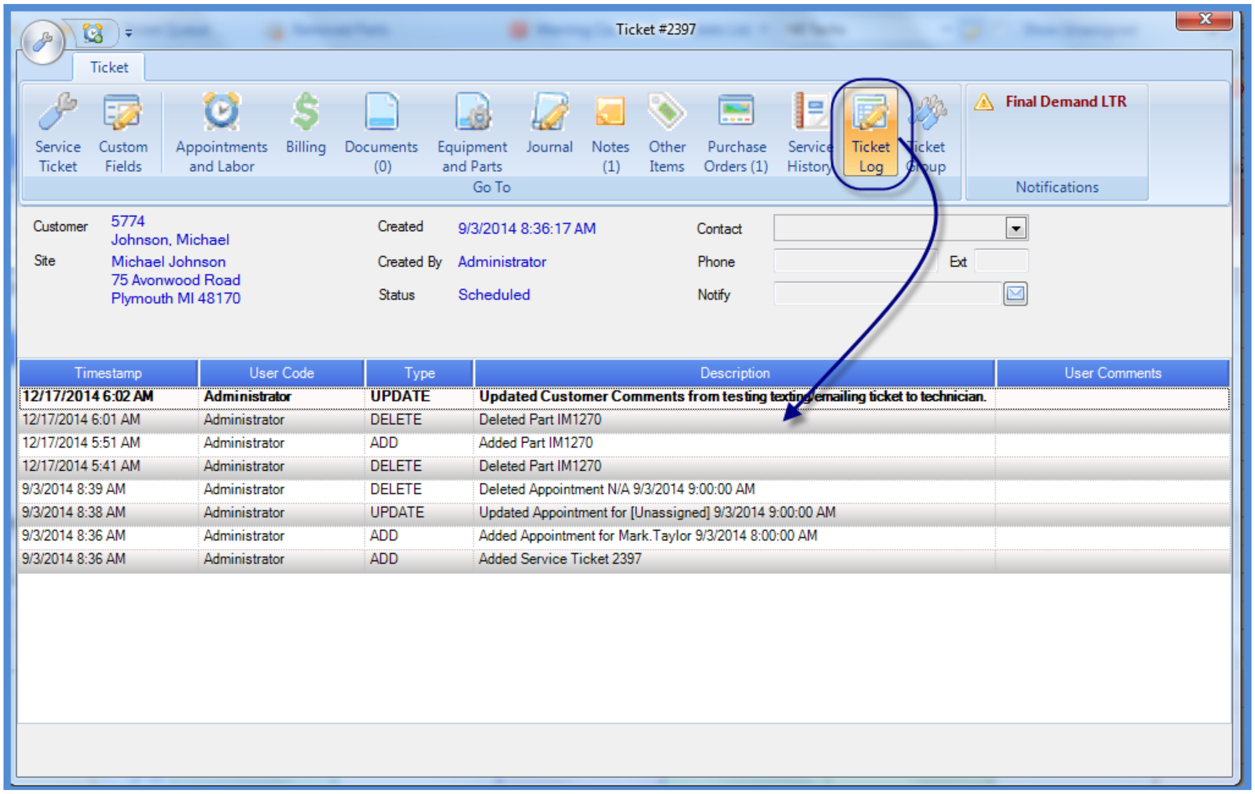
The SedonaScan interface form will be displayed. Type in a name for the file that will be created as a result of the scan. Type in a Description for the scan file. Select a Security Level and Document Type from the drop-down lists. Click on the Scan button. Once the Scan has finished, click on the Save button located at the lower right of the Ticket Documents form.



Ticket Log

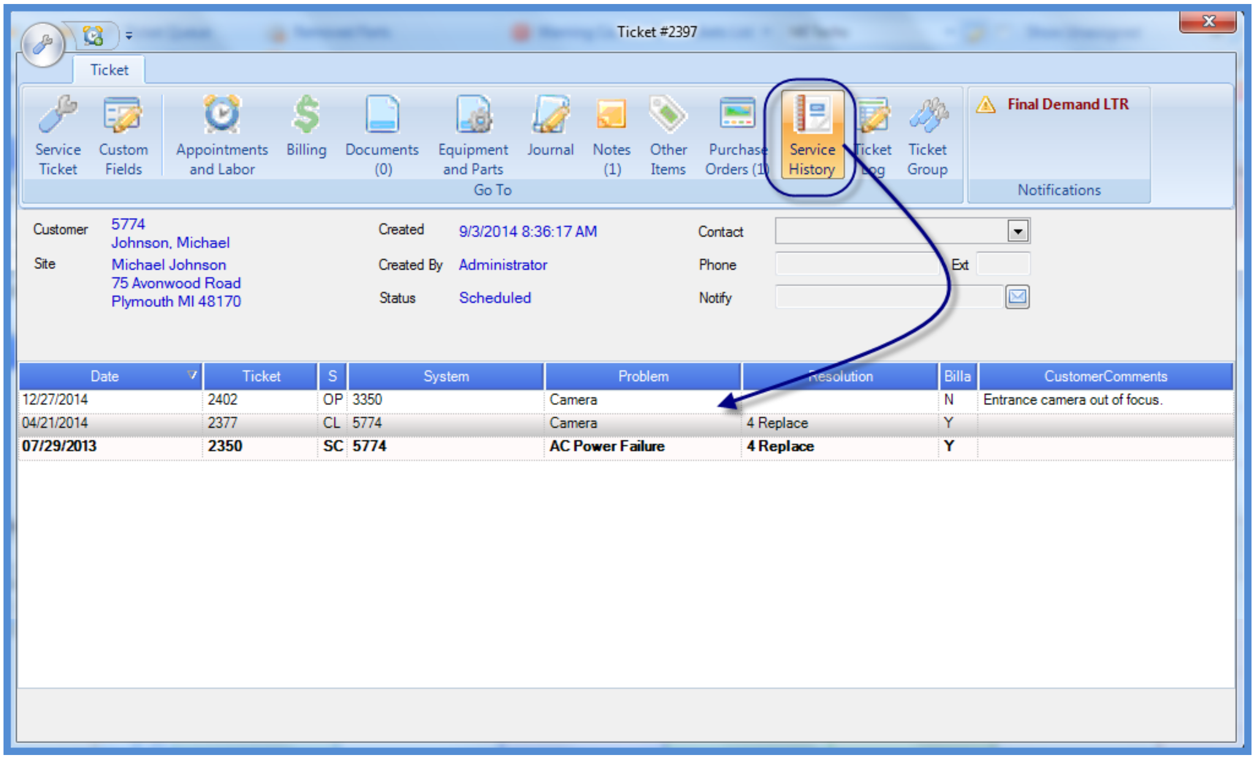
The Ticket Log is used to view actions and activities performed on a Ticket. Not every event is recorded to the Ticket Log, but major events that are helpful when researching who did what and when.

This information may not be modified – view only.



Service History

The Service History will display a list of all Tickets (both open and closed) created for all Systems associated with the Site. You may double-click on any Ticket in the list to open and review the information.



Scheduling Ticket Appointments

Technician appointments for tickets may be created using one of three methods; from the Ticket by clicking on the *New Appointment* button, by dragging and dropping the ticket from the Un-scheduled Ticket List onto the Schedule Board or by double-clicking in a Technician appointment slot within the Schedule Board which will create and schedule the Ticket in one step.

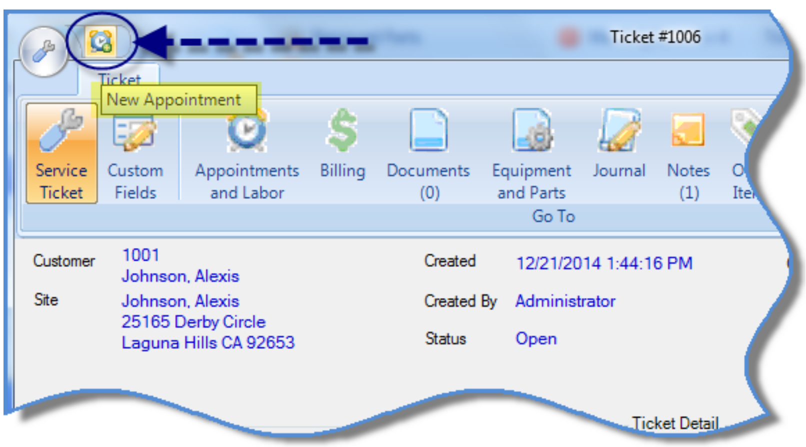
If more than one Technician appointment is needed for the Ticket (a different Technician or the same Technician on another day), repeat the steps below for each appointment needed.

These scheduling methods may be used for any type of Ticket.

Scheduling a Technician Appointment from a Ticket

To schedule a technician appointment from a Ticket, you must first open the desired Ticket.

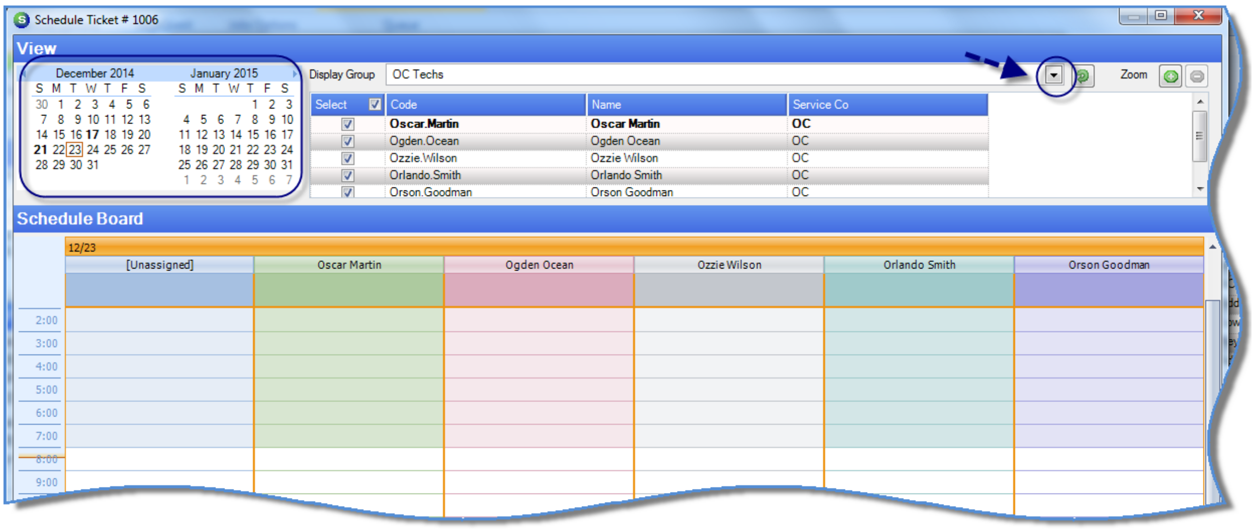
Click on the *New Appointment*  icon located above the Ticket ribbon.



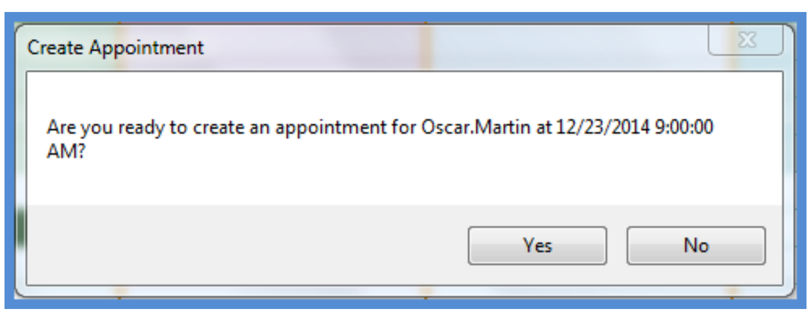
Scheduling Ticket Appointments (continued)

The Schedule Ticket form will be displayed. The Schedule Board will default to today's date. If the appointment is being scheduled for a future date, click the desired date on the Calendar.

Once you have determined which Technician and the time for the appointment, double-click on the desired timeslot in the column for the desired Technician.



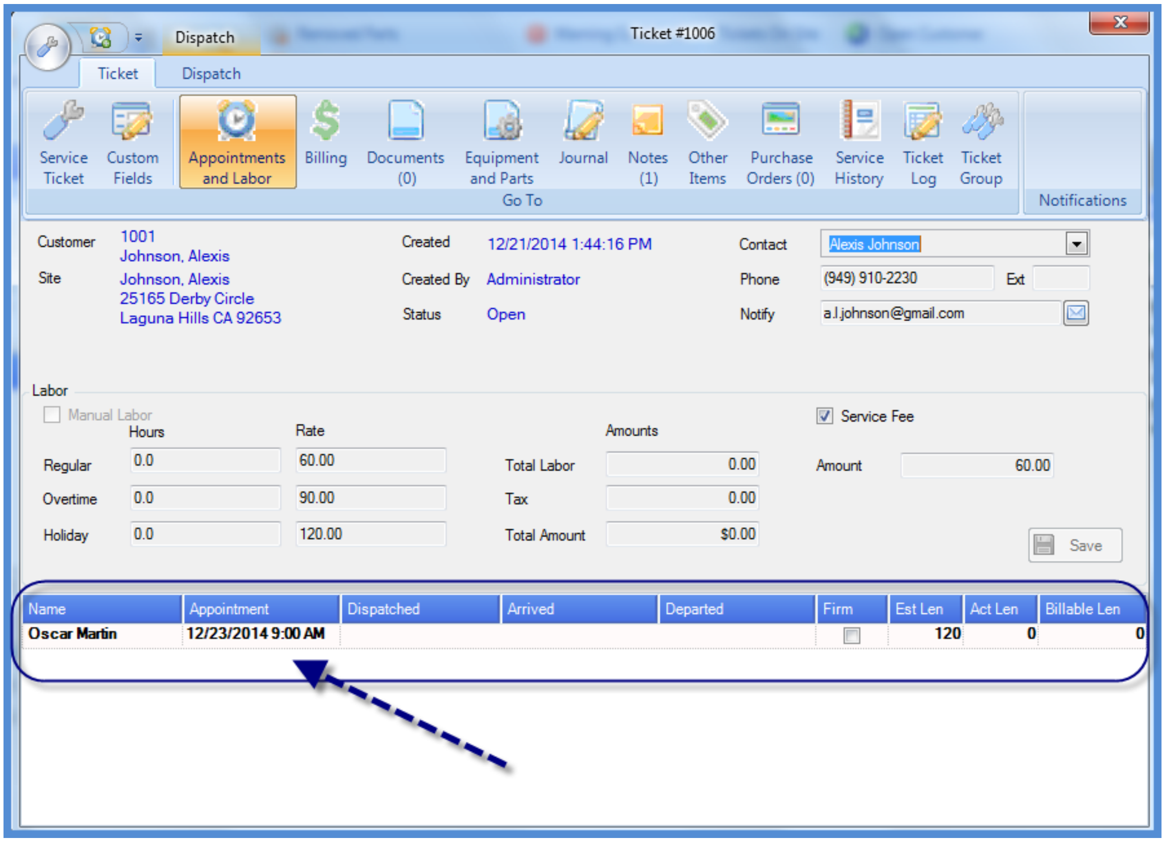
A confirmation message will be displayed with your selections for the Technician Appointment. If this is correct click on the *Yes* button.



The Appointment will now be displayed on the Ticket Appointments and Labor form and on the main Schedule Board for the date selected.

Scheduling Ticket Appointments (continued)

The Appointment will now be displayed on the Ticket Appointments and Labor form and on the main Schedule Board for the date selected.



Scheduling Ticket Appointments (continued)

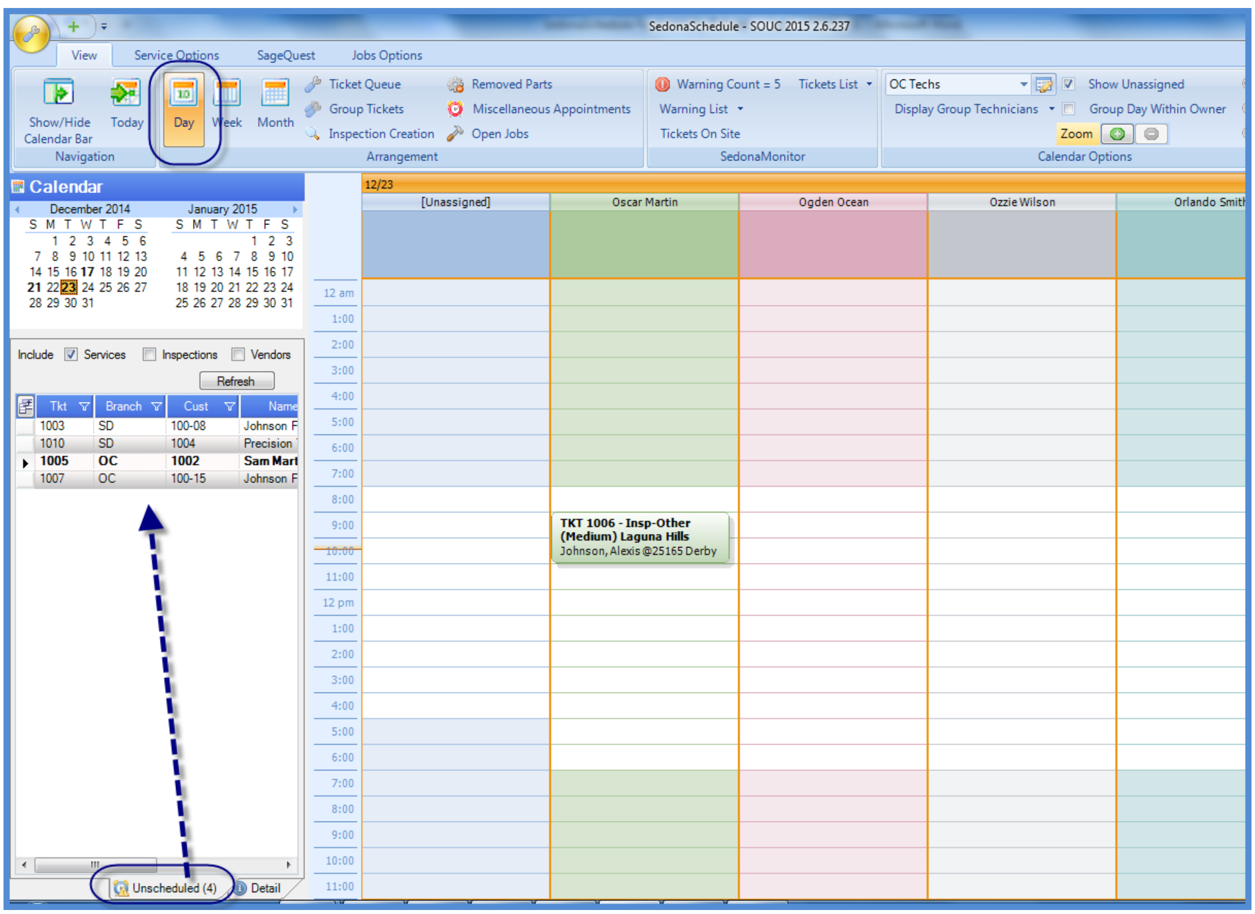
Scheduling a Technician Appointment from the Schedule Board

Technician appointments are scheduled from the Schedule Board by using the drag and drop method from the list of Unscheduled Tickets list.

You must have the *Day* view selected from the Ribbon to be able to drag and drop a ticket onto the Schedule Board.

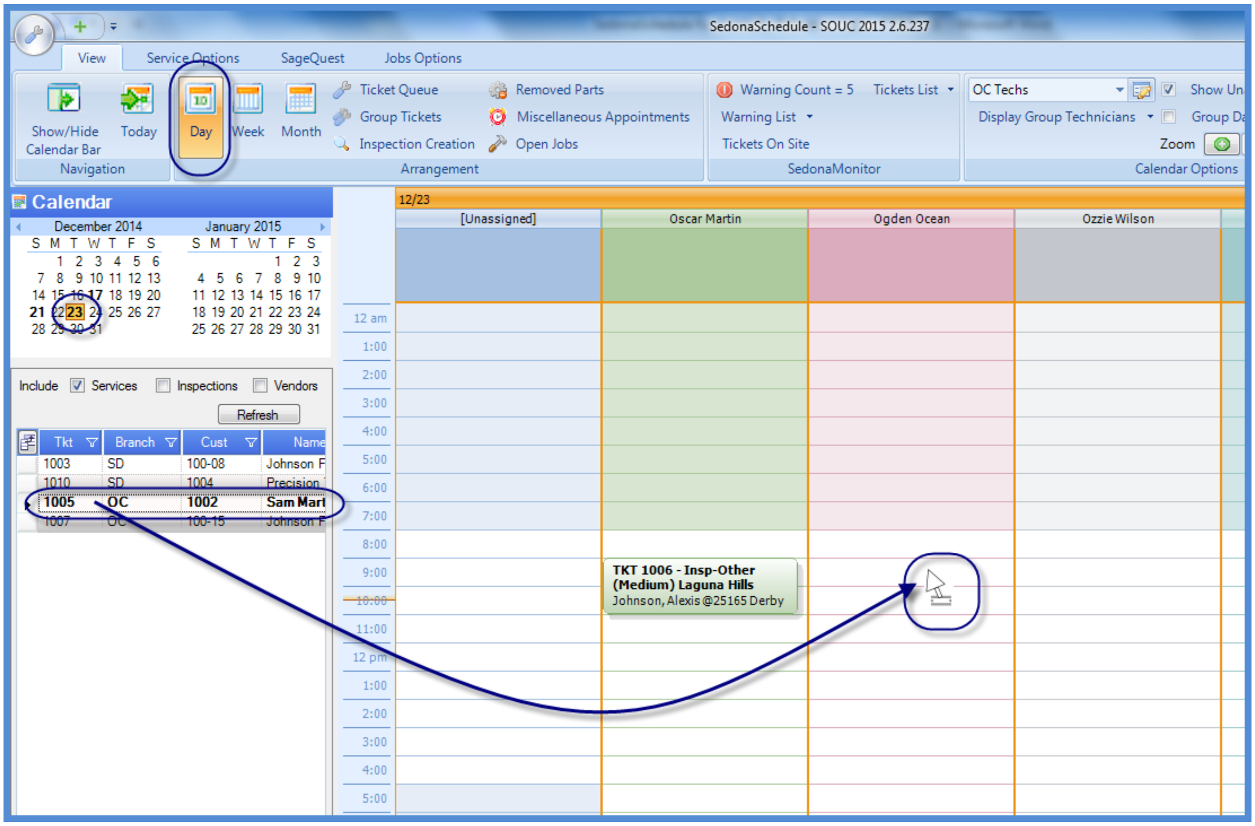
Determine which date will be scheduled; click on the date in the calendar to view available Technicians for the date. Next hold the left mouse button down while on a ticket in the Unscheduled List then drag the ticket to the desired Technician column and time slot, then release the mouse.

When releasing the mouse, a message will be displayed confirming you want to schedule the appointment with the technician on the date and time where you are dropping the ticket; click the *Yes* button to continue.



Scheduling Ticket Appointments (continued)

Dragging a Ticket to the Schedule Board



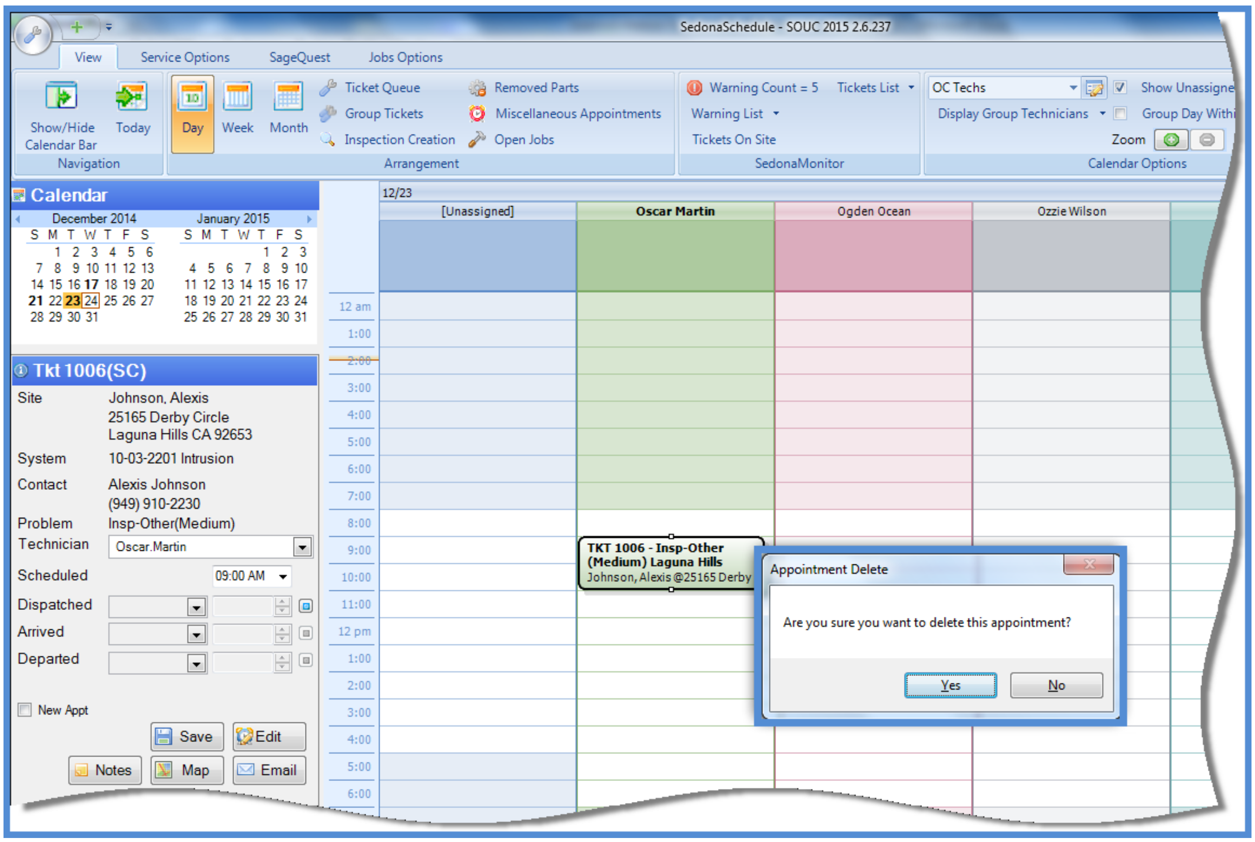
Delete a Technician Appointment

If an appointment needs to be deleted, this may be accomplished from the Schedule Board or from the Appointments and Labor form of the Ticket. Both methods are described below.

Delete an Appointment from the Schedule Board

From the Schedule Board, click on the appointment to delete, and then press the *Delete* key on your keyboard. A confirmation message will be displayed asking you if you are sure you want to delete the appointment; click on the *Yes* button to confirm.

The Ticket will be removed from the Schedule Board and will appear in the list of Unscheduled Tickets if no other appointments exist for the Ticket.



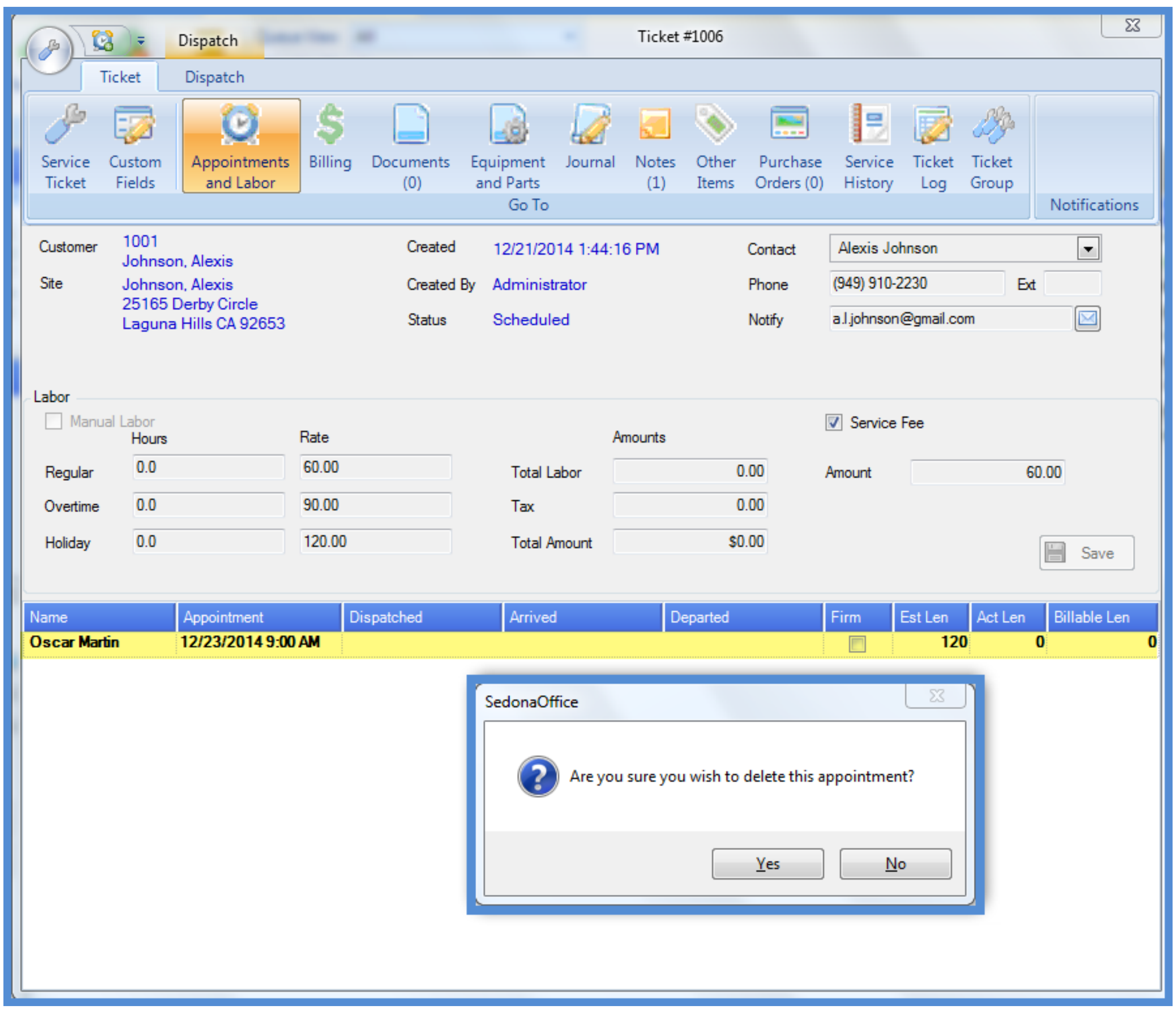
Deleting an Appointment (continued)

Delete an Appointment from a Ticket

Open the desired Ticket and click on the *Appointments and Labor* button on the ribbon. In the grid area of the form, click on the appointment you wish to delete. Press the *Delete* key on your keyboard. A confirmation message will be displayed asking you if you are sure you want to delete the appointment; press the *Yes* button to confirm.

The Ticket will be removed from the Schedule Board and will appear in the list of Unscheduled tickets only if there are no other appointments scheduled for the Ticket.

Note: If the appointment has already been dispatched, it may not be deleted. You must first open the Dispatch form and clear out the dispatch times and save, and then will be able to delete the appointment.



Re-Schedule an Appointment

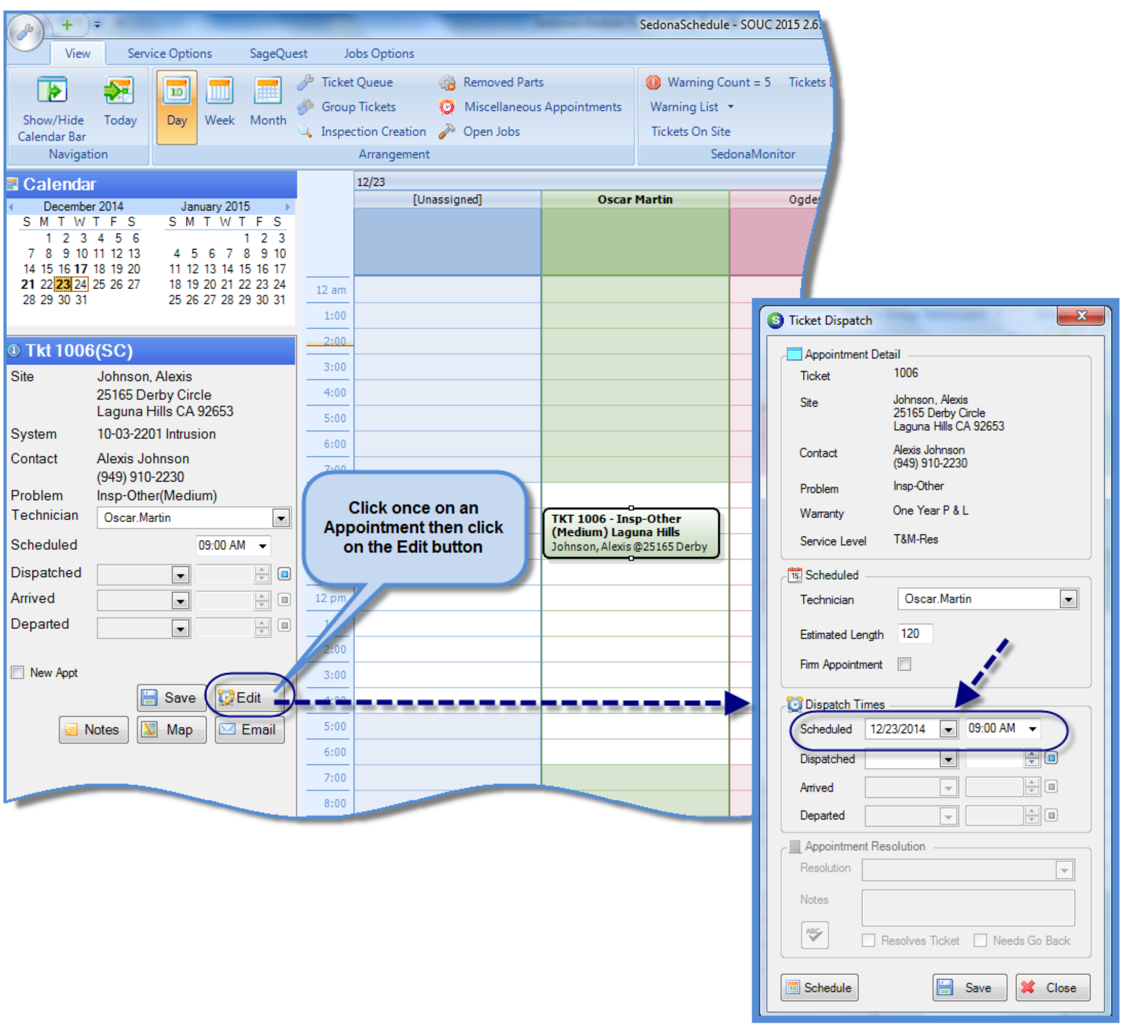
If an appointment needs to be re-scheduled, this may be accomplished from the Schedule Board or from the *Appointments and Labor* form of the Ticket. Both methods are described below.

Re-Schedule an Appointment from the Schedule Board

If you are re-scheduling the appointment for the same day, simply drag the appointment to another time slot for the same Technician or drag to a different Technician on the Schedule Board.

If the appointment needs to be re-scheduled for a different date, click on the appointment on the Schedule Board, then press the *Edit* button at the lower right of the Ticket Detail Viewer (below the calendar).

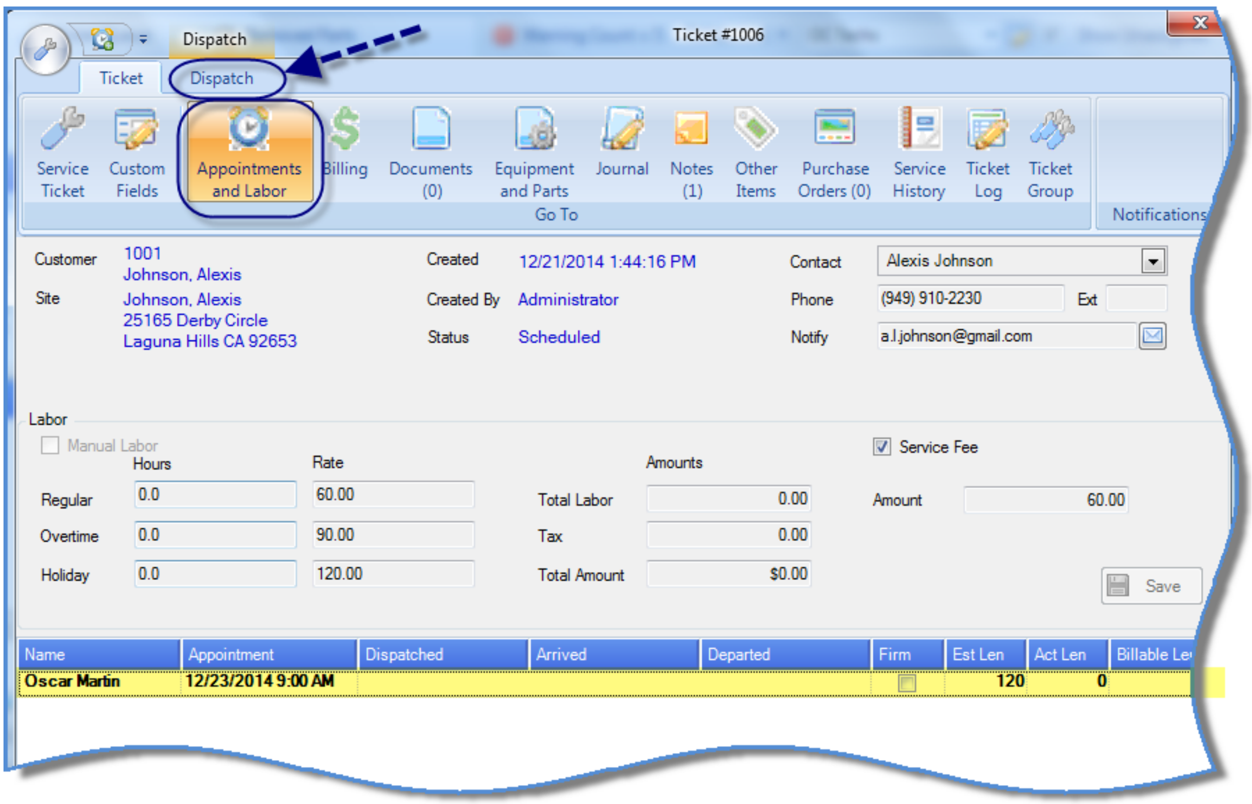
The *Ticket Dispatch* form will be displayed. You may change the date/time for the current Technician or select a different Technician from the drop-down list and select a new appointment date/time. When finished, click the *Save* button at the bottom of the Ticket Dispatch form.



Re-scheduling an Appointment (continued)

Re-Schedule an Appointment from a Ticket

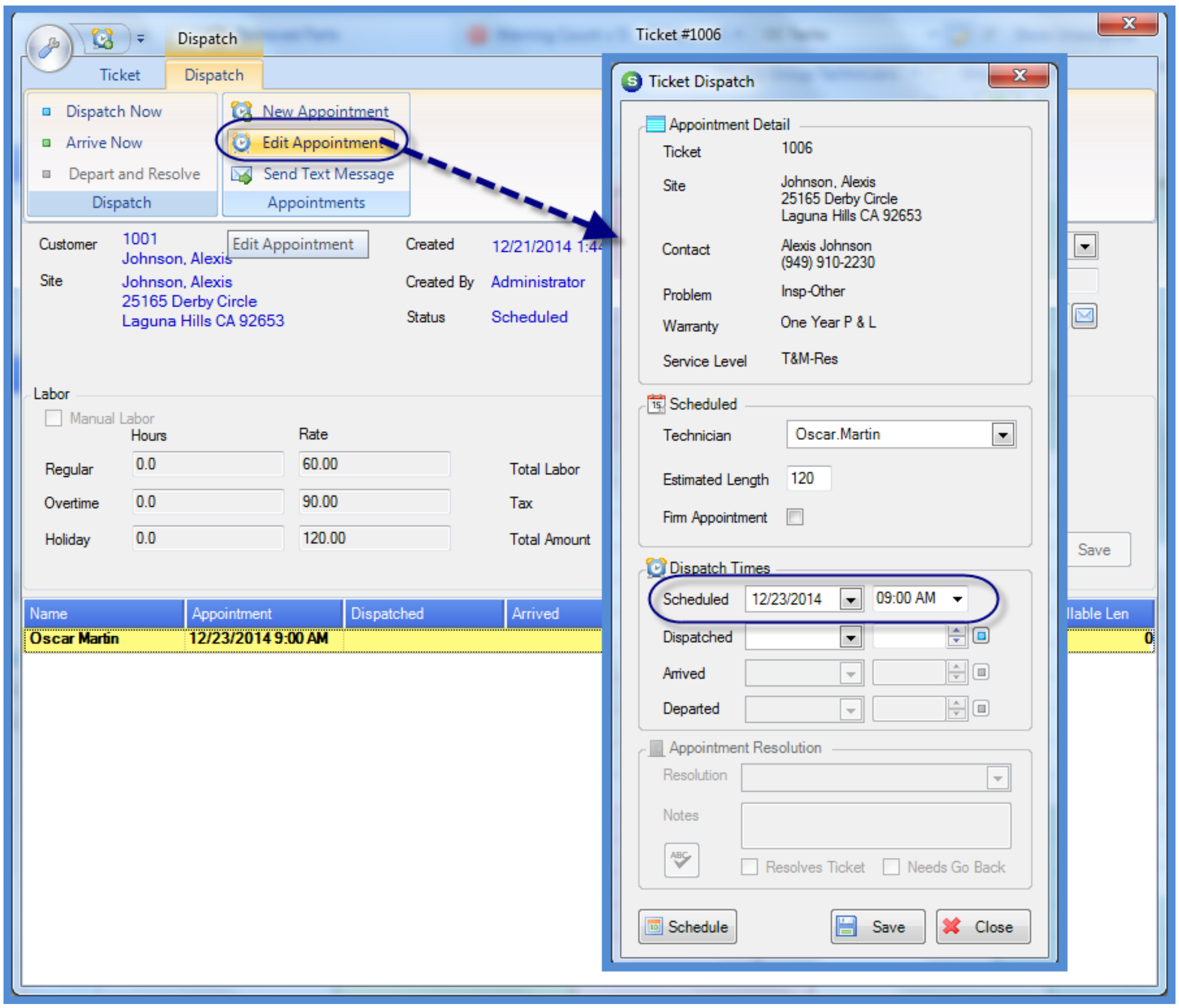
Open the desired Ticket and click on the *Appointments and Labor* button on the ribbon. In the grid area of the form, click on the appointment you wish to re-schedule. Click on the *Dispatch* context menu above the ribbon.



Re-scheduling an Appointment (continued)

Click on the *Edit Appointment* button from the Appointments ribbon group.

The *Ticket Dispatch* form will be displayed. You may change the date/time for the current Technician or select a different Technician from the drop-down list and select a new appointment date/time. When finished, click the *Save* button at the bottom of the Ticket Dispatch form.



Dispatching

Technician appointments may be dispatched from the Schedule Board or from the *Appointments and Labor* form of the Ticket. Each method will be described in this section.

Dispatch a Technician from the Schedule Board

There are two dispatch methods: Live Dispatching and Manual Dispatching.

If Technicians call in as they are arriving and departing from appointments, you may record the exact date/time when the Technician calls in; this is *Live Dispatching*.

If arrival and departure times are not provided on a real-time basis, the dispatch date/times will be entered manually at a later time; this is *Manual Dispatching*.

Both Dispatch methods from the Schedule Board will be covered on the following pages.

When entering dispatch times there are three date/times that must be entered:

- *Dispatch Time* - the time the Technician is on the way to the appointment.
- *Arrival Time* – the time the Technician arrives on site.
- *Departure Time* – the time at which the appointment is completed.

A note on billable labor

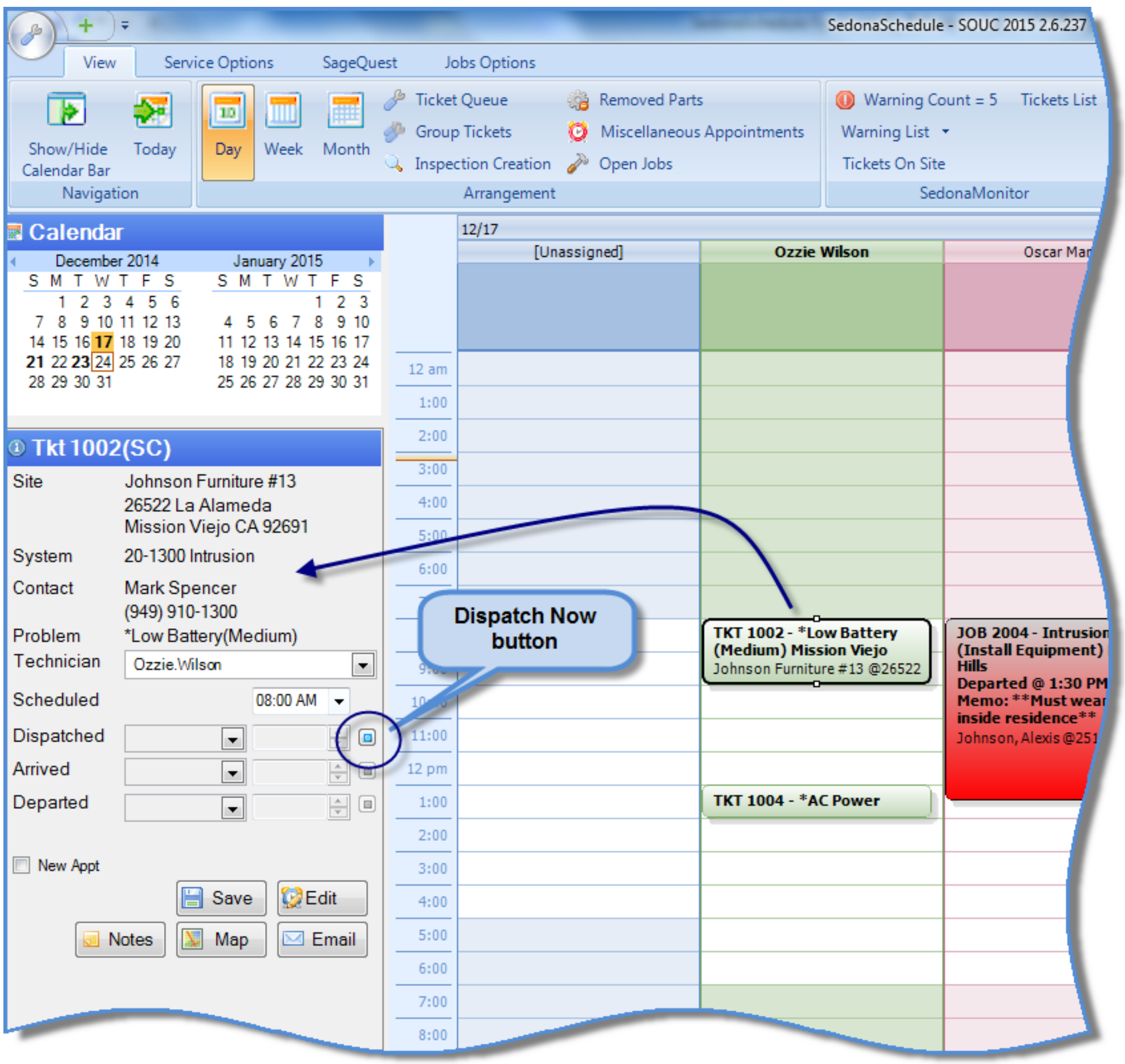
Billable Labor is determined by the Service Level assigned to the Ticket. The Service Level contains the billing rules as to:

- Is labor is billable
- How is billable labor calculated - from Dispatch time to Departure time *or* Arrival time to Departure time
- Labor billing increments
- Labor hourly rates

Dispatch a Technician from the Schedule Board (continued)

Live Dispatching - Dispatched

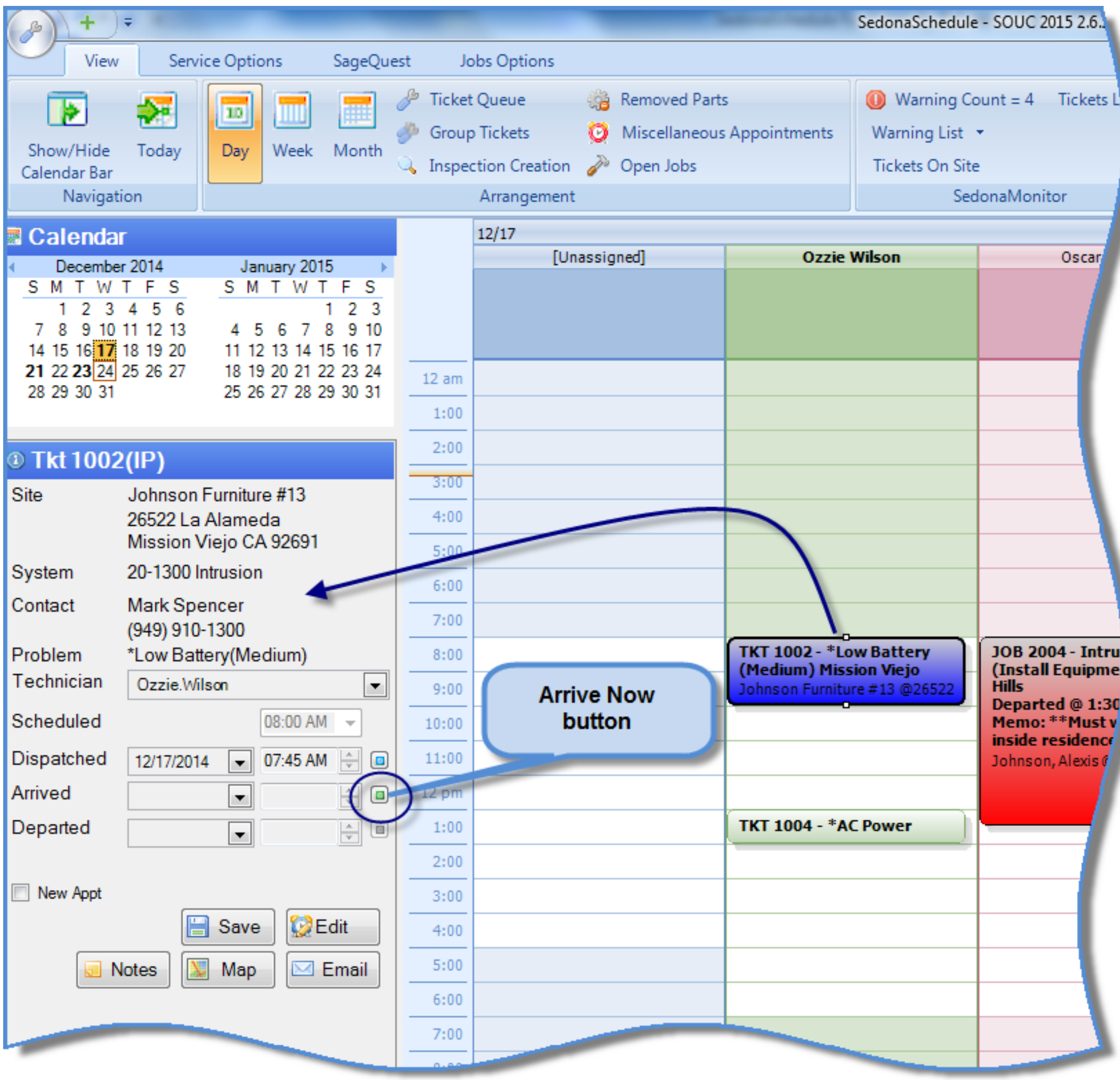
From the Schedule Board, click once on the Ticket to be dispatched. In the Ticket Detail Viewer click on the blue "*Dispatch*" button. The Dispatch date and time will automatically fill in with today's date and the current time. On the Schedule Board, the background color of the Ticket will change to Blue when a dispatch date/time is entered.



Dispatch a Technician from the Schedule Board (continued)

Live Dispatching - Arrived

Once the Technician has arrived on site, click on the appointment in the Schedule Board, and then click on the green *"Arrived"* button from the Ticket Detail Viewer. The Arrived date and time will automatically fill in with the current date and time. On the Schedule Board, the background color of the Ticket will change to Green when an arrival date/time is entered.



Dispatch a Technician from the Schedule Board (continued)

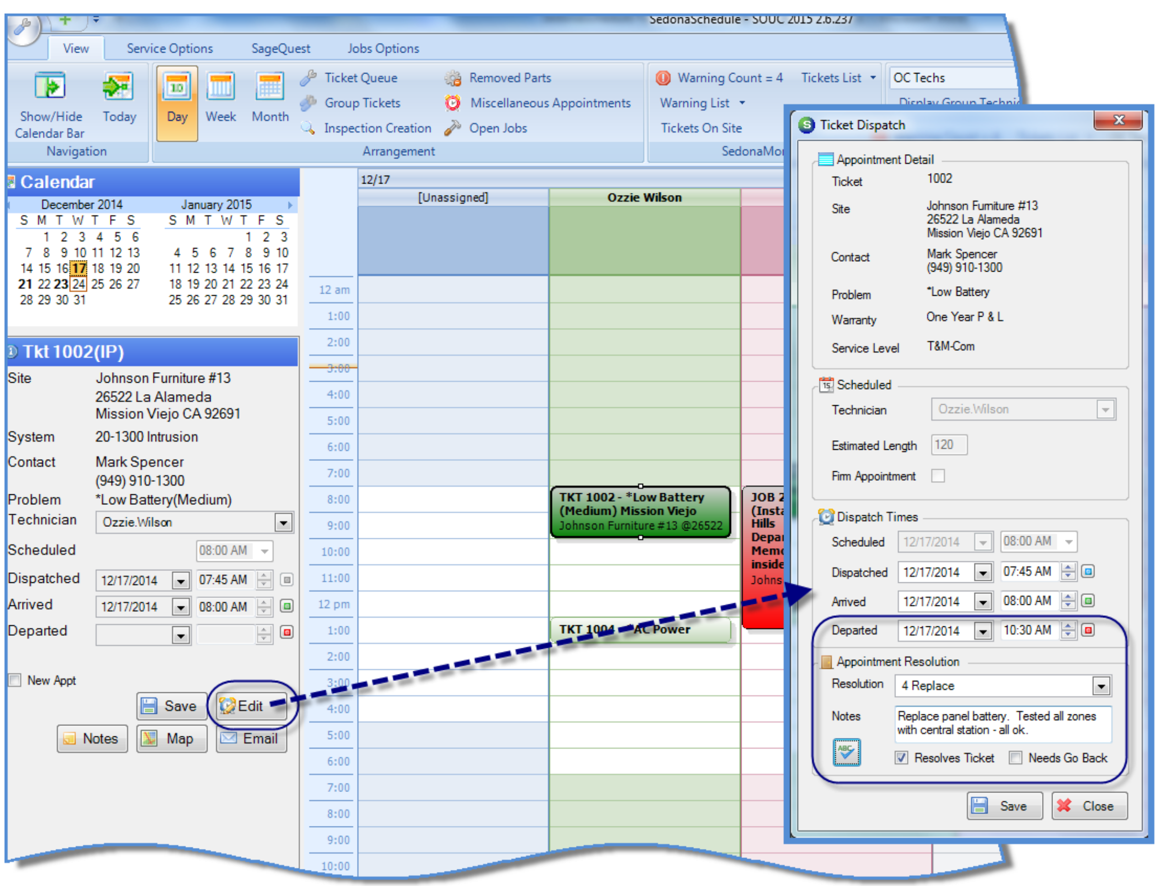
Live Dispatching - Departed

Once the Technician has completed the call and is ready to depart, click on the appointment in the Schedule Board, and then click on the *Edit* button from the Ticket Detail Viewer. The Ticket Dispatch form will be displayed. In the Departed time field, type in the departure time for the appointment (you do not need to enter the date, this will automatically fill in).

Select a *Resolution* code from the drop-down list. If the Technician is providing resolution notes, type this information into the *Notes* field (below the resolution code field). If resolution notes are not entered at the time of departing the appointment, they may be entered at a later time.

If the Ticket is complete and ready to review for invoicing, check the *Resolves Ticket* checkbox. If a return appointment is needed and you want to keep the Ticket open for a return appointment, check the *Needs Bo Back* checkbox. Click the *Save* button on the Ticket Dispatch form when finished.

On the Schedule Board, the background color of the appointment will change to gray if the “Resolves Ticket” option was selected. If the Ticket was marked for “Go Back”, the background color will change to orange.



Dispatch a Technician from the Schedule Board (continued)

Manual Dispatching

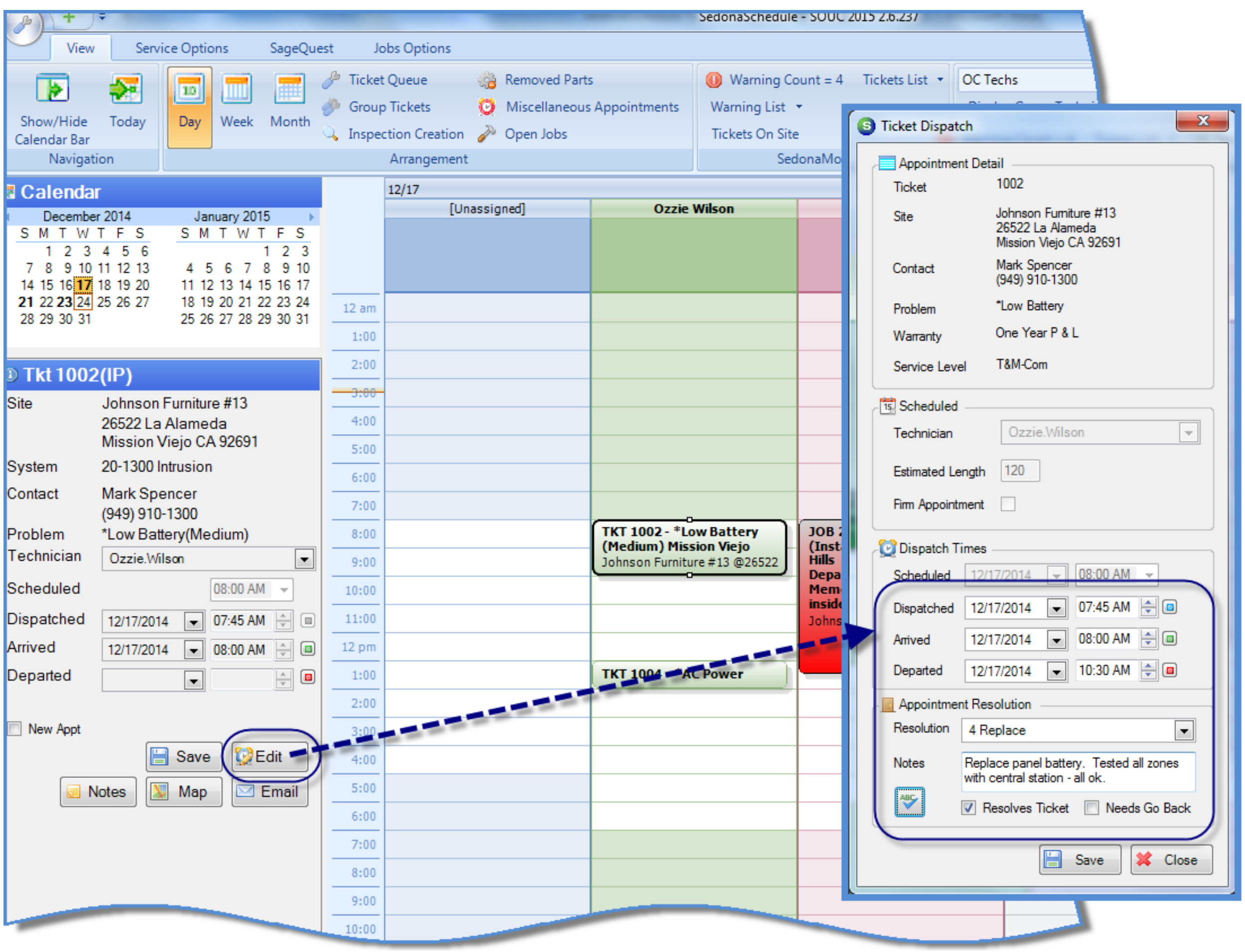
From the Schedule Board, click once on the Ticket to be dispatched. In the Ticket Detail Viewer click on the *Edit* button. The Ticket Dispatch form will be displayed - enter the times into the Dispatched, Arrived and Departed fields. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a *Resolution* code from the drop-down list.

Enter any resolution notes provided by the Technician into the *Notes* field.

If the Ticket is complete and ready to review for invoicing, check the *Resolves Ticket* checkbox. If a return appointment is needed, check the *Needs Go Back* checkbox.

Click the *Save* button on the Ticket Dispatch form when finished.



Dispatch a Technician from a Ticket

There are two dispatch methods: Live Dispatching and Manual Dispatching.

If your Technicians call in as they are arriving and departing from appointments, you may record the exact date/time when the Technician calls in; this is *Live Dispatching*.

If arrival and departure times are not provided on a real-time basis, the dispatch date/times will be entered manually at a later time; this is *Manual Dispatching*.

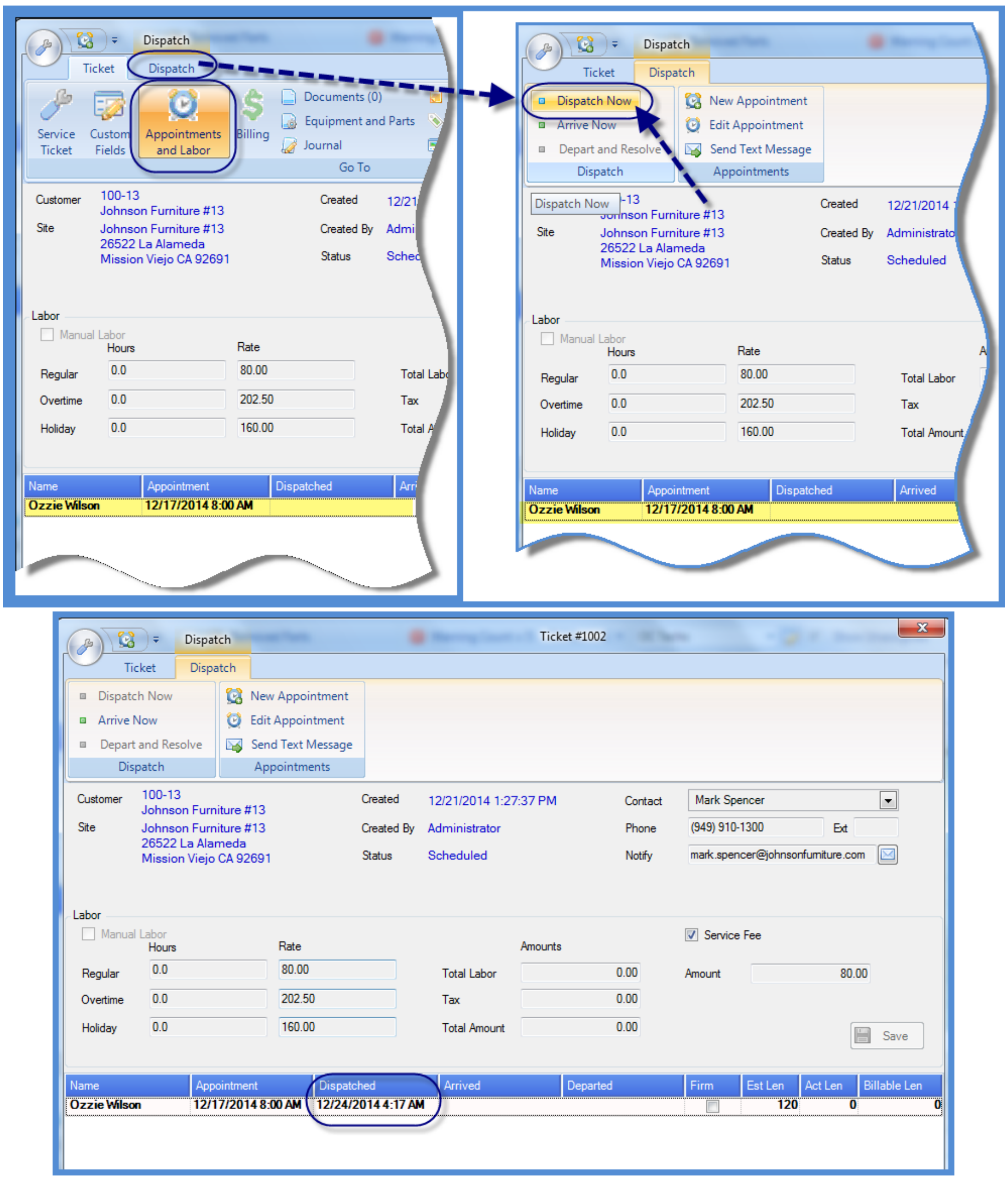
Both Dispatch methods from the Ticket will be covered on the following pages.

Dispatch a Technician from the Ticket (continued)

Live Dispatching - Dispatched

Open the Ticket for the appointment to be dispatched. Click on the *Appointments and Labor* button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the *Dispatch* context menu above the ribbon.

From the Dispatch ribbon group, click on the *Dispatch Now* button. You may close out of the Ticket when finished.

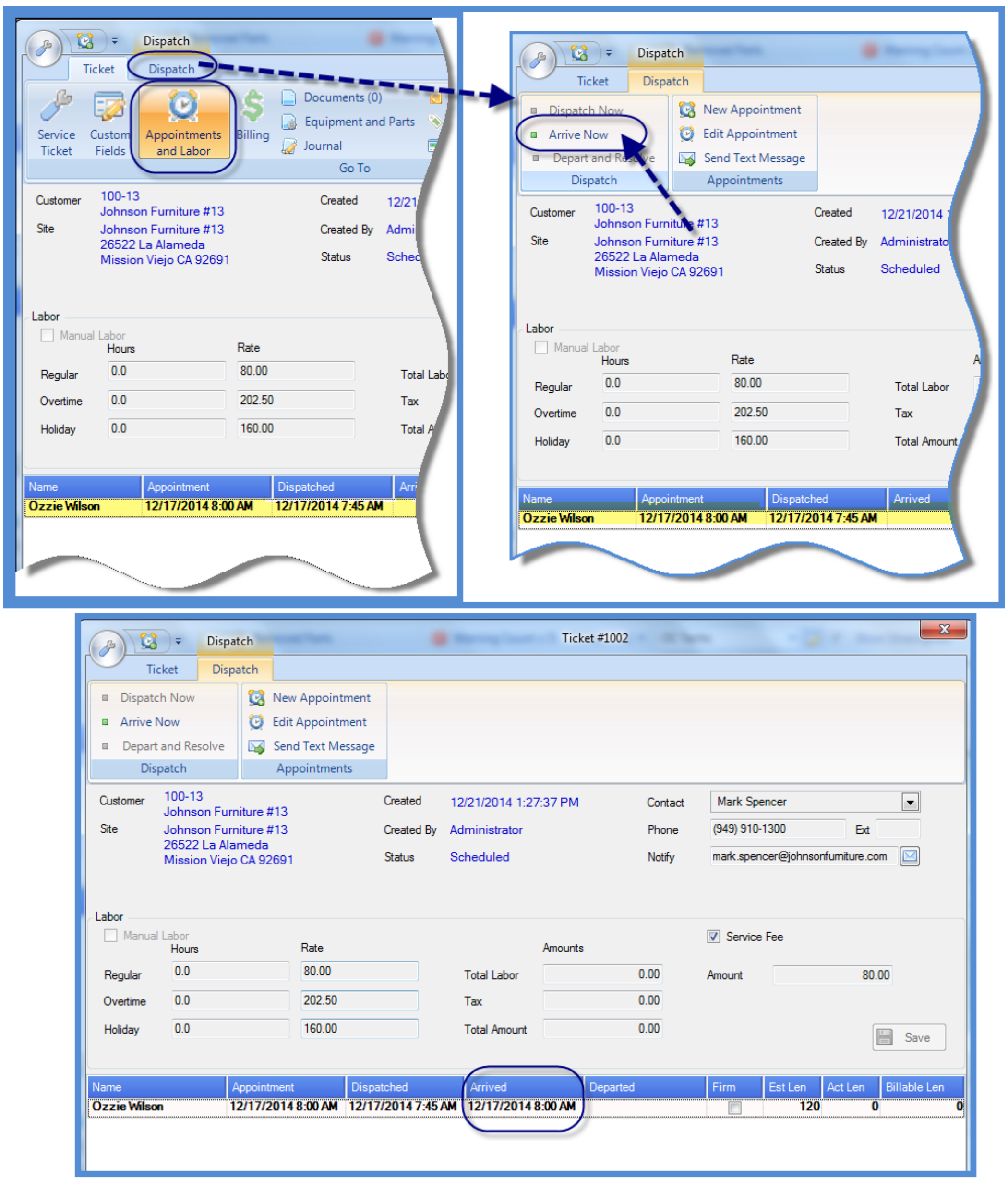


Dispatch a Technician from the Ticket (continued)

Live Dispatching - Arrived

Open the Ticket for the appointment to be dispatched. Click on the *Appointments and Labor* button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the *Dispatch* context menu above the ribbon.

From the Dispatch ribbon group, click on the *Arrive Now* button. You may close out of the Ticket when finished.



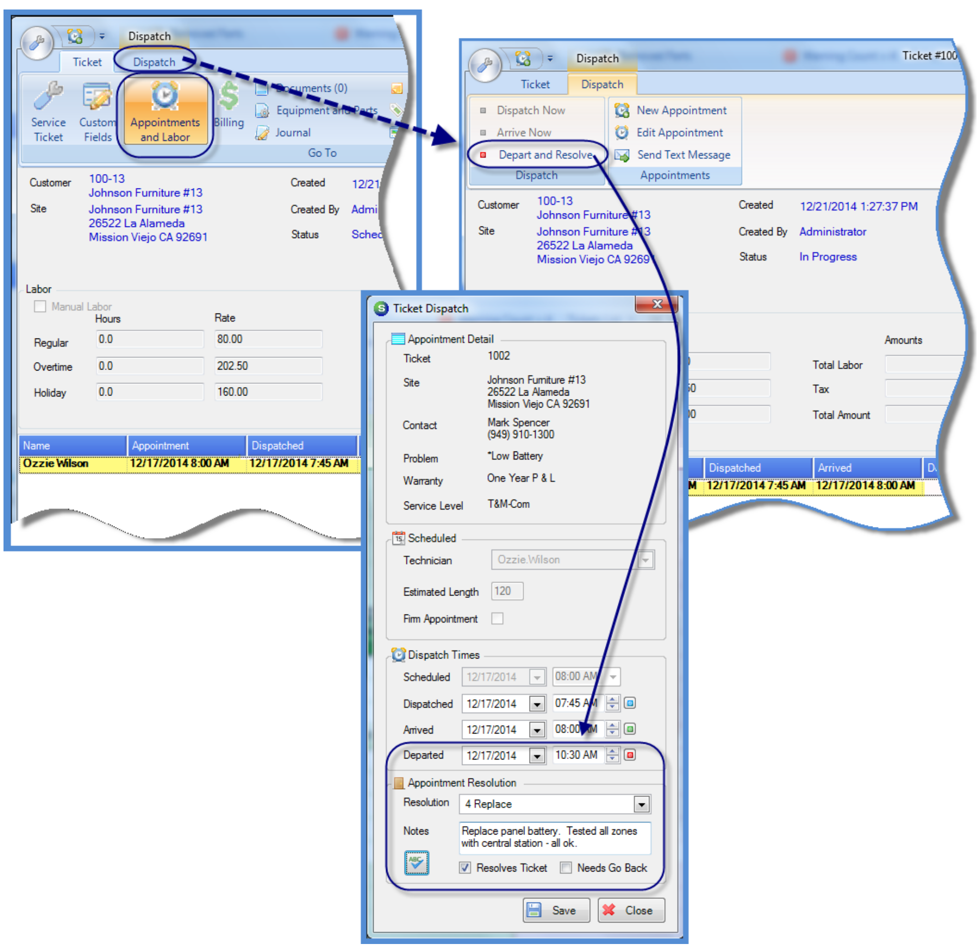
Dispatch a Technician from the Ticket (continued)

Live Dispatching - Departed

Open the Ticket for the appointment to be dispatched. Click on the *Appointments and Labor* button on the ribbon. In the grid area, click on the appointment to dispatch, then click on the Dispatch context menu above the ribbon.

From the Dispatch ribbon group, click on the *Depart and Resolve* button. The Ticket Dispatch form will be displayed - enter the time into the Departed time field. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a *Resolution* code from the drop-down list. Enter any resolution notes provided by the Technician into the *Notes* field. If the Ticket is complete and ready to review for invoicing, check the *Resolves Ticket* checkbox. If a return appointment is needed, check the *Needs Go Back* checkbox. Click the *Save* button on the Ticket Dispatch form when finished.



Dispatch a Technician from the Ticket (continued)

Manual Dispatching

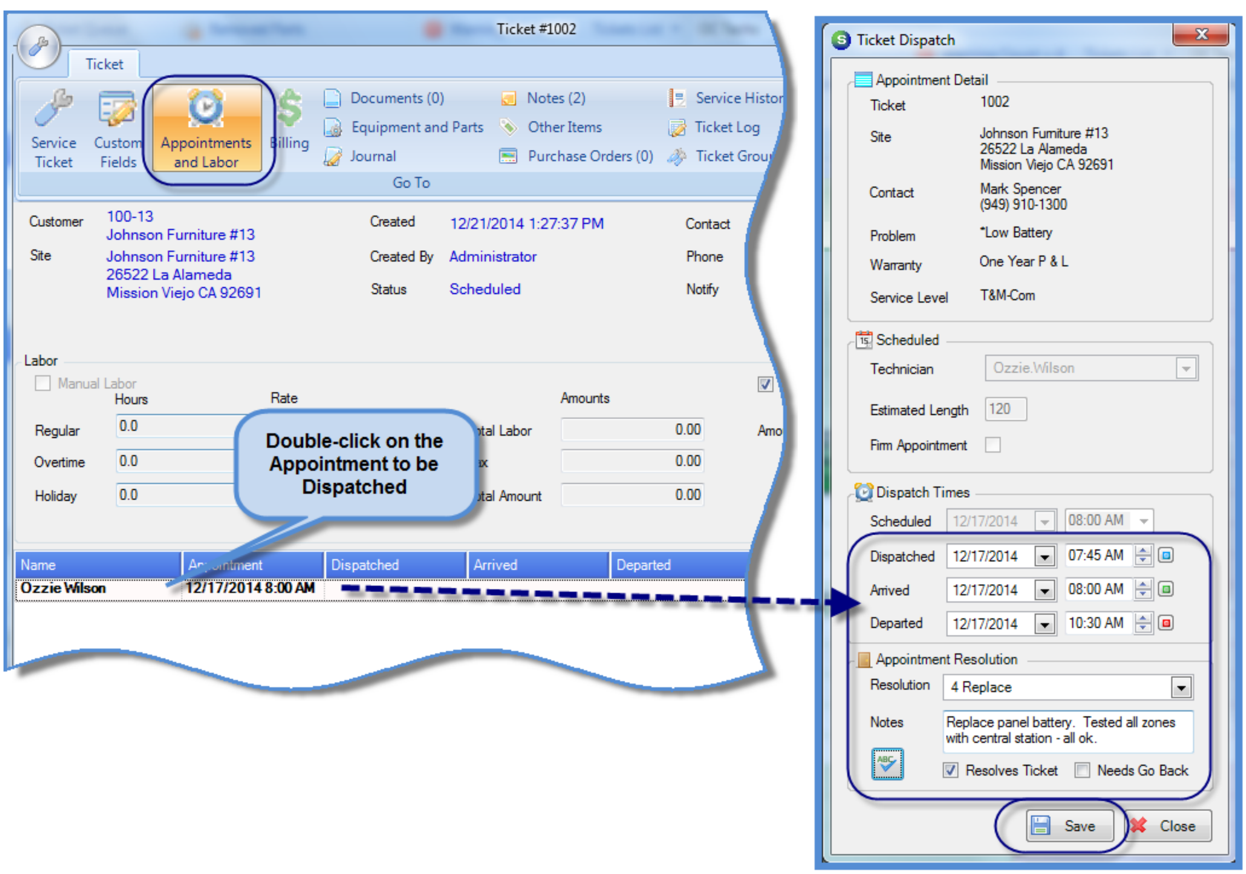
Open the Ticket for the appointment to be dispatched. Click on the *Appointments and Labor* button on the ribbon.

In the grid area, double-click on the appointment to be dispatched. The Ticket Dispatch form will be displayed. Enter the times in the Dispatched, Arrived and Departed fields. If the Technician performed the work on the scheduled date, you do not need to fill in or select the date on the Ticket Dispatch form – the date will automatically fill in.

Select a *Resolution* code from the drop-down list. Enter any resolution notes provided by the Technician into the *Notes* field.

If the Ticket is complete and ready to review for invoicing, check the *Resolves Ticket* checkbox. If a return appointment is needed, check the *Needs Go Back* checkbox.

Click the *Save* button on the Ticket Dispatch form when finished.



Parts

If a Technician used parts on a ticket, these are entered on the *Equipment and Parts* form of the ticket. If the part being installed is replacing an existing part on the System Equipment List, this is handled on the same form.

Parts Warehouse

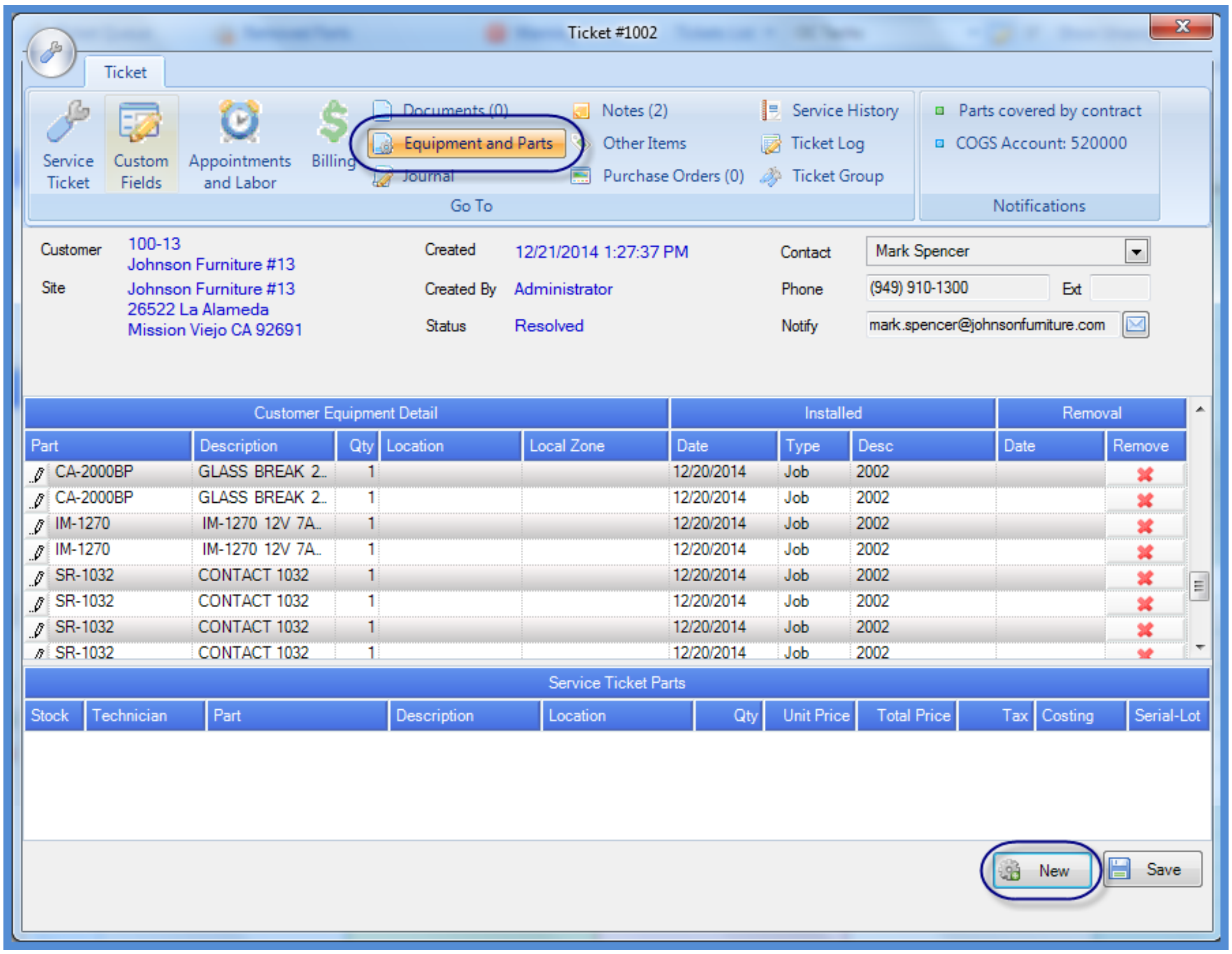
When Parts are entered on a Ticket, if a Technician Appointment has been scheduled, it is assumed the parts will be removed from the Warehouse linked to the Technician. If the parts are to be removed from a different Warehouse, the User has the option of selecting a different Warehouse on the part line.

Parts (continued)

Adding Parts to a Ticket

Open the Ticket to which parts will be added. Click on the *Equipment and Parts* button on the ribbon.

The *Equipment and Parts* form is divided into two tiers; the upper tier, which is labeled *Customer Equipment Detail*, will display any existing parts on the System Equipment List. The lower tier, labeled *Service Ticket Parts*, is used to add new parts that were used on the ticket. To add a part, click the *New* button located at the lower right of the form.



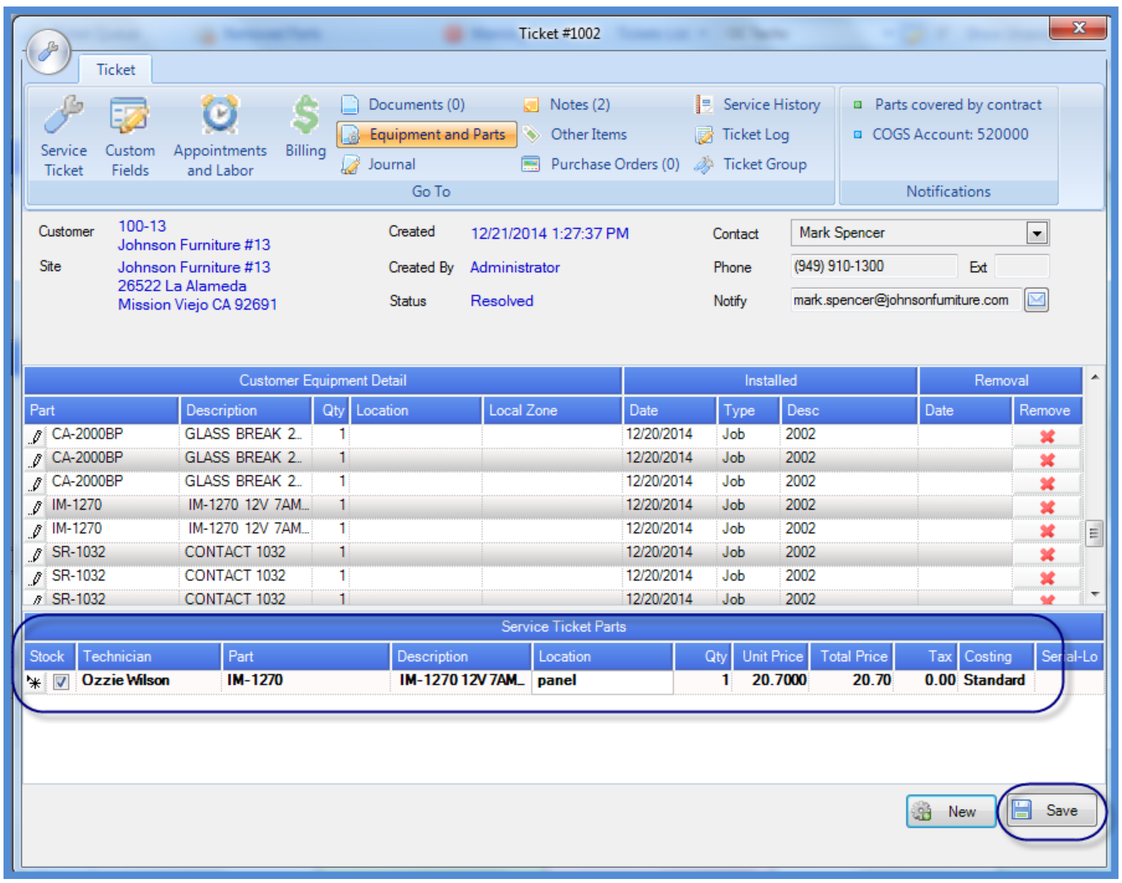
Parts (continued)

A row will open in the *Service Ticket Parts* grid. The Warehouse will default to the warehouse linked to the Technician scheduled to the ticket. The User may override the warehouse if necessary.

In the Part field, the User may type in the exact part number or click on the lookup button to the right of this field to search for the part number within the warehouse that is currently selected.

Once a part has been selected, the unit price and tax will automatically fill in; the quantity of 1 will default. The User has the option of changing the unit price if the part is being sold at a price other than the default price.

Click the *Save* button after completing the data entry on a part line. Click the *New* button to add additional parts.



If your company is tracking the installed location of parts, type in the location in the Location field. If more than one of the same part was used and you are tracking locations, enter multiples lines for the part.

If any of the parts used are replacing a part on the existing equipment list, continue on to the next page for instructions.

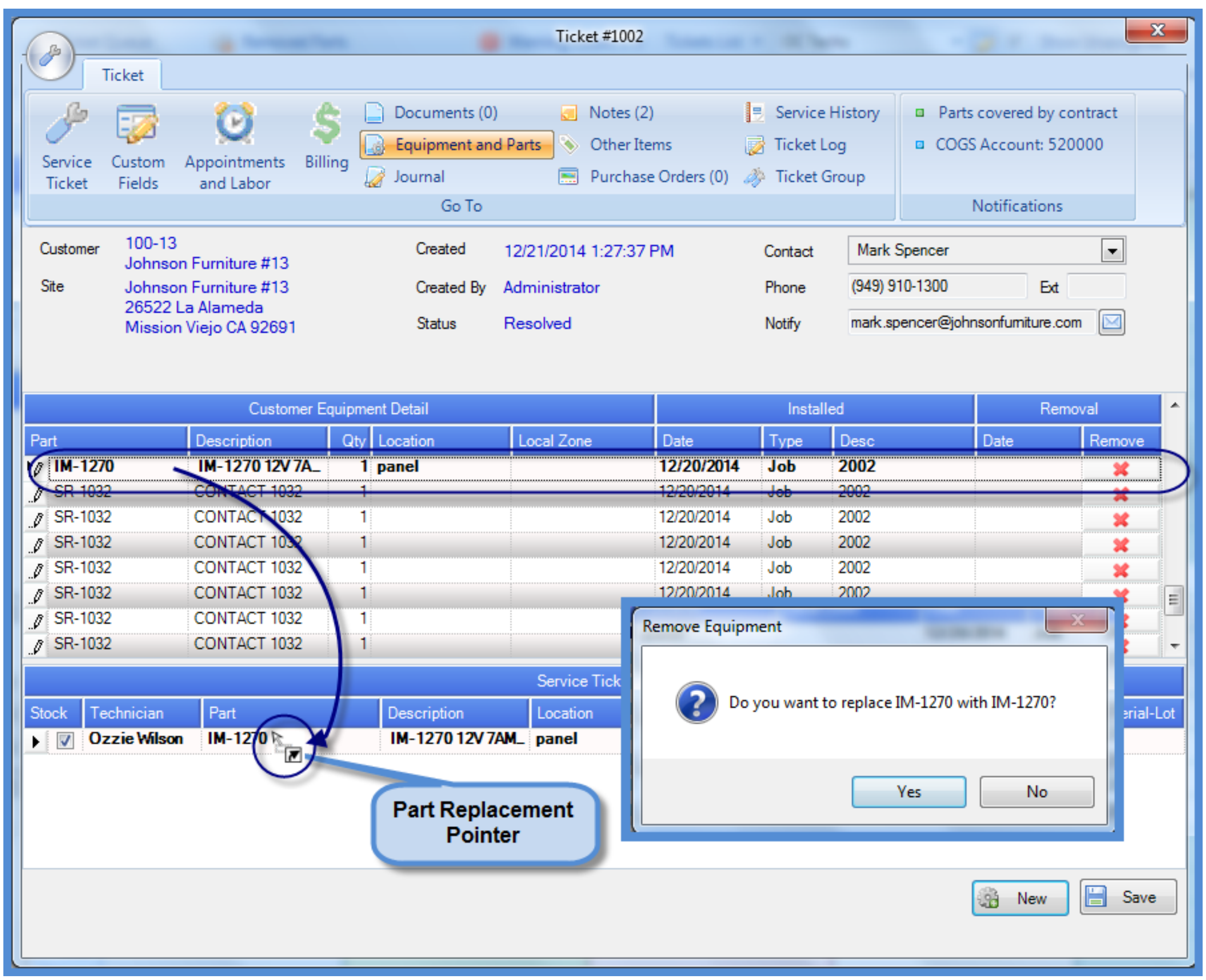
Replacing a Part

To replace a part, in the upper tier (Customer Equipment Detail), click once on the part that is being replaced; the font of the part information will become bold. Hold the left mouse button down and drag the part to the lower tier; once the white pointer arrow is on the row of the part to be replaced, release the mouse.

You will receive a confirmation message that you are replacing the part. Click the *Yes* button on the confirmation if you have selected the correct part replacement.

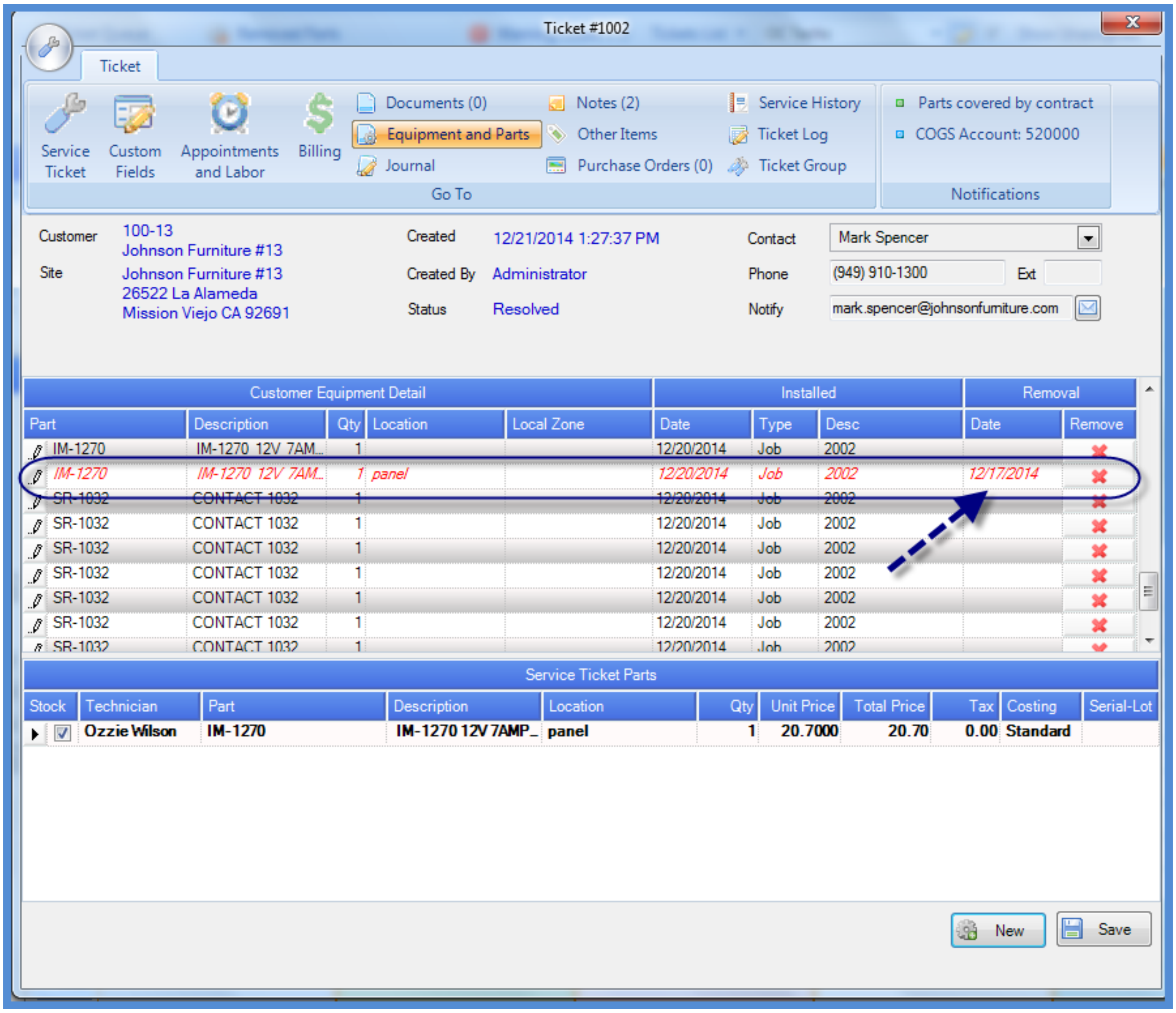
Repeat the same process for any other parts being replaced.

Part Replacement Pointer Icon: 



Replacing a Part (continued)

Once you have confirmed the part replacement, the font color of part being replaced in the upper tier (Customer Equipment List) will turn red and today's date will display in the Removal Date column.

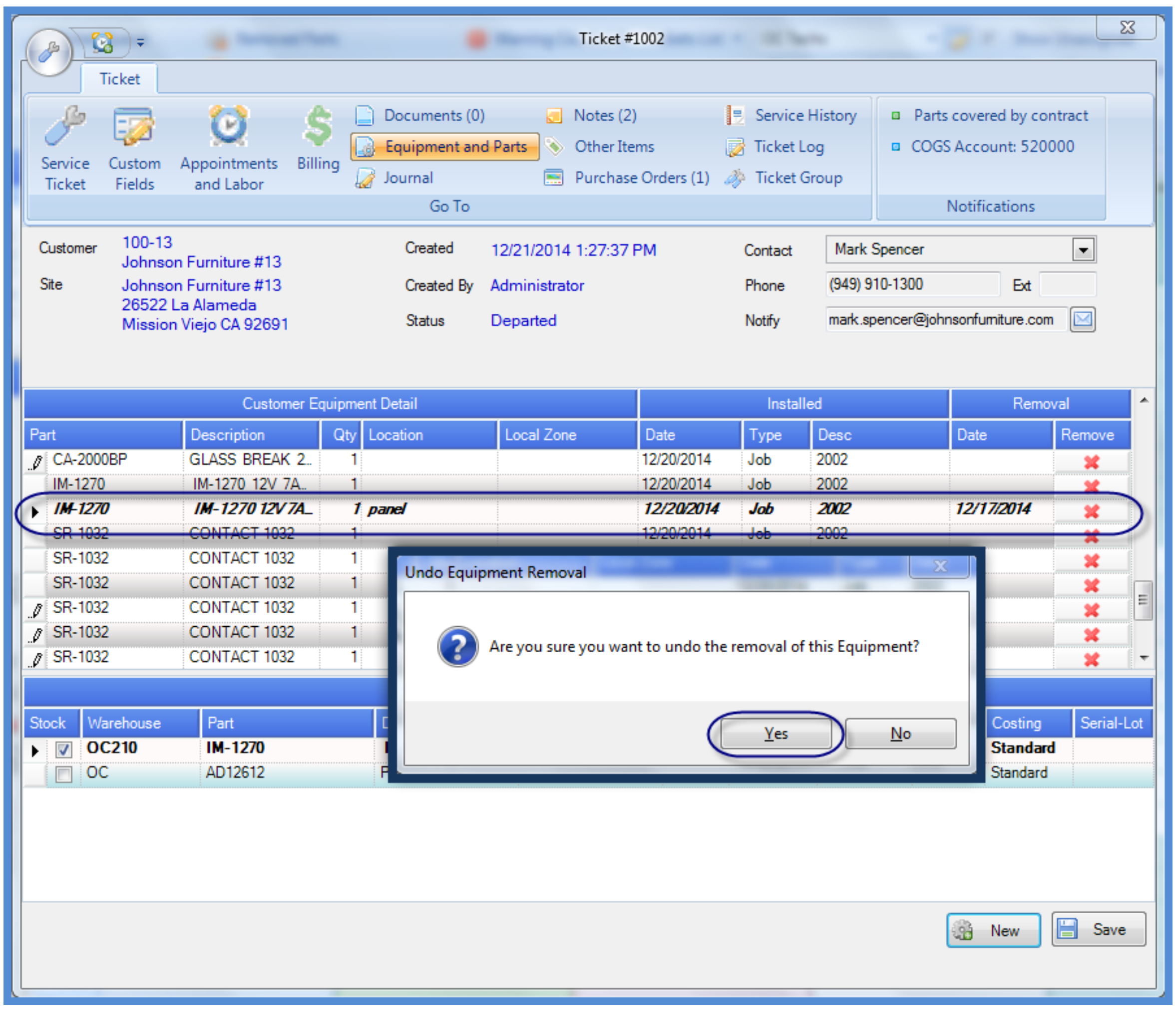


Replacing a Part (continued)

Deleting a Part Replacement

If an error was made in selecting the part being replaced, you are able to correct this from the Equipment and Parts form.

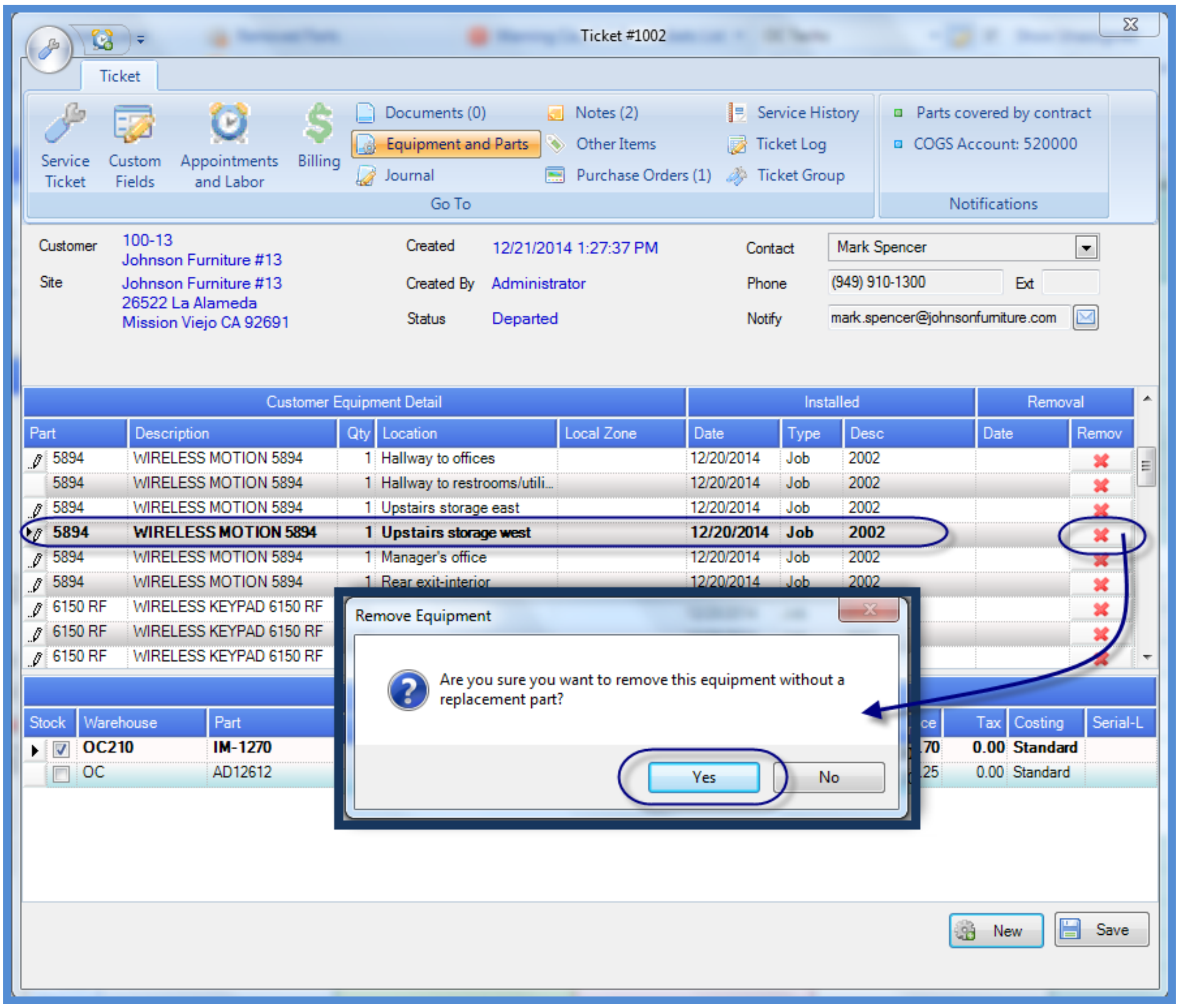
Double-click on the part in the Customer Equipment Detail section (upper tier) that was incorrectly selected for replacement (the part text will be bolded in a black font), and then press the Delete key on your keyboard. A confirmation message will be displayed asking if you want to undo the removal; click the *Yes* button to confirm.



Remove a Part from Equipment List

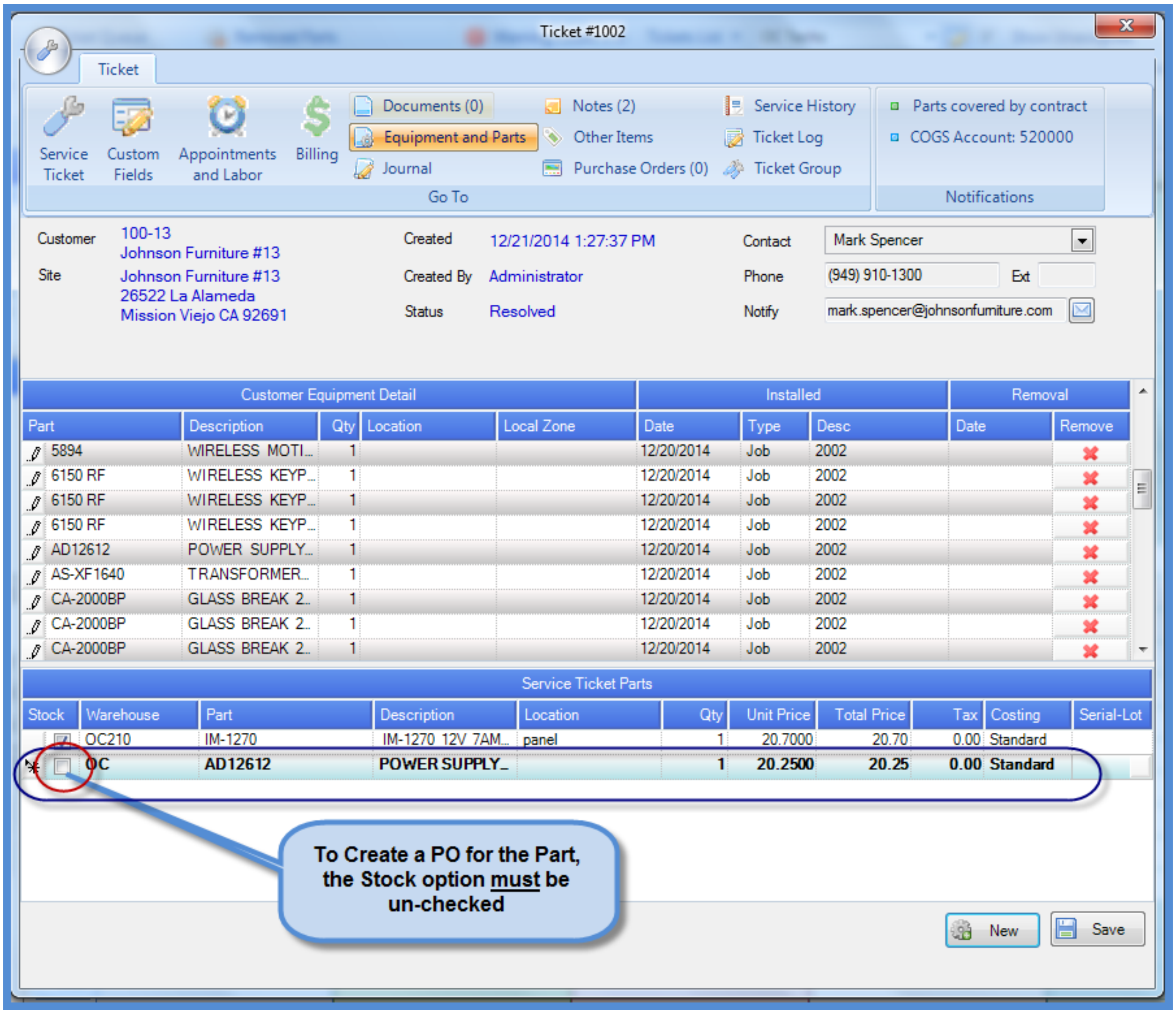
If a part was removed and is not being replaced, this is handled from the *Equipment and Parts* form of the ticket.

In the Customer Equipment Detail section (upper tier), click once on the part to be removed, and then press the red “X” button in the Remove column. A confirmation message will be displayed; click the *Yes* if you are certain you want to remove the part without a replacement.



Ordering Parts for a Ticket

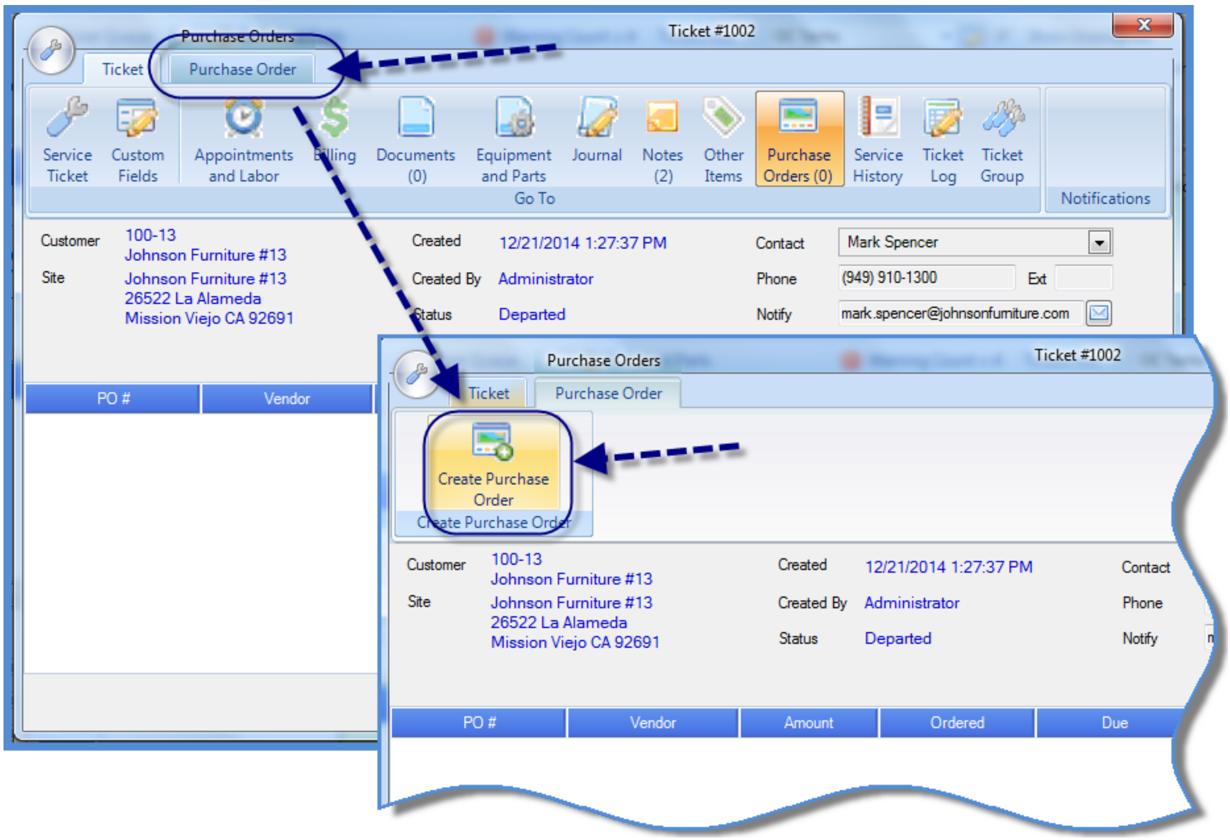
If Purchase Order for Parts needs to be created, this can be accomplished directly from the ticket. Before being able to create the PO within the Ticket, you must first add the Part(s) to be ordered to the Service Ticket Parts List on the Equipment and Parts form of the Ticket. You must also un-check the "Stock" option to the left of each part that will be ordered on a PO.



Ordering Parts for a Ticket (continued)

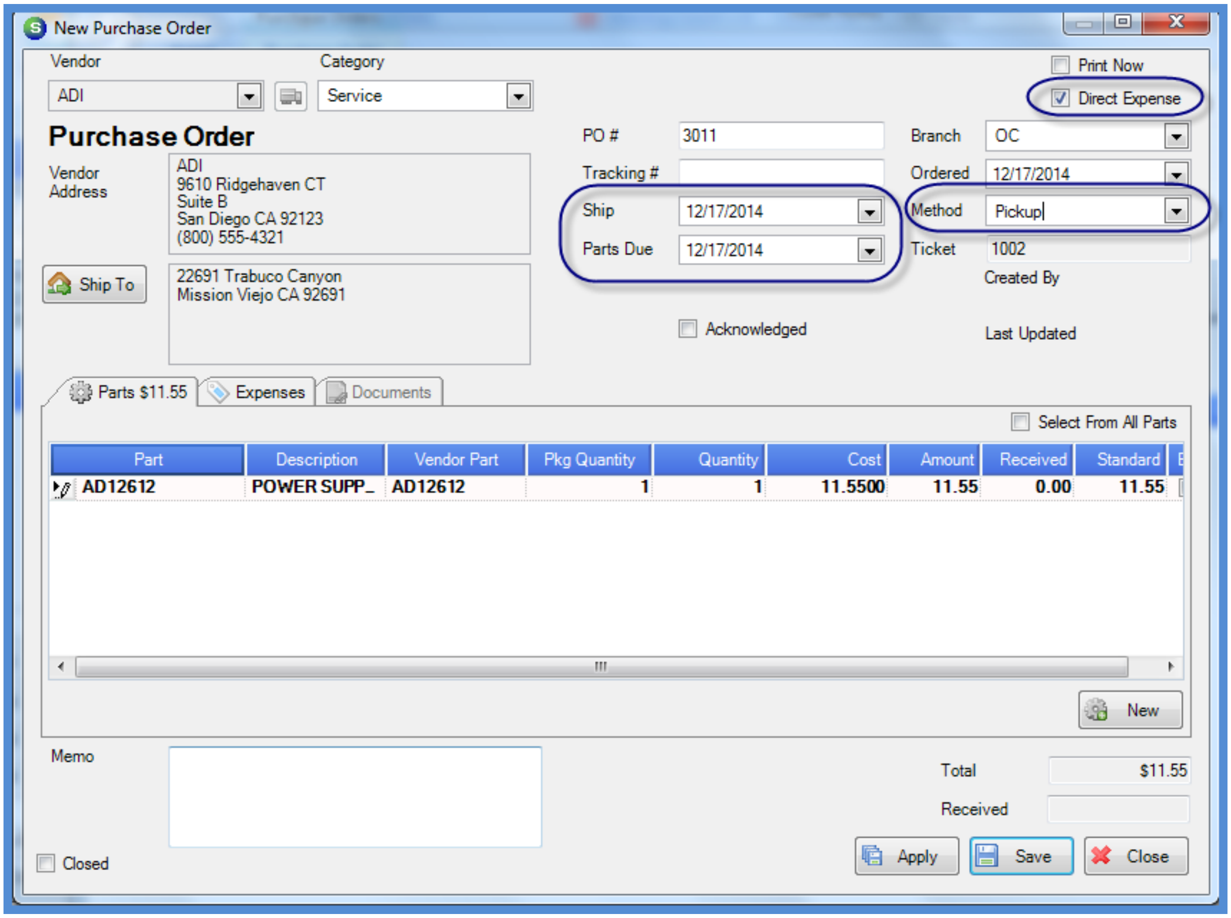
With the ticket open, click on the *Purchase Orders* button on the ribbon, and then click on the Purchase Order context menu.

A new ribbon, Create Purchase Order, will be displayed. Click on the *Create Purchase Order* button.



Ordering Parts for a Ticket (continued)

Most of the Purchase Order fields will automatically be populated; fill in the remaining fields on the Purchase Order then click the *Save* button.



Notes

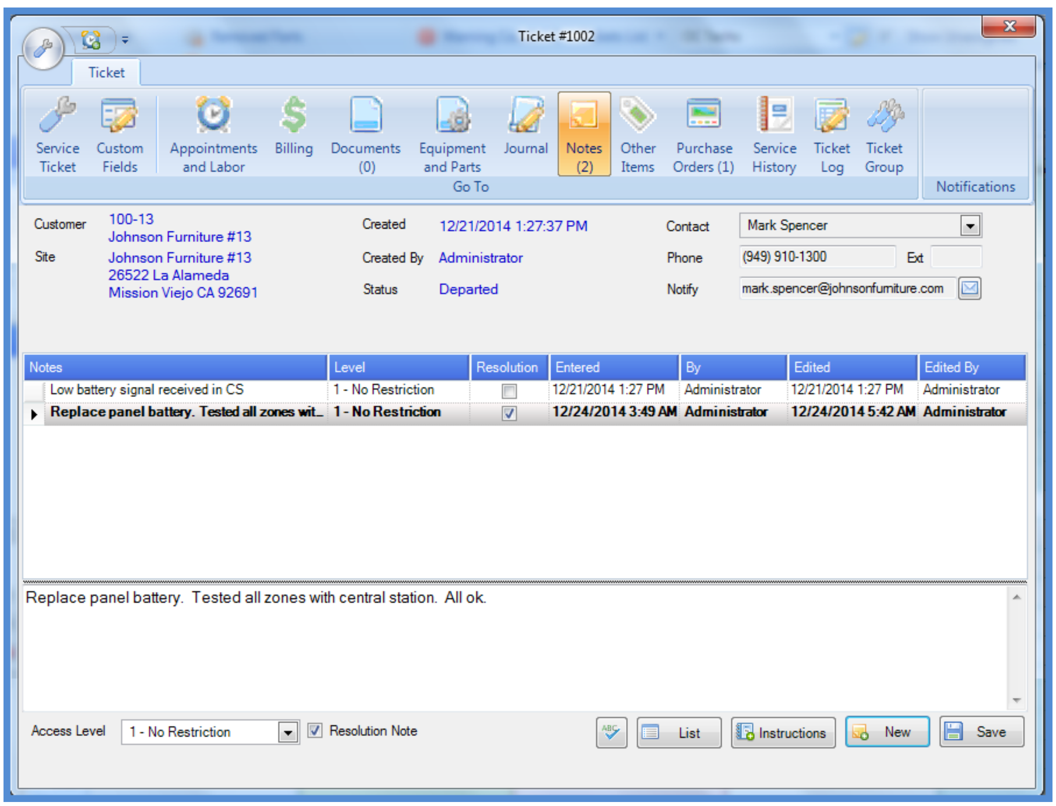
Notes may be added to a ticket at any time; even for closed tickets. To enter a note, open the ticket and click on *Notes* on the ribbon.

The Notes form is divided into two tiers; previously saved notes display in the upper tier and the lower tier is used to enter new notes.

To enter a new note, click on the *New* button located at the lower right of the Notes form. Type the note into the text box within the lower tier. Select an *Access Level* for the note then click on the *Save* button when finished. Once saved, the note entered will move to the upper tier of the form.

Access Levels

- <u>Level 1</u> – the note entered may be viewed by all Users and may be printed on the Service Ticket if printing ticket notes is selected by the user printing the ticket. If your company is using SedonaWeb, your Customers will be able to see Level 1 notes. Notes flagged as the Resolution Note must be saved as a Level 1 so they may be printed on the invoice.
- <u>Level 2</u> – the note entered may only be viewed by Users with a Level 2 User Group access. Level 2 notes may be printed on Service Tickets.
- <u>Level 3</u> – the note entered may only be viewed by Users with a Level 3 User Group access. Level 3 notes will <u>not</u> be printed on Service Tickets.

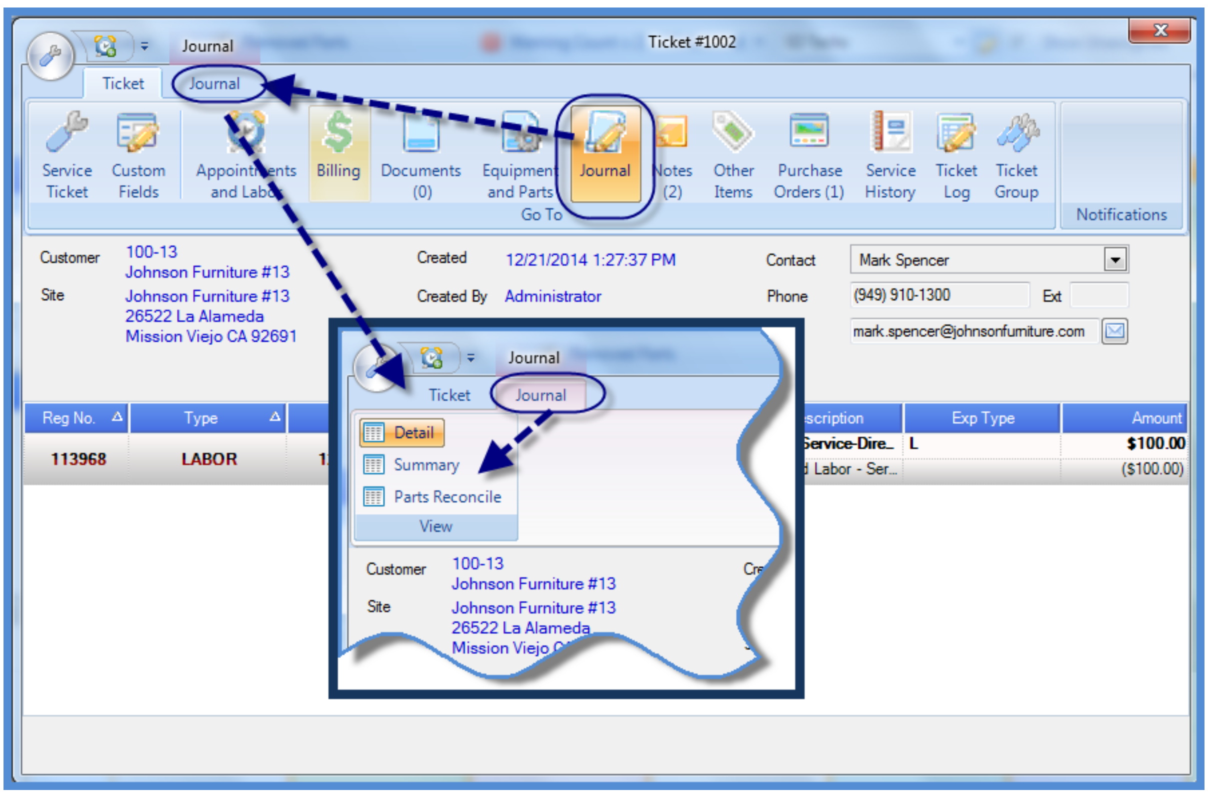


Journal

The Ticket Journal is comprised of two main elements:

- Financial Information which displays all Income and Expenses recorded to the Ticket; there are two views available – Detail and Summary.
- The Parts Reconcile displays a list of parts assigned to the Ticket and whether the issue transaction has been completed for each part. Unless the User closing the Ticket has appropriate permissions, a Ticket may not be closed if all parts have not been issued/direct expensed to the Ticket.

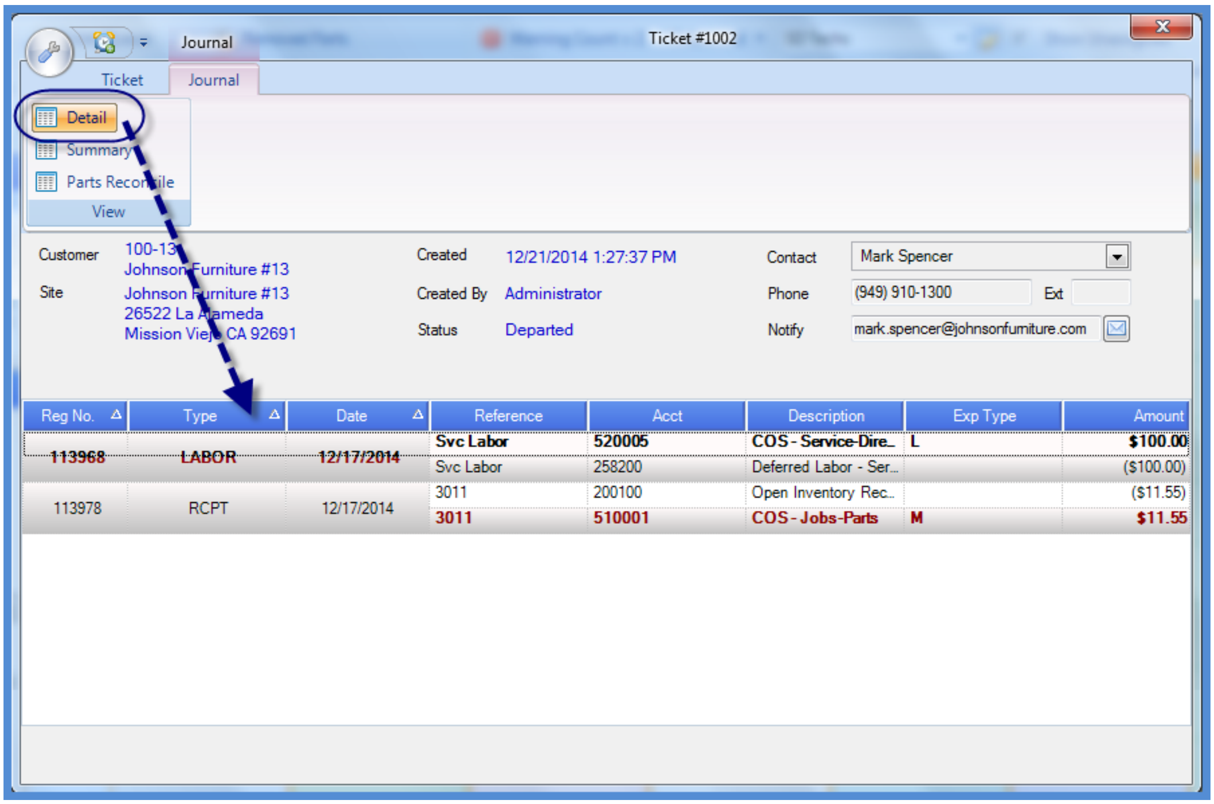
When reviewing a Ticket for Invoicing, the User will most likely review the Journal Information as a part of the process.



Journal (continued)

Journal Detail

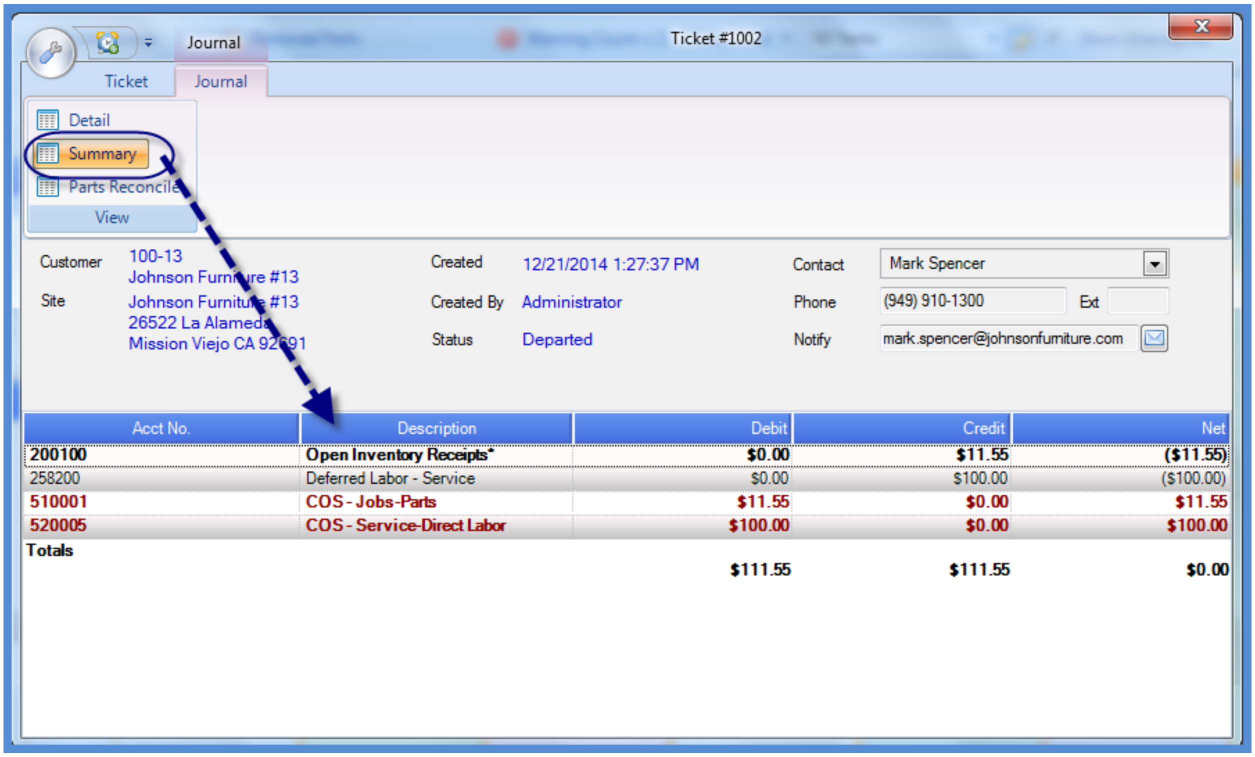
When clicking on the Journal *Detail* button, a list of all financial transactions applied to the Ticket will be displayed. Both the debit and credit side of the transaction is viewable.



Journal (continued)

Journal Summary

When clicking on the Journal *Summary* button, a list of all financial transactions applied to the Ticket will be displayed – totals for each unique G/L Account affected.



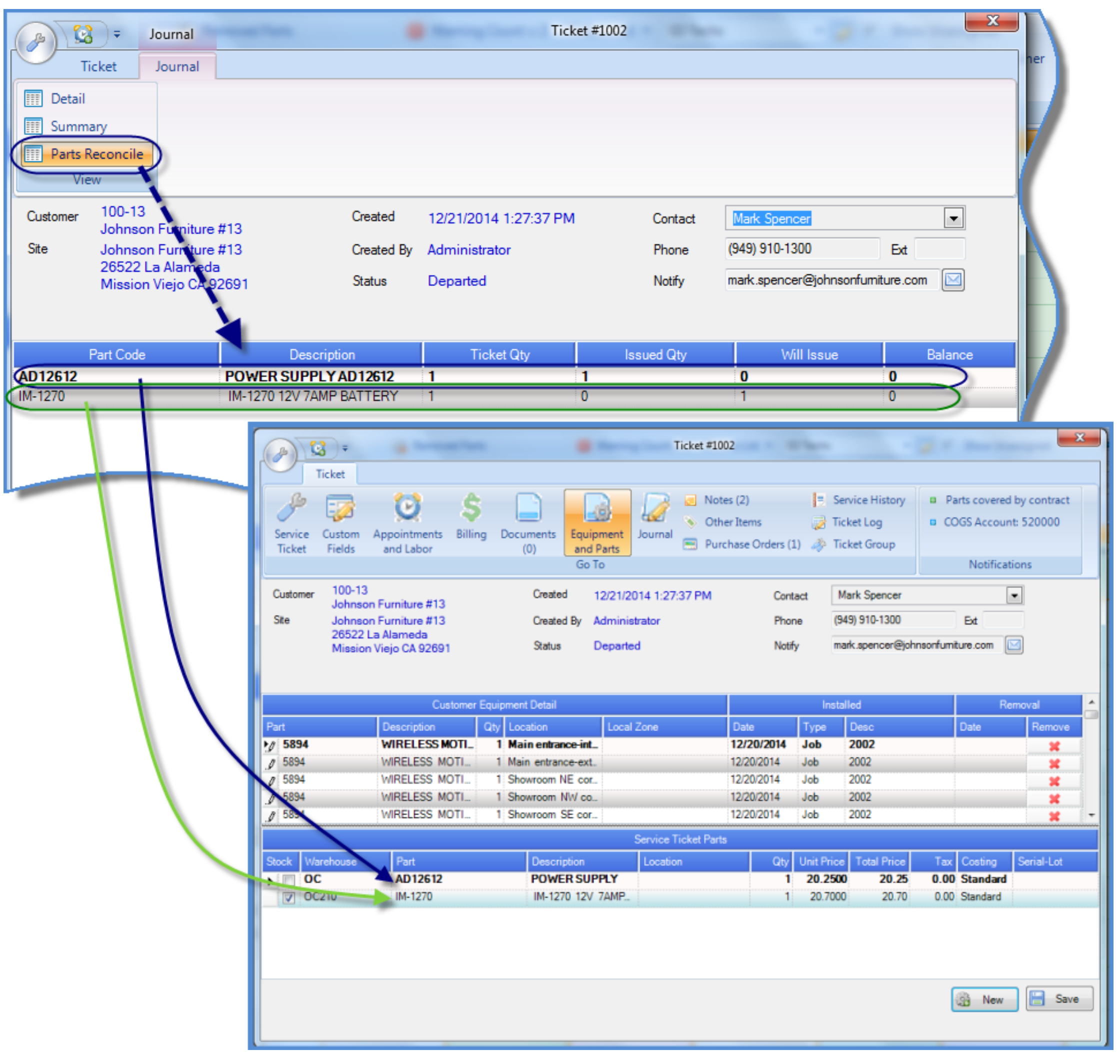
Journal (continued)

Parts Reconcile

When clicking on the Journal *Parts Reconcile* button, a list of all Parts entered in the Service Ticket Parts section of the Equipment and Parts form [of the ticket] will be displayed.

For Parts that were ordered on a Purchase Order and have been received [direct expense], the Issued Quantity on the Parts Reconcile list will be updated with the received quantity.

For Parts that will be issued from the Technician's Warehouse, the part Issue transaction will occur [depending on your company settings in SedonaSetup] when the invoice is created or when the Ticket is closed.



Review Ticket for Invoicing

Once a Ticket has been Resolved, it is ready to be reviewed and prepared for invoicing. This section will cover reviewing, modifying charges and creating the invoice for all types of Tickets.

There are three forms within the Ticket that may contain billable charges to be included on the customer invoice:

- Labor Charges – viewable and editable from the *Appointments and Labor* form
- Part Charges - viewable and editable from the *Equipment and Parts* form
- Other Charges - viewable and editable from the *Other* form

Each of the above three charge types will be covered in this section.

Note: User Group Permissions are required to create an invoice, and to be able to modify labor charges and override the warranty and/or service level automatic charges. Permission is also required to be able to close a Ticket.

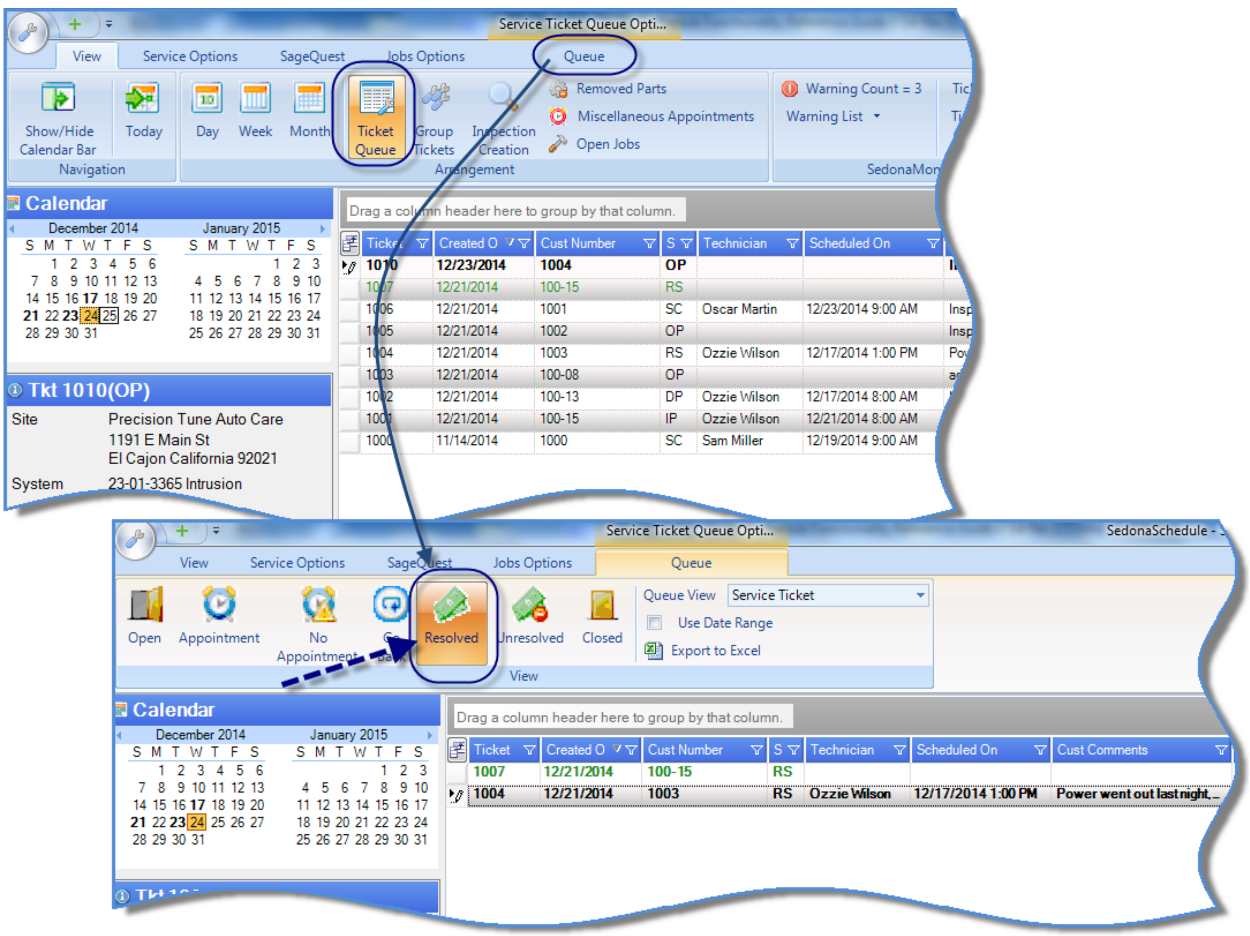
Reviewing Ticket for Invoicing (continued)

Service & Inspection Tickets – Reviewing Ticket/Charges

The list of Tickets ready to be reviewed for invoicing is accessed from the Ticket Queue. To view a list of all "Resolved" tickets ready to review, click on the Queue context menu located above the main ribbon.

Click on the *Resolved* button from the Ribbon. A List of all Resolved tickets will be displayed. Tickets are review, invoiced and closed individually. The User works through the list; as Tickets are invoiced and closed, they will drop off the Resolved list.

Within the Resolved Ticket list, double-click on the Ticket to open and review.

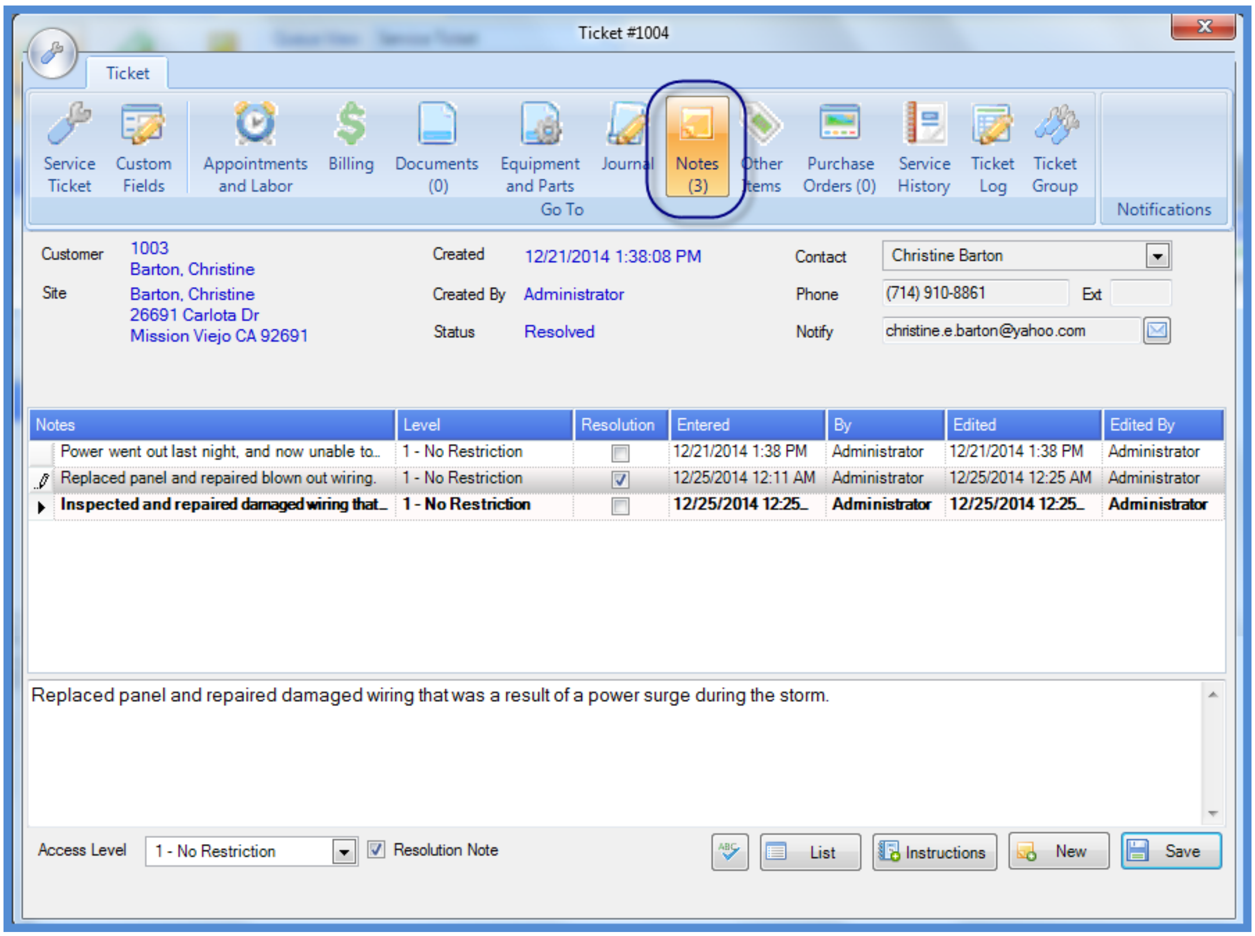


Reviewing Ticket for Invoicing (continued)

Review Ticket Notes

Once the Ticket is open, click on the *Notes* button on the Ticket ribbon to review any notes entered by staff or Technicians (if using the FSU). If the notes indicate parts were used, make certain to review the Equipment and Parts form to make certain the parts are listed.

If after reviewing the notes you need to enter a new resolution note that is suitable for printing on the invoice, click the *New* button located at the lower right of the form. Enter the note and make certain to select the *Access Level* of 1 and check the *Resolution Note* checkbox; click the *Save* button when finished.

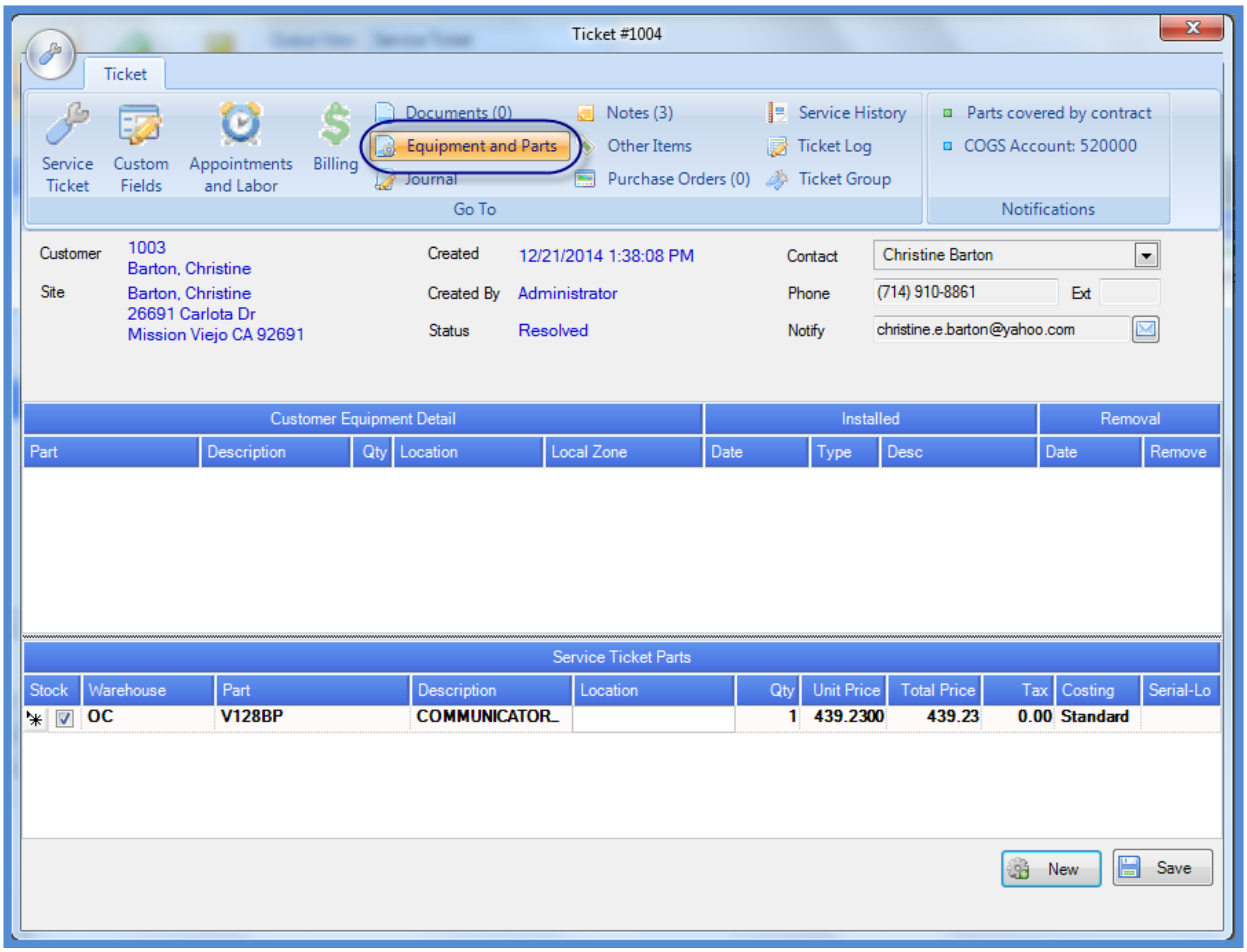


Reviewing Ticket for Invoicing (continued)

Review Parts

Click on the *Equipment and Parts* button on the Ticket ribbon to review or add parts to the ticket.

Review any parts/charges listed in the lower tier (Service Ticket Parts) of the form. If parts were used but have not yet been entered on the ticket, click the *New* button at the lower right of the form to add parts (make certain the appropriate Warehouse is selected).



Reviewing Ticket for Invoicing (continued)

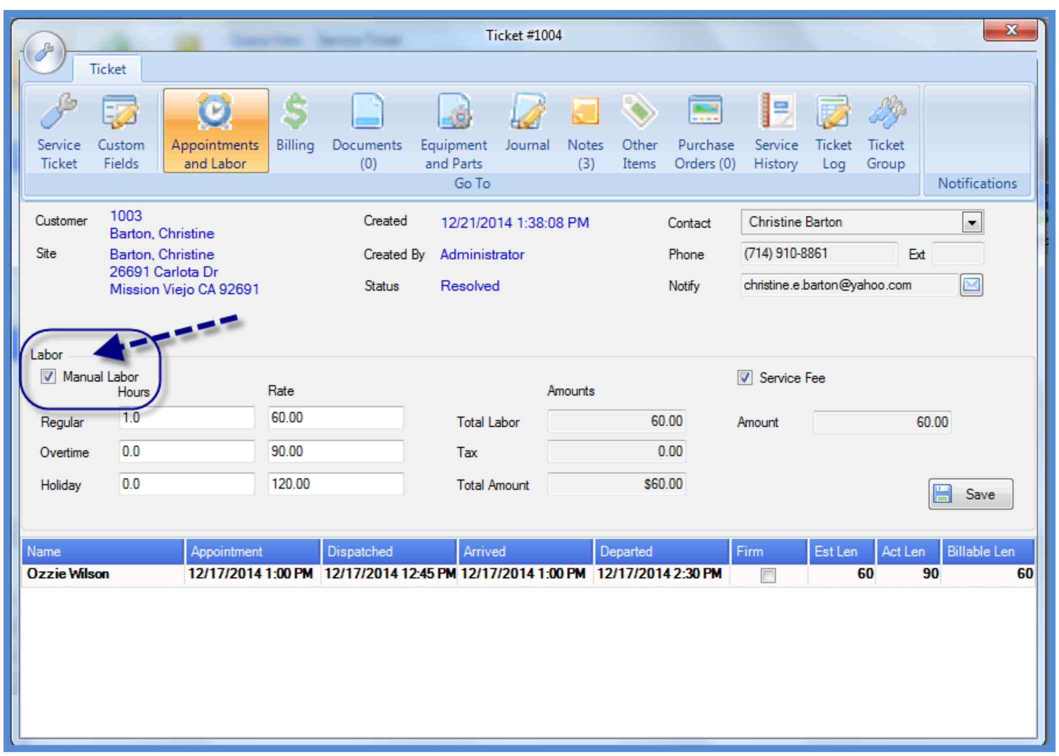
Review Labor

Click on the *Appointments and Labor* button on the Ticket ribbon to review labor charges and service fee (trip charge). If any changes need to be made to the number of labor hours or the labor rate being charged, check the *Manual Labor* checkbox; this will open up the labor hours and rates fields for you to make manual changes. When finished, click on the *Save* button to retain any changes.

Labor Charges and Service Fees (trip charge) are automatically calculated based on whether the System is still covered by the initial Warranty and the Service Level assigned to the Ticket.

- If a System is still under warranty, billable labor charges are automatically calculated using the rules of the Warranty code for the system.
- If the System is out of warranty, billable labor charges are automatically calculated using the rules of the Service Level selected on the Service Ticket form.
- If a System is still under warranty, and the User selects the Override Warranty option on the Billing form, charges are automatically calculated using the rules of the Service Level selected on the Service Ticket form.

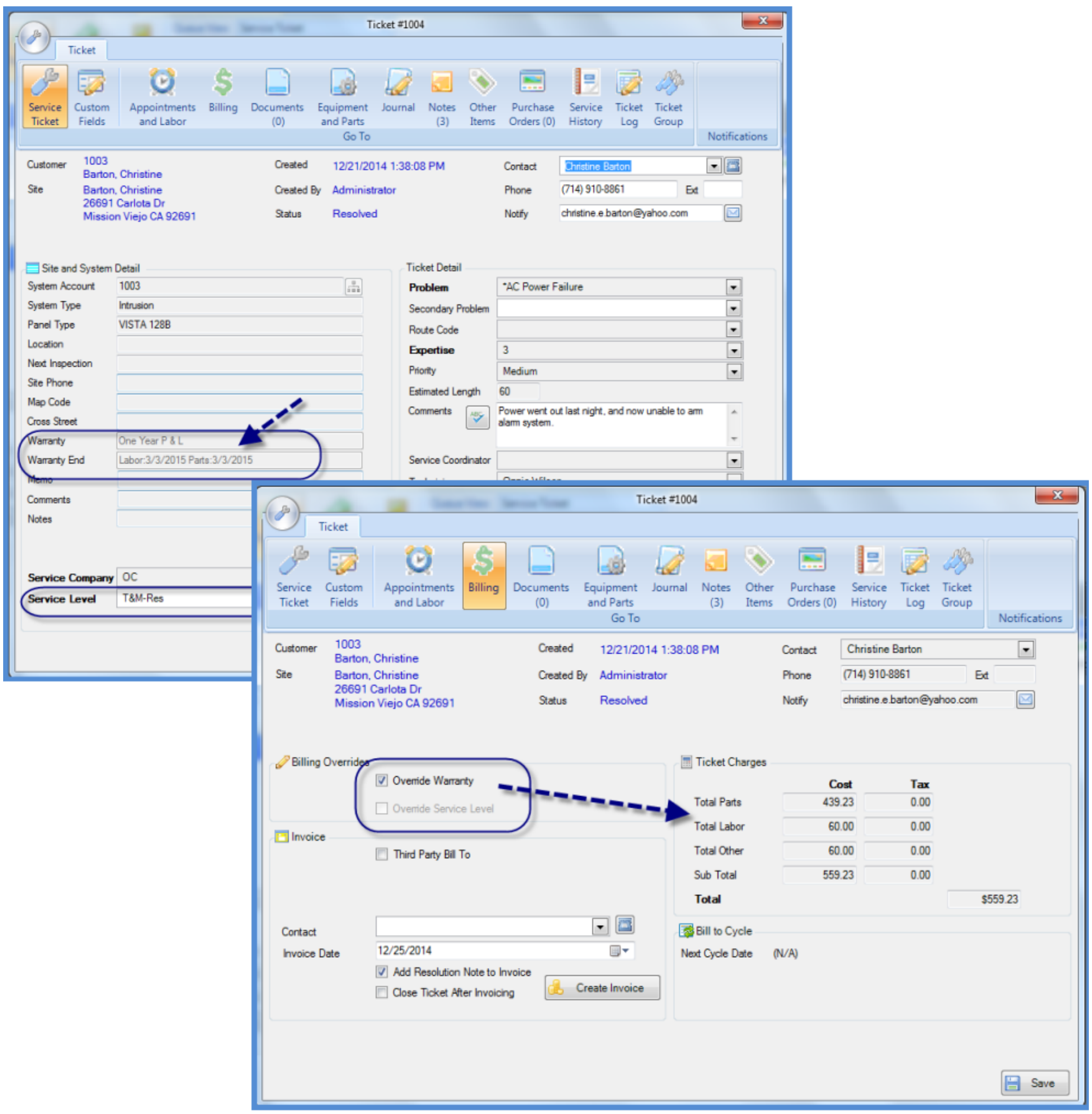
Note: Any automatically calculated charges may be manually overridden by the User if the appropriate user security permissions have been granted to the User.



Reviewing Ticket for Invoicing (continued)

Override Warranty

If the System is still covered by the initial Warranty yet you want to invoice the customer for charges (some or all), you would need to select the "*Override Warranty*" option on the Billing form. When selecting to Override the Warranty, the application then looks to the Service Level of the Ticket to determine billable charges. The Ticket Charges area of the Billing form will be updated based on the rules of the Service Level. Any amounts for Parts, Labor, Service Fee or "Other" charges may be manually modified as needed.

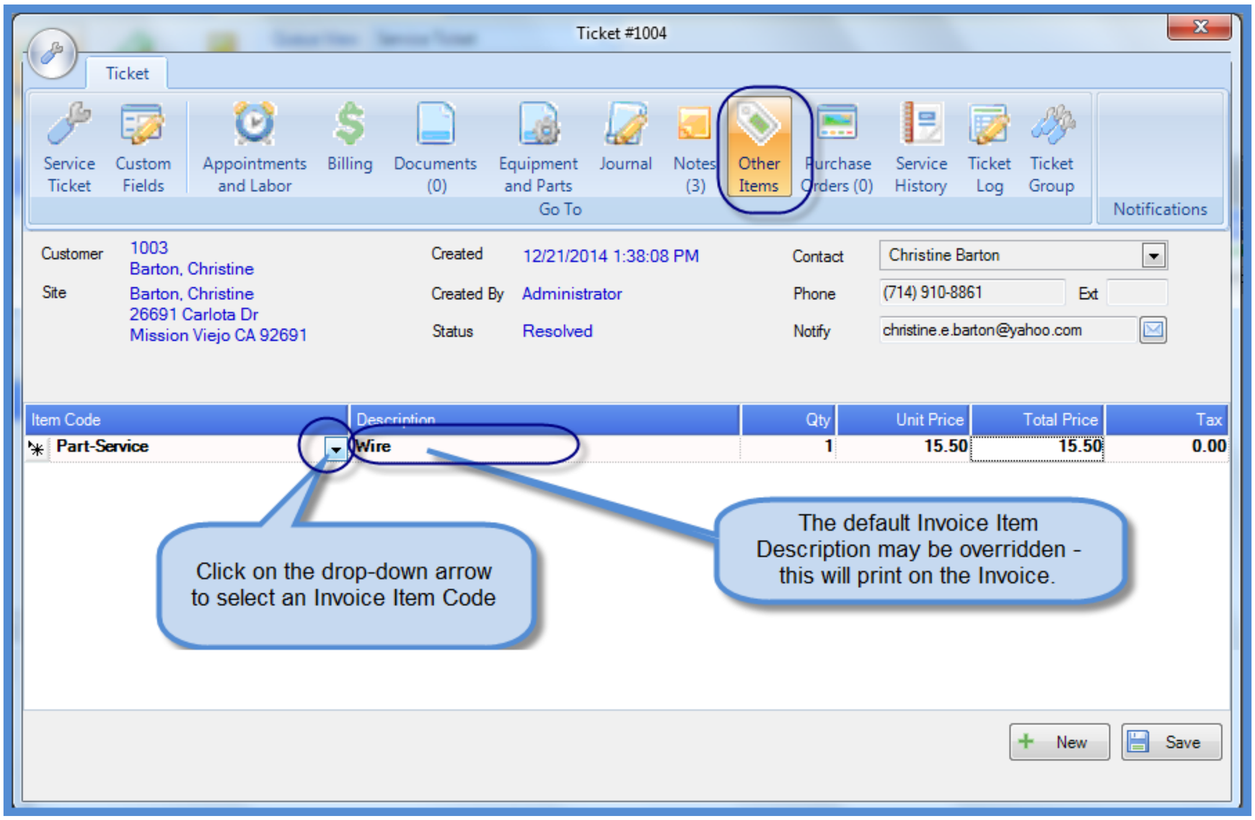


Reviewing Ticket for Invoicing (continued)

Review Other Items

Click on the *Other Items* button on the Ticket ribbon to review or add miscellaneous charges to be included on the invoice.

Review any Items already listed. If additional Items need to be added, click the *New* button located at the lower right of the form. Click on the *Save* button when finished.



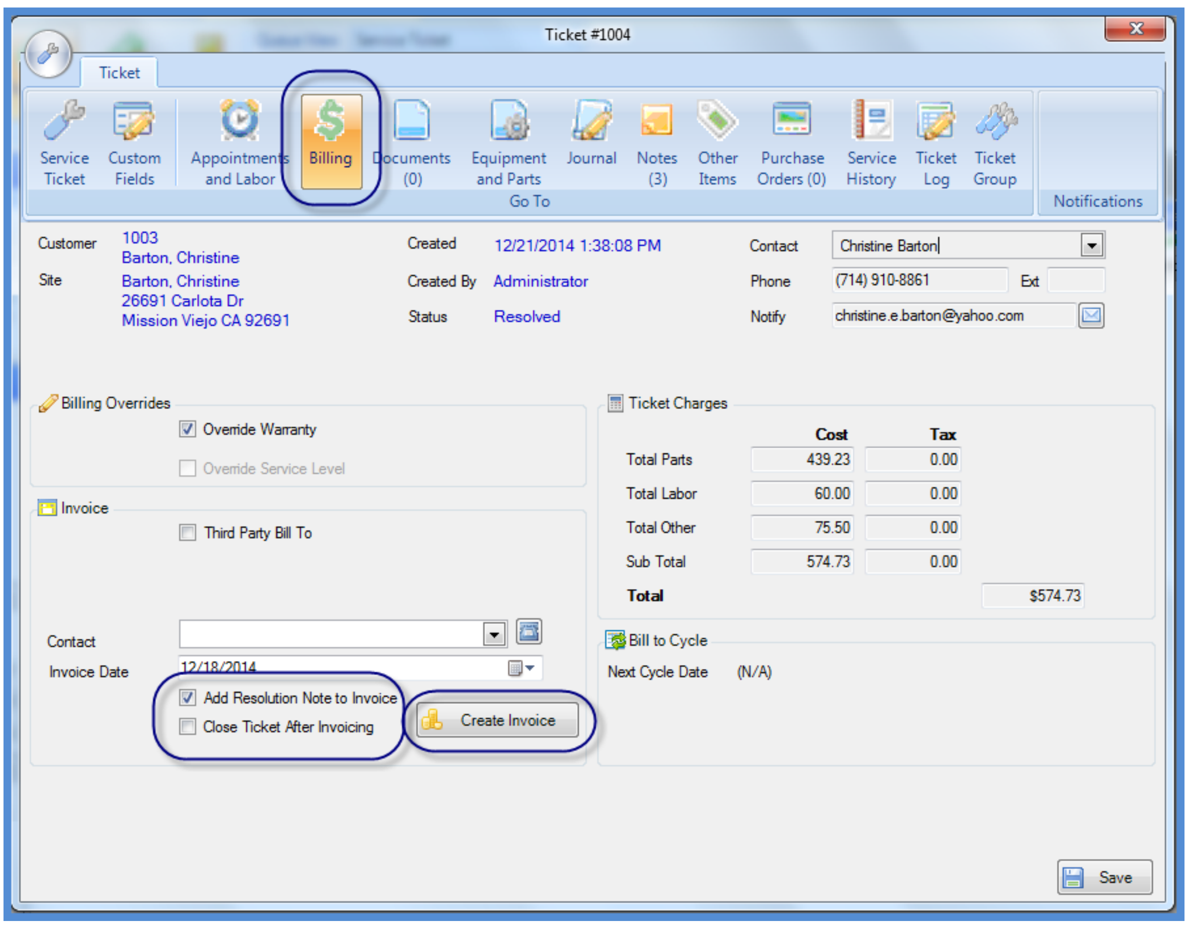
Reviewing Ticket for Invoicing (continued)

Review Billing – Create an Invoice

Once all charges have been reviewed, and are ready for invoicing, click on the *Billing* button from the Ticket ribbon. Review all charges displayed. If you are satisfied with the charges, and are ready to create the invoice you have two options from which to select prior to creating the invoice.

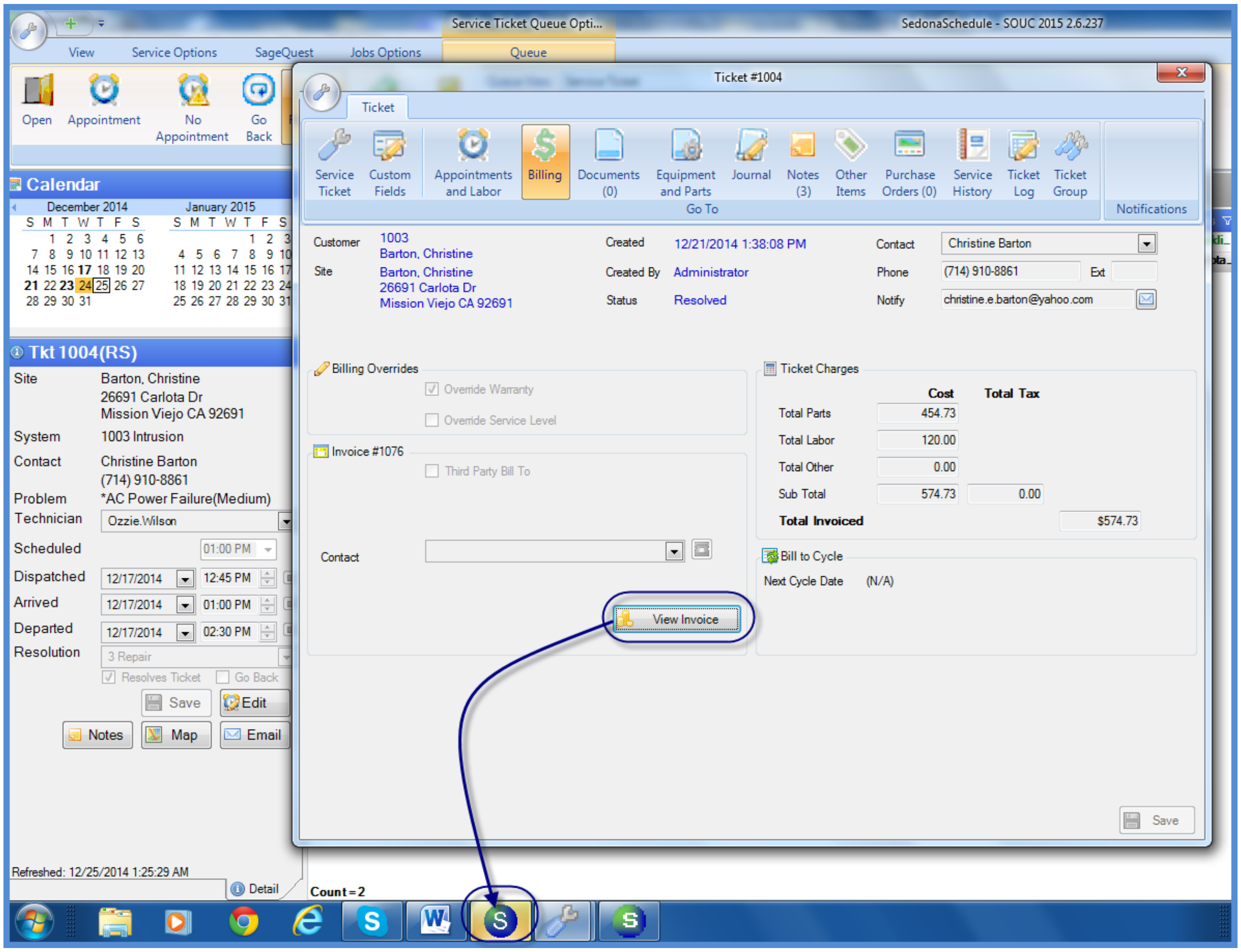
- Add Resolution Note to Invoice – if a resolution note was entered on the ticket and you want that note to print in the memo field of the invoice, select this option.
- Close Ticket After Invoicing – if you wish to automatically close the ticket once the invoice is created, select this option.

Once options have been selected, click on the *Create Invoice* button.



Reviewing Ticket for Invoicing (continued)

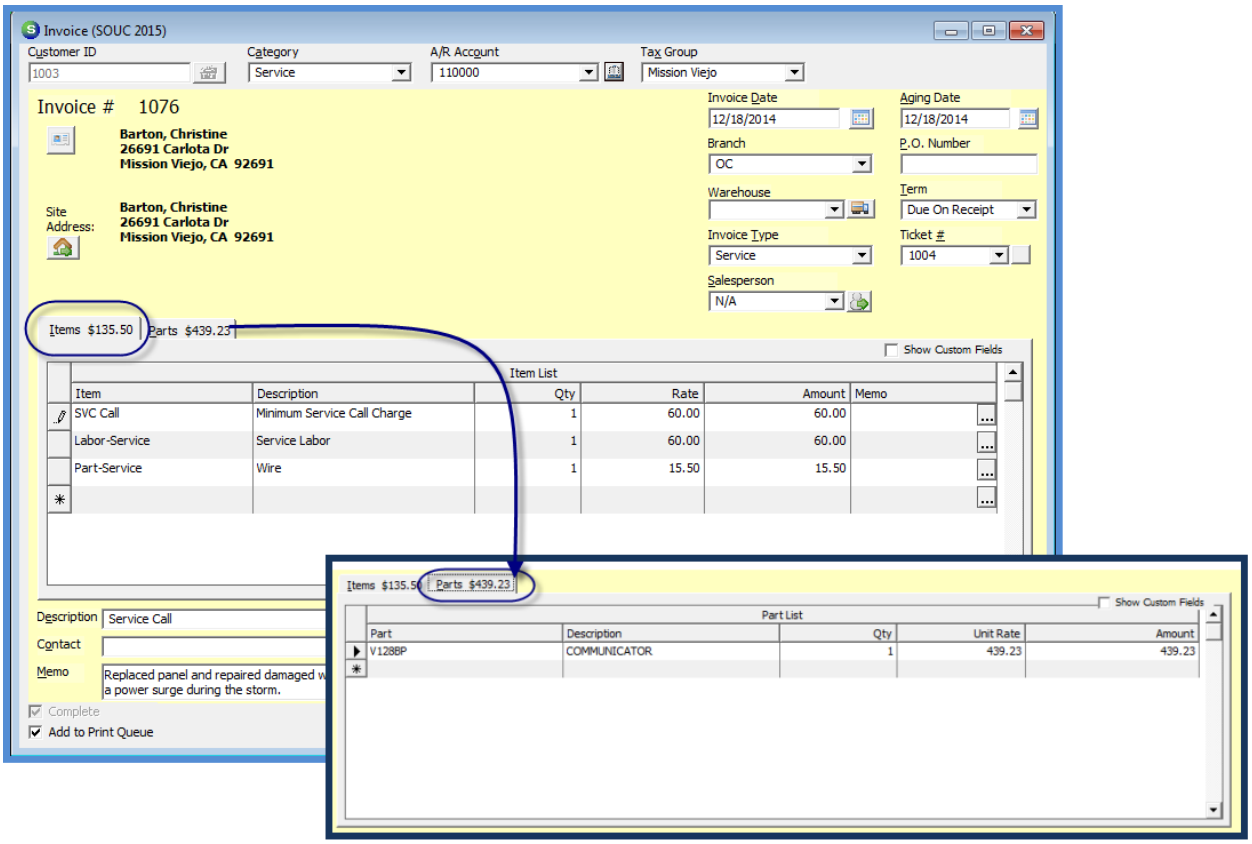
If the *Close Ticket After Invoicing* option was not selected prior to creating the invoice, you may click on the *View Invoice* button to review the charges contained on the invoice. Once the View Invoice button has been clicked, the main SedonaOffice application icon will begin to blink on the workstation taskbar. Click on the SedonaOffice icon to view the invoice.



Reviewing Ticket for Invoicing (continued)

Once an Invoice has been created, it may not be modified from SedonaSchedule. If changes need to be made to the Invoice, it may be opened with the Customer Explorer record for editing. User permissions are required to be able to make changes to an Invoice.

Note: If a payment was automatically applied to the invoice during the posting of the invoice, and you need to make changes to the invoice, you must first un-apply any payment applications.



Reviewing Ticket for Invoicing (continued)

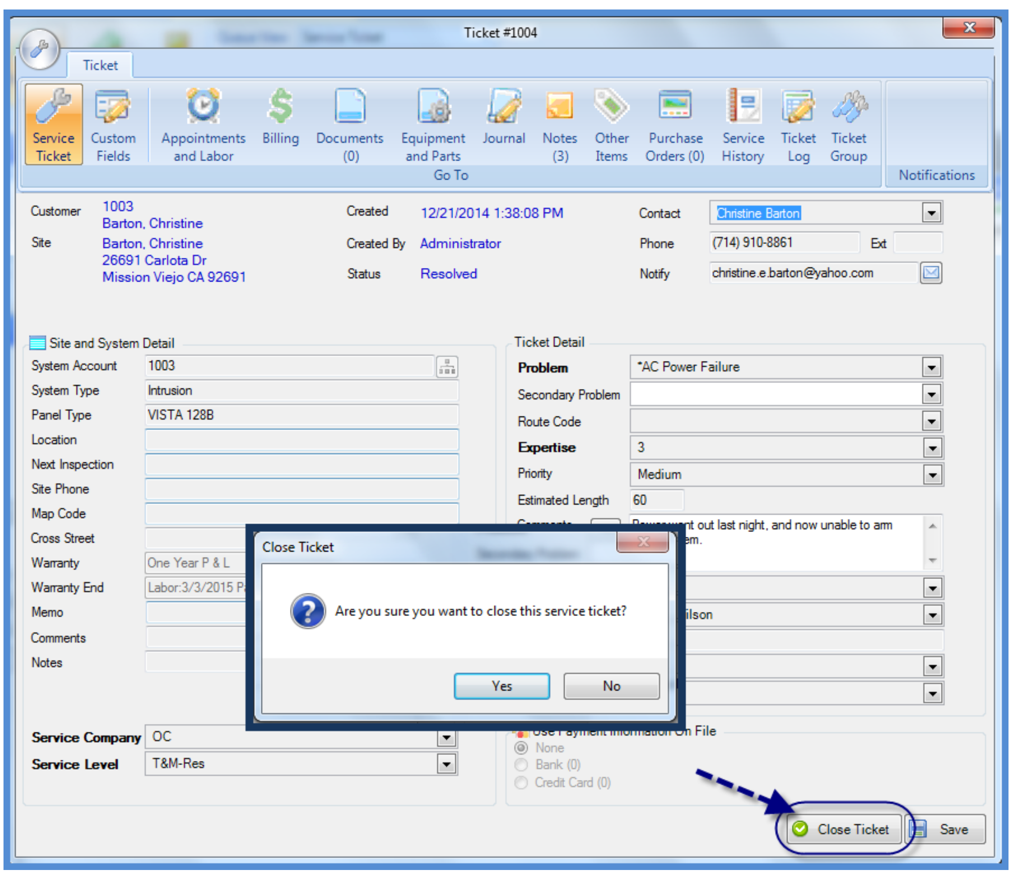
Closing a Ticket

If the *Close Ticket After Invoicing* option was not selected on the *Billing* form prior to creating the invoice, you will need to manually close the ticket. This same process below is also used when closing a non-billable Ticket.

Click on the *Service Ticket* button from the Ticket ribbon. At the lower left is a button labeled *Close Ticket*; check this box then click on the *Save* button located at the lower right of the form.

A confirmation message will be displayed asking you if you are sure you want to close the ticket; click the *Yes* button to proceed with the ticket closing.

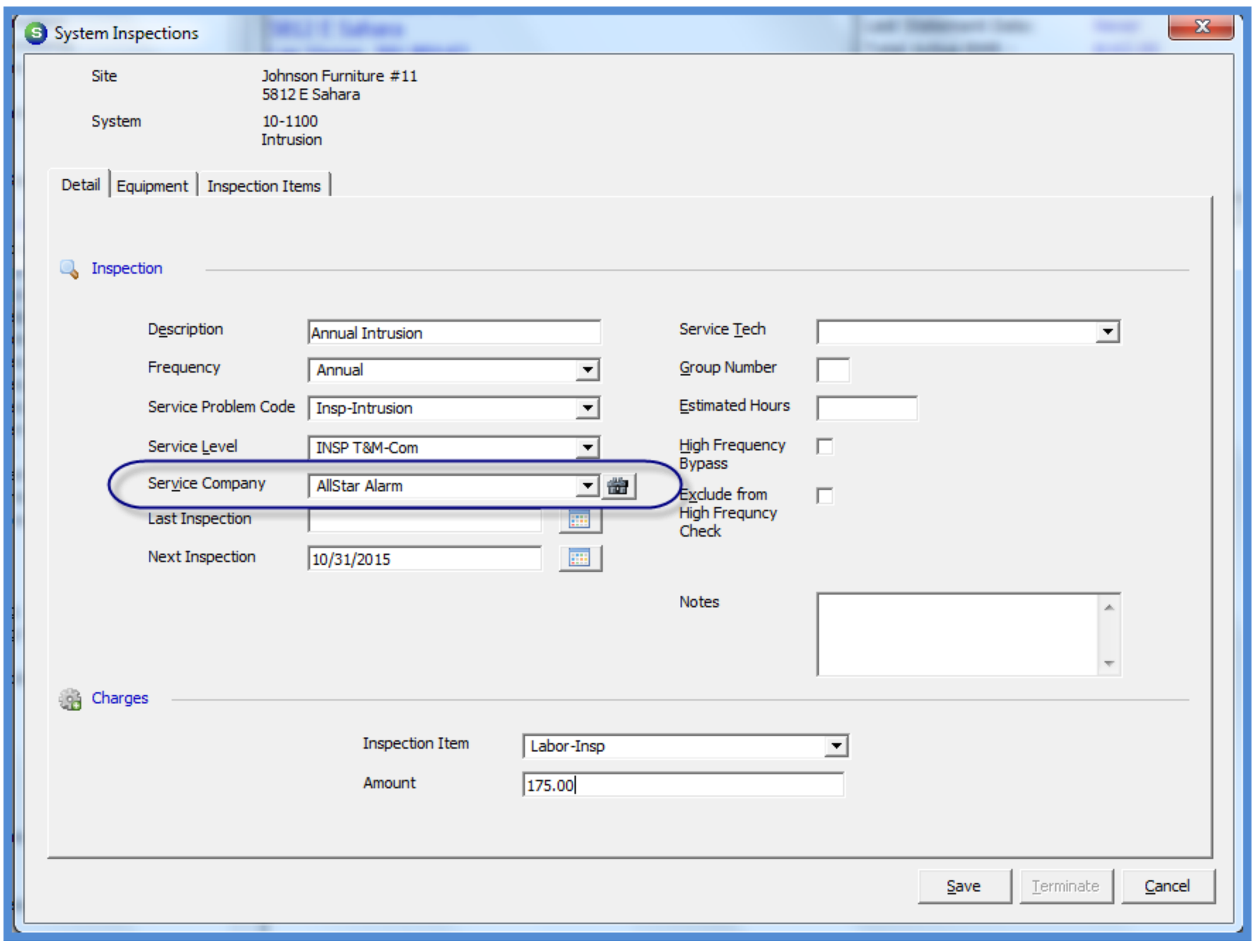
Note: If any Parts were put on the Ticket and there is an existing Equipment List for the Ticket System and no part replacement was done, as message will be displayed to the User asking if you want to Replace Equipment now. If selecting Yes to this prompt, the Equipment & Parts form will be displayed to perform the replacement. When finished, return to the Service Ticket form and click on the Close Ticket button.



Vendor Tickets

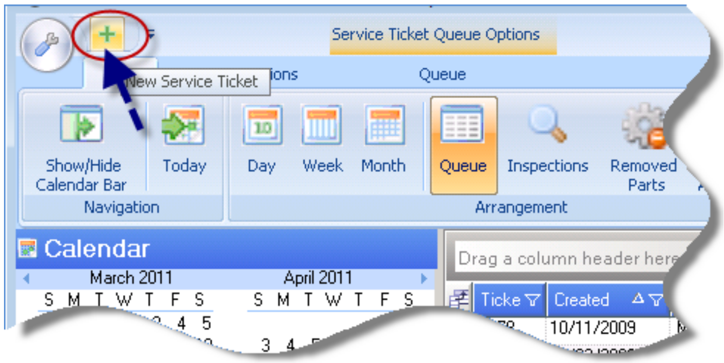
A Vendor Ticket is used when a service call or an inspection is performed by a Service Provider (subcontractor) on behalf of your company. What distinguishes a regular Service Ticket from a Vendor Ticket is the Service Company selected on the Service Ticket form. If the Service Company selected is a Service Provider, the Ticket will automatically be saved as a Vendor Ticket.

For Inspections, a Service Provider may be setup as the default Service Company if it is typical the Inspection is performed by a Service Provider. The Inspection Record for the System contains the setup where the service company is selected.

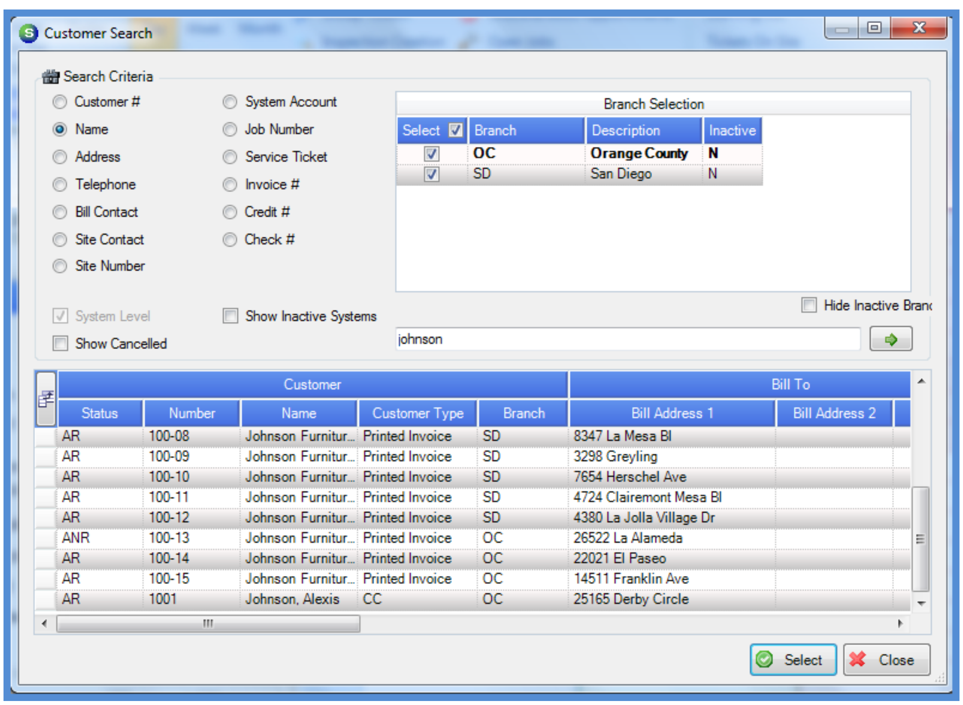


Creating a Vendor Service Ticket

Click on the *New Service Ticket* button located at the upper left of the SedonaSchedule application.



The Customer Search form will be displayed for locating the Customer/Site/System for which a ticket will be created. Select a Search Criteria option, then enter a search value in the search text box, then press the green search arrow. Double-click on the row in the search results area for which you want to create the ticket.



Creating a Vendor Service Ticket (continued)

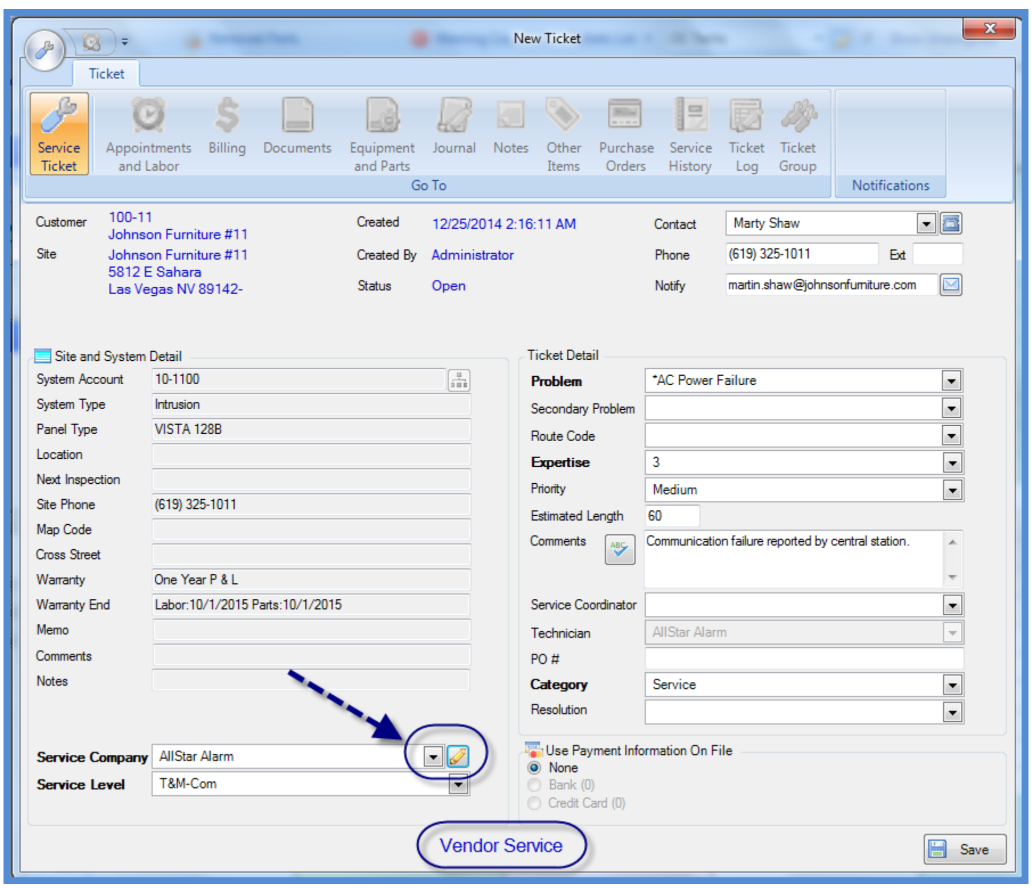
A new Service Ticket will be displayed. There are five required fields that must be populated to be able to save the Service Ticket. The field label to the left of a required field is displayed with a **bold** font. The only required field that is not automatically populated is the Problem code.

Note: If the label of the PO # field is bolded, this indicates this field is also required.

In the *Service Company* field, if the default company displayed is Service Provider, then the words Vendor Service will be displayed at the bottom of the ticket, and the ticket will automatically be saved as a Vendor Service Ticket.

If the default Service Company displayed is your company or a company branch service company, you may click on the drop-down arrow or the lookup button to the right of the service company field to display a list of all available service companies and Service Providers from which to select. If you select a Service Provider from the list and save the ticket, the ticket will be treated as a Vendor Service Ticket.

Once all required fields have been populated and the customer *Comments* has been entered, click the *Save* button located at the lower right of the form.

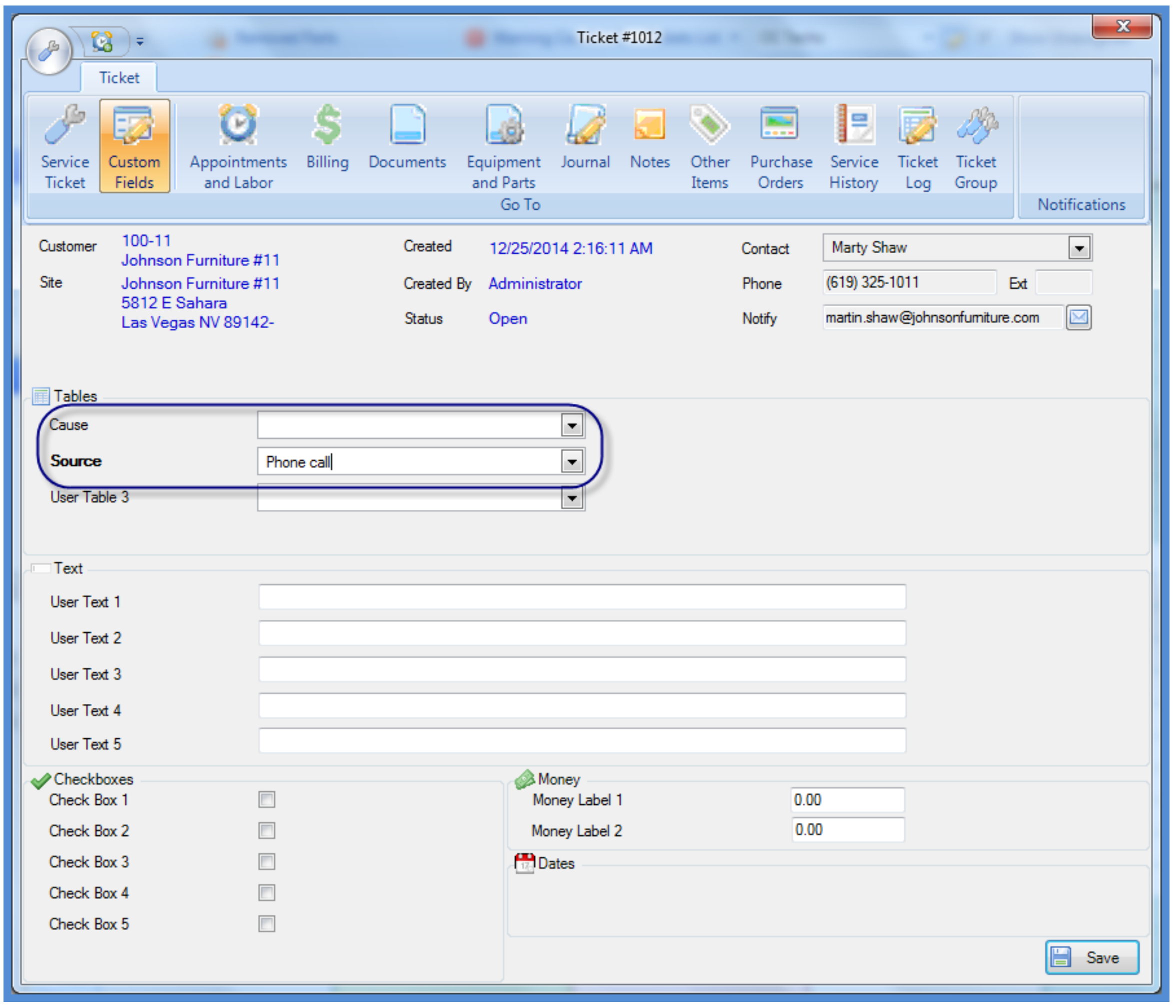


Creating a Vendor Service Ticket (continued)

Note: Once the Service Ticket form is saved, a Field Note will automatically be created with any information entered into the [customer] Comment field. This automatic Field Note creation will only occur if information is entered into the Comment field prior to the initial Save of the ticket. If a comment is entered at a later time, an automatic field note will not be created.

Once the Ticket has been saved, the *Custom Fields* form of the Ticket will be displayed. If your company is using any of the Custom Fields; fill in this form according to your company policy and procedures. After populating any of the custom fields, press the *Save* button located at the lower right of the form to save the selections/entries.

Note: If a Custom Field has been marked as required, the field label to the left of a required field is displayed with a **bold** font.

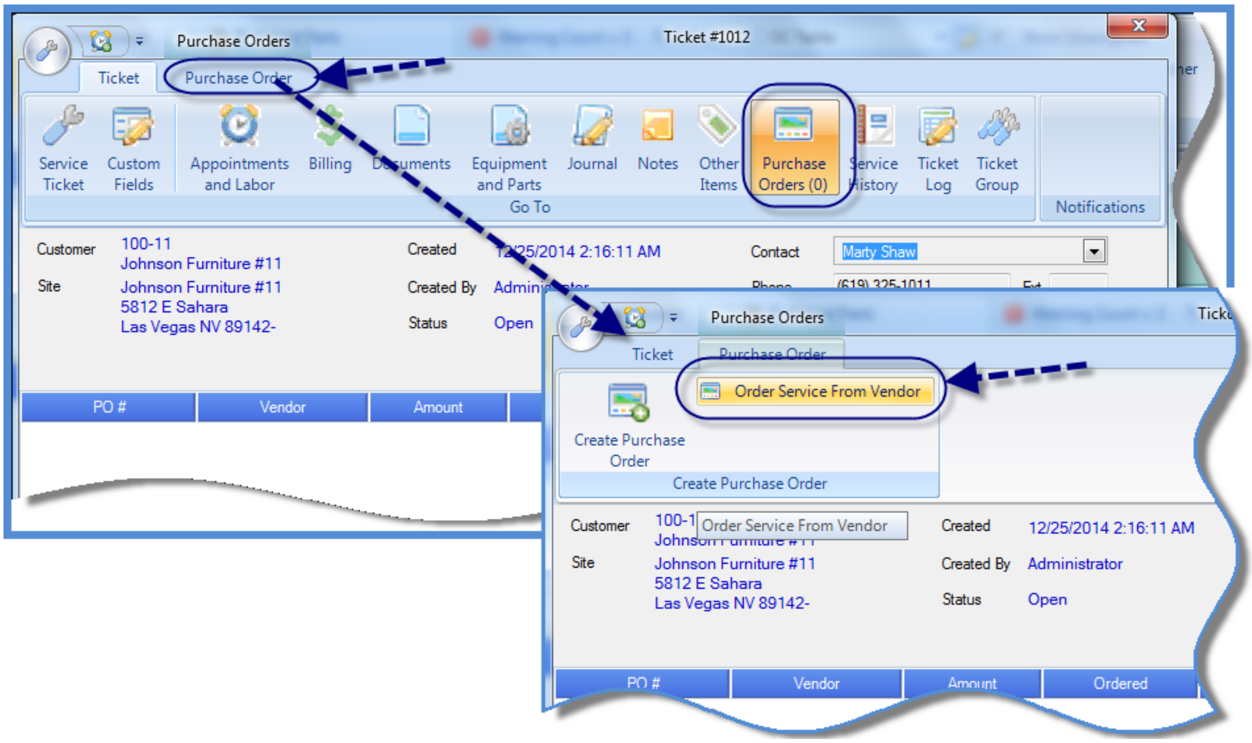


Creating a Purchase Order for Vendor Service

If your company issues a Purchase Order to a Service Provider (Vendor) for services provided on a Vendor Ticket, the Purchase Order may be created directly from the ticket.

With the Vendor Ticket open, click on the *Purchase Order* button on the ribbon, and then click on the Purchase Order context menu.

A new ribbon, Create Purchase Order, will be displayed. Click on the *Order Service From Vendor* button.

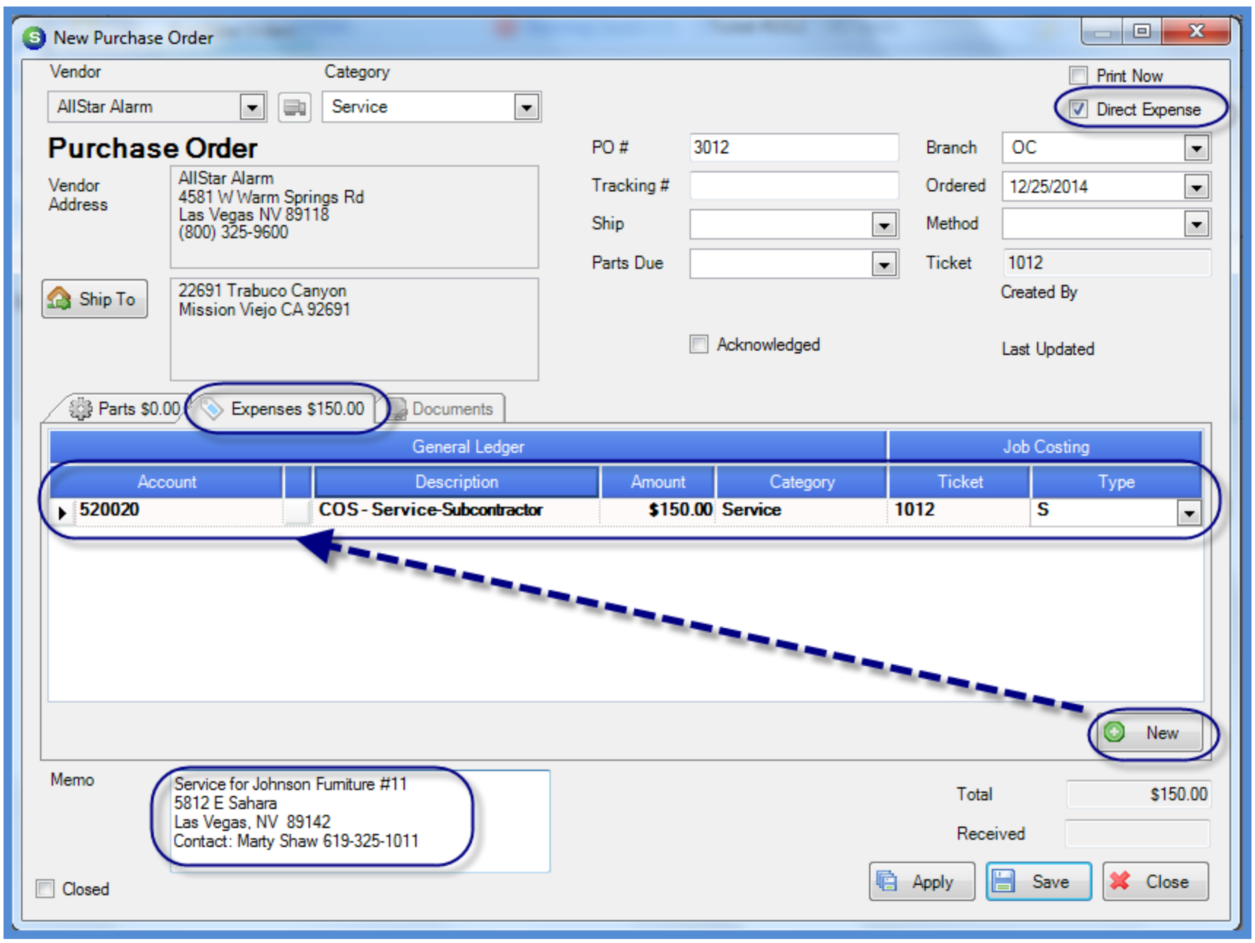


Creating a Purchase Order for Vendor Service (continued)

The *New Purchase Order* form will be displayed.

- The Vendor name is automatically filled in.
- Select the appropriate Branch in the header area of the form.
- Click on the Expenses tab and enter or lookup the G/L Account number for the expense; enter the amount and select the appropriate Job Costing Expense Type.
- You may override the Description field that is automatically filled in.
- Enter any additional information into the memo field.

When finished, click on the *Save* button located at the lower right of the form.



Scheduling Vendor Tickets

Appointments for Vendor Tickets may be created using one of three methods; from the ticket by clicking on the New Appointment shortcut button, from the Schedule Board using the double-click to create and schedule the appointment, or by dragging and dropping the ticket onto the Schedule Board. The "Double-click to Add" method is not available for Vendor Inspection Tickets generated by the Inspection program.

If you need to schedule one of your company Technicians to accompany the Service Provider, these may be scheduled from the Ticket, or by using the Copy and Paste function on the Schedule Board – copy the Service Provider appointment and paste into the Schedule Board for a company Technician timeslot.

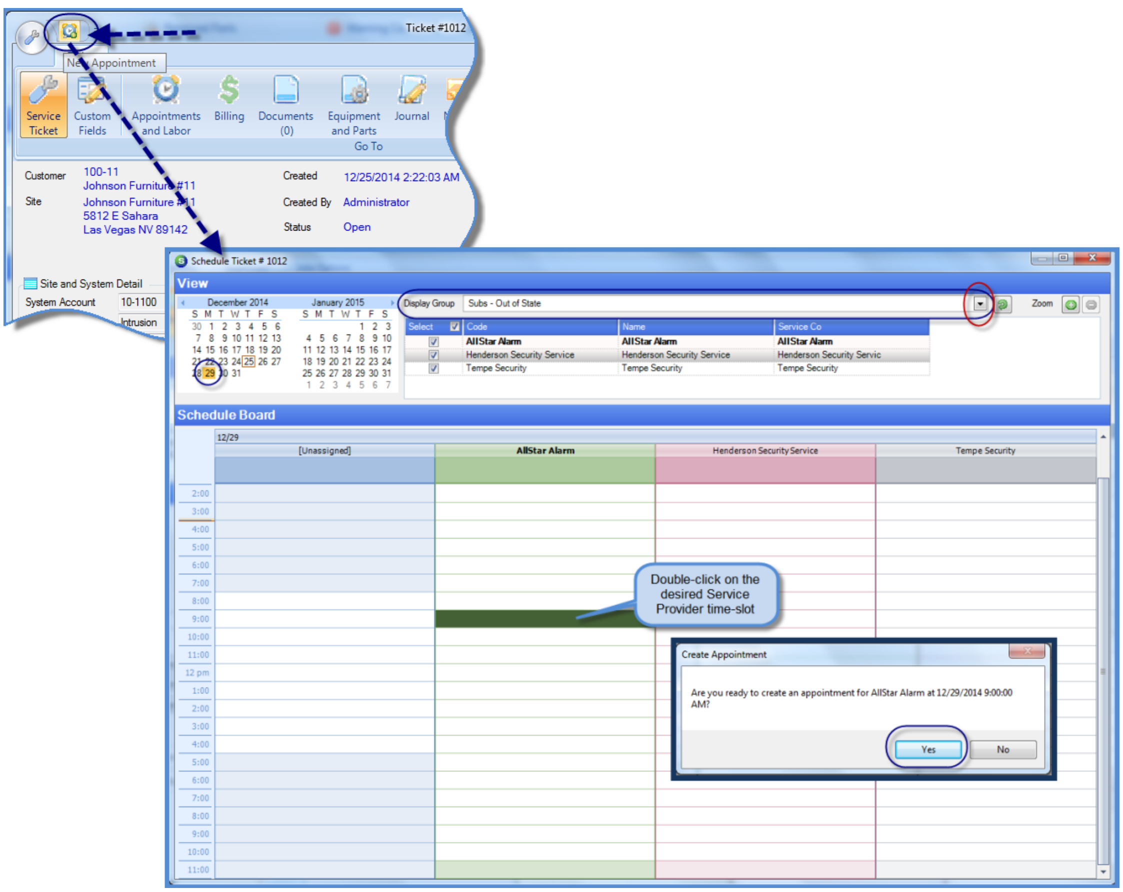
Each method will be described in this section.

Scheduling an Appointment from a Vendor Ticket

To schedule a technician appointment from the ticket, open the Ticket for which you want to schedule the appointment. Click on the New Appointment button at the upper left of the Ticket.

The Schedule Ticket form will be displayed. At the top of the form, change the Display Group to a Service Provider Group – the schedule board will populate with all Service Providers assigned to the Display Group. Select the appointment date on the calendar then double-click on the Service Provider/time-slot to be scheduled.

A message will be displayed confirming the appointment you want to create – click on the *Yes* button to accept.



Scheduling a Vendor Appointment from the Schedule Board

Drag & Drop Method

Vendor appointments are scheduled from the Schedule Board by using the drag and drop method from the list of Unscheduled Tickets displayed below the Calendar.

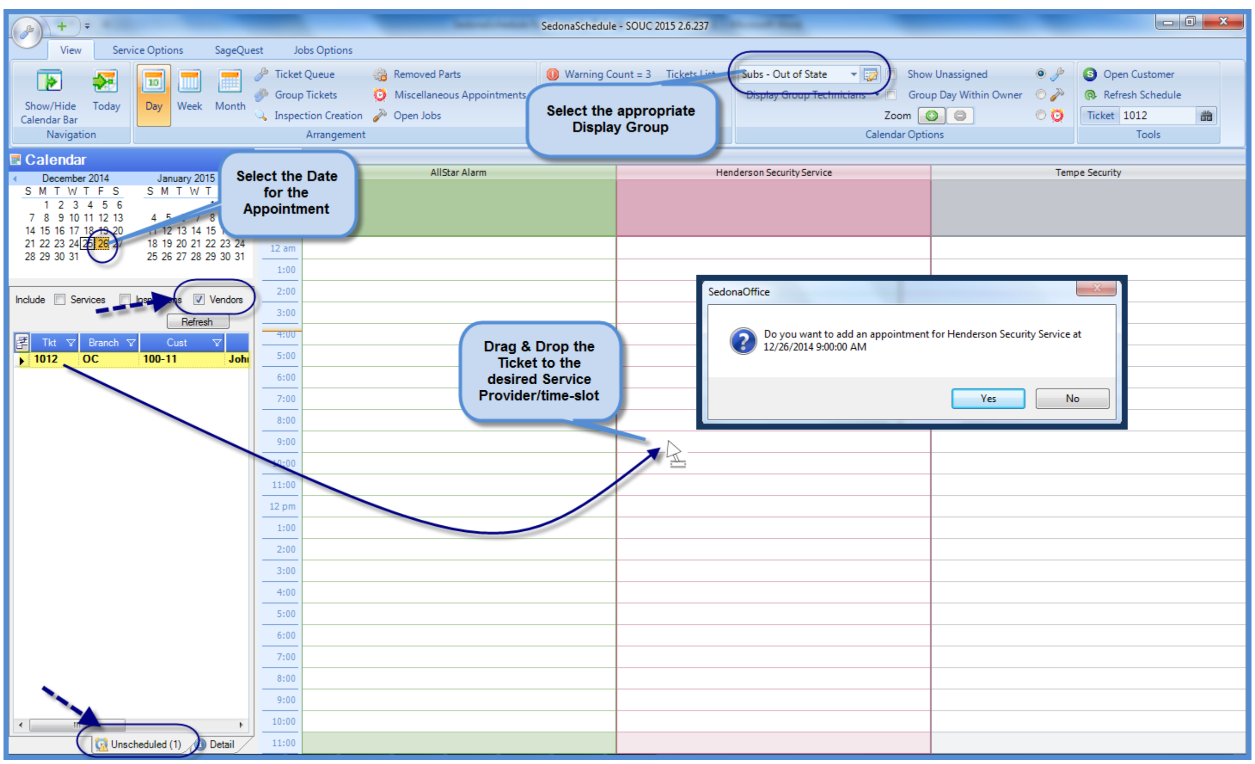
You must have the *Day* view selected from the Ribbon to be able to drag and drop a Vendor Ticket onto the Schedule Board.

Select the appropriate *Display Group* which contains your Service Providers.

On the Unscheduled Tickets list, click on the *Vendors* option at the top of the form.

Determine which date the will be scheduled; click on the date in the calendar to view available Service Providers for the date. Next hold the left mouse button down while on a ticket in the Unscheduled List then drag the ticket to the desired Service Provider column and time-slot, then release the mouse.

When releasing the mouse, a message will be displayed confirming you want to schedule the appointment with the Service Provider on the date and time where you are dropping the ticket; click the *Yes* button to continue.



Scheduling a Vendor Appointment from the Schedule Board (continued)

Double-Click to Add Method

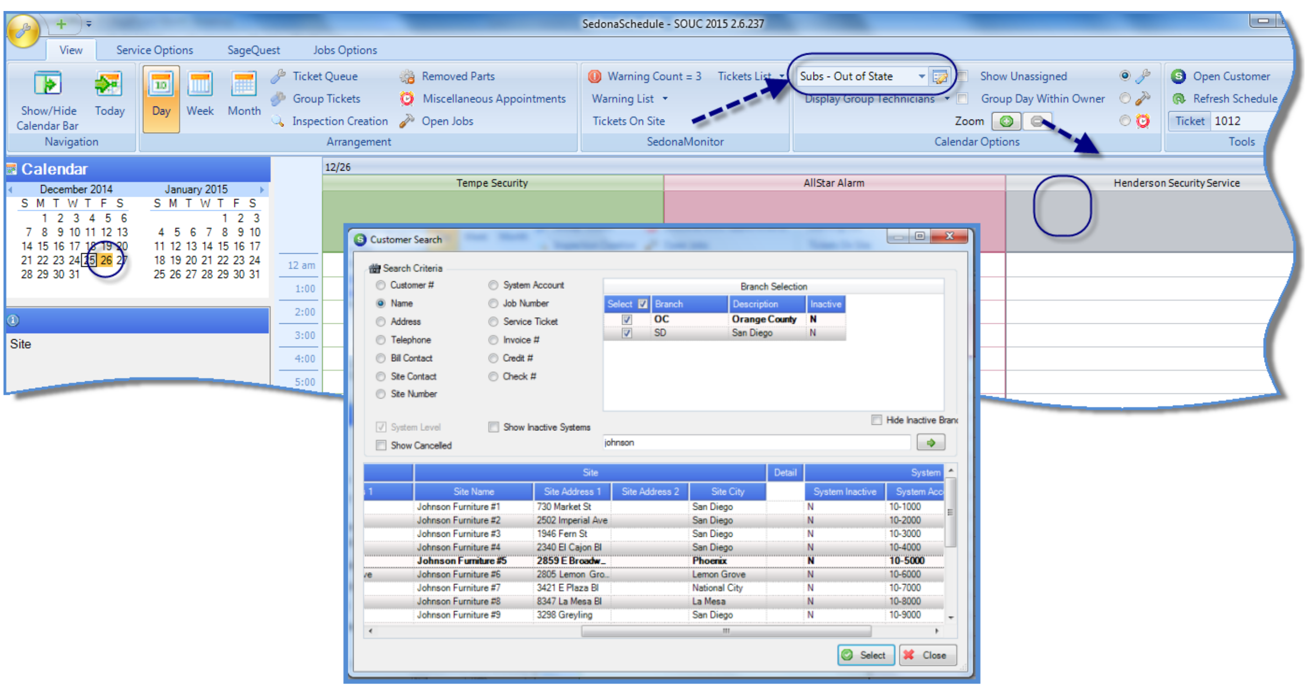
Vendor Tickets may be created and scheduled from the Schedule Board by “Double-Click to Add” method, the same as regular Service Tickets.

From the Schedule Board make certain to:

- Click on the Day view from the Ribbon
- Select a Display Group that contains your company’s Service Providers
- On the Calendar click on the date for the appointment to be scheduled
- The Wrench Icon  is selected for the “double-click to add” option

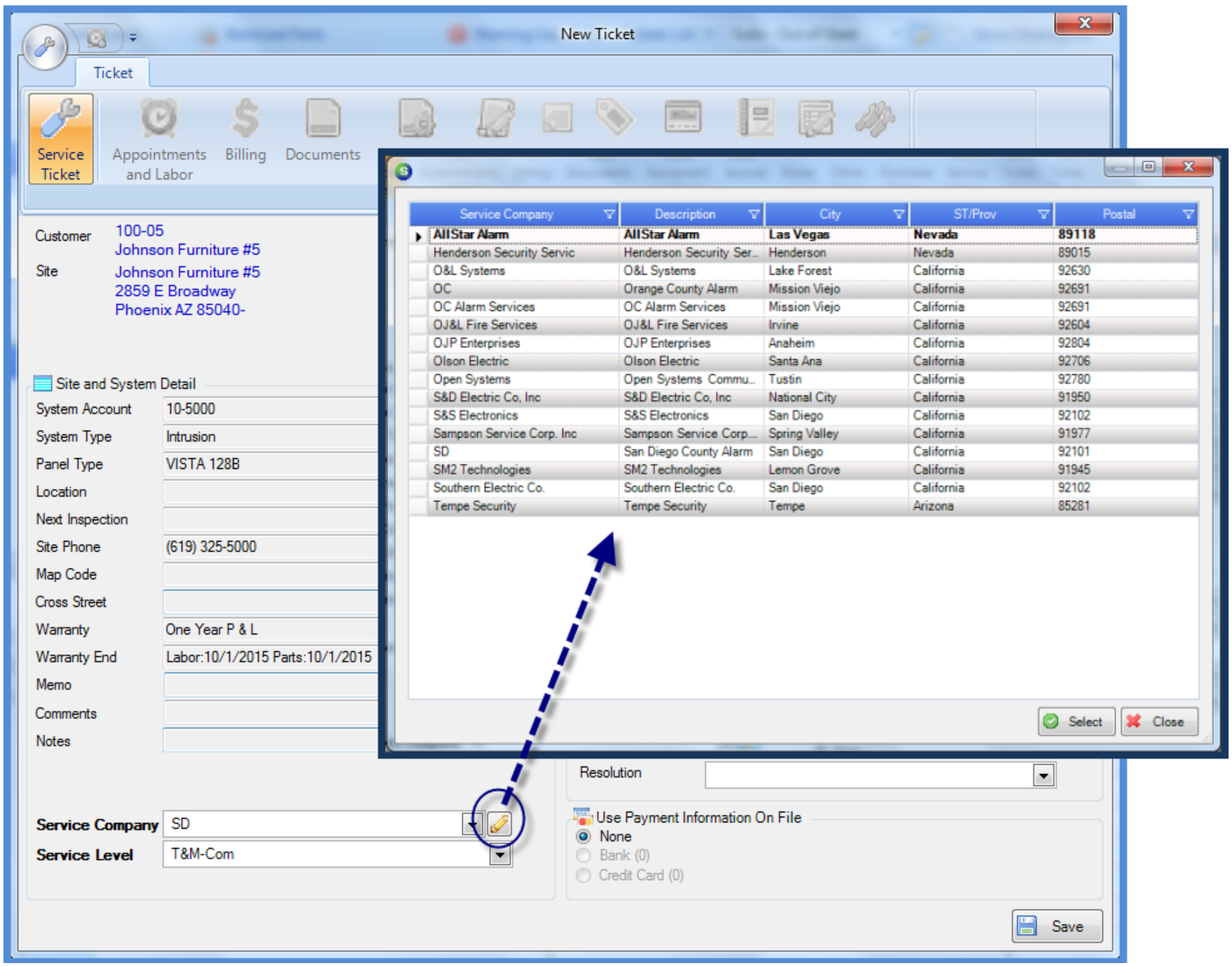
Determine which Service Provider and time-slot will be used for the appointment, and then double-click at that location on the Schedule Board. The Customer Search form will be displayed for locating the account for which the Ticket/Appointment will be created.

Located the Customer/Site/System for the Ticket and double-click on the row within the search results grid.



Scheduling a Vendor Appointment from the Schedule Board (continued)

The new Ticket form will be displayed. In the Service Company field, click on the pencil icon to open the Service Company lookup form. Double-click on the Service Company (Service Provider) for the Ticket. Finish filling out the data entry fields on the Ticket according to your company's policies and procedures and click the Save button when finished. The Ticket is created and saved as a Vendor Ticket and will appear on the Schedule Board.



Processing Vendor Service Tickets

The Dispatching, Re-Scheduling and Deleting of Vendor Appointments is accomplished in the same manner as a regular service ticket. The same applies to adding Parts, ordering parts, reviewing for Invoicing and Closing. Please refer to these topics earlier in this document for detailed information.

Inspections

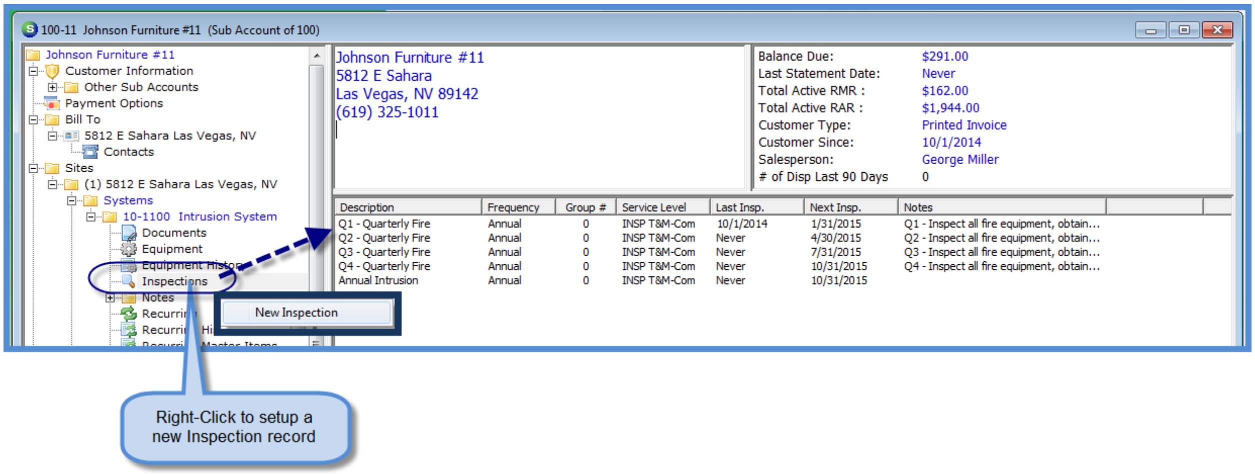
This section is designed to provide information on how to generate bulk Inspection Tickets. This section includes the following topics:

- Setup of Inspection records
- Viewing List of upcoming Inspections
- Creating Inspection Tickets

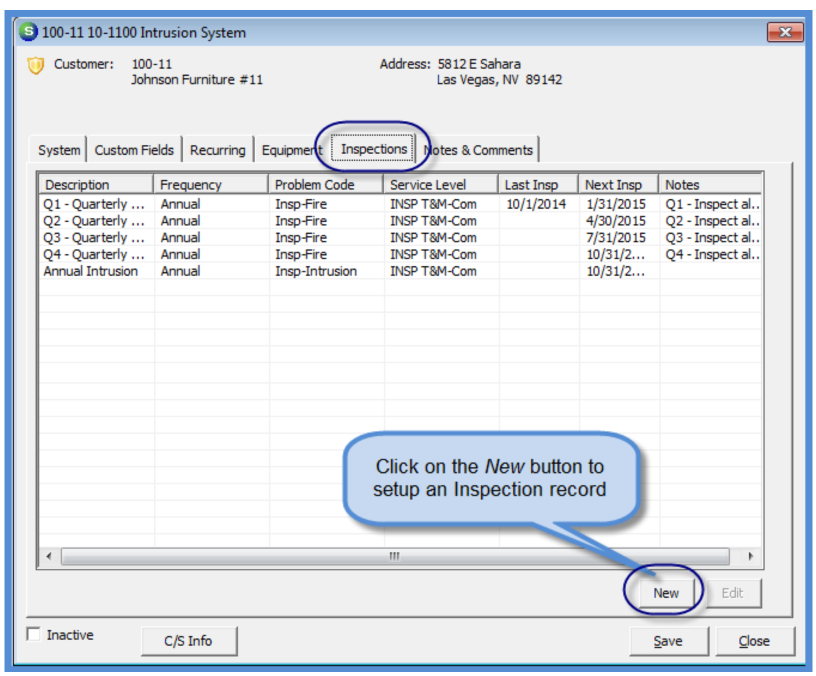
Inspection Setup

The Inspection Ticket generation program within SedonaSchedule creates tickets in bulk based upon the information contained in the Inspection Setup records that are attached to a Customer's System record within the Customer Explorer. It is important to understand how to setup and maintain Inspection information as it will have a direct effect on what information will used to create the Inspection Tickets.

New Inspection records may be setup by right-clicking on the Inspections option of the Customer Tree at the System level.



The New Inspection setup form may also be accessed by opening a System record in edit mode, then navigating to the Inspections tab [of the system record].

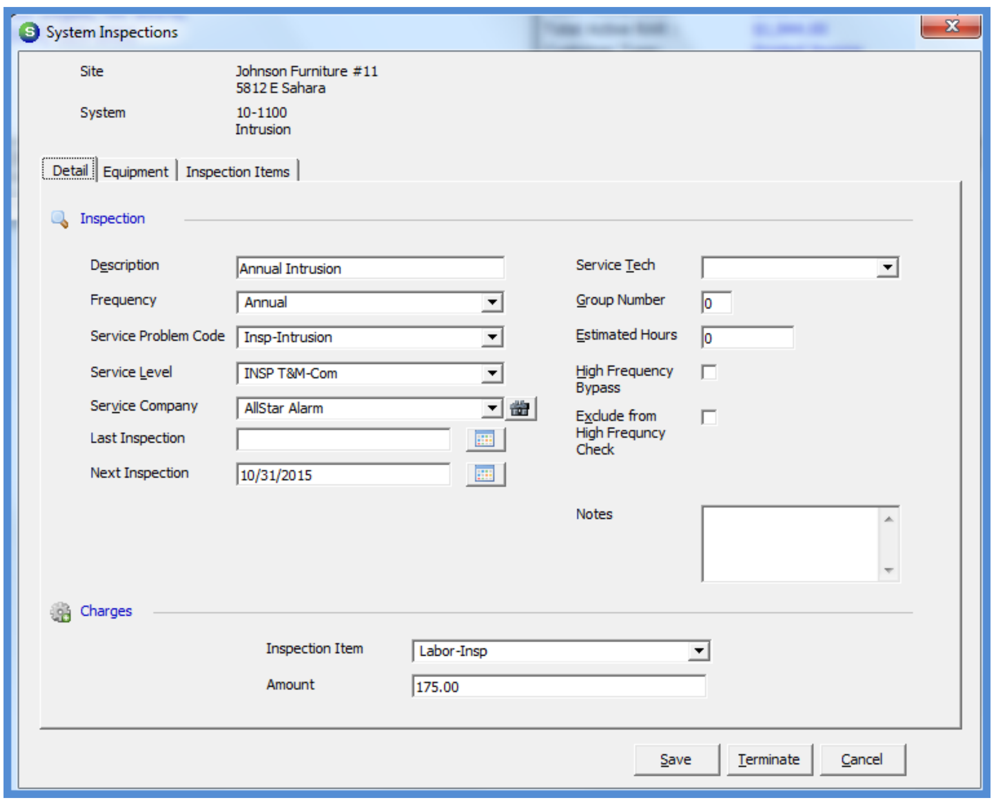


Inspection Setup (continued)

The System Inspections form is comprised of three tabs; Detail, Equipment and Inspection Items.

- Detail tab - Information on the Detail tab is required – this is the information used to generate the Inspection Ticket.
- Equipment tab – in prior versions of SedonaOffice, this form was used to select parts from the System Equipment that should be inspected. This information would display and print on the Inspection Ticket form. The Inspection Ticket printing has been changed to print all of the parts on the System Equipment List, so this form is no longer needed.
- Inspection Items tab – This form is used to list devices and quantities to be inspected. This information is not linked to the System Equipment List.

The following pages will describe each data entry field (and its purpose) on the *Detail* form.

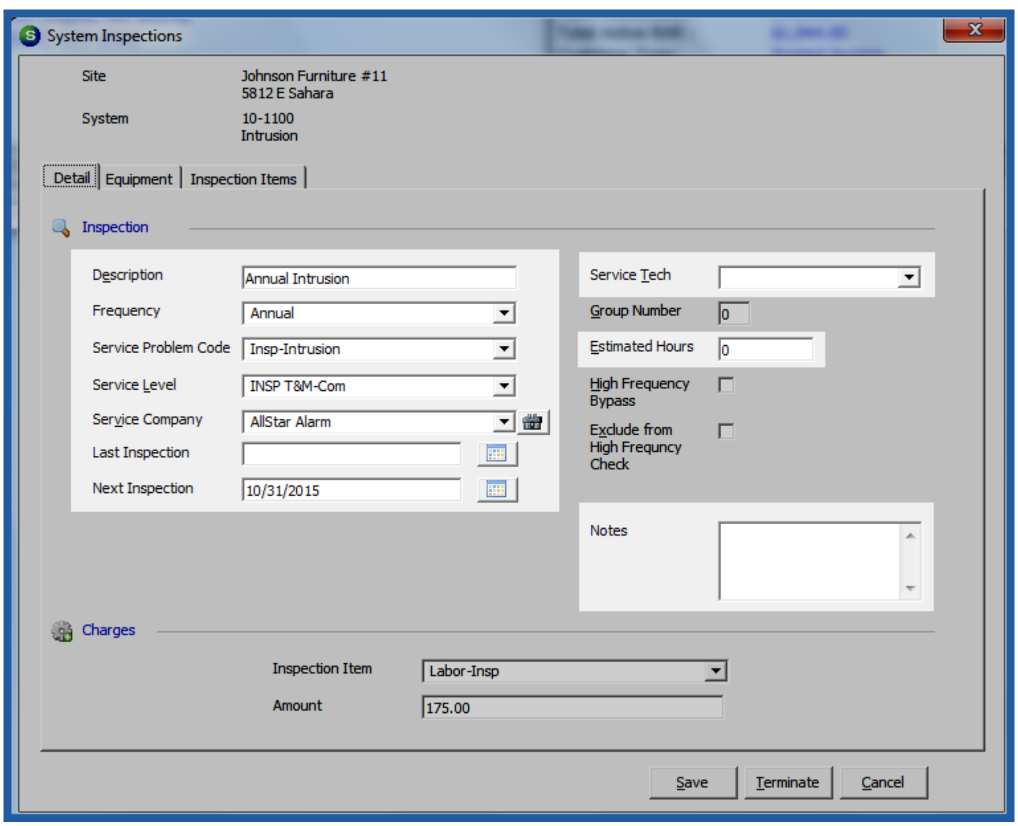


Inspection Setup (continued)

Inspection Setup – Detail form

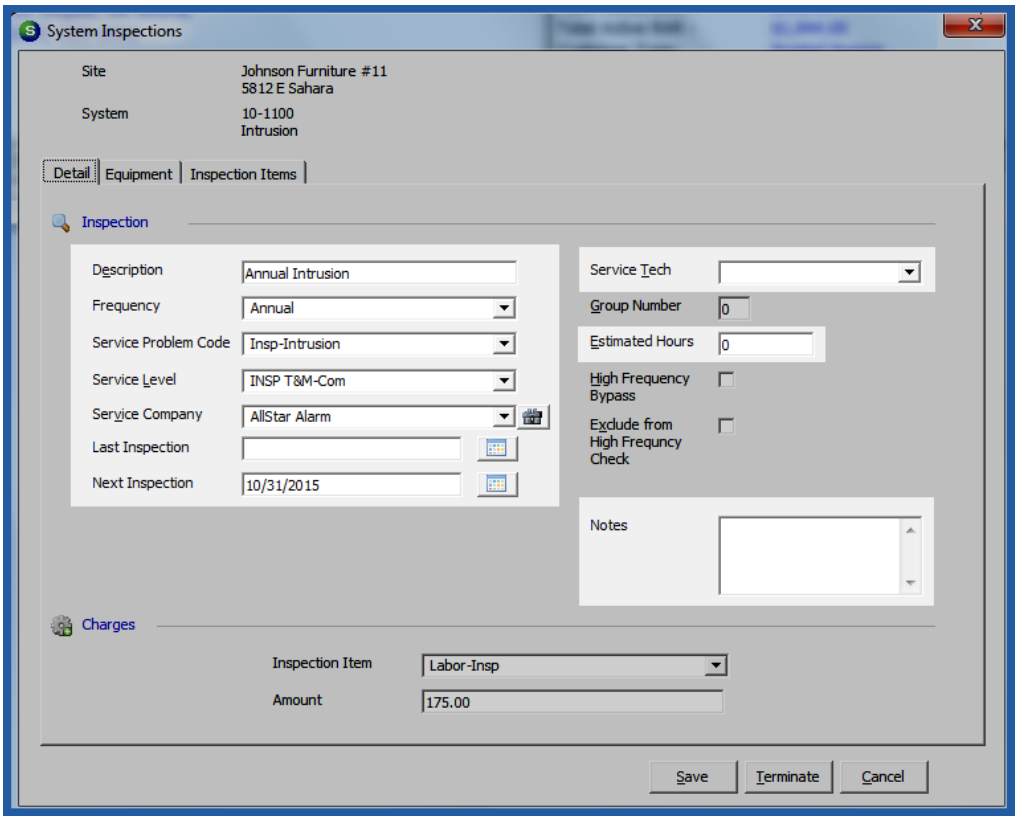
On the left side of the Inspection Detail form are seven data entry fields – six of these are required; fields which are bolded below are required.

- **Description** – This is a free-form text field to enter information about the inspection – 50 character limit.
- **Frequency** – How often Inspection Tickets should be generated (drop-down list choices controlled by SedonaOffice).
- **Service Problem Code** – Problem Code to be used on the Inspection Ticket.
- **Service Level*** - The Service Level to use on the Inspection Ticket. This determines the billing rules for the Inspection.
  *If the Service Level selected from the drop-down list has been setup to link to a recurring line, two new fields will be displayed below the Next Inspection date field: Recurring Item Link and Cycle Amount; these fields must be populated.
- **Service Company** – The Service Company that will be assigned to the Inspection Ticket. If a Service Provider is selected, once the Inspection Ticket is generated, it will automatically be created as a Vendor Inspection type ticket.
- Last Inspection – If the date of the last Inspection is known, that date may be entered here for informational purposes. This is not a required field.



Inspection Setup (continued)

- Next Inspection – Enter the date on which the Next Inspection Ticket is due.
- Service Tech – A preferred Technician may be selected; when the Inspection Ticket is created, the Technician field on the Service Ticket form will be automatically filled with this name.
- Notes – Any information entered into this field will automatically create a Note on the Ticket every time an Inspection Ticket is generated. Typically this is used for special instructions for the Inspector – 1,024 character limit.



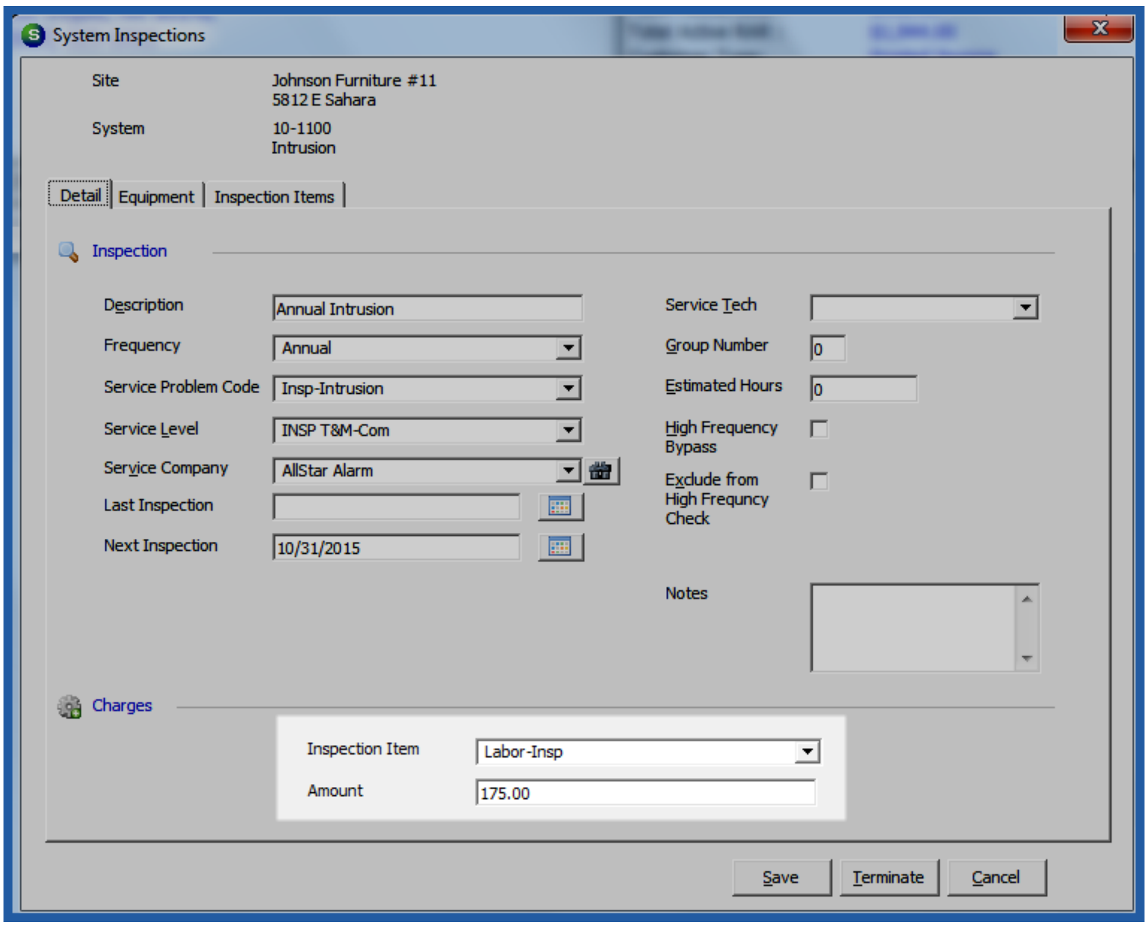
Note: The Group Number, High-Frequency Bypass, and Exclude from High Frequency Check fields are only used if your company has activated and is using the Group Tickets feature.

Inspection Setup (continued)

The next two fields are only used if you have a pre-negotiated amount that you will charge the Customer each time the Inspection is performed.

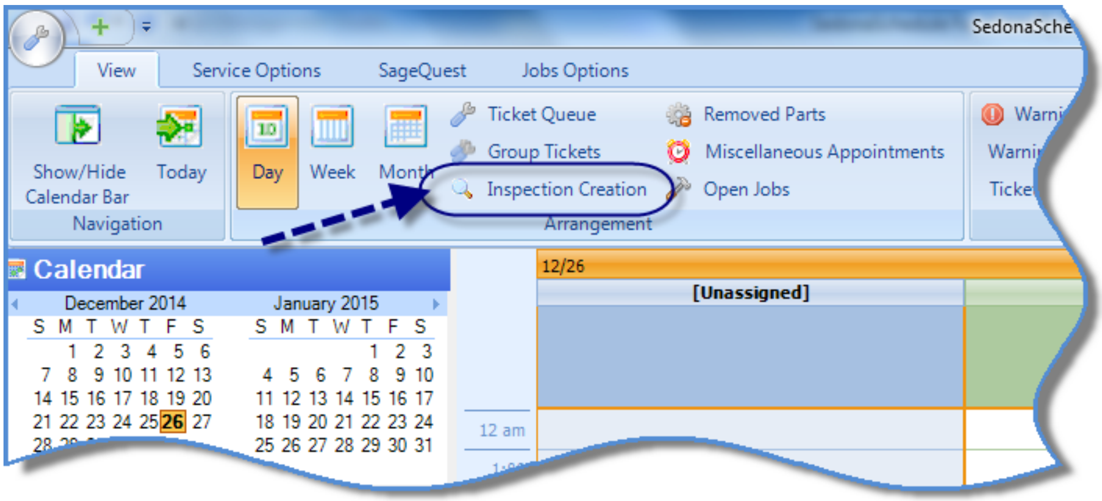
These fields would not be used if you are invoicing the customer for the Inspection through the Cycle Billing process or if billing the customer on a time and material basis.

- Inspection Item – If a set fee is to be charged to the Customer each time the Inspection is completed, select the Invoice Item to be used for invoicing the Customer.
- Amount – Enter the amount to invoice the customer for the Inspection service.



Creating Inspection Tickets

From the Arrangement Ribbon Group, click on the *Inspection Creation* button.

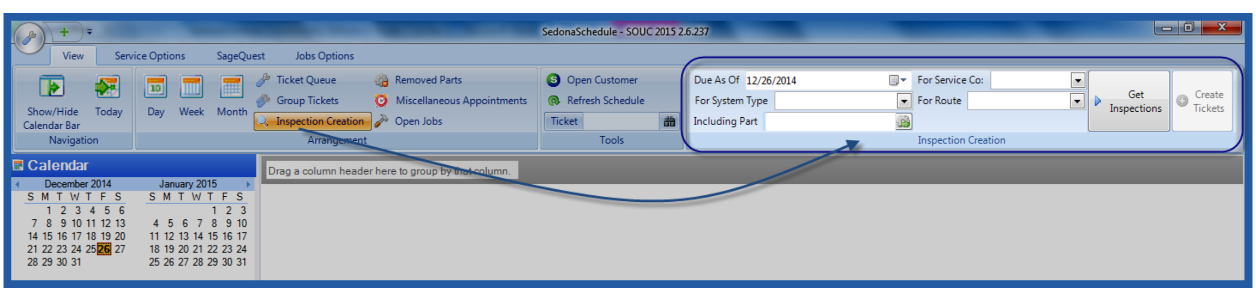


A new Ribbon Group, labeled "Inspection Creation" will be displayed. The fields on this Ribbon Group are used to select which Inspections Tickets will be created.

In the *Due As Of* field, enter the date through which Inspections Tickets will be created. The "Next Inspection Date" on the System Inspection setup record is used to determine which Inspection Tickets need to be created.

Many companies generated Inspection Tickets 30 days in advance to allow for planning the necessary resources.

After selecting the *Due As Of* date, click on the *Get Inspections* button – this will display a list of all Inspections due by this date. This will not create the Inspection Tickets yet – just provides a list for review prior to creating the Tickets.



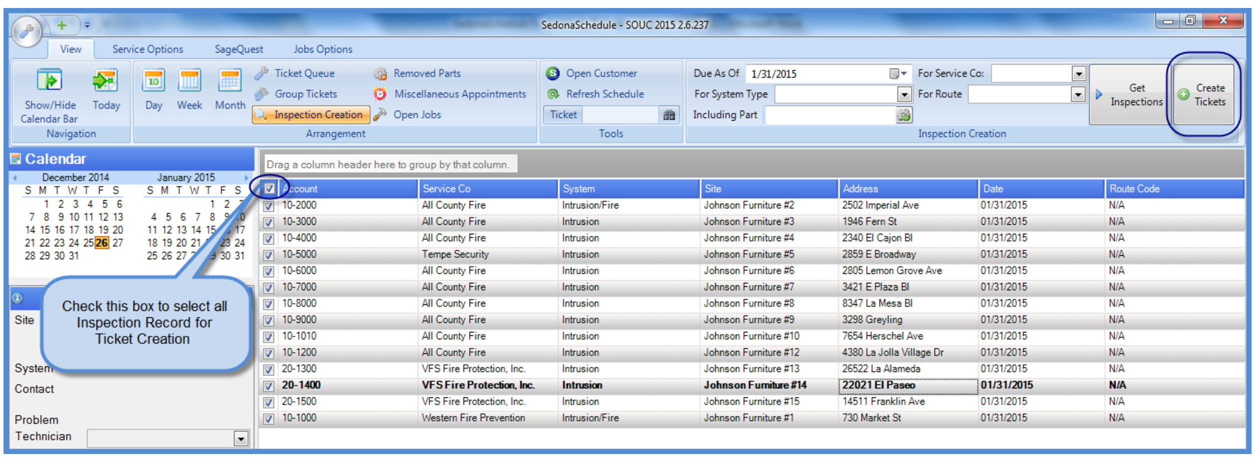
Creating Inspections Tickets (continued)

A list of all Inspections that meet the criteria selected will display in the list. By default, none of the Inspection records are selected for ticket generation. To select all Inspections in the list, select the checkbox in the header row. If certain Inspection records are to be excluded from ticket creation, un-check the box to the left of those records.

Once you have made the desired selections from the Inspection viewing list, click on the *Create Tickets* button.

Depending on the number of Inspection records which were selected for ticket creation, the process may take a few seconds to a few minutes – be patient.

You will know when the Inspection Ticket creation process is complete when the list of Inspections is empty (if all inspection records were selected) or the list of un-selected Inspections is all that is shown remaining in the Inspection List.



Creating Inspections Tickets (continued)

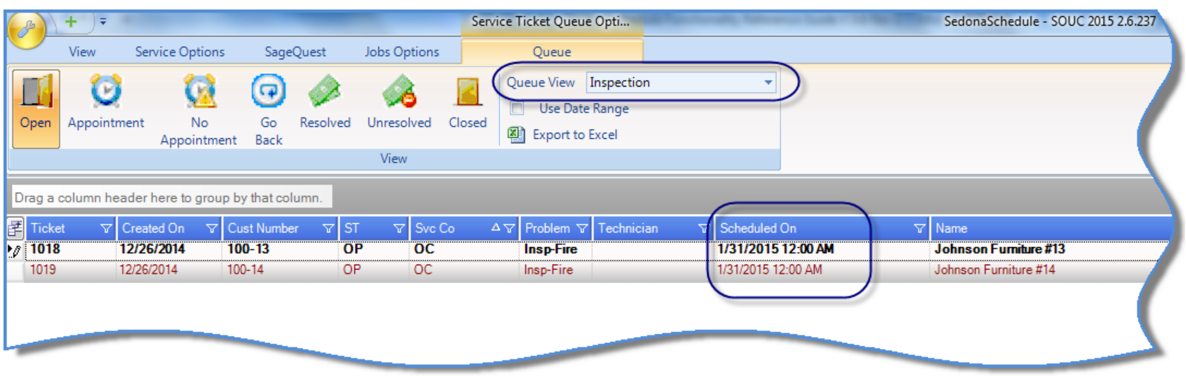
Once the Inspection Tickets have been created, they are viewable from the Ticket Queue(s).

As previously mentioned, Inspection Tickets are processed in the same manner as regular Service Tickets.

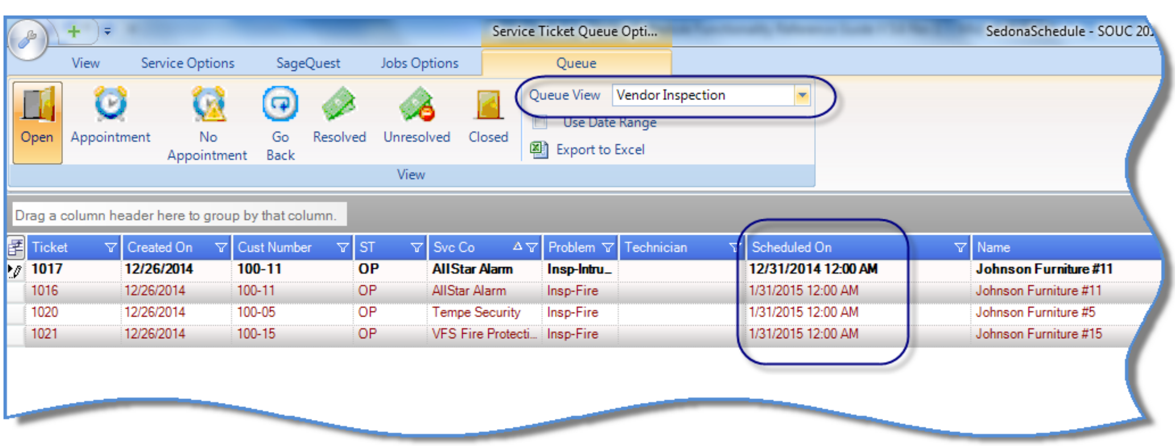
Note: Within the Ticket Queue, the *Schedule On* date field will display the date on which the Inspection is due to be completed. This does not schedule an appointment for the Inspection Ticket; this is just a reminder to the staff member who schedules the Inspections, when the Inspection Tickets need to be completed. Once an Appointment is scheduled, this field will update with the Scheduled Appointment Date/Time.

⚠ **Important Note:** If the Inspection Ticket is not completed and closed on a timely basis, the next Inspection Ticket may not be created when needed. For example, if Inspections are due quarterly, if the current Inspection Ticket is not completed and Closed prior to the next due date, a quarter will be missed.

Ticket Queue - Company Inspection Tickets



Ticket Queue - Vendor Inspection Tickets



Additional Features

This section is designed to provide information on additional features available within SedonaSchedule. Topics in this section include:

- Miscellaneous Appointments
- "Firm" Appointments
- Technician Appointment Clock-out & Clock-in function
- Copy and Paste Technician Appointments

Miscellaneous Appointments

A feature of SedonaSchedule is *Miscellaneous Appointments*. A miscellaneous appointment may be scheduled to block out time on the Schedule Board to indicate the Technician is not available to be scheduled for tickets or jobs.

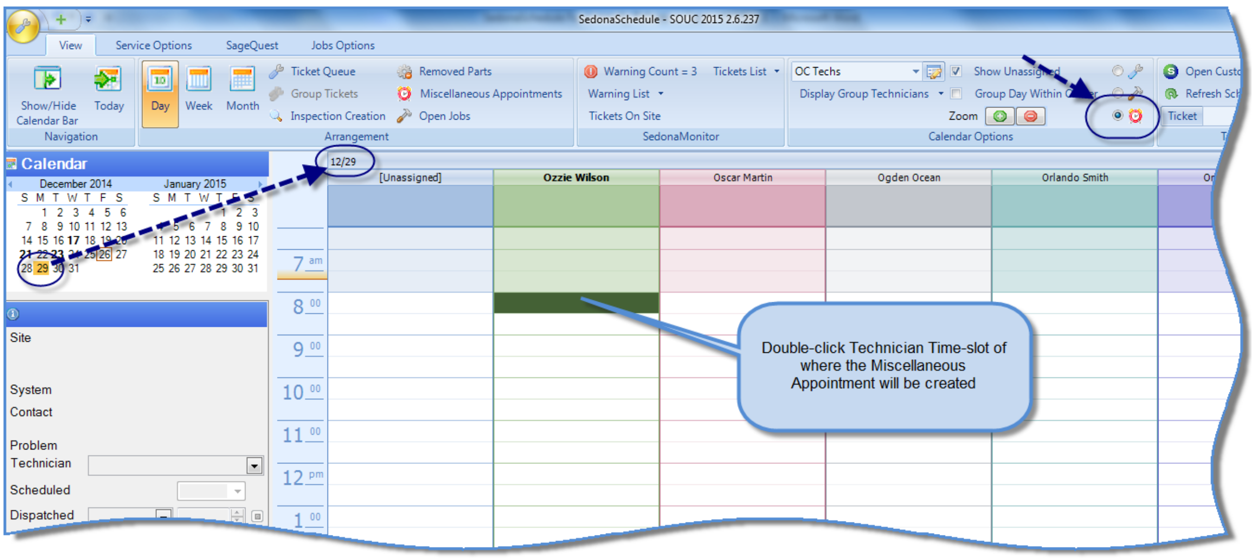
You may schedule a miscellaneous appointment for one or multiple Technicians at a time. These appointments may be for a single day, a portion of a day or several consecutive days. For example if several Technicians will be attending a meeting on the same date and time, you may setup all of these appointments at one time.

To schedule a miscellaneous appointment, follow the instructions on the following pages.

Creating a Miscellaneous Appointment

From the Calendar Options Ribbon Group, click on the *Miscellaneous Appointment* radio button. Click on the Date within the Calendar for which the appointment will be created. Make certain that you have selected the *Day* view from the Arrangement Ribbon Group. Miscellaneous Appointments may not be created from the *Week* or Month view.

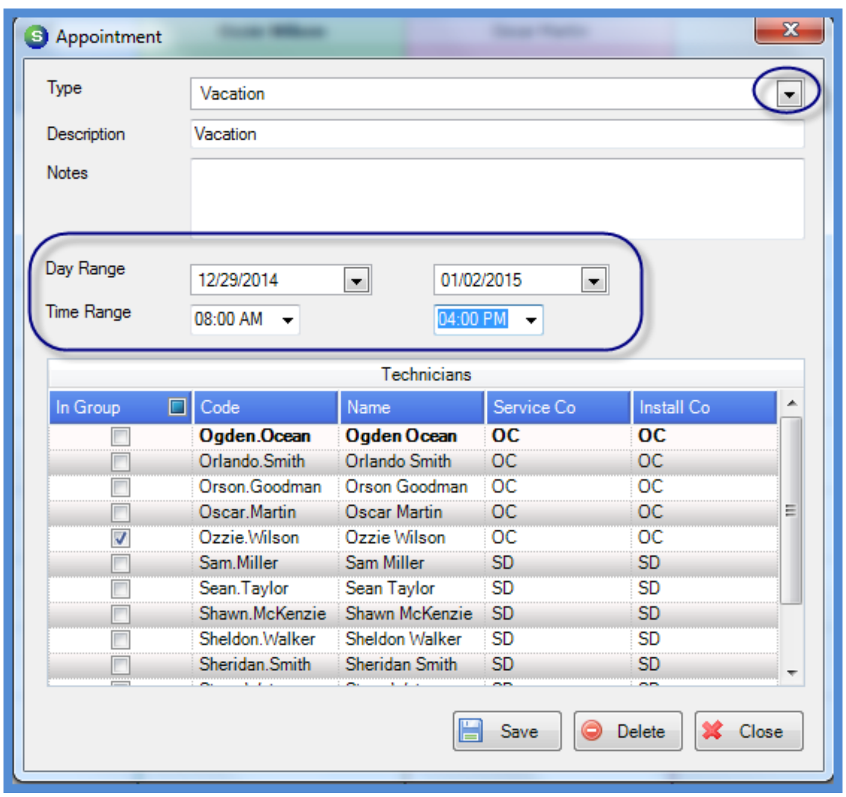
Within the Schedule Board double-click on the begin time within the column of the Technician to be scheduled for a Miscellaneous Appointment.



Creating a Miscellaneous Appointment (continued)

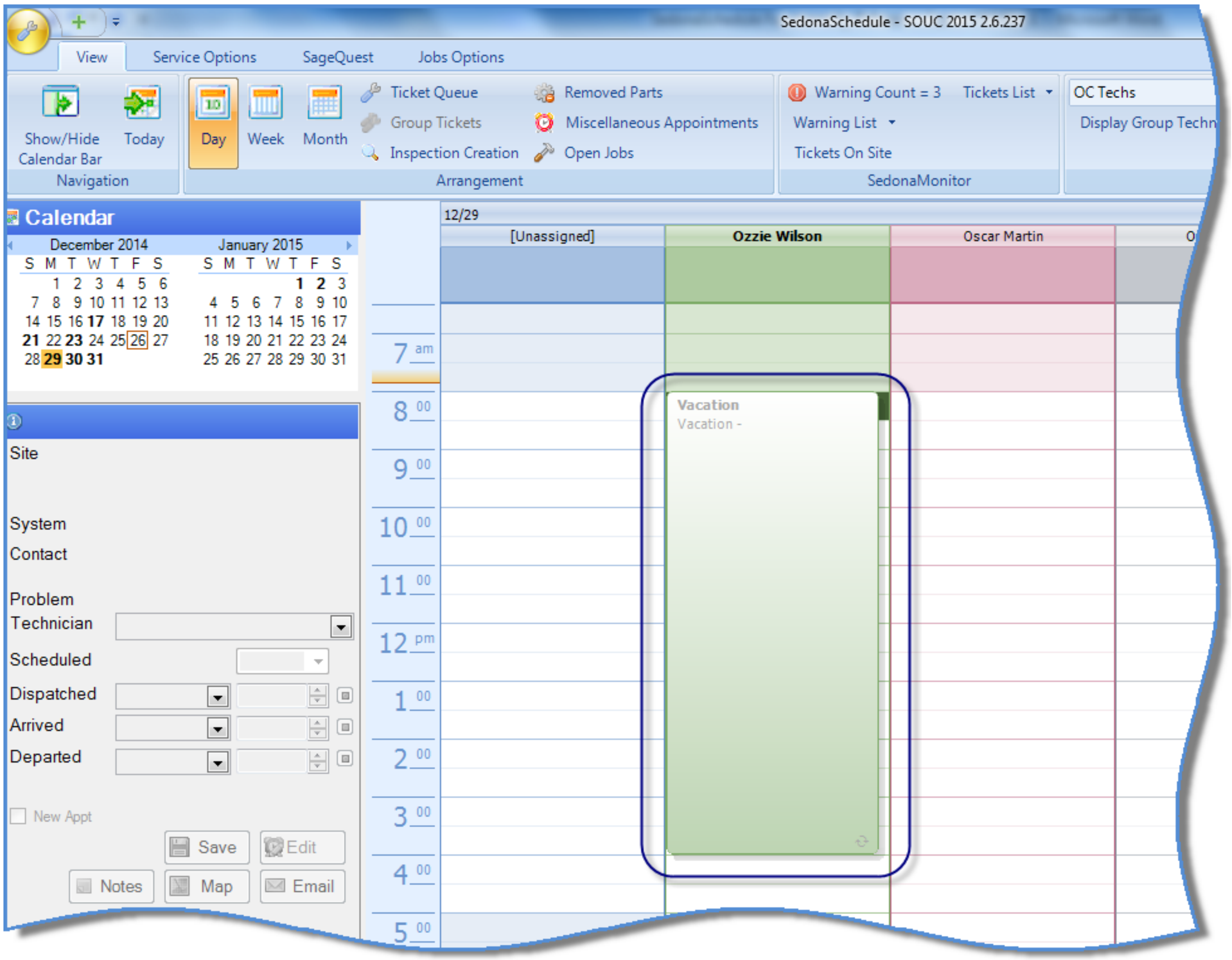
The *Appointment* form will be displayed. Enter information into the fields as described below. When finished click on the *Save* button to create the appointment(s).

- Type - Select the appointment Type from the drop-down list. The software contains several default appointment types – your company may add more choices to the list. Consult your company system administrator to add selections to the available list.
- Description - This field will auto-fill with the description associated with the Type; the User may change this if desired.
- Notes - Notes are optional; the User may enter up to 256 characters in this field. Any information entered into the Notes field will be viewable from the Schedule Board when hovering over the Miscellaneous Appointment.
- Day Range – Select the date range for the appointment
- Time Range – Enter the beginning and ending time for the appointment
- Technicians – If more than one Technician is to be scheduled for the same date/time, check the box to the left of each Technician name to be included.



Creating a Miscellaneous Appointment (continued)

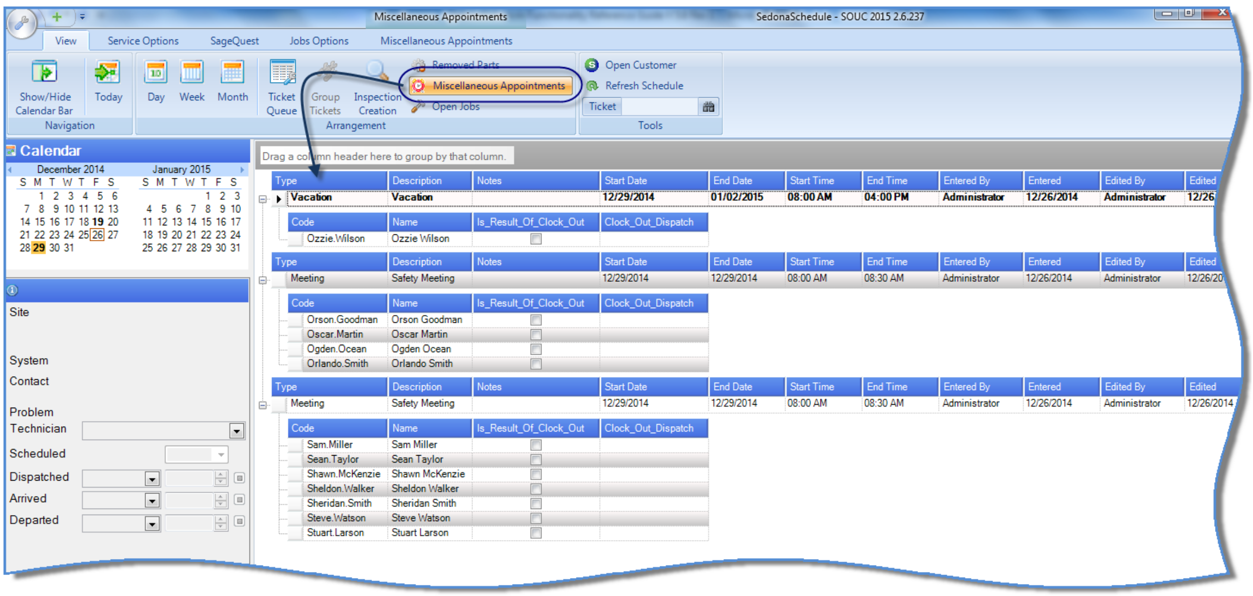
Once the Miscellaneous Appointment(s) has been saved, it will appear on the Schedule Board.



View List of Miscellaneous Appointments

To view a list of all scheduled Miscellaneous Appointments, click on the Miscellaneous Appointments button from the Arrangement Ribbon Group.

Miscellaneous Appointments are listed in groups by Service Company and appointment Type. To expand the group and view the individual appointments, click on the "+" symbol to the left of the group. If you need to make any changes, add notes or just want to view the details of the appointment, double-click on the appointment to open.



Firm Appointments

A "Firm Appointment" is one that must be completed on the scheduled date and time and should not be changed. Once an appointment has been marked as "Firm", it may not be moved or modified within the Schedule Board unless the User removes the "Firm" flag. The Firm Appointment option may be used for Ticket or Job appointments.

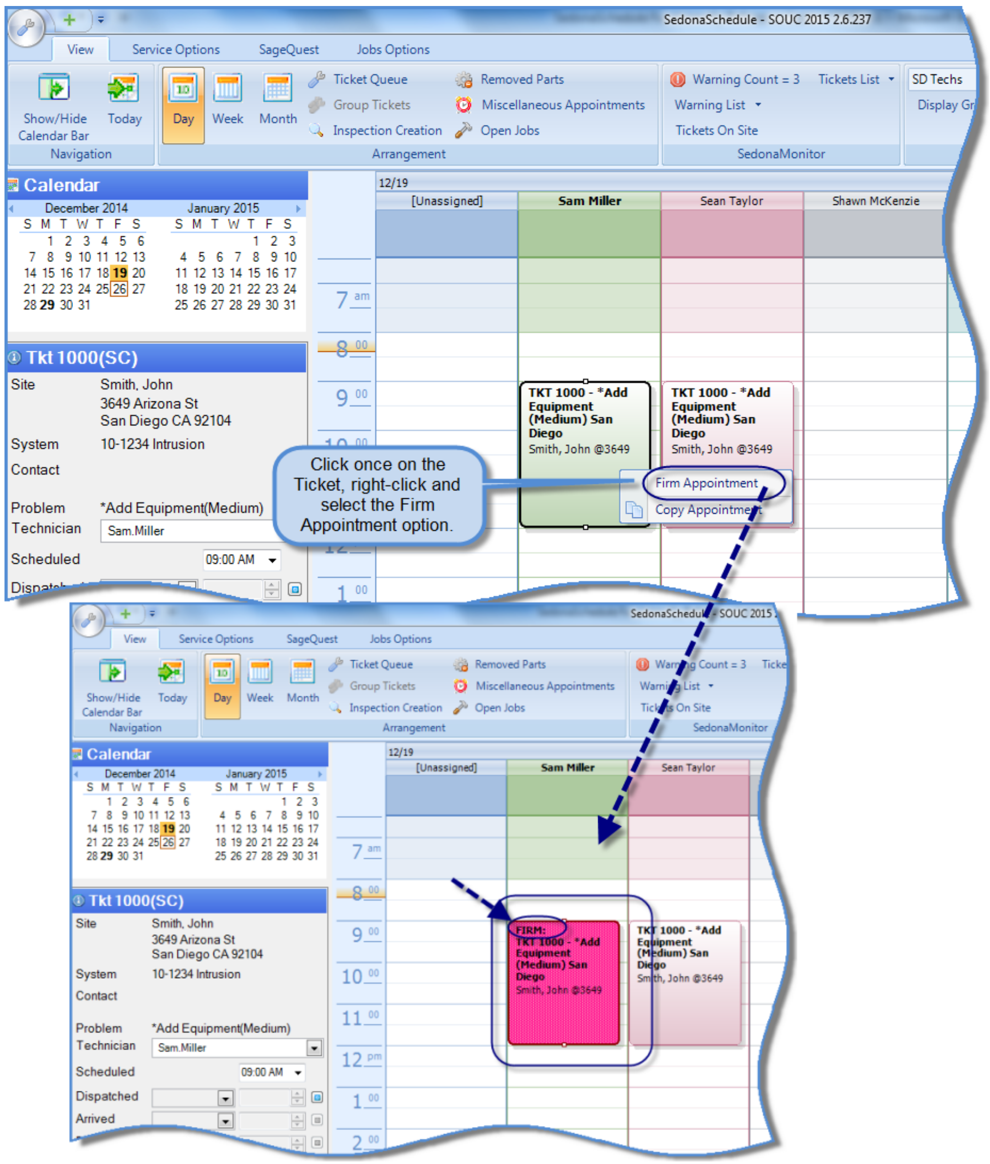
Marking an appointment as Firm, locks down the date/time and Technician for the appointment. While that appointment is locked, several restrictions are put into place by the software:

- Users cannot drag-and-drop a firm appointment to a different time-slot or to another Technician on the Schedule Board.
- You cannot "drag-adjust" the length of an appointment on the Schedule Board (i.e. grabbing the top or bottom of an appointment and increasing or decreasing its length).
- Within the Ticket and Job Dispatch Form, a checkbox labeled "Firm Appointment" is displayed. This works identically to the right-click option from the Schedule Board. When an appointment is firm, you cannot change the Technician, estimated length of time, or the scheduled date or time within these forms.

Firm Appointments (continued)

Flag an Appointment as "Firm"

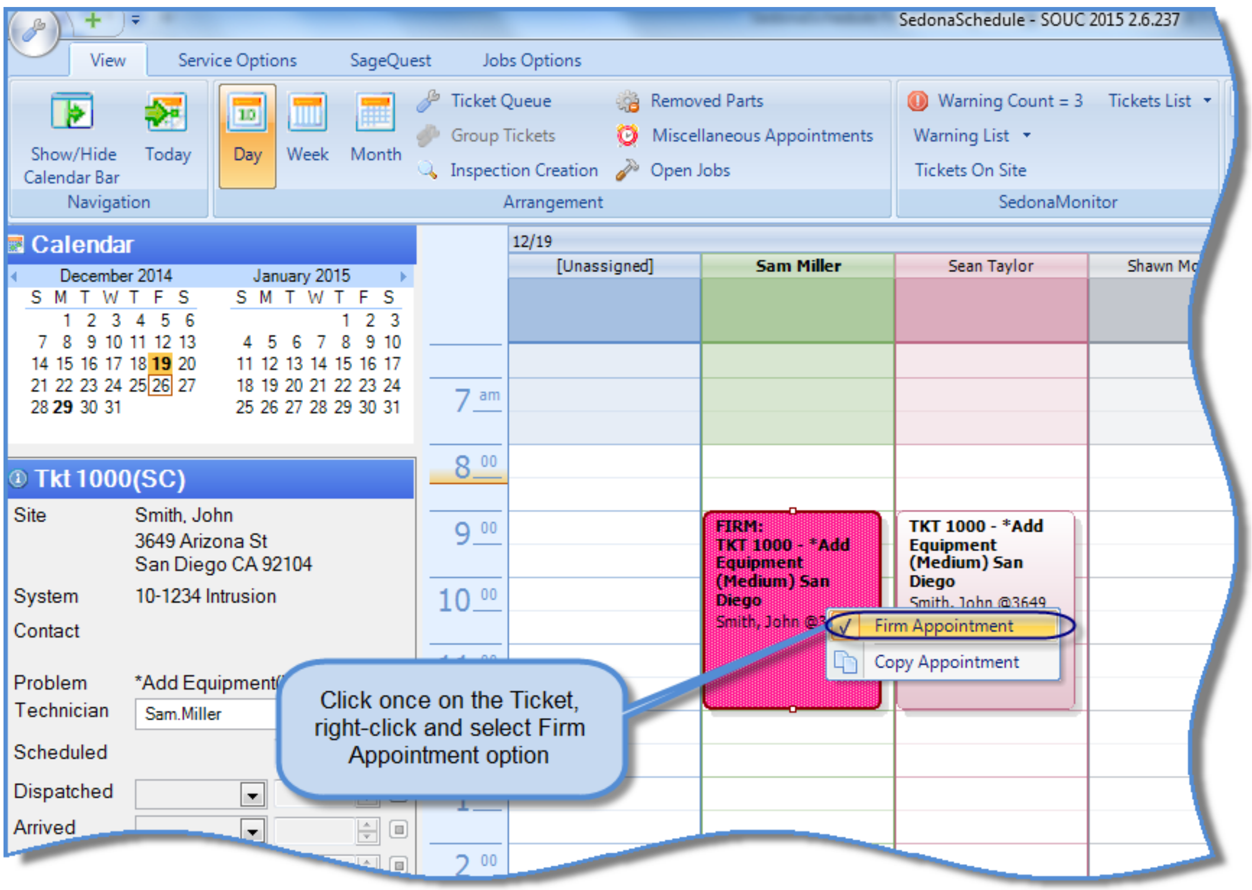
Flagging an appointment as "Firm" is performed from the Schedule Board while the Day view selected. Click once on the appointment, right-click and select the Firm Appointment option. The background color of the appointment will change to bright pink and the word "Firm" will be display above the Ticket or Job Number.



Firm Appointments (continued)

Remove the Firm Flag

If the Firm Flag needs to be removed, click once on the Appointment within the Schedule Board, right-click and select the Firm Appointment option. This will remove the Firm Flag.



Appointment Clock-out & Clock-in

The Clock-In/Clock-Out feature set facilitates managing down-time for Technicians and Installers. The time span allotted for the Ticket or Job remains constant with the transitions from clocked-in to clocked-out, ensuring that a scheduler always knows when an employee is free or busy.

The Clock-out & Clock-in is initiated from the Schedule Board by right-clicking on an appointment where the Technician has been marked as "On-Site" (green background color of the appointment).

When Clocking-out on an Appointment, the software automatically creates a Miscellaneous Appointment for the period of time the Technician is "Clocked-out". When a Clock-in is performed, the Miscellaneous Appointment is ended and a new "continuation" Appointment for the Ticket or Job is created for recording time against the Ticket or Job.

Typical uses of the Clock-out & Clock-in feature would be:

- The Technician may take a lunch break during the scheduled Ticket or Job appointment.
- The Technician must leave the Site to pick-up parts, but plans on returning.
- The Technician must leave to assist at another Site, but plans on returning.

This will prevent labor hours and costs from being applied to the Ticket or Job.

There are restraints placed on the times that can be entered for clocking in and clocking out. The time of a clock-out *must be later than the dispatch time*. Likewise, clocking-in (on a miscellaneous appointment) *must have a clock-in time later than the start of the appointment*.

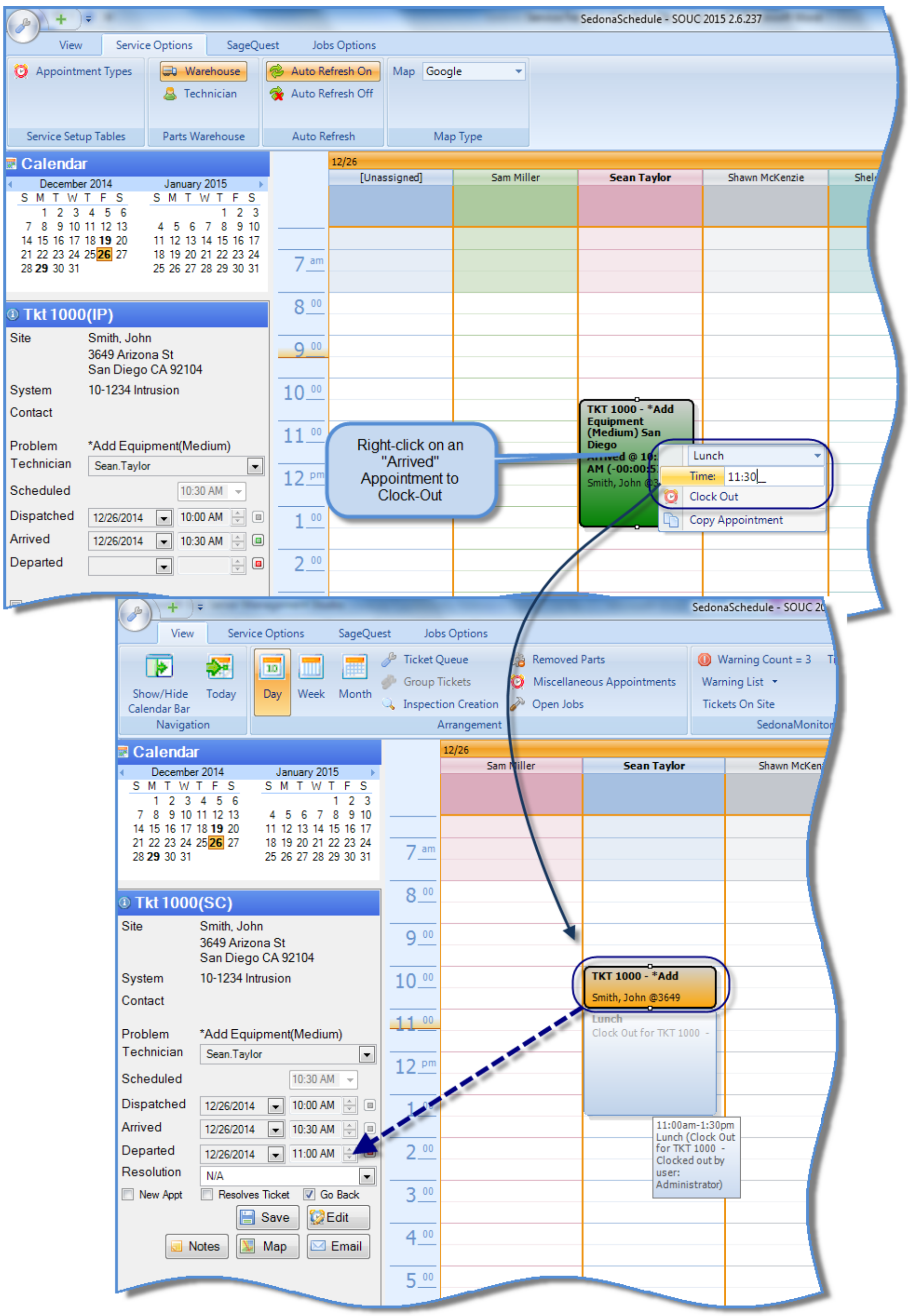
Contrary to the previously mentioned restraints, you can clock-out and clock-in after the regularly scheduled end of the appointment—whether it's a ticket, job, or miscellaneous appointment.

For example, you have a service ticket that starts at 8:00 am and is scheduled for two hours. The application will allow a User to clock-out of this ticket at 11:00 am. Doing this will create the miscellaneous appointment (for clock-out actions), or a service Ticket/Job (for clock-in actions) that starts and ends at the same time, i.e. a zero-length appointment.

Appointment Clock-Out & Clock-In (continued)

Appointment Clock-out

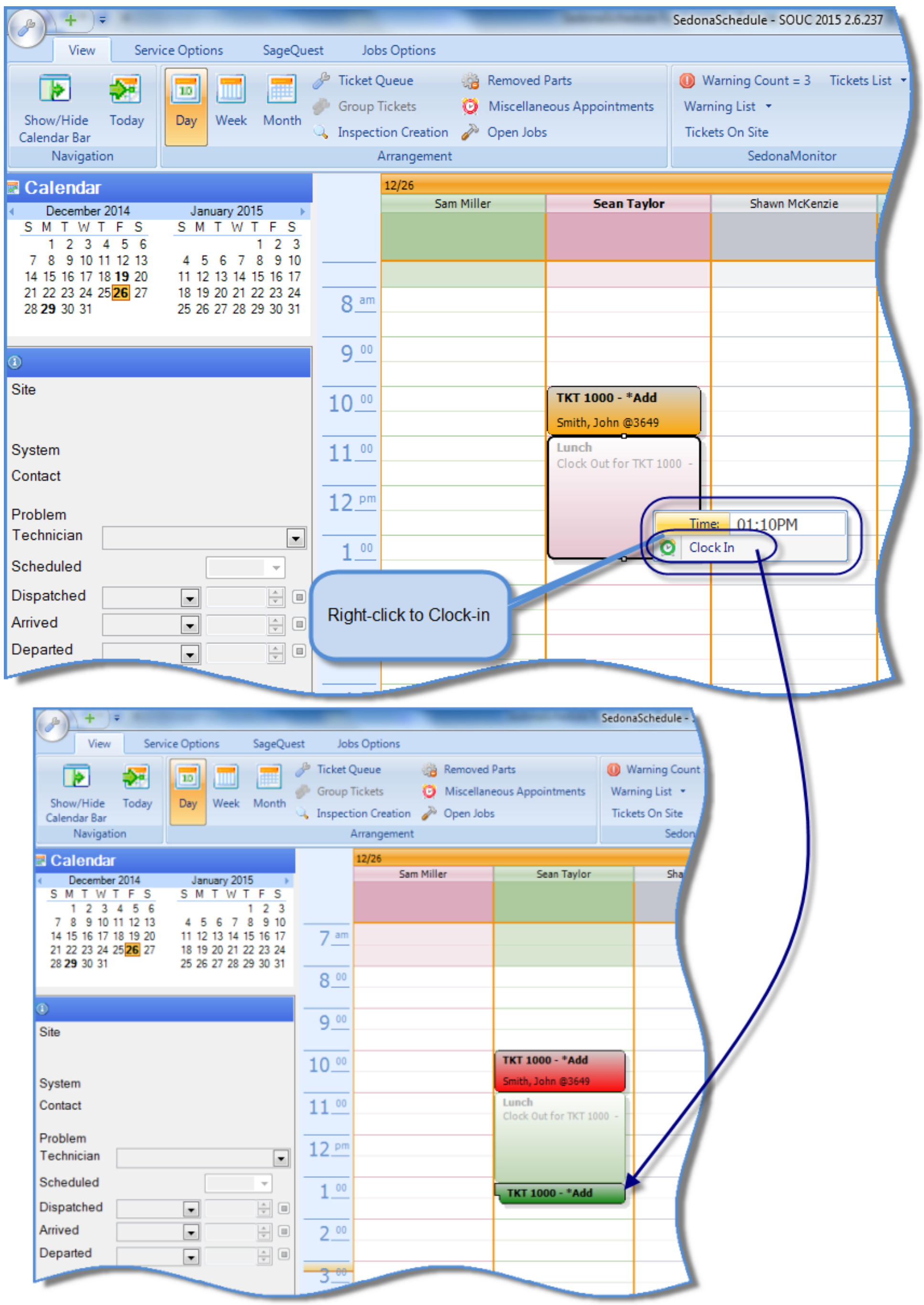
From the *Day* view of the Schedule Board, click once on the appointment then right-click to open the Clock-Out form. Within the Clock-out form, select the Clock-out type and enter the clock-out time.



Appointment Clock-out & Clock-in (continued)

Appointment Clock-in

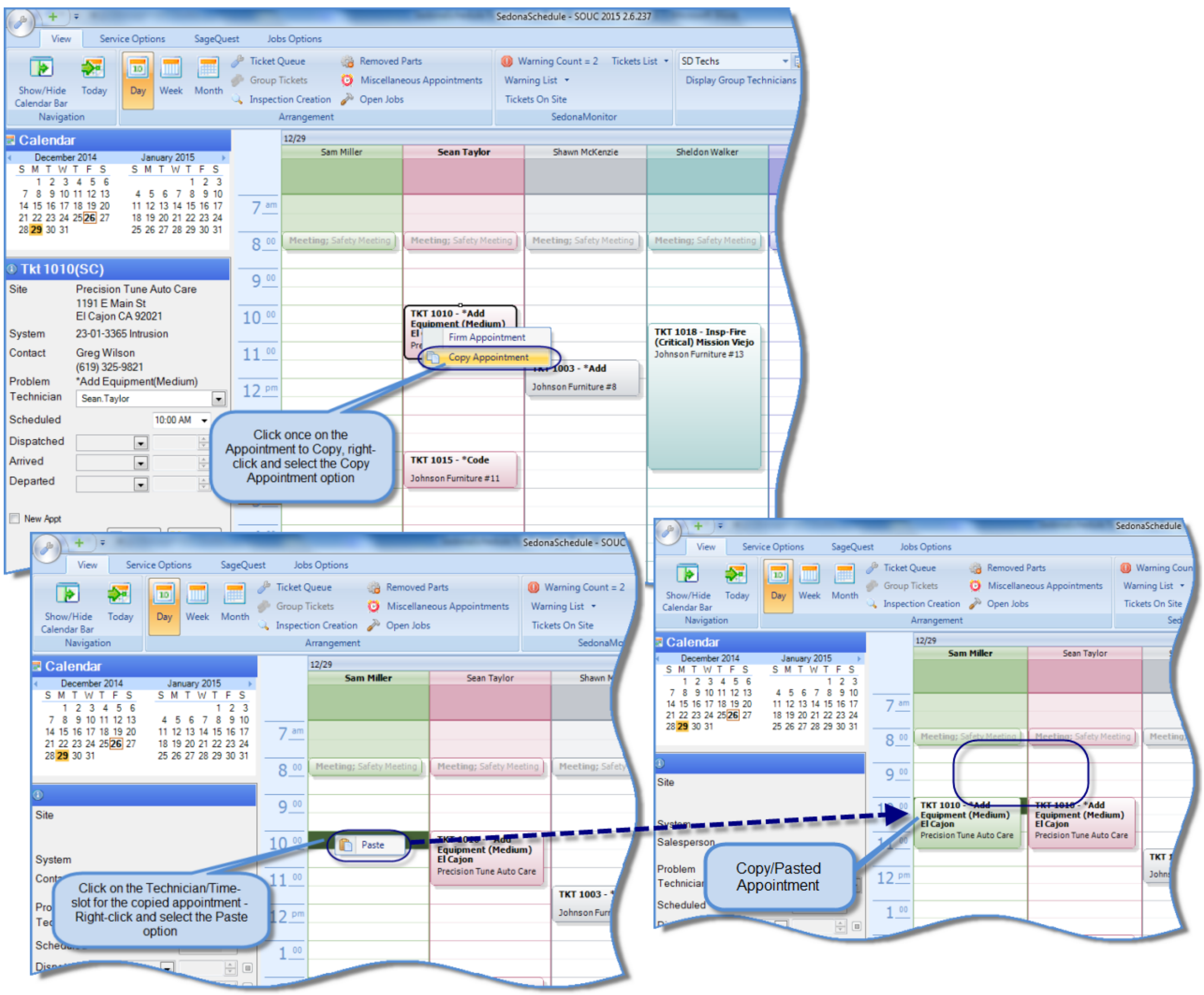
When ready to Clock-in to the appointment, click once on the Appointment, right-click to enter the clock-in time and then click on the *Clock In* button.



Appointment Copy & Paste

If more than one appointment needs to be scheduled for a Ticket or a Job, the quickest method is to use the Copy and Paste feature from the Schedule Board. Appointments may be copied and pasted to the same Technician on the same day, a different day or to a different Technician on the same or different day.

To use the Appointment Copy and Paste feature you will begin from the Schedule Board in the *Day* view. Click once on the Appointment to be copied, right-click and select the Copy Appointment option. Next click on the Technician/time-slot desired for the copied appointment, right-click and select the Paste option.



Job Features

There are two main Job related features available in SedonaSchedule; the ability to view the list of open Jobs which is similar to the Job Queue in the main SedonaOffice application, and the ability to create/dispatch and manage Job Appointments. Both of these features may be accomplish from a Job record within the main application, however for companies that want to manage all appointments in one place, SedonaSchedule was designed for this purpose.

The Open Job List within SedonaSchedule provides more flexibility [than the Job Queue in the main SedonaOffice application] with the available use of filters and arranging the columns within the list according to individual user preferences.

Scheduling Job Appointments in SedonaSchedule is quite a bit different than the method available within a Job record. In SedonaSchedule, users are able to schedule Job Appointments on multiple dates for the same Installer as well as multiple Installers and dates all from one form – this feature is not available when scheduling within a Job record in the main SedonaOffice application.

Of course, there is nothing preventing companies from scheduling exclusively from a Job record; it is a matter of preference for each company.

Open Jobs List

The Open Job List is accessed by clicking on the *Open Jobs* button located in the Arrangement Ribbon Group.

When clicking on the *Open Jobs* button, the list of Jobs will be displayed.

The Job List is configured with the Field Chooser, which functions just as the Field Chooser in the Ticket Queues.

In the header area of the Job List are a few function buttons:

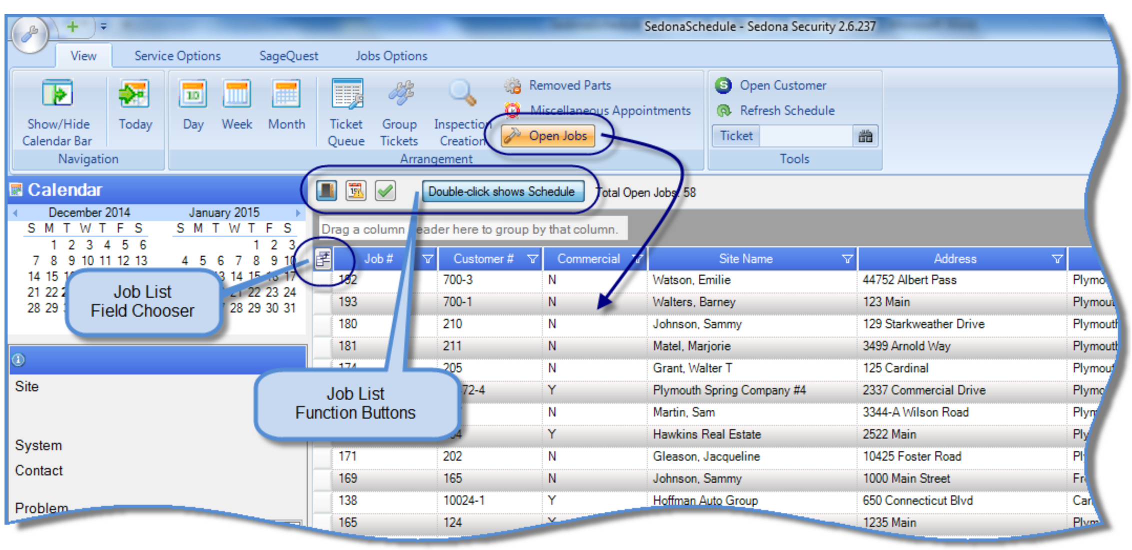
Open Door button – when clicking on this button, the list is refreshed with all Open Jobs.

Calendar button - clicking on this button will list all Un-scheduled Jobs (Jobs that have never been scheduled).

Checkmark button - this option displays the list of Upcoming Tasks (setup on a Job Task List).

Toggle button Double-click shows Schedule Double-click shows Job - clicking this button will toggle functionality to the desired function:

- When the button is displayed as Double-click shows Schedule, double-clicking on a Job in the List will open the Job Appointment Scheduling form.
- When the button is displayed as Double-click shows Job, double-clicking on a Job in the List will open the Job record in the main SedonaOffice application.

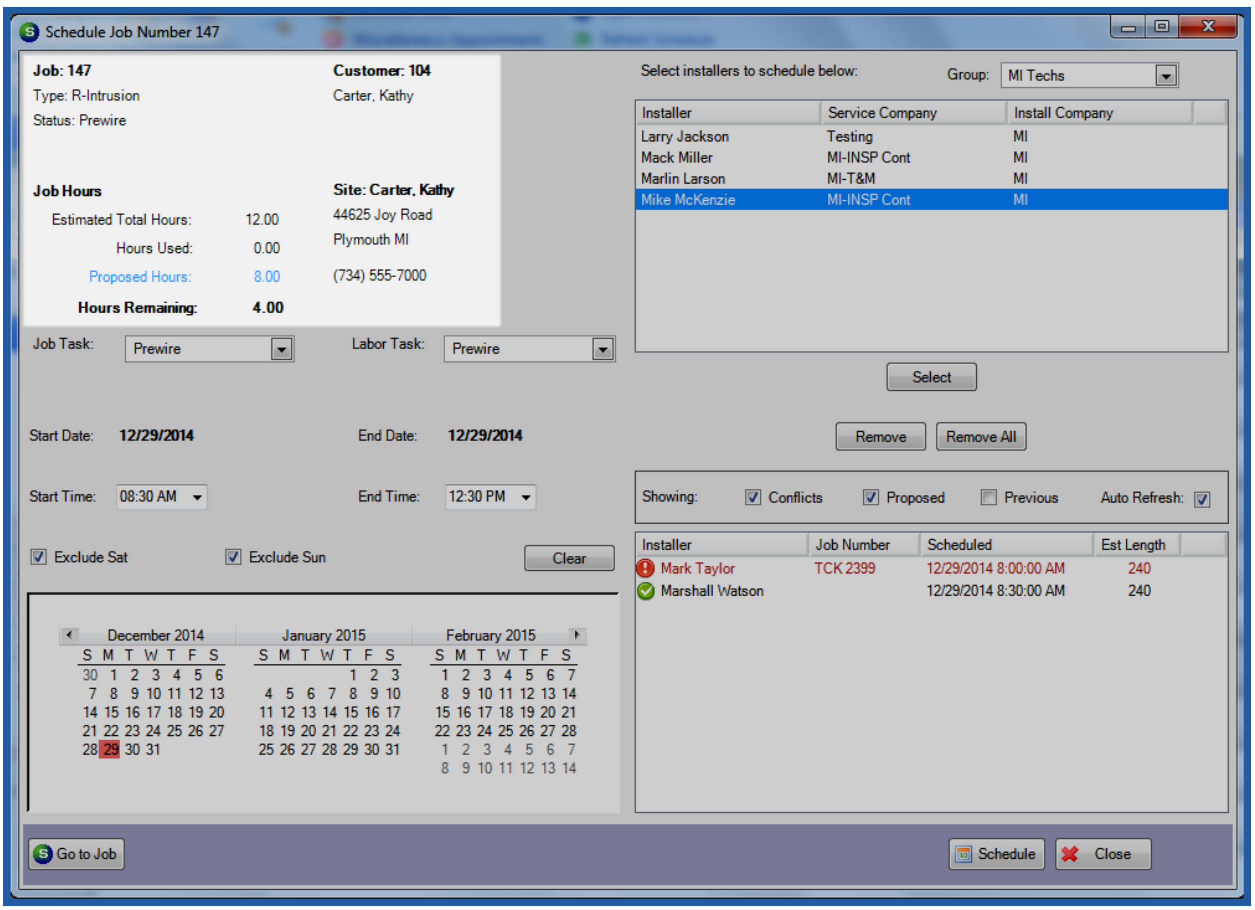


The Job Scheduling Form

Before scheduling a Job Appointment, it is important to understand the layout and functionality of the Job Scheduling form.

The Job Schedule form is comprised of several components, each of which will be explained on this and the following pages.

- ***Job Information*** – The upper left area displays information about the Job including the total estimated hours, hours used, proposed hours and remaining hours. As dates, times and Installers are selected in the scheduling form, the Proposed hours is automatically updated.

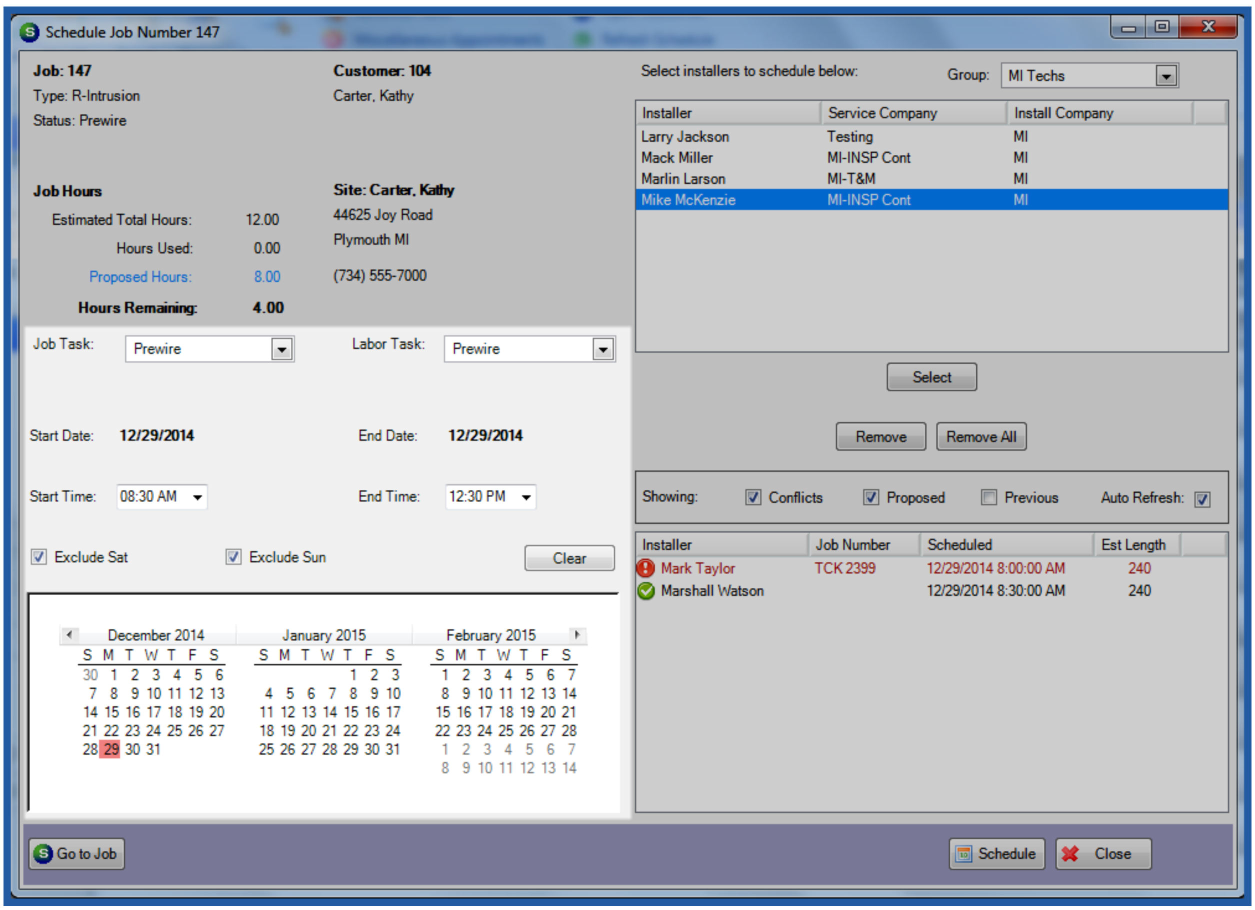


The Job Scheduling Form (continued)

- ***Task/Date/Time Information*** – The left side of the form below the Job Information is used to select the Job Task being scheduled, the Labor Task to be performed, start and end times for the appointment(s), and the Calendar on which you select the date(s) for the appointment(s).

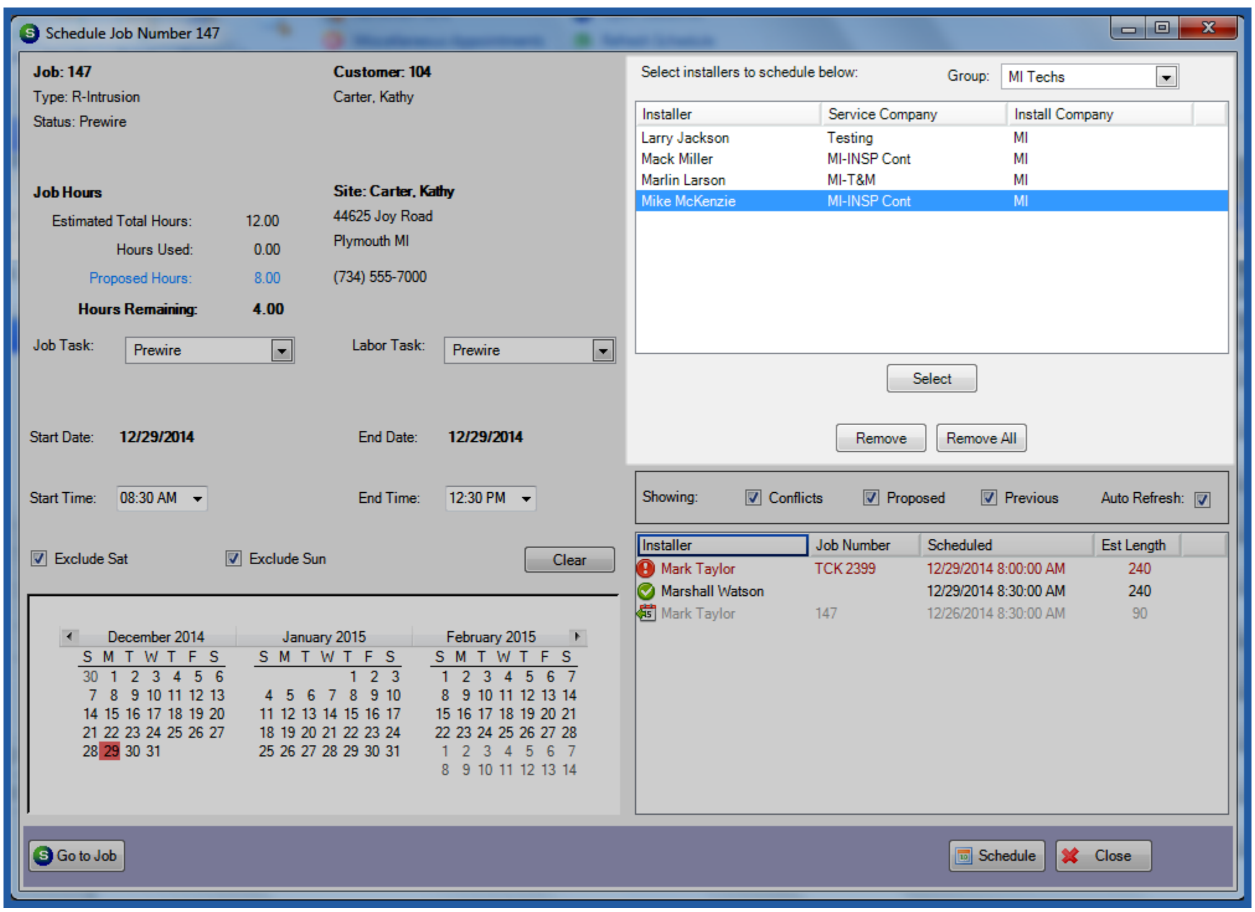
When selecting a Labor Task, the application automatically sets the Start and End Time based on the default minutes assigned to the Labor Task in SedonaSetup. This is just the default to expedite the scheduling process and may be changed.

The Start Date and End Date will automatically default to the current date; clicking on the desired date or dates on the calendar will refresh the Start and End Dates displayed above the calendar.



The Job Scheduling Form (continued)

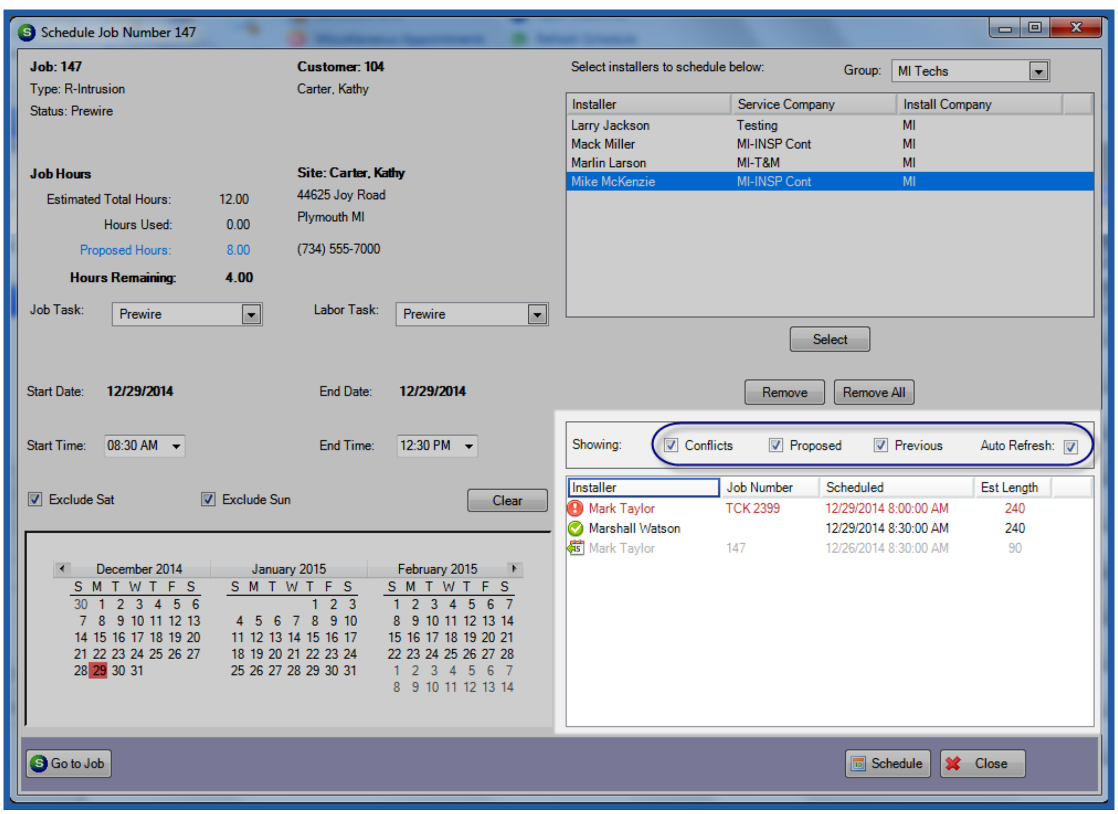
- ***Installer Selector*** – The right side of the form is used to select one or multiple Installers to perform the work.
  The names of Installers displayed in the upper tier are determined by the Display Group selected at the upper right of the form. These are the same Display Groups used on the Schedule Board for Tickets. The Display Group that is defaulted into this form is the current Display Group selected on the main SedonaSchedule Schedule Board. Many companies setup Display Groups specifically for Installers. Changing the Display Group will refresh the list of Installer names. Double-clicking on an Installer name or highlighting an Installer name then clicking on the Select button will move the Installer to the lower tier of Proposed Appointments.



The Job Scheduling Form (continued)

- ***Proposed Appointments*** – The Installer name along with the proposed schedule date and estimated length of time is displayed as names are selected from the Installer Selector list [upper tier]. There are four option checkboxes at the top of the Proposed Appointments area:
    - Conflicts – When this option is selected, the application checks to see if the selected Installer is already scheduled for a Ticket or Job that will conflict with the appointment you are trying to schedule. It is highly recommended this option is always selected.
    - Proposed – Selecting this option will update the Proposed Hours in the Job Information area (upper left).
    - Previous – With this option selected, any other previously scheduled appointments (completed or yet to be completed) for the Job will display below the Proposed Appointments.
    - Auto Refresh – Selecting this option will refresh the Proposed Appointment area if another staff member has scheduled the Proposed Installers at a time that would conflict with your current scheduling attempt. It is highly recommended to leave this option selected at all times.

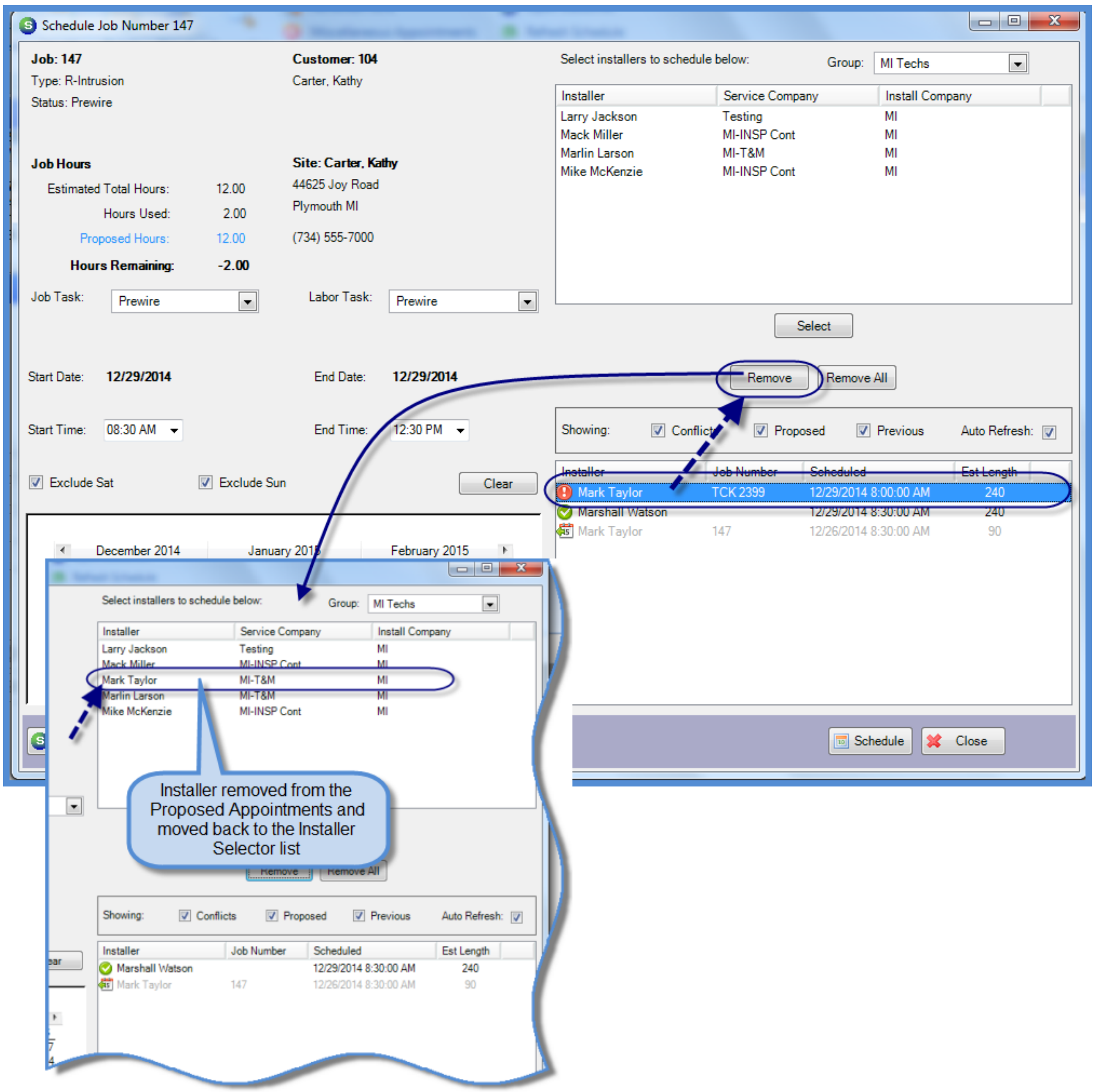
In the below example, one of the selected Installers is already scheduled for a Ticket on the proposed appointment date/time.



The Job Scheduling Form (continued)

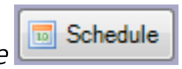
If Scheduling conflicts are displayed, in the Proposed Appointment list, highlight the Installer Name then click on the *Remove* button.

Note: The application will allow you to create a Job Appointment for an Installer even if a scheduling conflict exists.

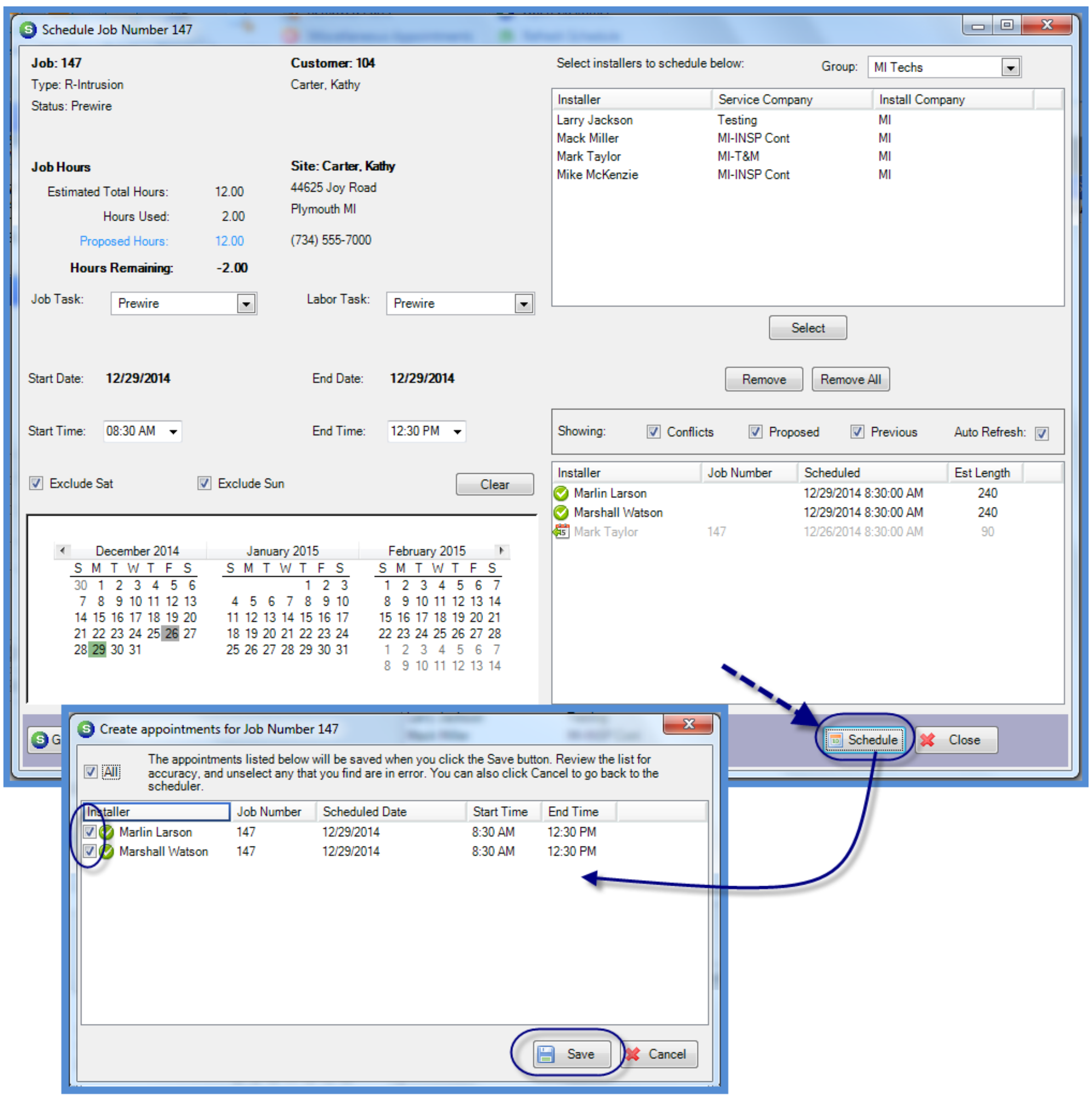


The Job Scheduling Form (continued)

If you do not want to continue scheduling a Job Appointment, click on the *Close* button located at the lower right of the Job Schedule form.

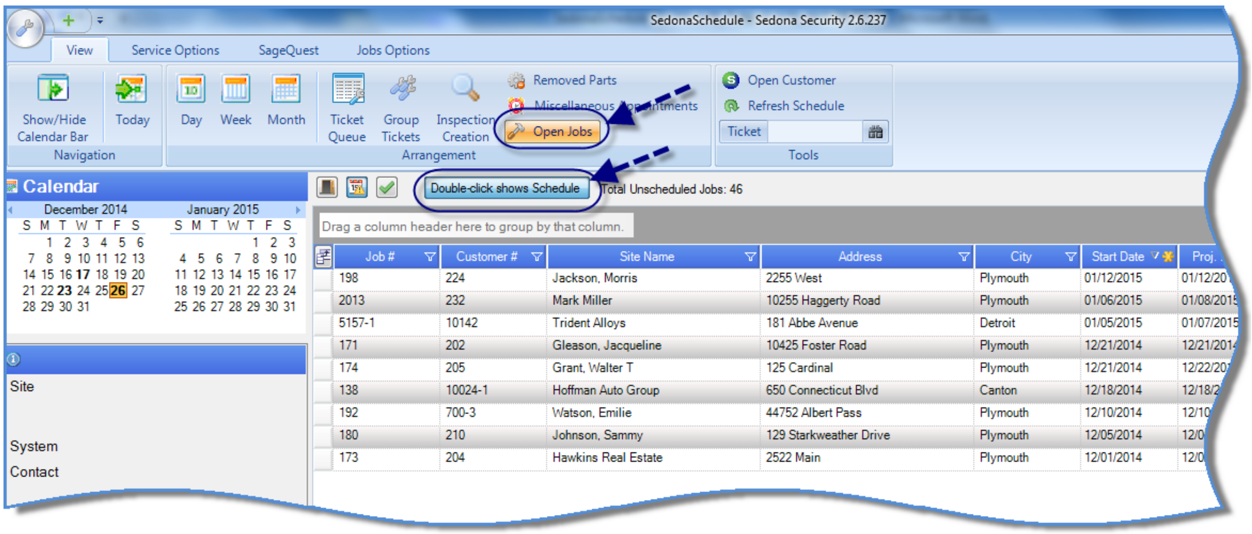
If you are ready to create the Job Appointment(s), click on the *Schedule*  button located at the lower right of the Job Schedule form.

A confirmation form will be displayed listing the Proposed Appointments. If you change your mind and want to remove any Proposed Appointment from the list, un-check the box to the left of that row. Appointments will only be created for rows that are checked. Click on the *Save* button when ready to create the Appointment(s).



Scheduling a Job Appointment

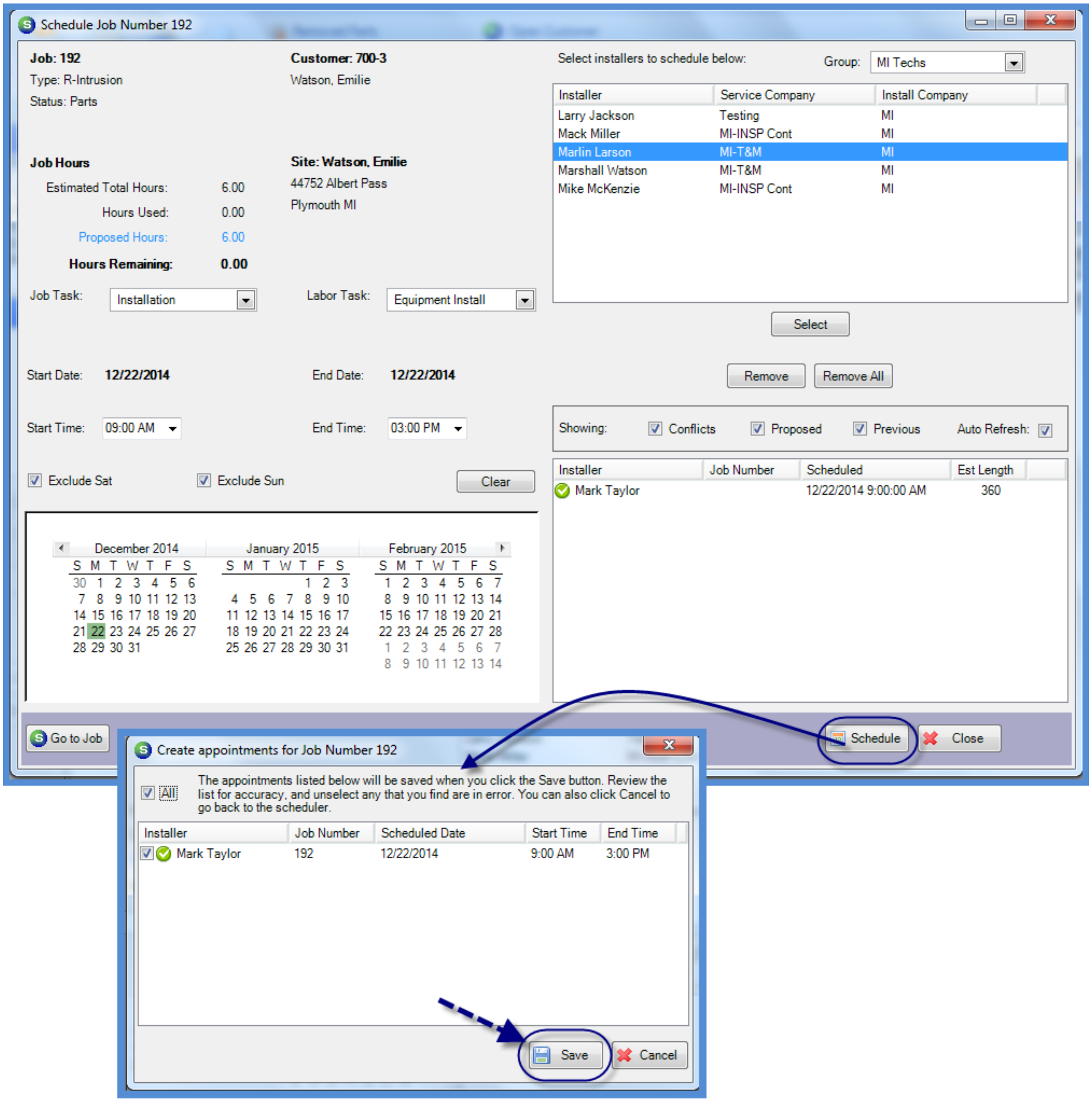
Scheduling a Job Appointment begins by selecting the *Open Jobs* button from the SedonaSchedule Arrangement Ribbon Group, then making certain the Toggle button is set to Double-click shows Schedule. Within the list of open Jobs, double-click on the Job record you will be scheduling.



Scheduling a Job Appointment (continued)

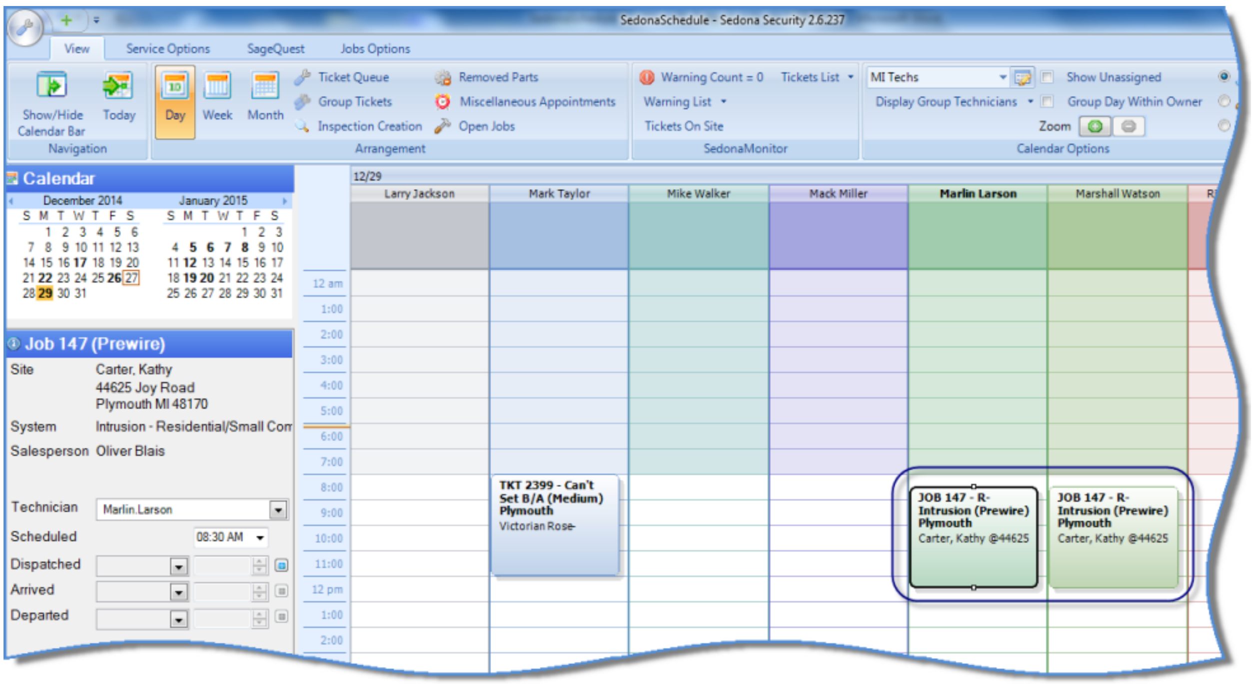
The Job Scheduling form will be displayed. Make your selections; when finished, click on the *Schedule* button.

A confirmation form will be displayed listing the Proposed Appointments. If you change your mind and want to remove any Proposed Appointment from the list, un-check the box to the left of that row. Appointments will only be created for rows that are checked. Click on the *Save* button when ready to create the Appointment(s).



Managing Job Appointments

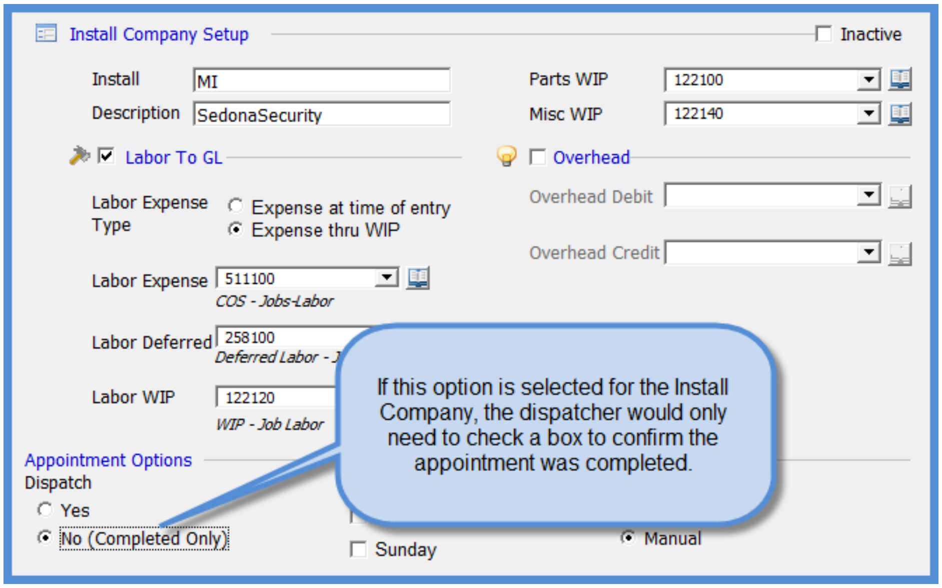
Once Job Appointments have been created, they will appear on the Schedule Board. Any scheduling changes (re-scheduling, changing the appointment length, deleting appointments, copy and paste and using the clock-out and clock-in function) are handled the same as Tickets.



About Job Appointment Dispatching

Dispatching Job Appointments is similar to Ticket Appointment dispatching – the only difference is there are fewer fields that need to be populated on the Dispatch form.

If your company does not want to enter dispatching times for Job Appointments but manually enter timesheets at a later time, you have the option of flagging the Install Company to mark appointments as Complete when they are finished – no data entry of dates/times required.

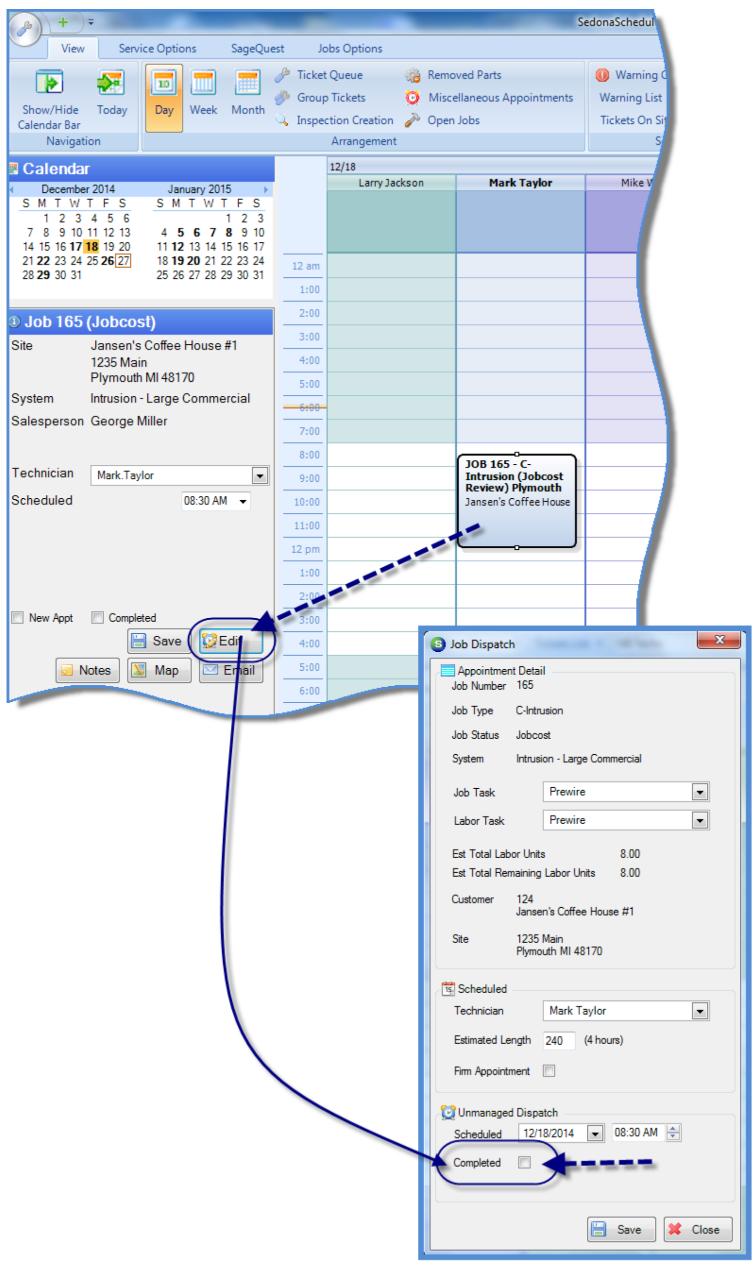


Either Live Dispatching or Manual Dispatching may be used for Job Appointments – which method is used is determined by your company policies and procedures.

Completing a Job Appointment (No Dispatching Method)

To mark a Job Appointment as “Completed”, from the Schedule Board, click once on the Job Appointment then click on the *Edit* button in the Detail Information Viewer. The Job Dispatch form will open; check the Completed checkbox at the bottom of the form then click on the Save button. The background color of the Job Appointment will change to Red to indicate the Appointment was completed.

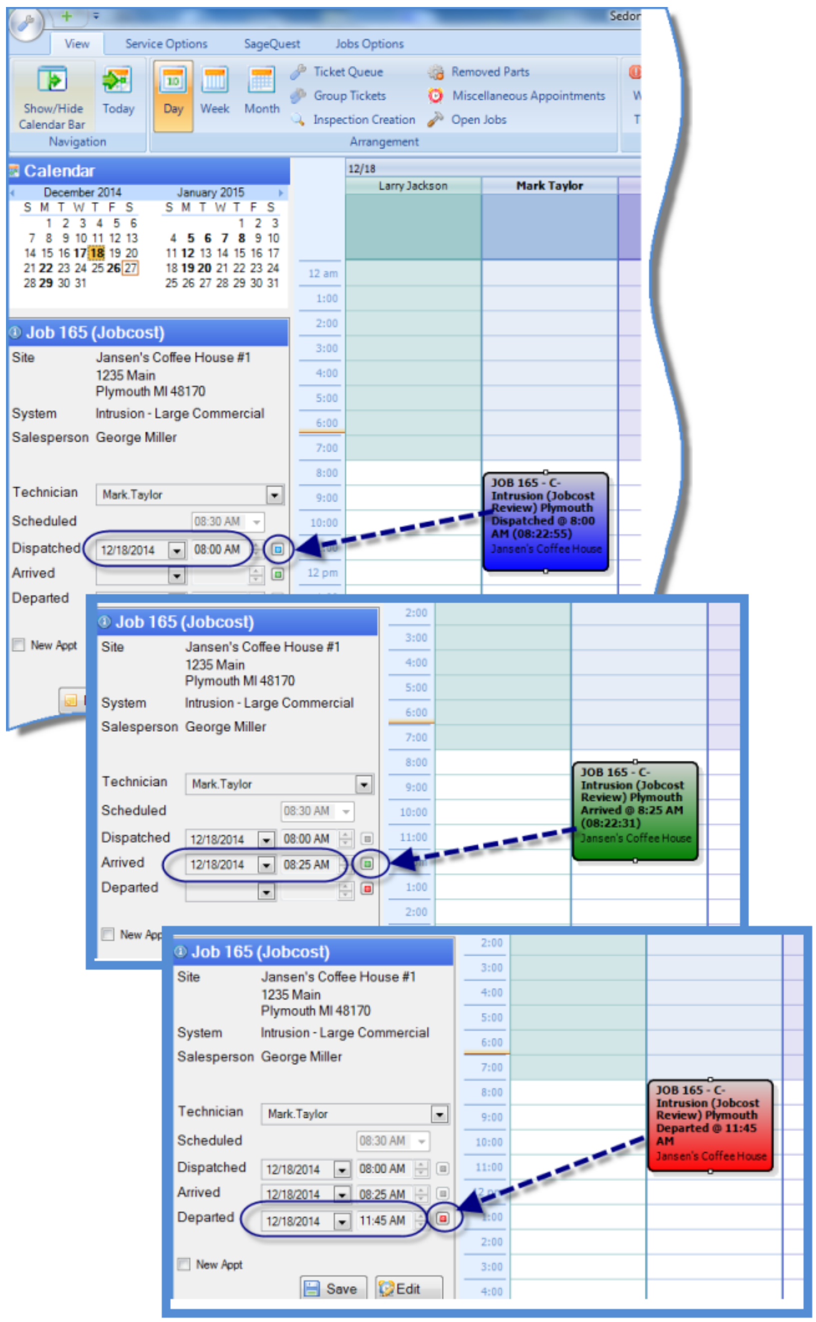
Note: Marking a Job Appointment as “Completed” will not update the Labor Units Used on the Job record. When a timesheet is posted to the Job, this will update the Job Labor Units used.



Live Dispatching a Job Appointment

Live Dispatching is used if your Installers are calling in or communicating to the office when they are on the way to the Job, arrived on site, and have finished the Job Appointment.

Live Dispatching is performed from the Schedule Board. Click once on the Job Appointment, then in the Detail Information Viewer use the Live Dispatch buttons to record the dispatch times.



Manually Dispatching a Job Appointment

Manual Dispatching is used when you want to enter the Installer's dispatch information (dispatched, arrived and departed) at a later time.

Manual Dispatching is performed from the Schedule Board. Click once on the Job Appointment, and then click on the *Edit* button in the Detail Information Viewer.

The Job Dispatch from will be displayed; enter the times in the Dispatched, Arrived and Departed fields. Click on the *Save* button when finished.

Note: If dispatch times are being entered *after* the date of the appointment, you must also enter the date [on which the work was performed] into each of the three date fields.