

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 through invoicing and closing.

Ticket Types

There are 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.

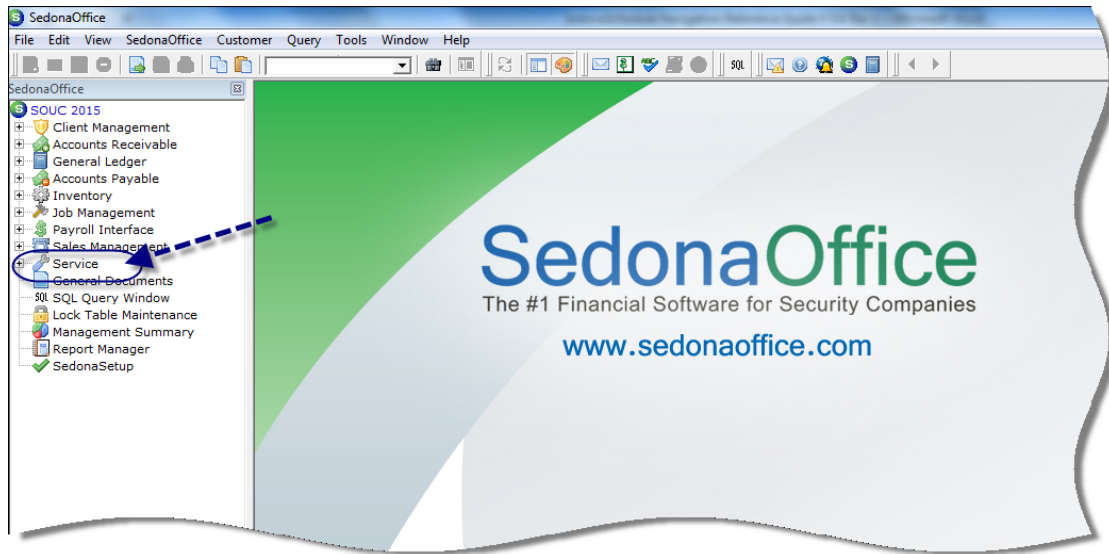
Prior to reading this document and using SedonaSchedule, it is important to first read the SedonaSchedule Navigation Reference Guide. This document provides information on the layout of the application, terminology which is specific to SedonaSchedule and general navigation within the application.

Topics covered in this document include:

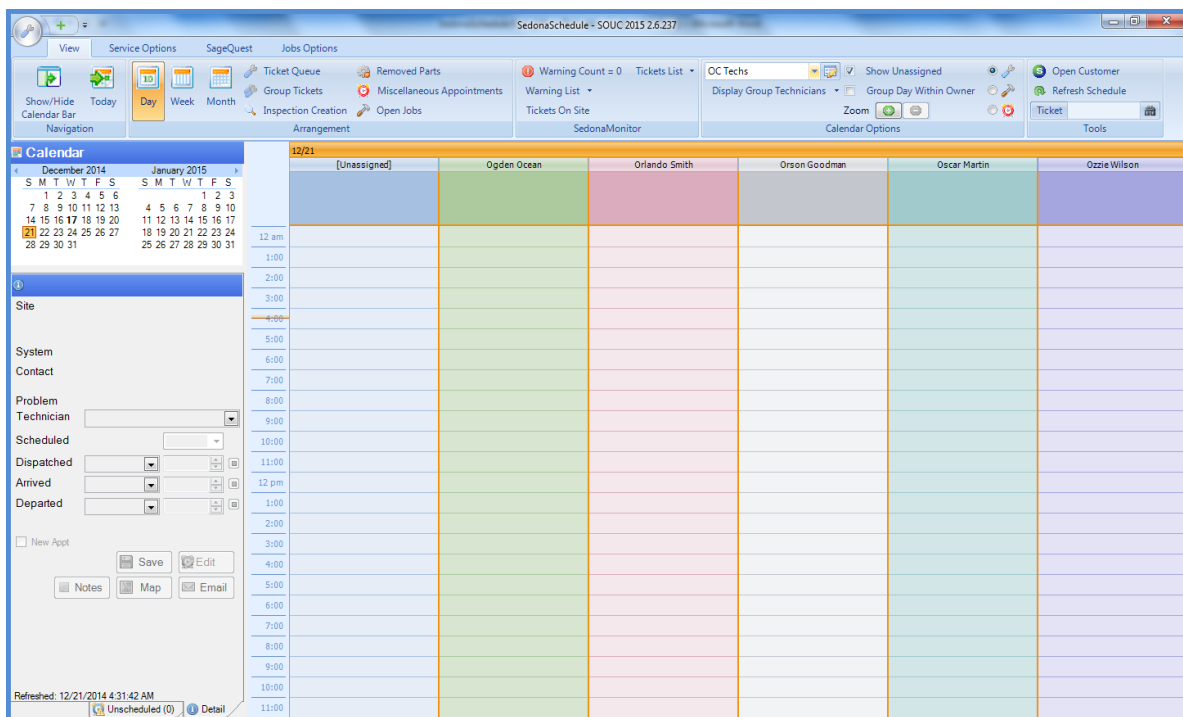
- Creating and Processing Service Tickets
 - Attaching Documents (add-on module SedonaDocs required)
 - Scheduling Technician Appointments
 - Adding Parts to a Ticket
 - Ordering Parts for a Ticket
 - Dispatching Technician Appointments
 - Adding Notes to a Ticket
 - Reviewing Ticket Charges
 - Invoicing 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.




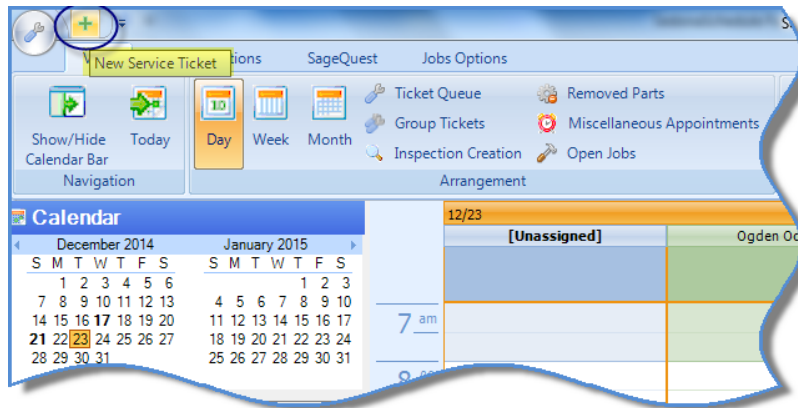
The SedonaSchedule application will open displaying the view last displayed when exiting the application. When opening SedonaSchedule for the first time, the Schedule Board will be displayed.




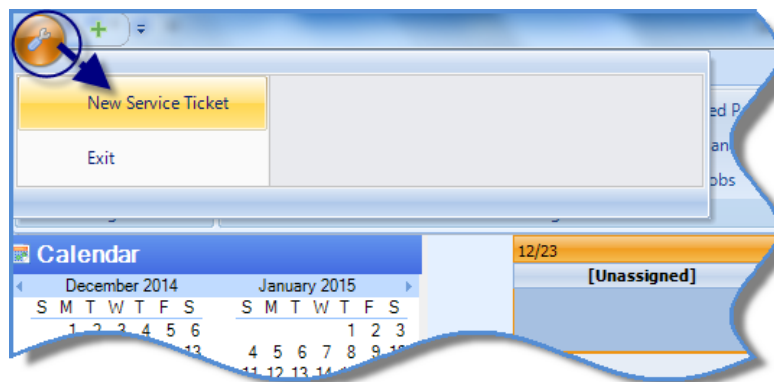
Where to Start a New Service Ticket

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.

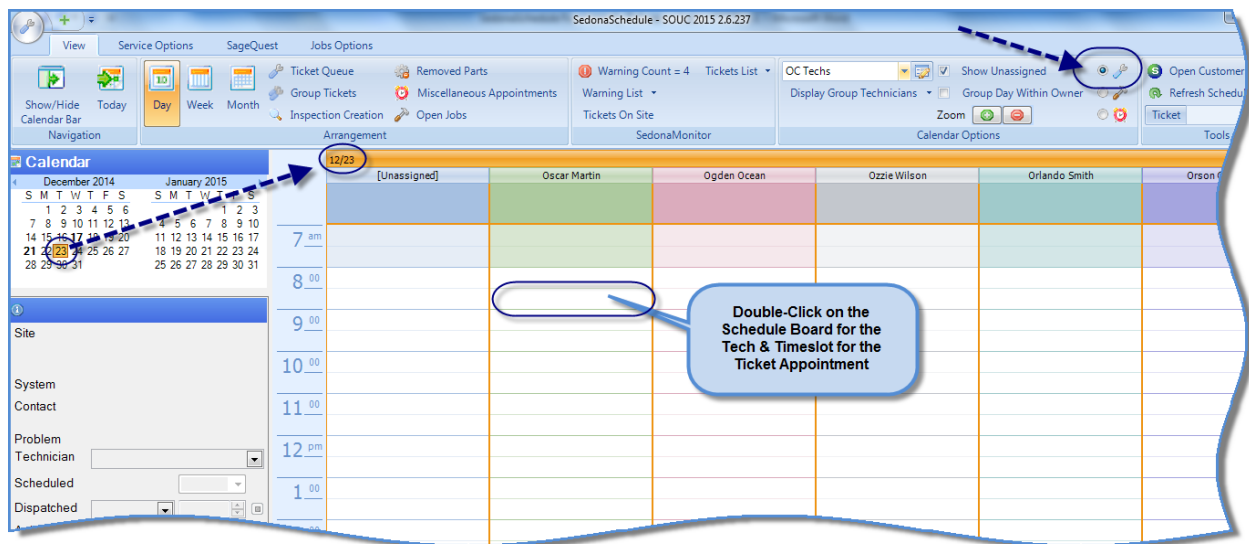


Where to Start a New Service Ticket (continued)

- 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.

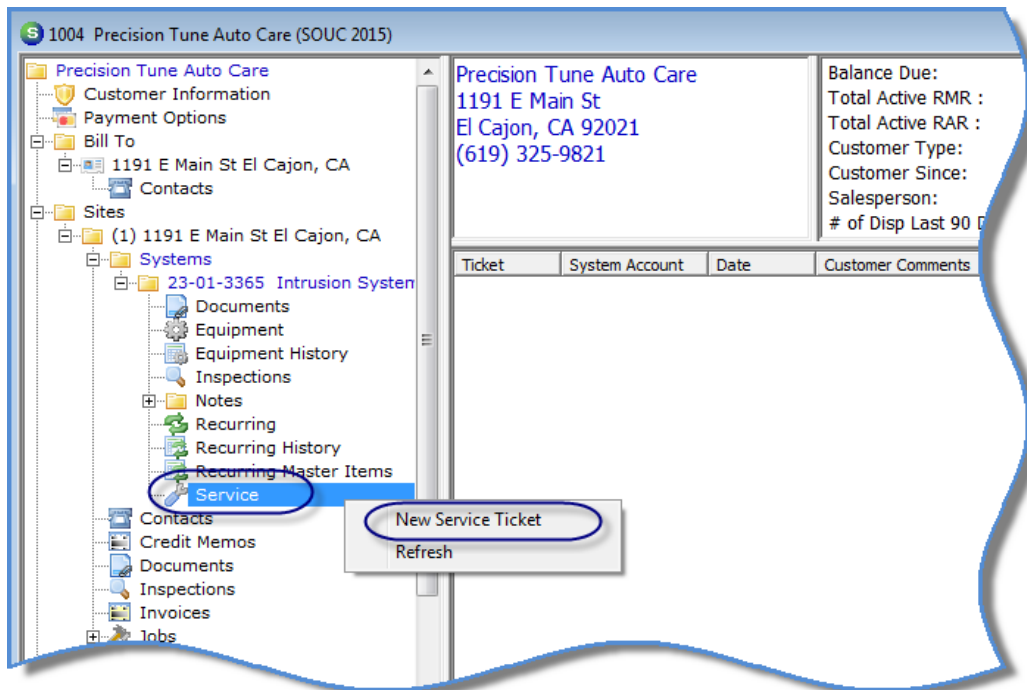
On the Calendar, click on the date of when the Technician Appointment will be scheduled.

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)

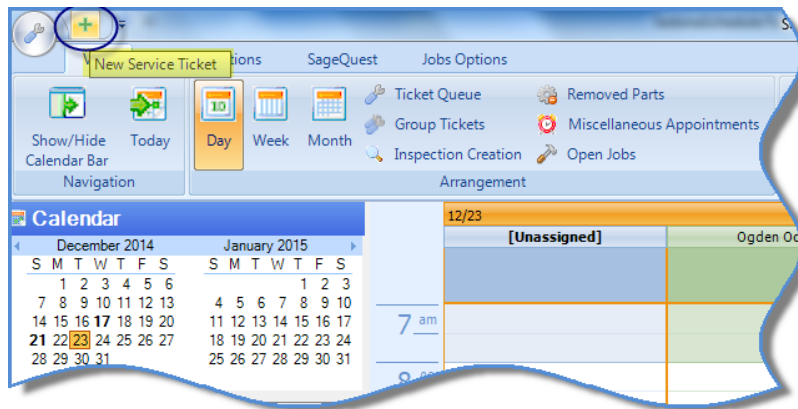
A Ticket may also be started while working in a Customer Explorer record of the main SedonaOffice application. Within the System area of the Customer Tree, highlight the Service menu option, right-click and select the *New Service Ticket* option. The software will re-direct you to the SedonaSchedule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



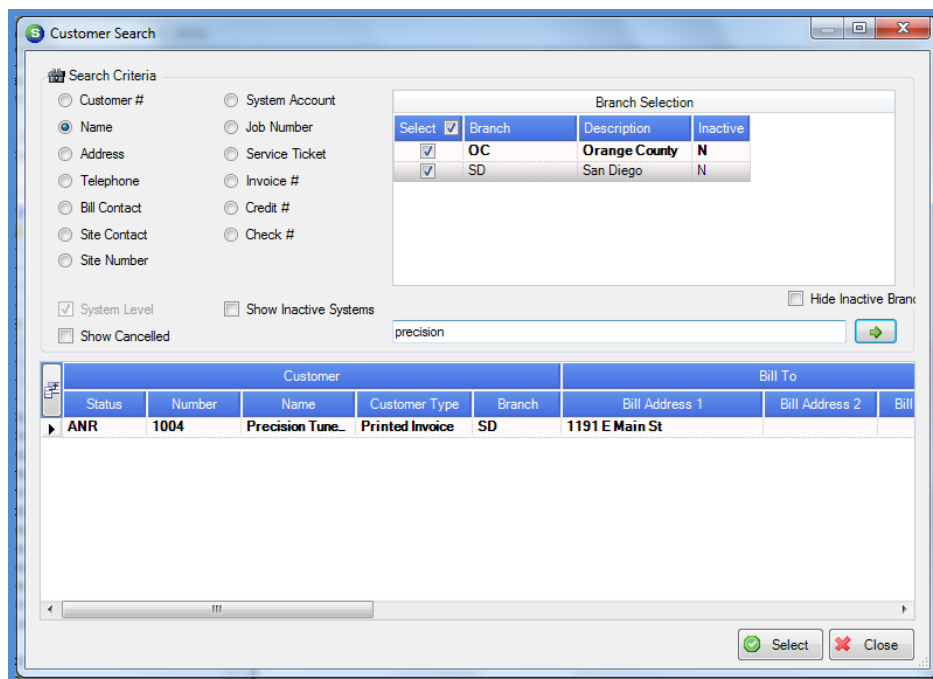
Creating a New Service Ticket from SedonaSchedule

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 locate the account for which the Ticket will be created.

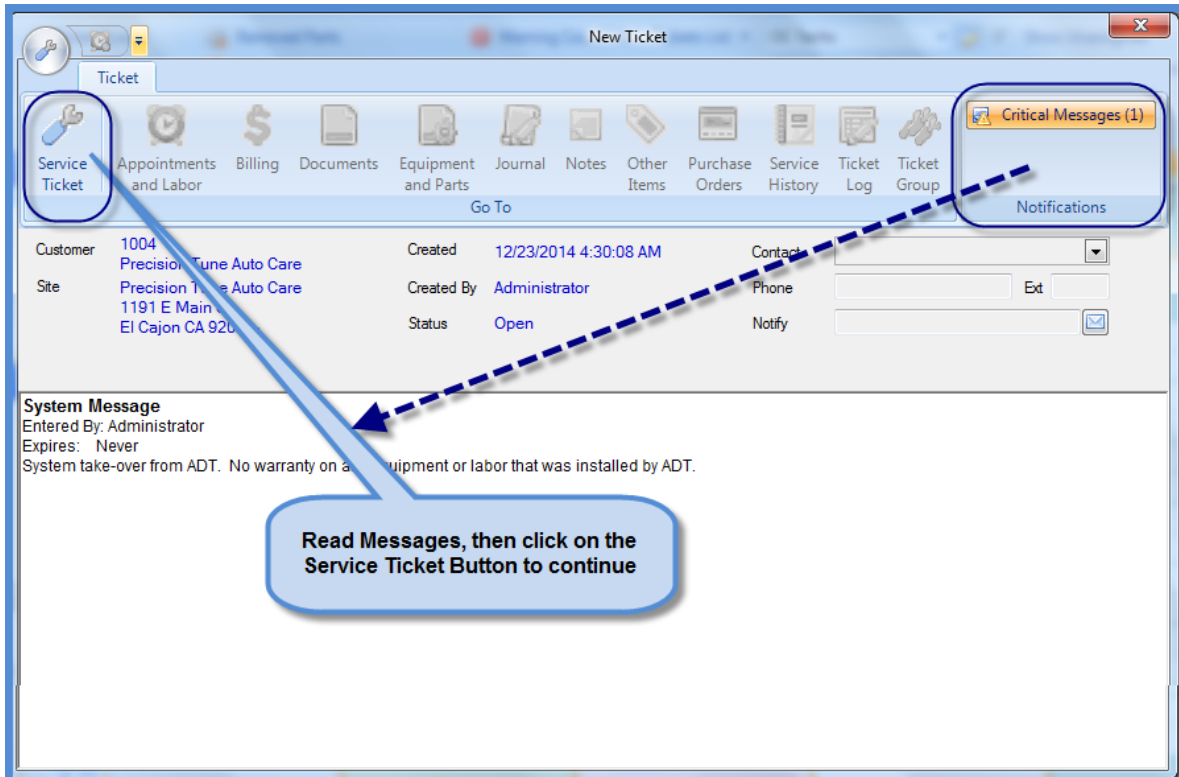


2. The Customer Search form will be displayed to locate the account for which the Ticket will be created. Enter the search criteria; once the correct customer system is located within the list, double-click on the row to open the Ticket form.



Creating a new service ticket from SedonaSchedule (continued)

- 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.

The screenshot shows the 'New Ticket' form in SedonaSchedule. The form is organized into several sections:

- Customer Information:** Customer 1004, Precision Tune Auto Care; Site Precision Tune Auto Care, 1191 E Main St, El Cajon CA 92021-.
- Created/Status:** Created 12/23/2014 4:39:24 AM, Created By Administrator, Status Open.
- Contact:** Fields for Contact, Phone, and Notify.
- Site and System Detail (Red Box):** System Account 23-01-3365, System Type Intrusion, Panel Type VISTA 128B, Location Utility Closet-SE corner of shop, Site Phone (619) 325-9821, Warranty None, Warranty End Expired.
- Ticket Detail (Blue Box):** Problem, Secondary Problem, Route Code, Expertise 1, Priority, Estimated Length 0, Comments, Service Coordinator, Technician, PO #, Category Service, Resolution.
- Service Company/Level:** Service Company SD, Service Level T&M-Com.
- Payment Information:** Use Payment Information On File (None, Bank (0), Credit Card (0)).
- Navigation:** A 'Save' button is located at the bottom right.

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

The screenshot displays the 'New Ticket' form in the SedonaSchedule application. The form is organized into several sections:

- Customer Information:** Customer ID 1004, Name Precision Tune Auto Care, Site Address 1191 E Main St, El Cajon CA 92021. Contact: Greg Wilson, Phone (619) 325-9821, Email greg.wilson@ptac.com.
- Site and System Detail:** System Account 23-01-3365, System Type Intrusion, Panel Type VISTA 128B, Location Utility Closet-SE corner of shop, Site Phone (619) 325-9821, Warranty None, Warranty End Expired.
- Ticket Detail:** Problem Add Equipment, Secondary Problem, Route Code 3, Expertise 3, Priority Medium, Estimated Length 90. Comments: Install keypad with weatherproof housing outside rear entrance.
- Service Information:** Service Company SD, Service Level T&M-Com.
- Payment Information:** Use Payment Information On File (None selected).

A 'Save' button is located at the bottom right of the 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 screenshot shows the 'Custom Fields' form for 'Ticket #1010'. The 'Custom Fields' icon in the top navigation bar is circled in blue. The form contains the following data and sections:

- Customer:** 1004 Precision Tune Auto Care
- Site:** Precision Tune Auto Care, 1191 E Main St, El Cajon CA 92021-
- Created:** 12/23/2014 6:32:46 AM
- Created By:** Administrator
- Status:** Open
- Contact:** Greg Wilson
- Phone:** (619) 325-9821
- Notify:** greg.wilson@ptac.com

Below the main data are several sections for user-defined fields:

- Tables:** Three dropdown menus labeled 'User Table 1', 'User Table 2', and 'User Table 3'.
- Text:** Five text input fields labeled 'User Text 1' through 'User Text 5'.
- Checkboxes:** Five checkboxes labeled 'Check Box 1' through 'Check Box 5', all of which are currently unchecked.
- Money:** Two money input fields labeled 'Money Label 1' and 'Money Label 2', both containing the value '0.00'.
- Dates:** A section for date input fields, currently empty.

A 'Save' button is located at the bottom right of the 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.

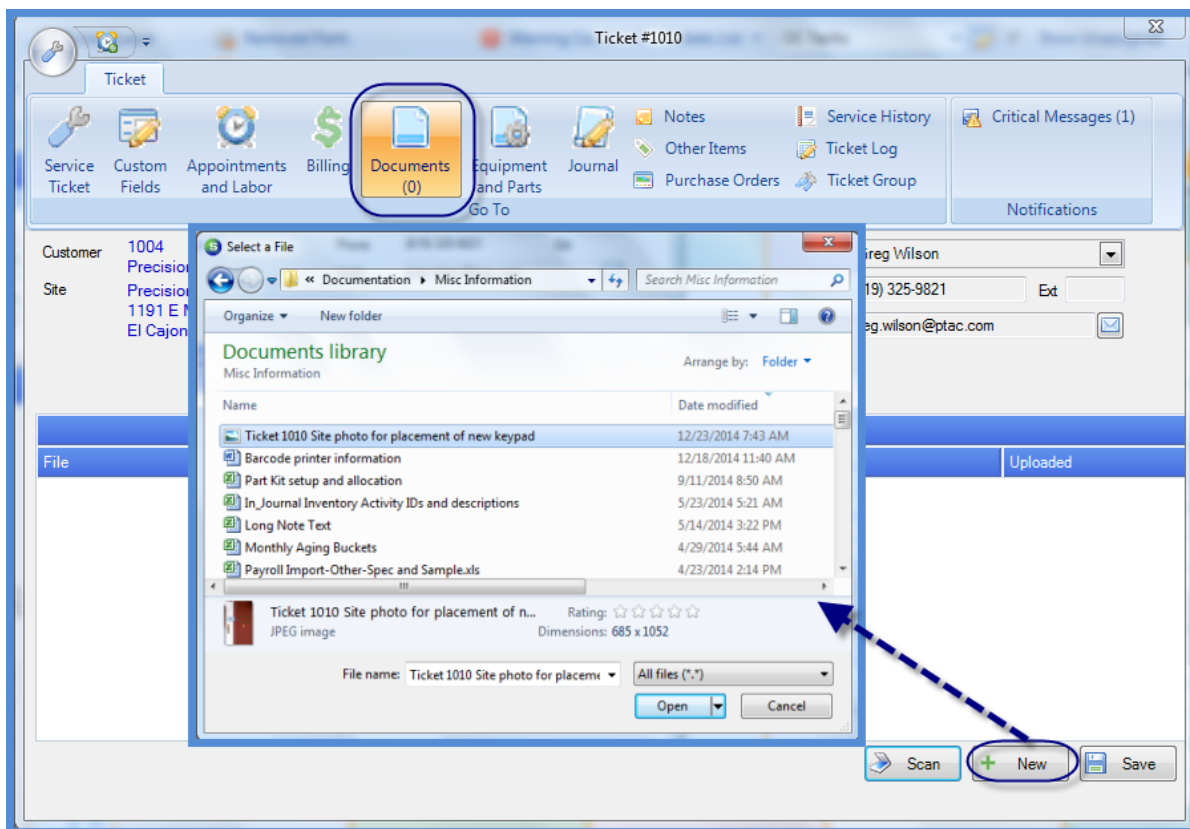
Documents

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.

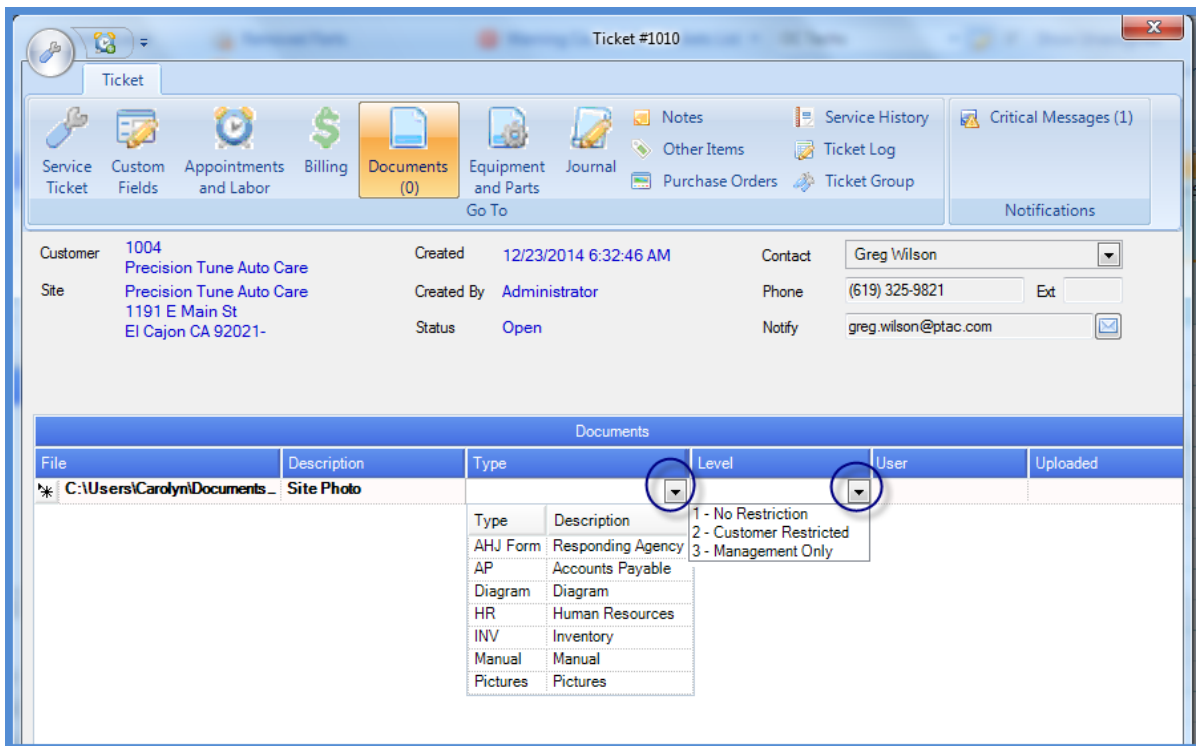


Ticket Documents (continued)

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)

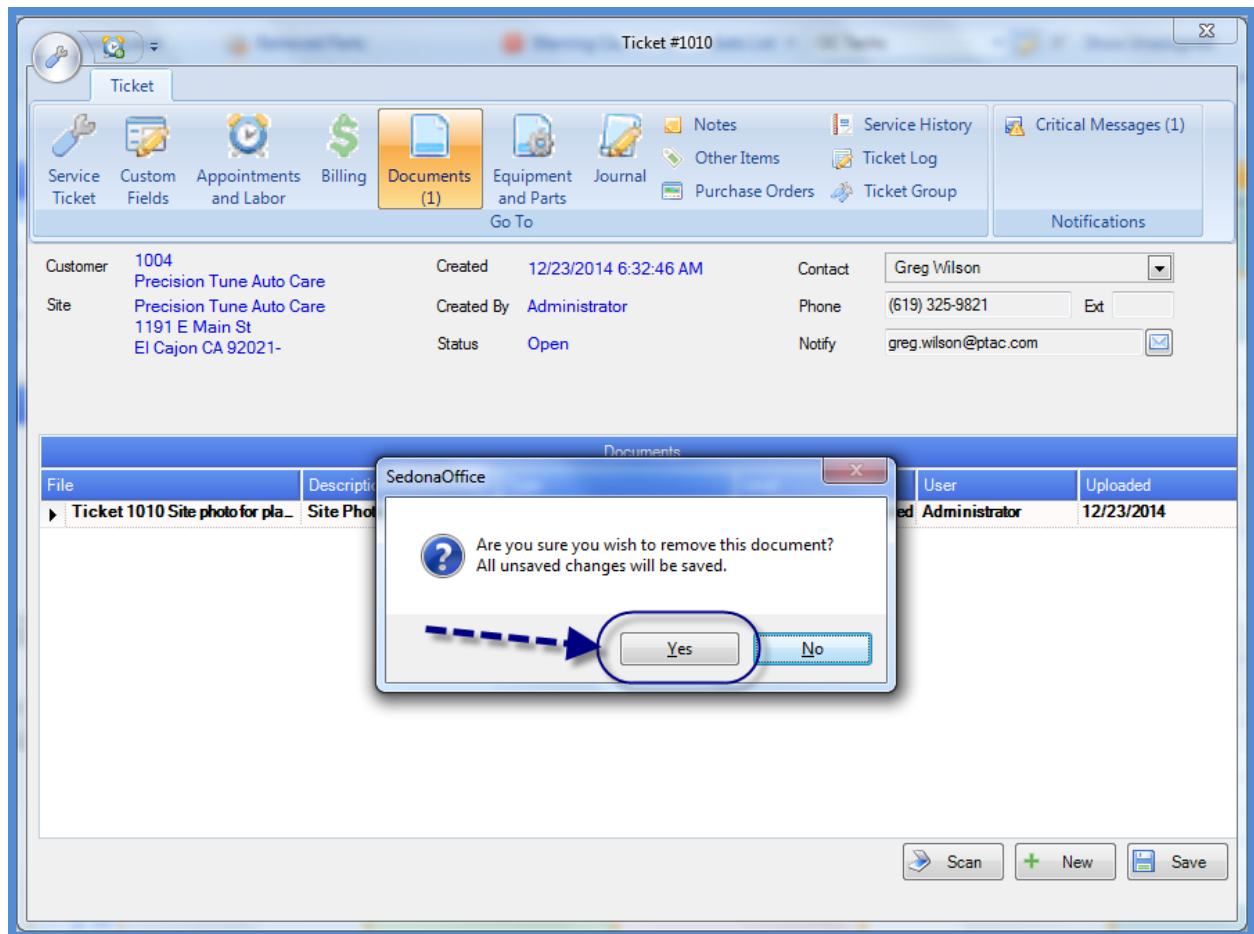
Removing a Document from a Ticket

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.

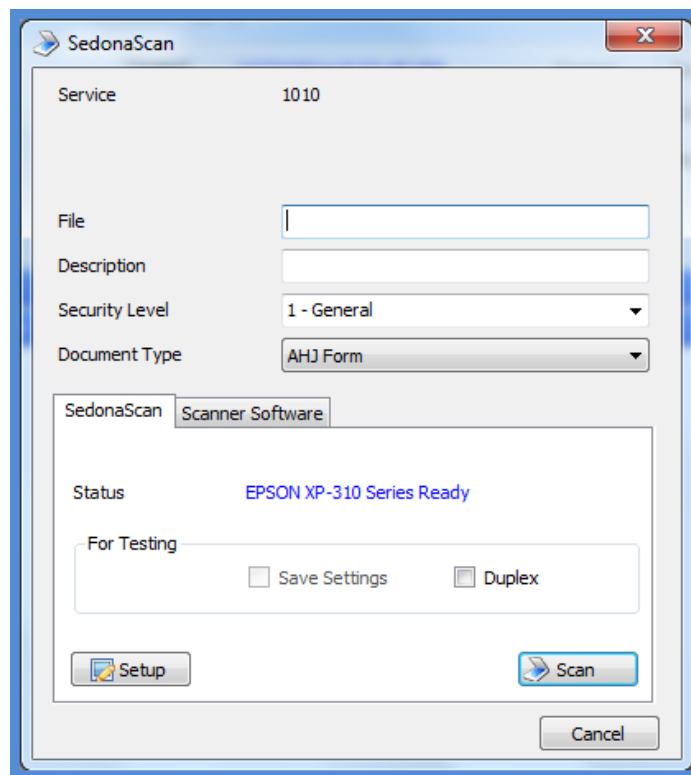


Ticket Documents (continued)

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.

Timestamp	User Code	Type	Description	User Comments
12/17/2014 6:02 AM	Administrator	UPDATE	Updated Customer Comments from testing text emailing ticket to technician.	
12/17/2014 6:01 AM	Administrator	DELETE	Deleted Part IM1270	
12/17/2014 5:51 AM	Administrator	ADD	Added Part IM1270	
12/17/2014 5:41 AM	Administrator	DELETE	Deleted Part IM1270	
9/3/2014 8:39 AM	Administrator	DELETE	Deleted Appointment N/A 9/3/2014 9:00:00 AM	
9/3/2014 8:38 AM	Administrator	UPDATE	Updated Appointment for [Unassigned] 9/3/2014 9:00:00 AM	
9/3/2014 8:36 AM	Administrator	ADD	Added Appointment for Mark Taylor 9/3/2014 8:00:00 AM	
9/3/2014 8:36 AM	Administrator	ADD	Added Service Ticket 2397	

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.

The screenshot shows the 'Ticket #2397' window. The 'Service History' tab is selected in the navigation bar. The metadata section shows:

- Customer: 5774 Johnson, Michael
- Site: Michael Johnson, 75 Avonwood Road, Plymouth MI 48170
- Created: 9/3/2014 8:36:17 AM
- Created By: Administrator
- Status: Scheduled

The Service History table contains the following data:

Date	Ticket	S	System	Problem	Resolution	Billed	CustomerComments
12/27/2014	2402	OP	3350	Camera		N	Entrance camera out of focus.
04/21/2014	2377	CL	5774	Camera	4 Replace	Y	
07/29/2013	2350	SC	5774	AC Power Failure	4 Replace	Y	

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.

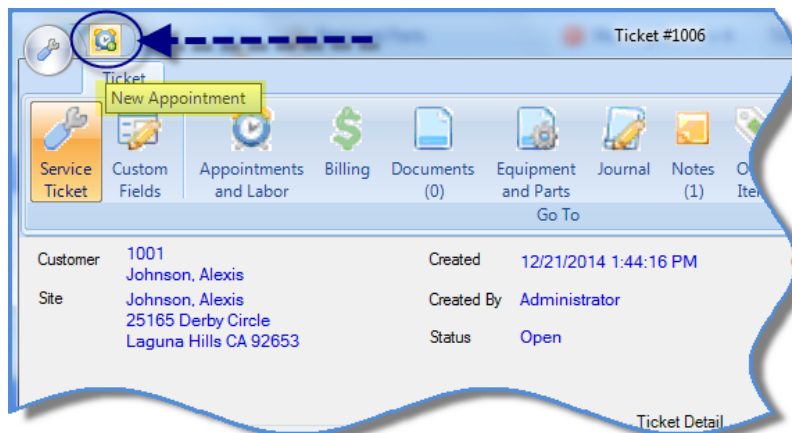
If more than one Technician appointment is needed for the Ticket (a different Technician or the same Technician on another day), repeat the steps below for each appointment needed.

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.

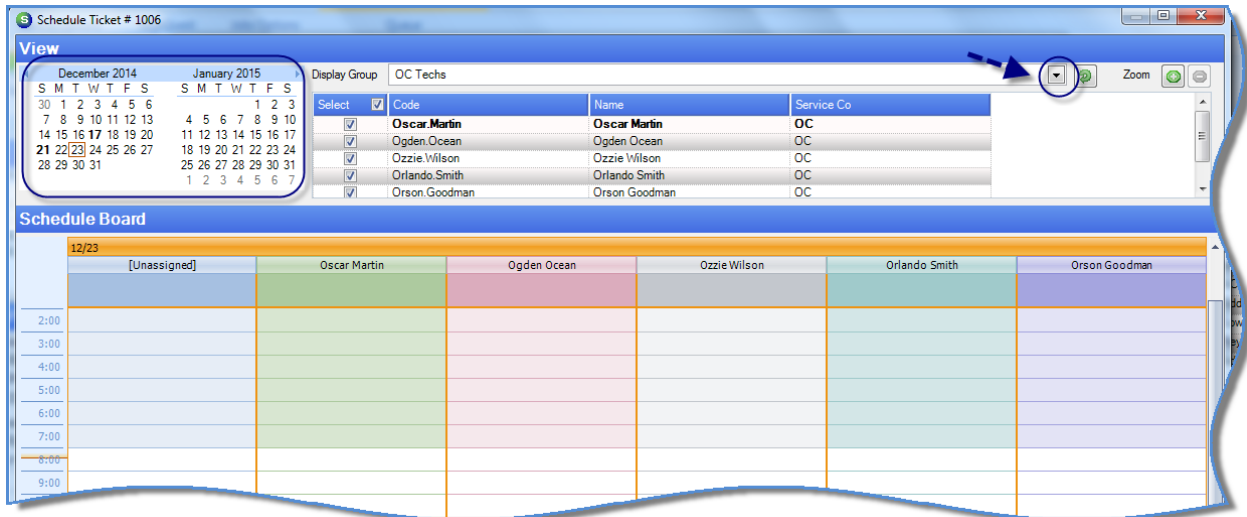
Click on the *New Appointment*  icon located above the Ticket ribbon.



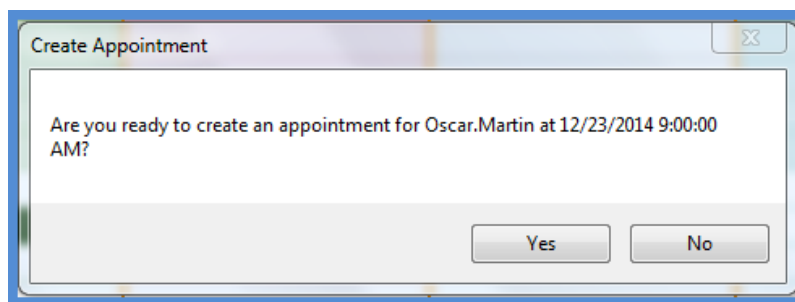
Scheduling Ticket Appointments (continued)

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.

The screenshot shows the 'Dispatch' window for 'Ticket #1006'. The 'Appointments and Labor' tab is active. The interface includes a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (1), Other Items, Purchase Orders (0), Service History, Ticket Log, and Ticket Group. Below the navigation bar, there are fields for Customer (1001 Johnson, Alexis), Site (25165 Derby Circle, Laguna Hills CA 92653), Created (12/21/2014 1:44:16 PM), Contact (Alexis Johnson), Created By (Administrator), Status (Open), Phone ((949) 910-2230), and Notify (a.ljohnson@gmail.com). The 'Labor' section includes a 'Manual Labor' checkbox, a table for labor rates (Regular, Overtime, Holiday), and a 'Service Fee' checkbox. A table at the bottom lists appointments, with one entry for Oscar Martin on 12/23/2014 at 9:00 AM. A blue dashed arrow points to this entry.

Name	Appointment	Dispatched	Arrived	Departed	Firm	Est Len	Act Len	Billable Len
Oscar Martin	12/23/2014 9:00 AM					120	0	0

Scheduling Ticket Appointments (continued)

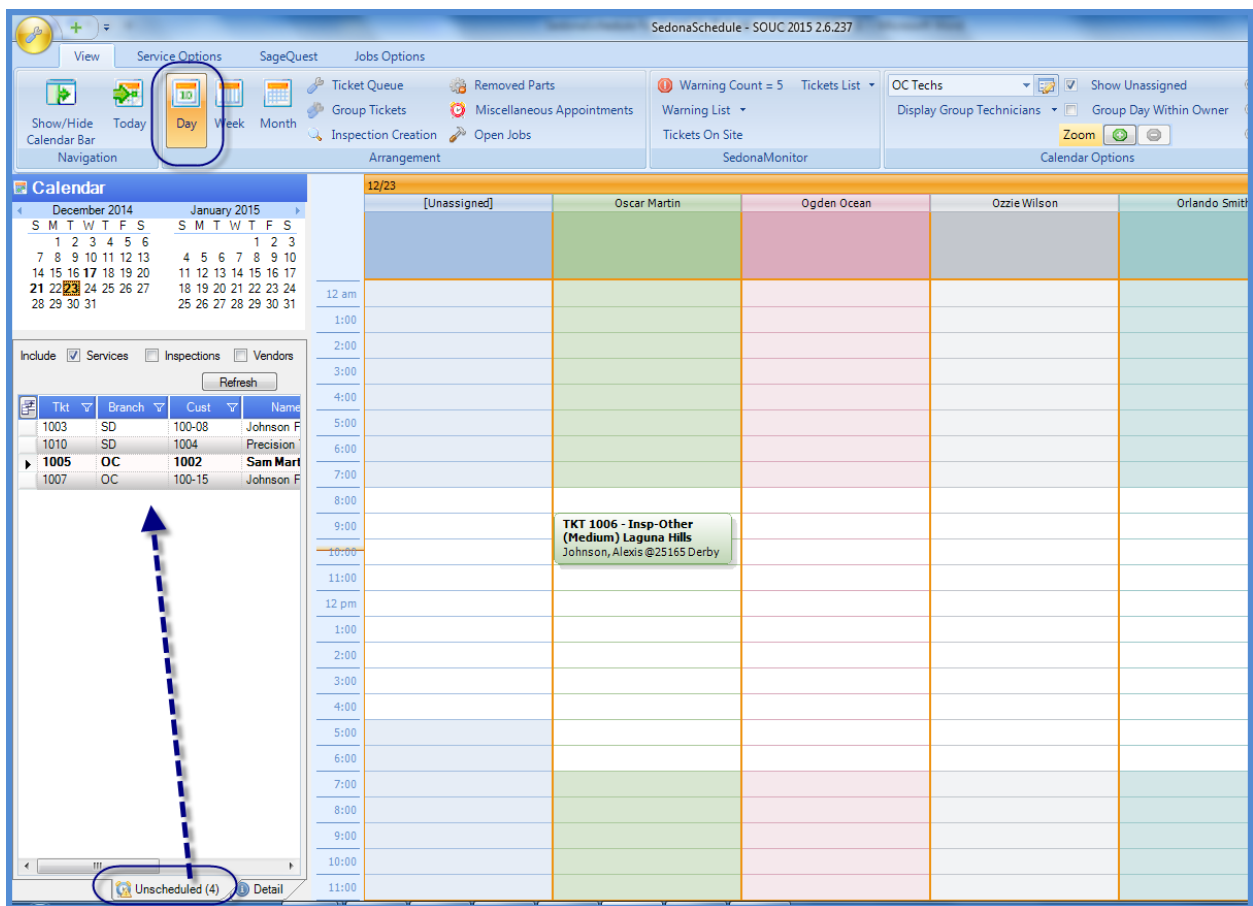
Scheduling a Technician Appointment from the Schedule Board

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.

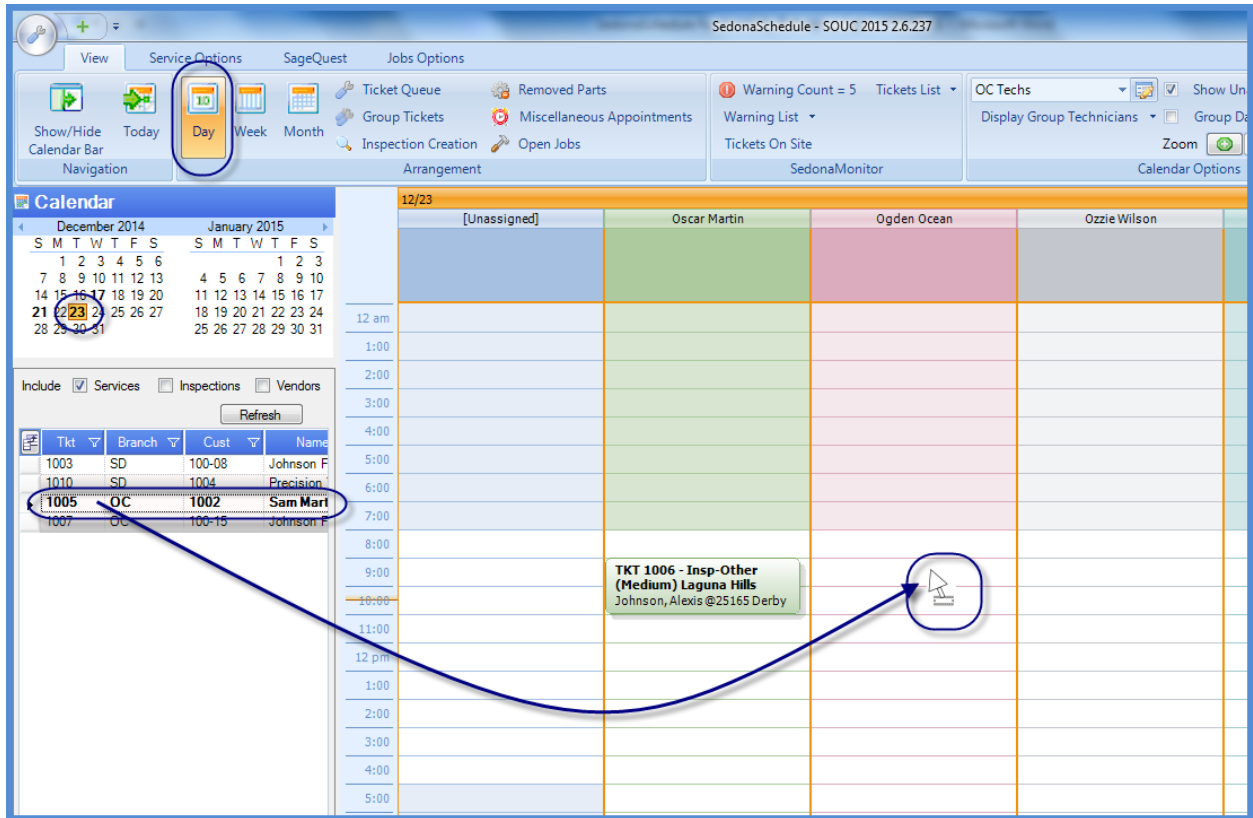
Determine which date will be scheduled; click on the date in the calendar to view available Technicians for the date. Next hold the left mouse button down while on a ticket in the Unscheduled List then drag the ticket to the desired Technician column and time slot, then release the mouse.

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



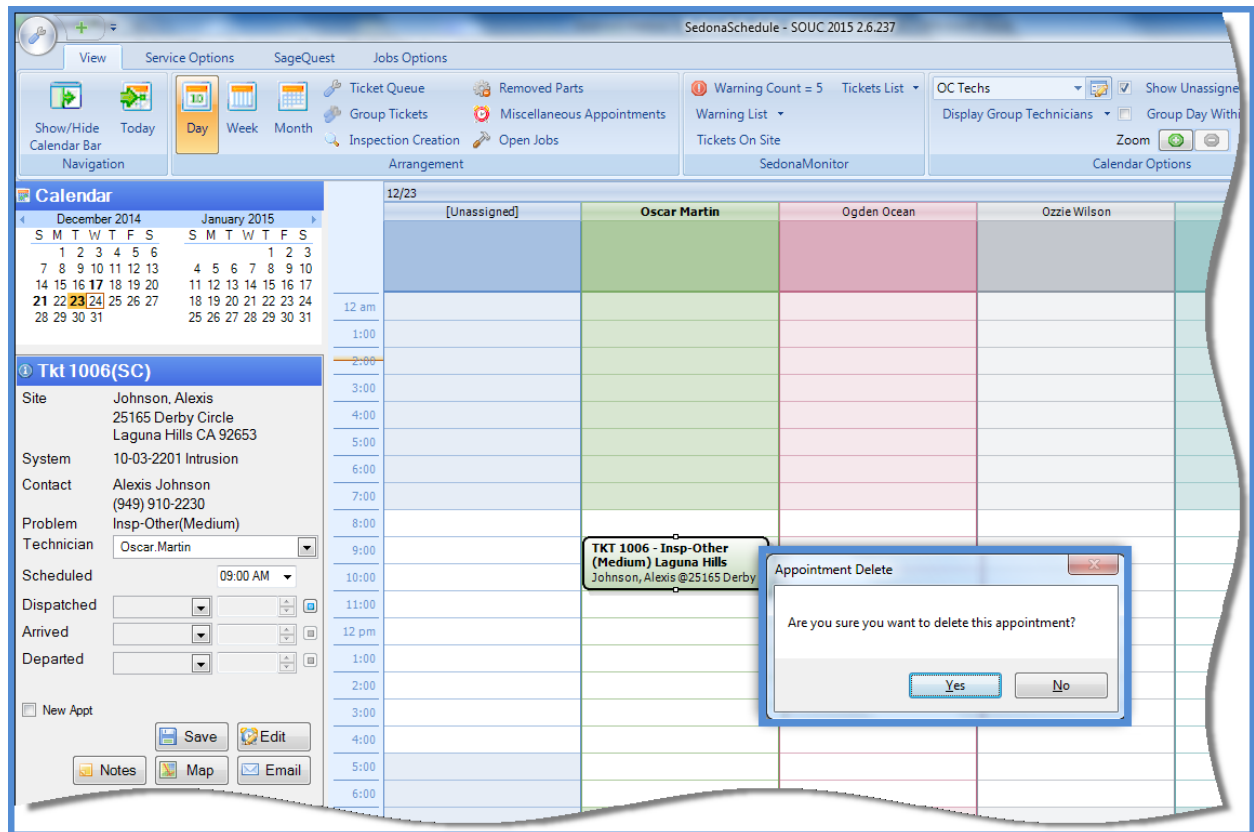
Delete a Technician Appointment

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.



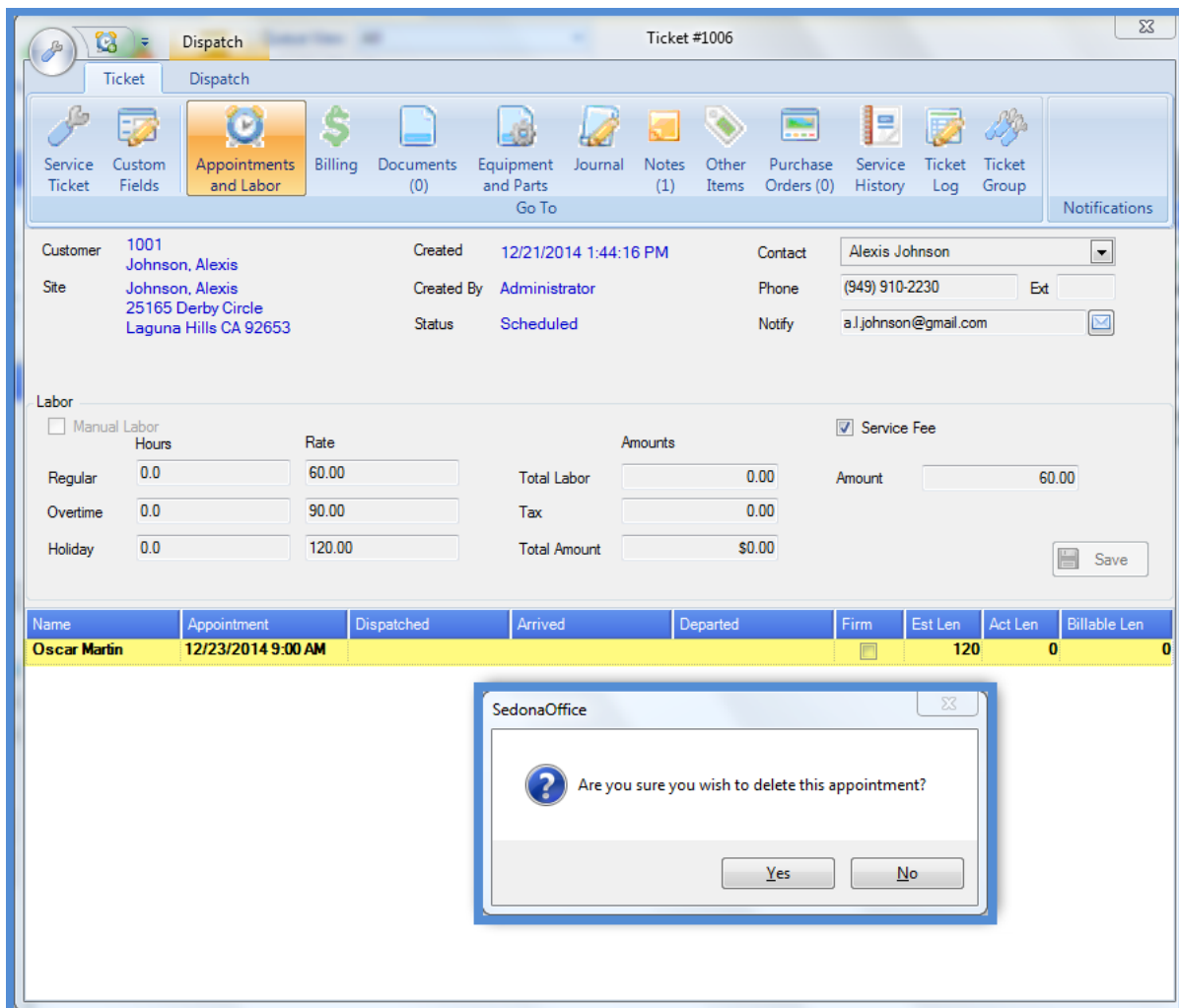
Deleting an Appointment (continued)

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).

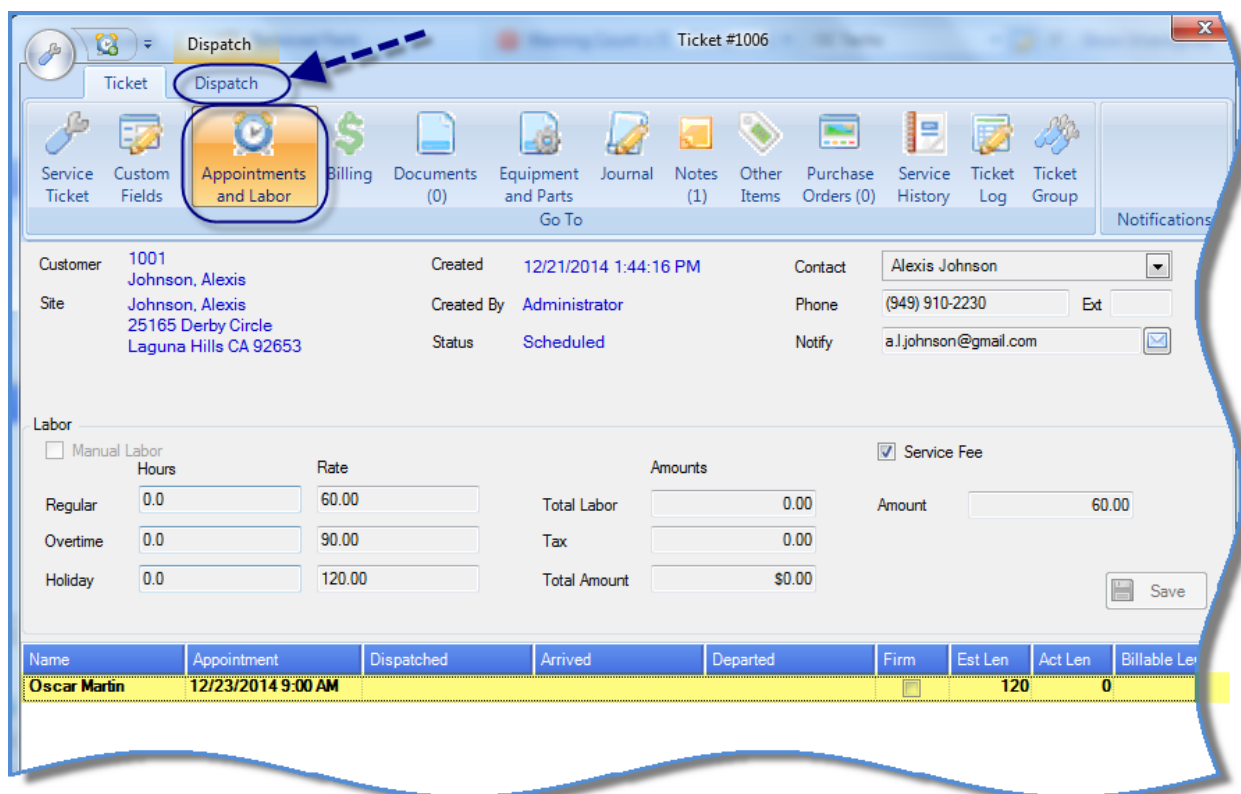
The *Ticket Dispatch* form will be displayed. You may change the date/time for the current Technician or select a different Technician from the drop-down list and select a new appointment date/time. When finished, click the *Save* button at the bottom of the Ticket Dispatch form.

The screenshot displays the SedonaSchedule interface. On the left, a calendar shows the transition from December 2014 to January 2015. The main area is a Gantt-style schedule board for December 23, 2014, with time slots from 12:00 AM to 8:00 PM. A technician named Oscar Martin is assigned to a slot. A callout box with a blue border and white background contains the text: "Click once on an Appointment then click on the Edit button". A dashed blue arrow points from the "Edit" button in the Ticket Detail Viewer to the "Scheduled" field in the Ticket Dispatch form. The Ticket Dispatch form is open and shows details for "TKT 1006 - Insp-Other (Medium) Laguna Hills Johnson, Alexis @25165 Derby". The "Scheduled" field is set to "12/23/2014" at "09:00 AM". Other fields include Site, Contact, Problem, Warranty, and Service Level. The form has "Schedule", "Save", and "Close" buttons at the bottom.

Re-scheduling an Appointment (continued)

Re-Schedule an Appointment from a Ticket

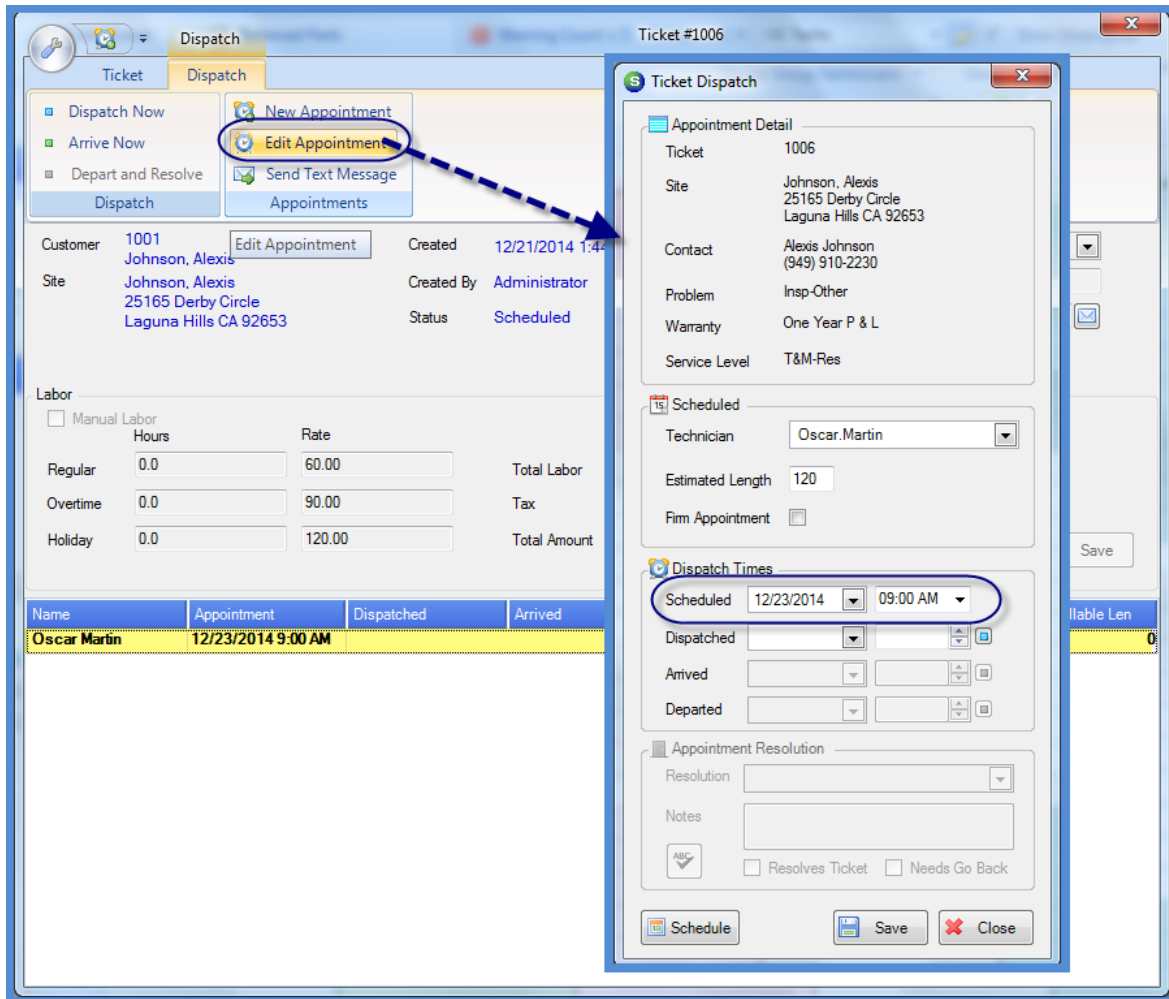
Open the desired Ticket and click on the *Appointments and Labor* button on the ribbon. In the grid area of the form, click on the appointment you wish to re-schedule. Click on the *Dispatch* context menu above the ribbon.



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

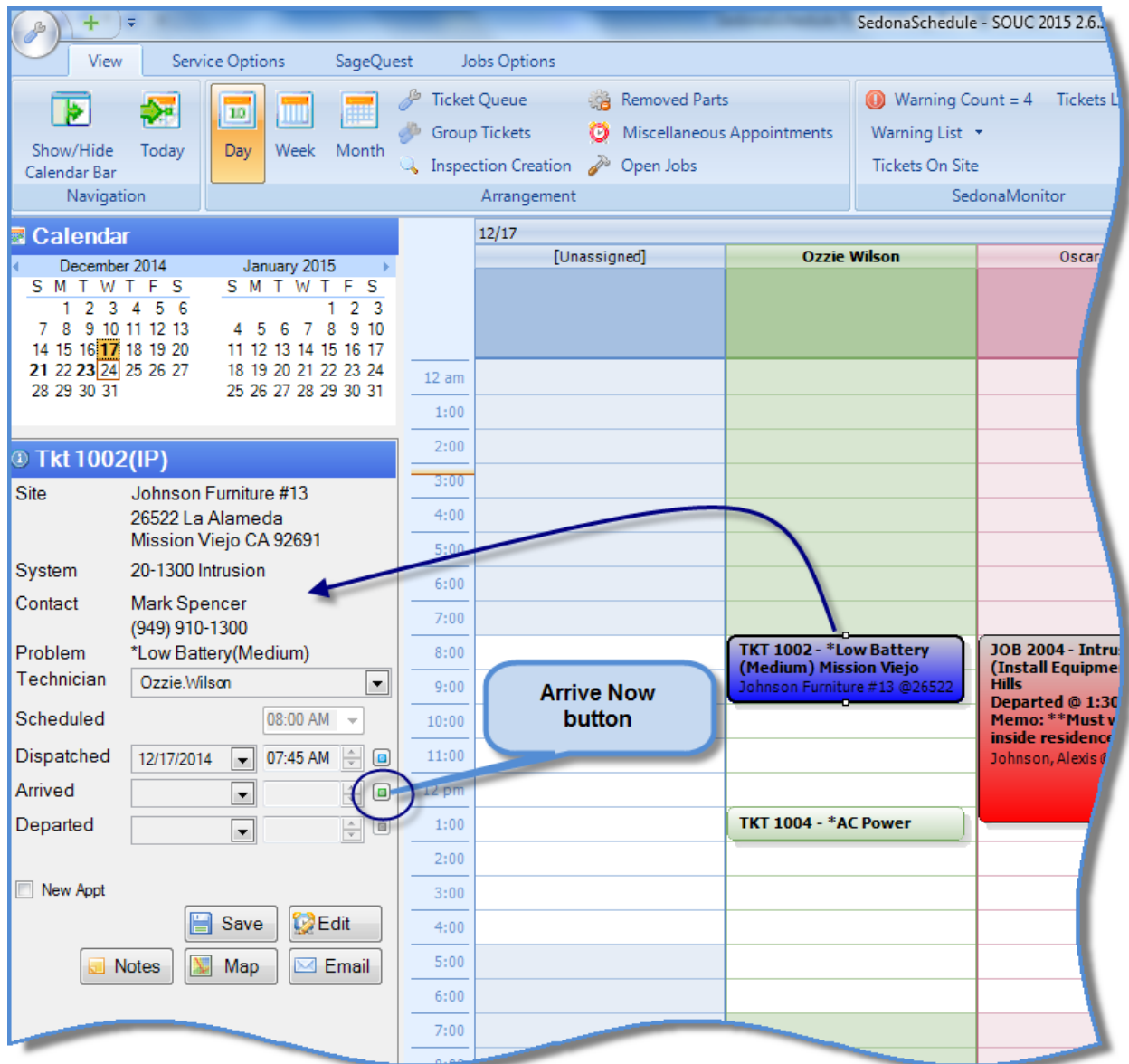
Billable Labor is determined by the Service Level assigned to the Ticket. The Service Level contains the billing rules as to:

- 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 - 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.



The screenshot displays the SedonaSchedule - SOUC 2015 2.6.1 interface. On the left, a calendar shows the transition from December 2014 to January 2015. Below the calendar is the 'Tkt 1002(IP)' details panel, which includes fields for Site (Johnson Furniture #13), System (20-1300 Intrusion), Contact (Mark Spencer), Problem (*Low Battery(Medium)), Technician (Ozzie.Wilson), Scheduled (08:00 AM), and Dispatched (12/17/2014 07:45 AM). A green 'Arrived' button is highlighted in the 'Arrived' field. The main area is a schedule board for 12/17, showing time slots from 12 am to 8:00 pm. A blue callout box labeled 'Arrive Now button' points to the green 'Arrived' button in the ticket details. The schedule board shows a green block for 'TKT 1002 - *Low Battery (Medium) Mission Viejo Johnson Furniture #13 @26522' from 7:45 AM to 12:00 PM. Other tickets shown include 'TKT 1004 - *AC Power' and 'JOB 2004 - Intru (Install Equipme Hills)'.

Dispatch a Technician from the Schedule Board (continued)

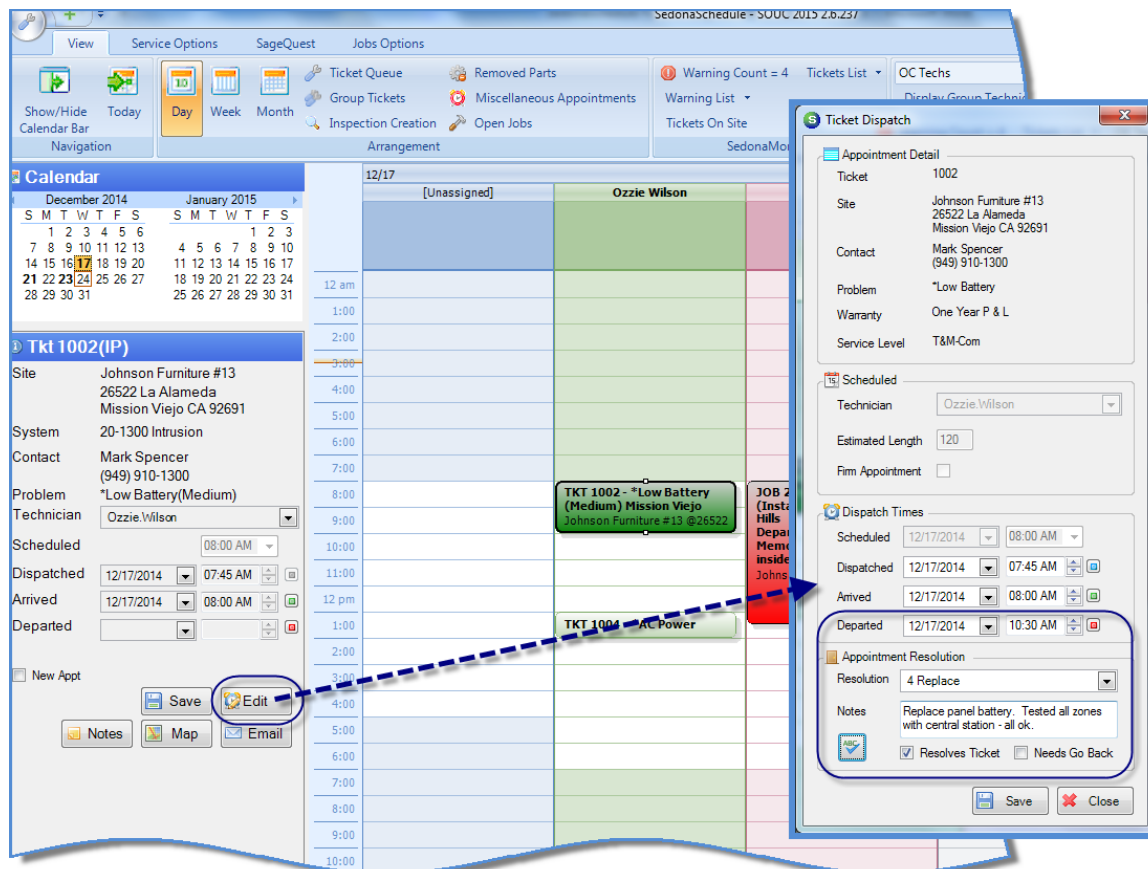
Live Dispatching - Departed

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

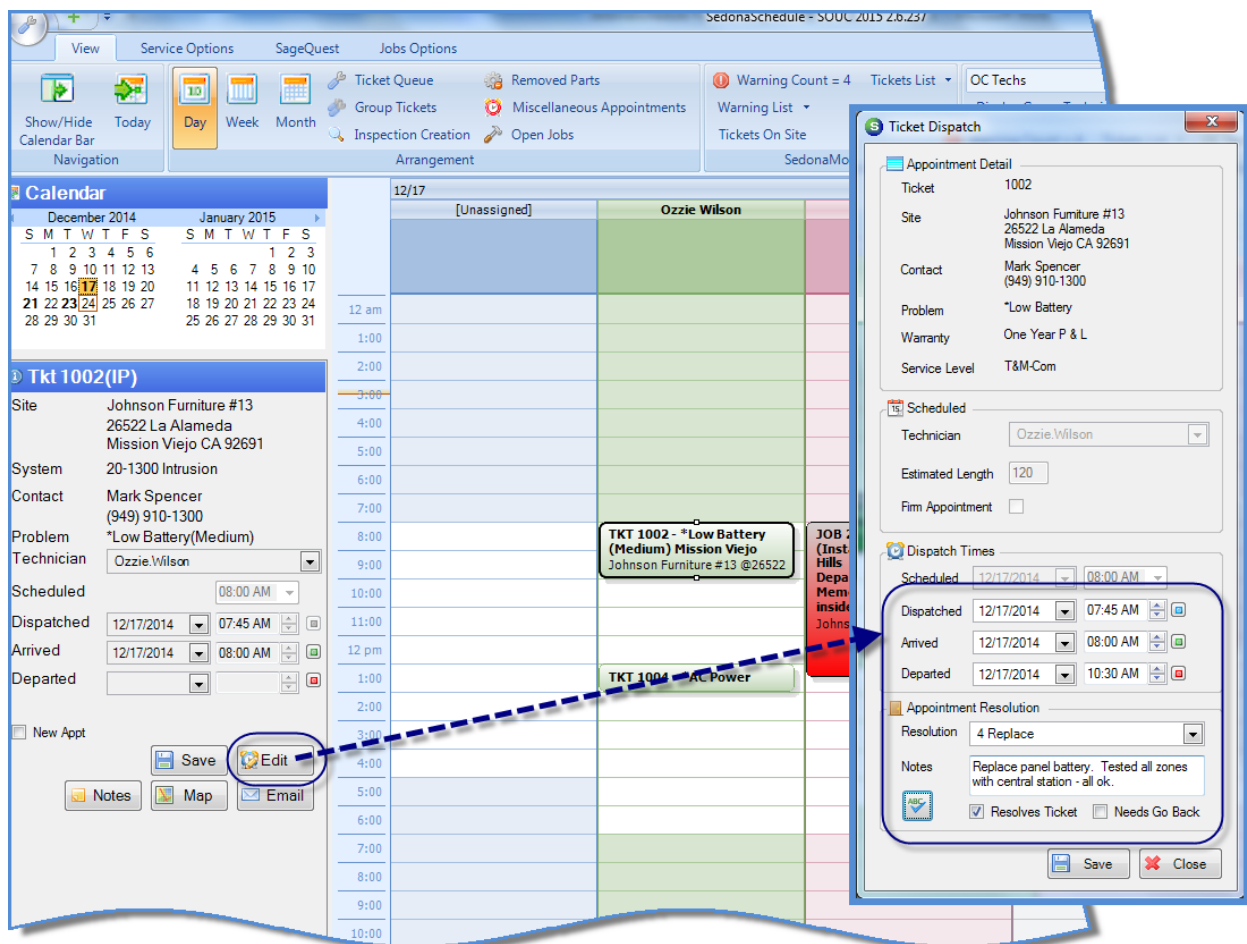
From the Schedule Board, click once on the Ticket to be dispatched. In the Ticket Detail Viewer click on the *Edit* button. The Ticket Dispatch form will be displayed - enter the times into the Dispatched, Arrived and Departed fields. If the Technician performed the work on the scheduled date, you do 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*.

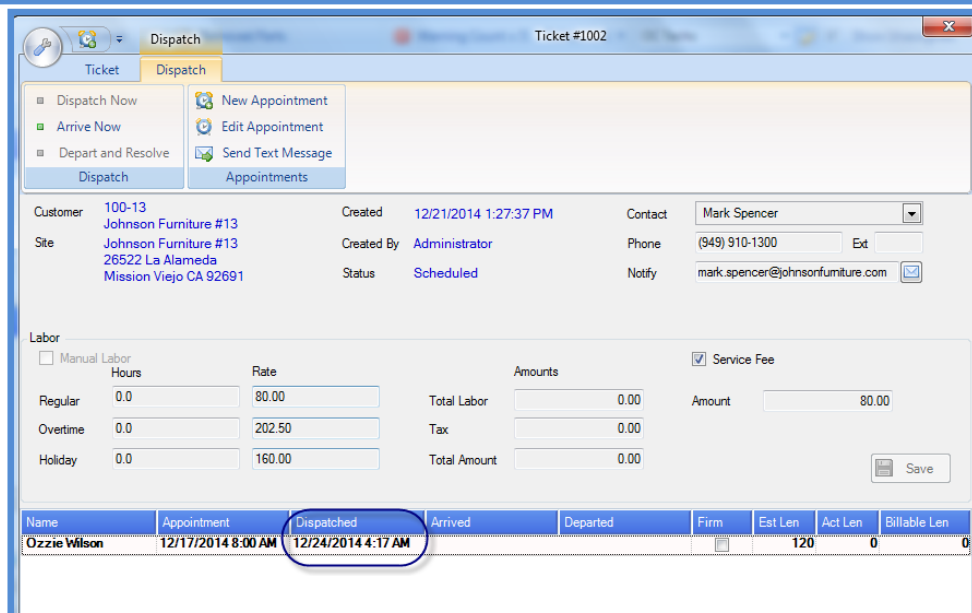
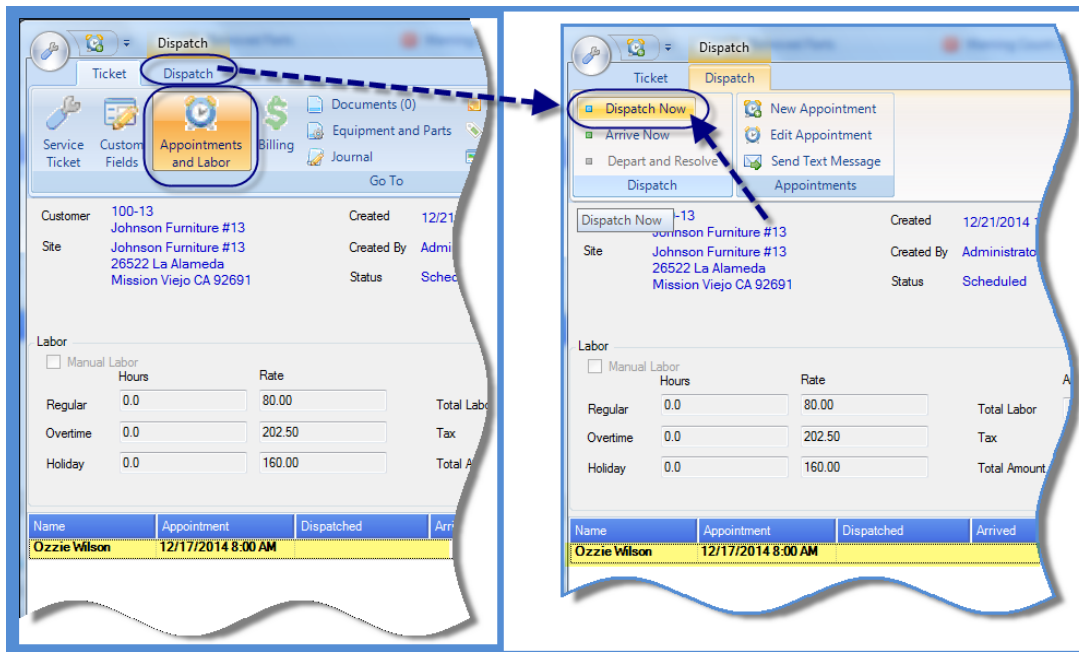
Both Dispatch methods from the Ticket will be covered on the following pages.

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.

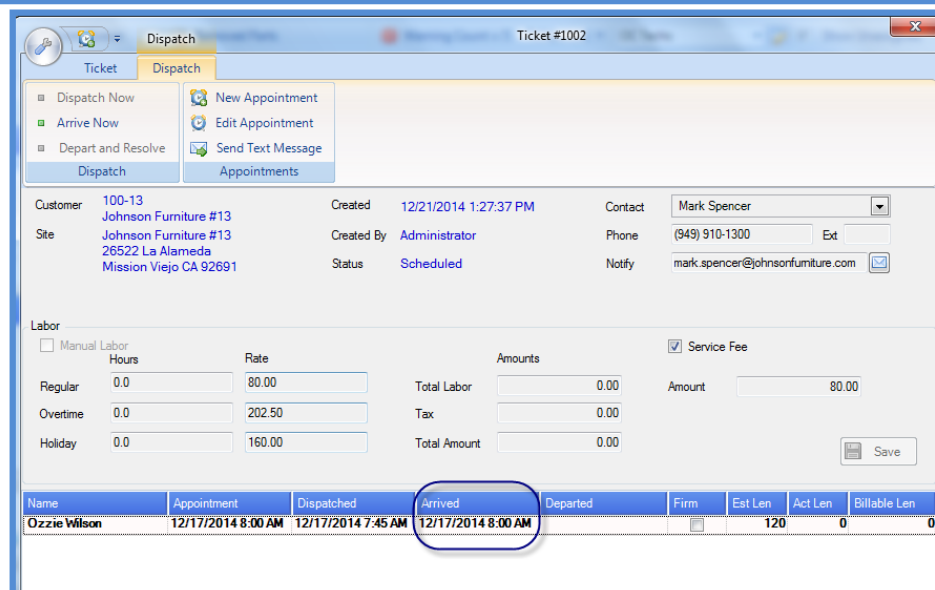
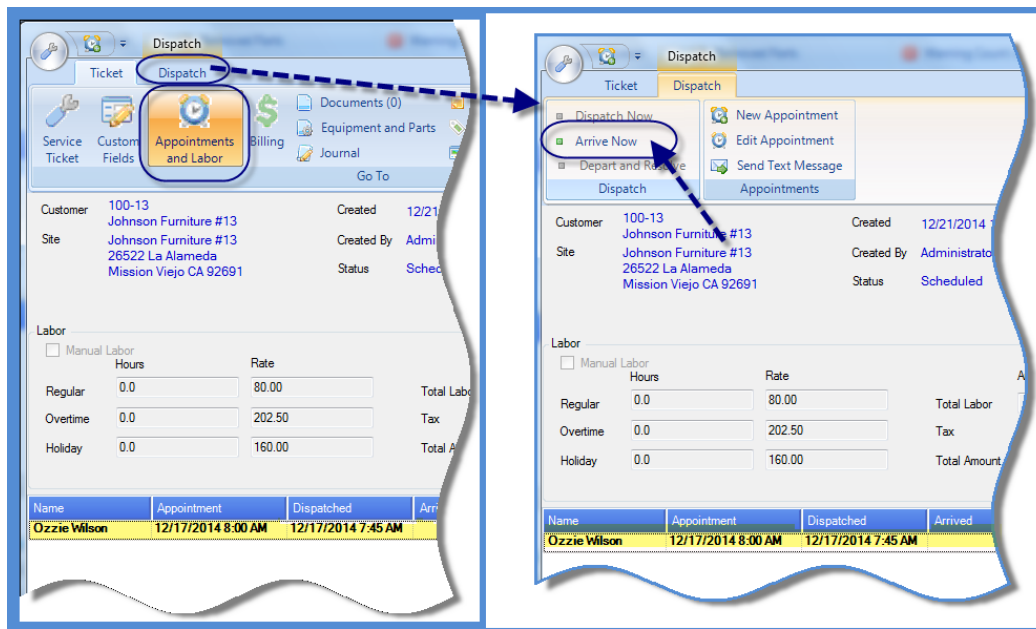


Dispatch a Technician from the Ticket (continued)

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.



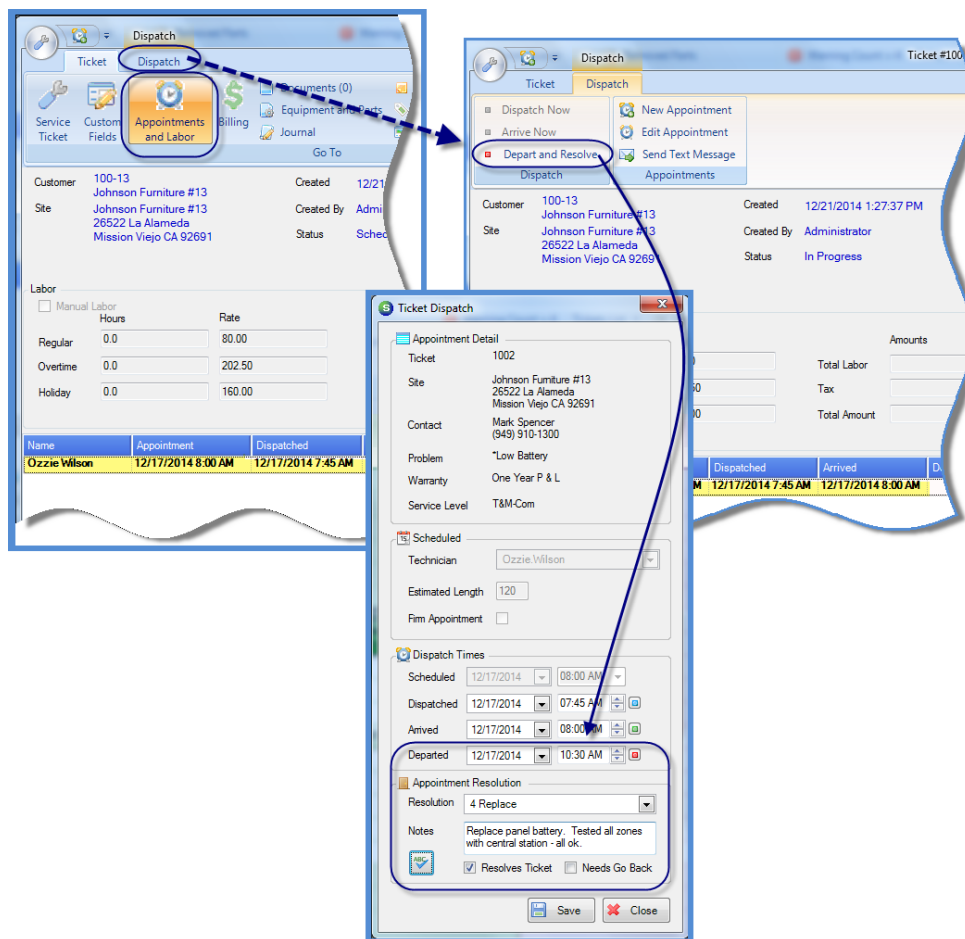
Dispatch a Technician from the Ticket (continued)

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.

Double-click on the Appointment to be Dispatched

Name	Appointment	Dispatched	Arrived	Departed
Ozzie Wilson	12/17/2014 8:00 AM			

Ticket Dispatch

Appointment Detail

Ticket: 1002
 Site: Johnson Furniture #13
 26522 La Alameda
 Mission Viejo CA 92691
 Contact: Mark Spencer (949) 910-1300
 Problem: *Low Battery
 Warranty: One Year P & L
 Service Level: T&M-Com

Scheduled

Technician: Ozzie Wilson
 Estimated Length: 120
 Firm Appointment:

Dispatch Times

Scheduled: 12/17/2014 08:00 AM
 Dispatched: 12/17/2014 07:45 AM
 Arrived: 12/17/2014 08:00 AM
 Departed: 12/17/2014 10:30 AM

Appointment Resolution

Resolution: 4 Replace
 Notes: Replace panel battery. Tested all zones with central station - all ok.
 Resolves Ticket Needs Go Back

Save Close

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.

The screenshot shows the 'Ticket #1002' window. The ribbon at the top includes buttons for 'Service Ticket', 'Custom Fields', 'Appointments and Labor', 'Billing', 'Equipment and Parts' (circled), 'Documents (0)', 'Notes (2)', 'Service History', 'Parts covered by contract', 'Journal', 'Other Items', 'Ticket Log', 'Purchase Orders (0)', and 'Ticket Group'. The 'COGS Account: 520000' is also visible. Below the ribbon, customer and site information is displayed, including 'Customer: 100-13 Johnson Furniture #13' and 'Site: Johnson Furniture #13'. A table titled 'Customer Equipment Detail' shows installed parts with columns for Part, Description, Qty, Location, Local Zone, Date, Type, Desc, and Remove. Below this is an empty 'Service Ticket Parts' table. At the bottom right, the 'New' and 'Save' buttons are visible, with 'New' circled.

Customer Equipment Detail					Installed			Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remove
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✘
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✘
IM-1270	IM-1270 12V 7A...	1			12/20/2014	Job	2002		✘
IM-1270	IM-1270 12V 7A...	1			12/20/2014	Job	2002		✘
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		✘
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		✘
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		✘
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		✘

Service Ticket Parts										
Stock	Technician	Part	Description	Location	Qty	Unit Price	Total Price	Tax	Costing	Serial-Lot

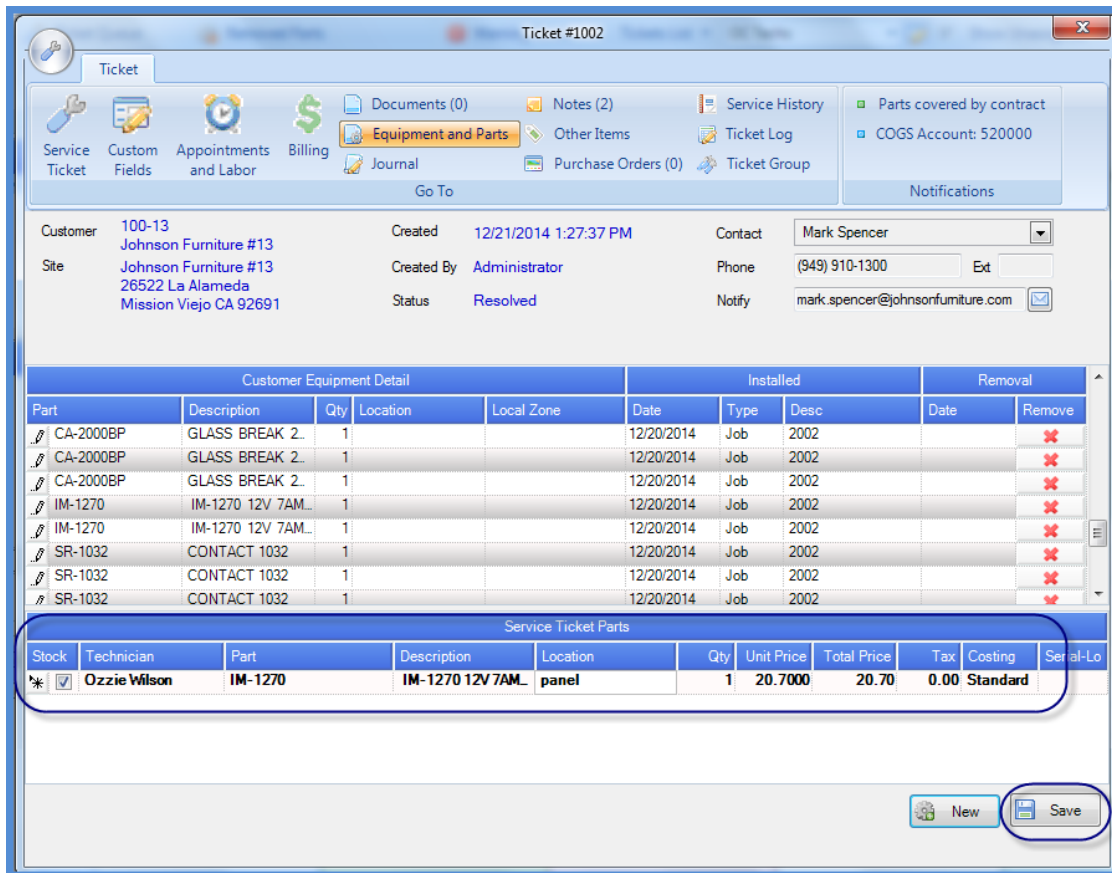
Parts (continued)

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.

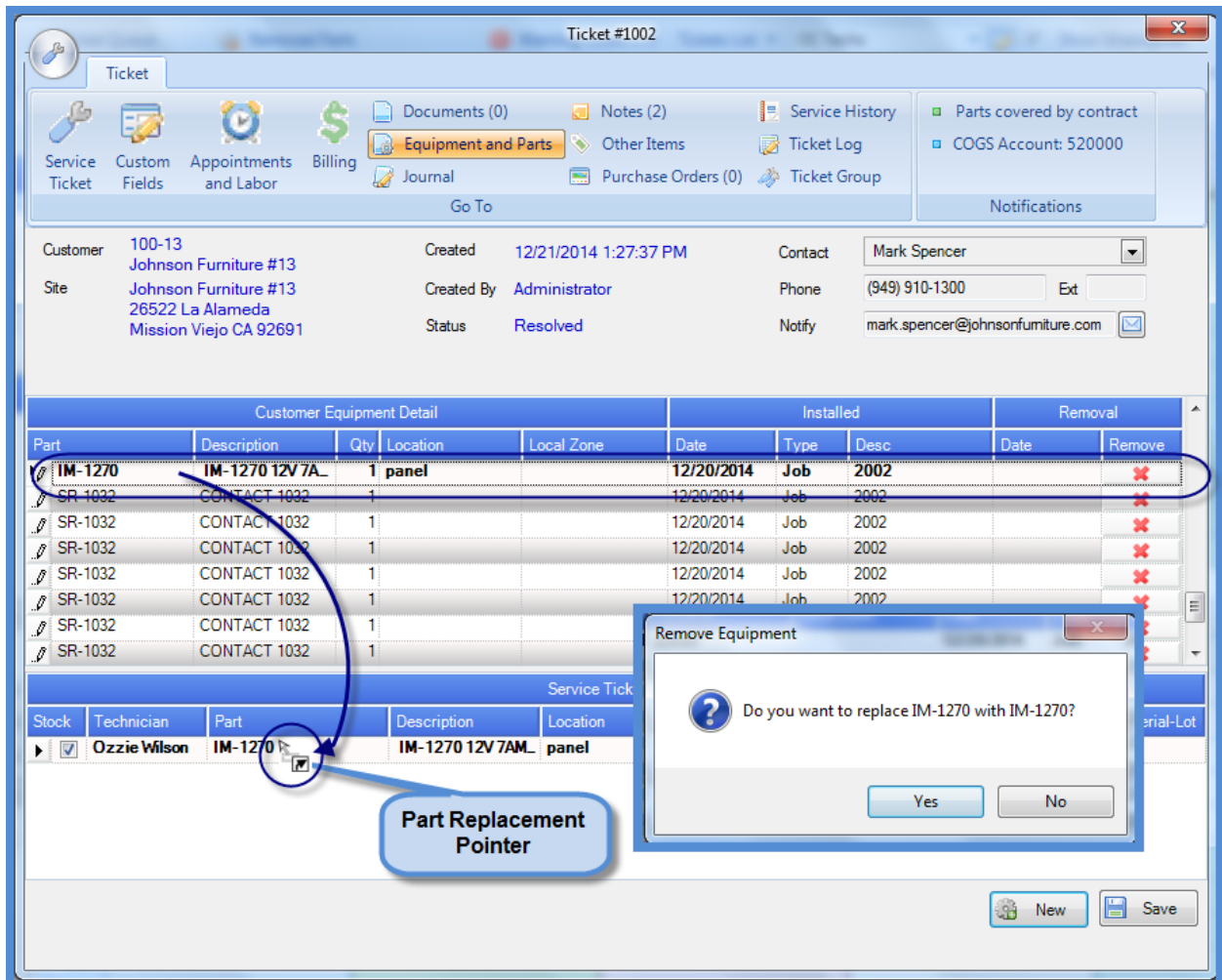
Replacing a Part

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: 



The screenshot displays the 'Ticket #1002' window. At the top, there are navigation tabs for 'Ticket', 'Equipment and Parts', 'Other Items', 'Purchase Orders (0)', and 'Ticket Group'. Below these are various icons for 'Service Ticket', 'Custom Fields', 'Appointments and Labor', 'Billing', 'Documents (0)', 'Notes (2)', 'Service History', 'Parts covered by contract', 'Journal', and 'Ticket Log'. The main area shows customer information for 'Johnson Furniture #13' and a 'Resolved' status. The 'Customer Equipment Detail' table lists several parts, with the first row 'IM-1270 IM-1270 12V 7A_ panel' selected. A 'Remove Equipment' dialog box is open, asking for confirmation to replace the part. A callout box labeled 'Part Replacement Pointer' points to a small icon in the 'Service Tick' table below the main table.

Customer Equipment Detail				Installed			Removal	
Part	Description	Qty	Location	Date	Type	Desc	Date	Remove
IM-1270	IM-1270 12V 7A_	1	panel	12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>
SR-1032	CONTACT 1032	1		12/20/2014	Job	2002		<input type="checkbox"/>

Service Tick				
Stock	Technician	Part	Description	Location
<input checked="" type="checkbox"/>	Ozzie Wilson	IM-1270	IM-1270 12V 7A_	panel

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.

The screenshot displays the 'Ticket #1002' window in SedonaOffice. The interface includes a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Notes (2), Service History, Parts covered by contract, Equipment and Parts, Other Items, Ticket Log, Journal, Purchase Orders (0), and Ticket Group. The COGS Account is 520000. Customer information includes Johnson Furniture #13, Site 26522 La Alameda, Mission Viejo CA 92691, and Contact Mark Spencer. The status is Resolved.

Customer Equipment Detail					Installed			Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remove
IM-1270	IM-1270 12V 7AMP...	1			12/20/2014	Job	2002		
IM-1270	IM-1270 12V 7AMP...	1	panel		12/20/2014	Job	2002	12/17/2014	
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		

Service Ticket Parts										
Stock	Technician	Part	Description	Location	Qty	Unit Price	Total Price	Tax	Costing	Serial-Lot
<input checked="" type="checkbox"/>	Ozzie Wilson	IM-1270	IM-1270 12V 7AMP...	panel	1	20.7000	20.70	0.00	Standard	

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.

The screenshot shows the SedonaOffice interface for Ticket #1002. The 'Equipment and Parts' section is active, displaying a table of equipment details. A modal dialog box titled 'Undo Equipment Removal' is open, asking 'Are you sure you want to undo the removal of this Equipment?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. In the background table, the row for part 'IM-1270' is highlighted with a red circle, and its text is bolded.

Customer Equipment Detail					Installed			Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remove
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✖
IM-1270	IM-1270 12V 7A...	1			12/20/2014	Job	2002		✖
IM-1270	IM-1270 12V 7A...	1 panel			12/20/2014	Job	2002	12/17/2014	✖
SR-1032	CONTACT 1032	1			12/20/2014	Job	2002		✖
SR-1032	CONTACT 1032	1							✖
SR-1032	CONTACT 1032	1							✖
SR-1032	CONTACT 1032	1							✖
SR-1032	CONTACT 1032	1							✖

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.

The screenshot displays the 'Equipment and Parts' interface for Ticket #1002. The 'Customer Equipment Detail' table is as follows:

Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remov
5894	WIRELESS MOTION 5894	1	Hallway to offices		12/20/2014	Job	2002		X
5894	WIRELESS MOTION 5894	1	Hallway to restrooms/utili...		12/20/2014	Job	2002		X
5894	WIRELESS MOTION 5894	1	Upstairs storage east		12/20/2014	Job	2002		X
5894	WIRELESS MOTION 5894	1	Upstairs storage west		12/20/2014	Job	2002		X
5894	WIRELESS MOTION 5894	1	Manager's office		12/20/2014	Job	2002		X
5894	WIRELESS MOTION 5894	1	Rear exit-interior		12/20/2014	Job	2002		X
6150 RF	WIRELESS KEYPAD 6150 RF								X
6150 RF	WIRELESS KEYPAD 6150 RF								X
6150 RF	WIRELESS KEYPAD 6150 RF								X

The 'Remove Equipment' dialog box contains the following text:

Are you sure you want to remove this equipment without a replacement part?

Buttons: Yes, No

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.

Customer Equipment Detail

Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remove
5894	WIRELESS MOTI...	1			12/20/2014	Job	2002		✖
6150 RF	WIRELESS KEYP...	1			12/20/2014	Job	2002		✖
6150 RF	WIRELESS KEYP...	1			12/20/2014	Job	2002		✖
6150 RF	WIRELESS KEYP...	1			12/20/2014	Job	2002		✖
AD12612	POWER SUPPLY...	1			12/20/2014	Job	2002		✖
AS-XF1640	TRANSFORMER...	1			12/20/2014	Job	2002		✖
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✖
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✖
CA-2000BP	GLASS BREAK 2...	1			12/20/2014	Job	2002		✖

Service Ticket Parts

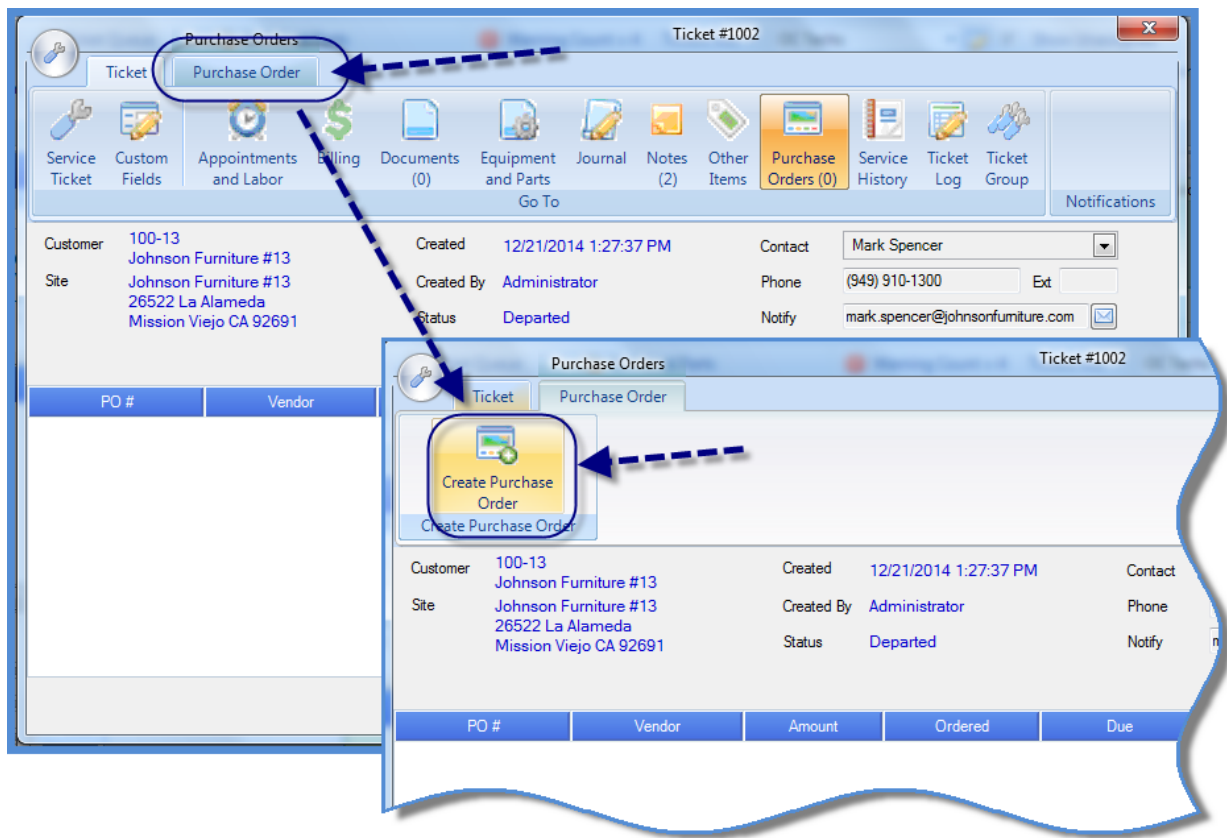
Stock	Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Tax	Costing	Serial-Lot
<input checked="" type="checkbox"/>	OC210	IM-1270	IM-1270 12V 7AM... panel		1	20.7000	20.70	0.00	Standard	
<input type="checkbox"/>	OC	AD12612	POWER SUPPLY...		1	20.2500	20.25	0.00	Standard	

To Create a PO for the Part, the Stock option must be un-checked

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.

New Purchase Order

Vendor: ADI | Category: Service | Print Now | Direct Expense

Purchase Order

Vendor Address: ADI, 9610 Ridgehaven CT, Suite B, San Diego CA 92123, (800) 555-4321

Ship To: 22691 Trabuco Canyon, Mission Viejo CA 92691

PO #: 3011 | Branch: OC | Ordered: 12/17/2014

Tracking #: | Ship: 12/17/2014 | Method: Pickup | Ticket: 1002

Parts Due: 12/17/2014 | Acknowledged: | Created By: | Last Updated:

Parts \$11.55 | Expenses | Documents | Select From All Parts

Part	Description	Vendor Part	Pkg Quantity	Quantity	Cost	Amount	Received	Standard
AD12612	POWER SUPP_	AD12612	1	1	11.5500	11.55	0.00	11.55

Memo:

Total: \$11.55 | Received:

Closed | | |

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

- Level 1 – 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.
- Level 2 – 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.
- Level 3 – the note entered may only be viewed by Users with a Level 3 User Group access. Level 3 notes will not be printed on Service Tickets.

The screenshot shows the 'Ticket #1002' window. The ribbon includes icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (2), Other Items, Purchase Orders (1), Service History, Ticket Log, and Ticket Group. The customer information section shows: Customer 100-13 Johnson Furniture #13, Site Johnson Furniture #13 26522 La Alameda Mission Viejo CA 92691, Created 12/21/2014 1:27:37 PM, Contact Mark Spencer, Phone (949) 910-1300, Status Departed, and Notify mark.spencer@johnsonfurniture.com. The Notes table has the following data:

Notes	Level	Resolution	Entered	By	Edited	Edited By
Low battery signal received in CS	1 - No Restriction	<input type="checkbox"/>	12/21/2014 1:27 PM	Administrator	12/21/2014 1:27 PM	Administrator
▶ Replace panel battery. Tested all zones with central station. All ok.	1 - No Restriction	<input checked="" type="checkbox"/>	12/24/2014 3:49 AM	Administrator	12/24/2014 5:42 AM	Administrator

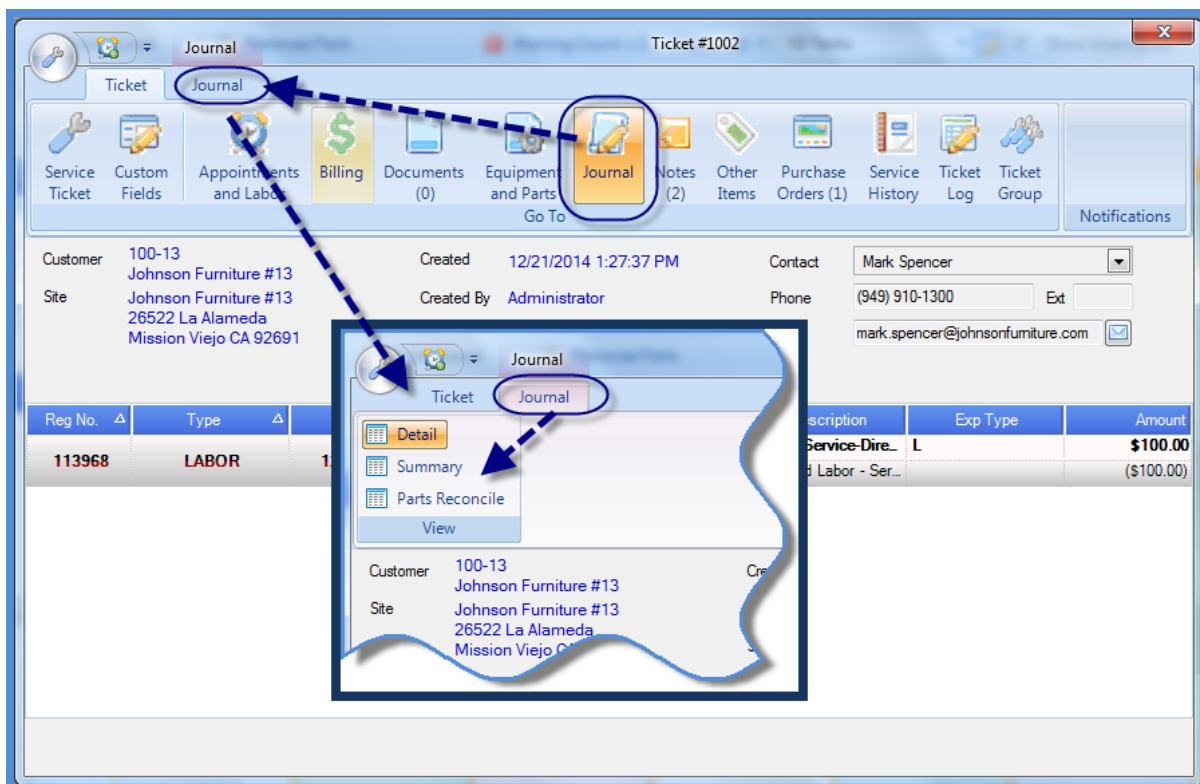
At the bottom, the Access Level is set to '1 - No Restriction' and the 'Resolution Note' checkbox is checked. Buttons for 'List', 'Instructions', 'New', and 'Save' are visible.

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.

The screenshot shows the 'Journal Detail' window for 'Ticket #1002'. The window title bar includes 'Journal' and 'Ticket #1002'. The main area is divided into a navigation menu on the left and a data section on the right. The navigation menu has 'Detail' selected, with a blue arrow pointing to the 'Detail' button. The data section contains the following information:

Customer: 100-13 Johnson Furniture #13
 Site: Johnson Furniture #13, 26522 La Alameda, Mission Viejo, CA 92691
 Created: 12/21/2014 1:27:37 PM
 Created By: Administrator
 Status: Departed
 Contact: Mark Spencer
 Phone: (949) 910-1300
 Notify: mark.spencer@johnsonfurniture.com

Reg No.	Type	Date	Reference	Acct	Description	Exp Type	Amount
113968	LABOR	12/17/2014	Svc Labor	520005	COS - Service Dire...	L	\$100.00
			Svc Labor	258200	Deferred Labor - Ser...		(\$100.00)
113978	RCPT	12/17/2014	3011	200100	Open Inventory Rec...		(\$11.55)
			3011	510001	COS - Jobs-Parts	M	\$11.55

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.

The screenshot shows the 'Journal Summary' window for Ticket #1002. The window title is 'Journal - Ticket #1002'. The navigation menu on the left includes 'Detail', 'Summary' (highlighted with a blue circle and a blue arrow), and 'Parts Reconcile'. Below the menu is a 'View' button. The main area displays ticket metadata:

- Customer: 100-13 Johnson Furniture #13
- Site: Johnson Furniture #13, 26522 La Alameda, Mission Viejo CA 92691
- Created: 12/21/2014 1:27:37 PM
- Created By: Administrator
- Status: Departed
- Contact: Mark Spencer
- Phone: (949) 910-1300
- Notify: mark.spencer@johnsonfurniture.com

Below the metadata is a table of financial transactions:

Acct No.	Description	Debit	Credit	Net
200100	Open Inventory Receipts*	\$0.00	\$11.55	(\$11.55)
258200	Deferred Labor - Service	\$0.00	\$100.00	(\$100.00)
510001	COS - Jobs - Parts	\$11.55	\$0.00	\$11.55
520005	COS - Service-Direct Labor	\$100.00	\$0.00	\$100.00
Totals		\$111.55	\$111.55	\$0.00

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.

The screenshot illustrates the 'Parts Reconcile' functionality. The top window shows the 'Journal' tab with the 'Parts Reconcile' button highlighted. A blue arrow points from this button to the 'Service Ticket Parts' table in the bottom window. The 'Service Ticket Parts' table lists parts with columns for Stock, Warehouse, Part, Description, Location, Qty, Unit Price, Total Price, Tax, Costing, and Serial-Lot. A green arrow points from the 'AD12612' part in the table to the 'AD12612' part in the 'Parts Reconcile' table above.

Part Code	Description	Ticket Qty	Issued Qty	Will Issue	Balance
AD12612	POWER SUPPLY AD12612	1	1	0	0
IM-1270	IM-1270 12V 7AMP BATTERY	1	0	1	0

Stock	Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Tax	Costing	Serial-Lot
<input type="checkbox"/>	OC	AD12612	POWER SUPPLY		1	20.2500	20.25	0.00	Standard	
<input checked="" type="checkbox"/>	OC210	IM-1270	IM-1270 12V 7AMP		1	20.7000	20.70	0.00	Standard	

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.

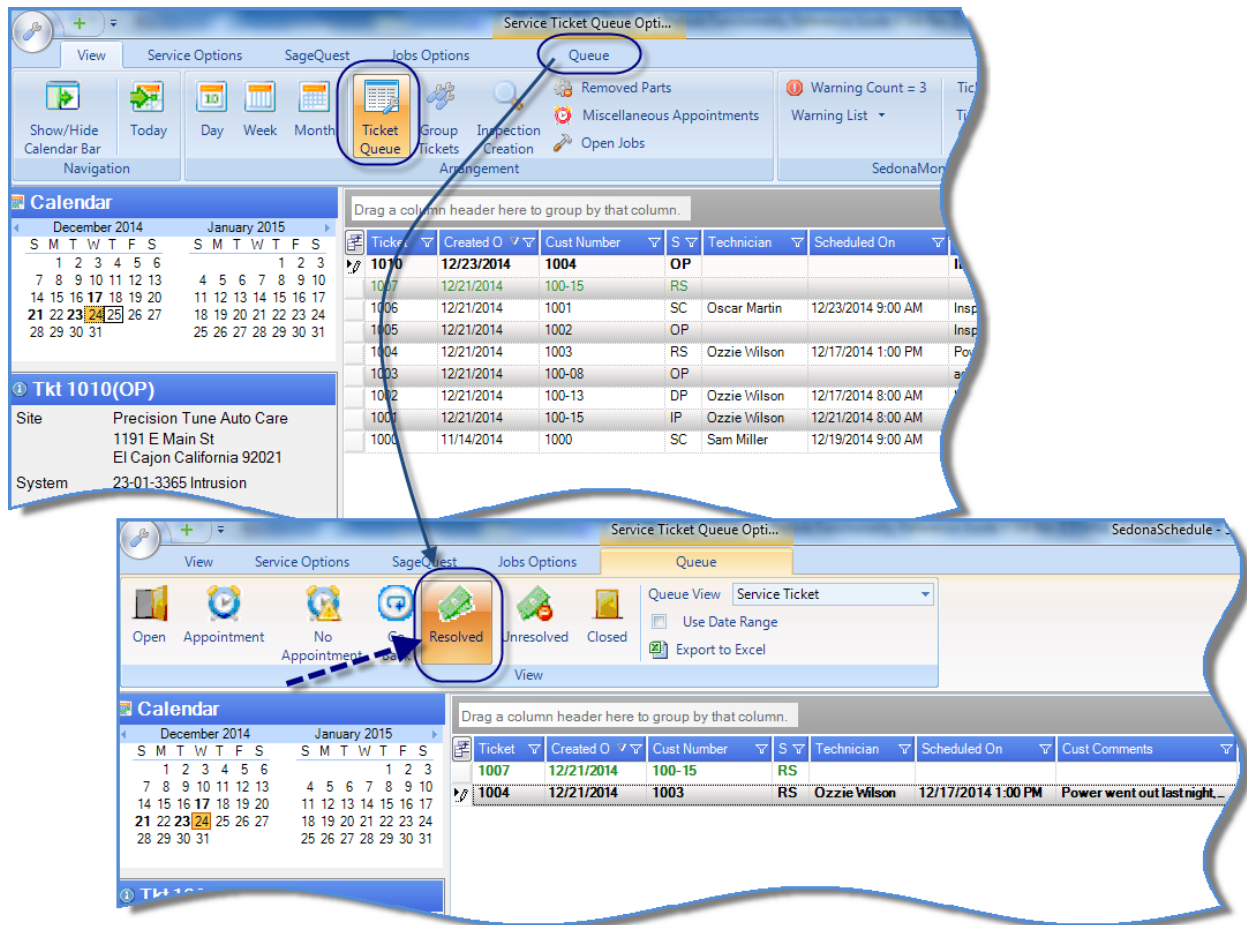
Reviewing Ticket for Invoicing (continued)

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.

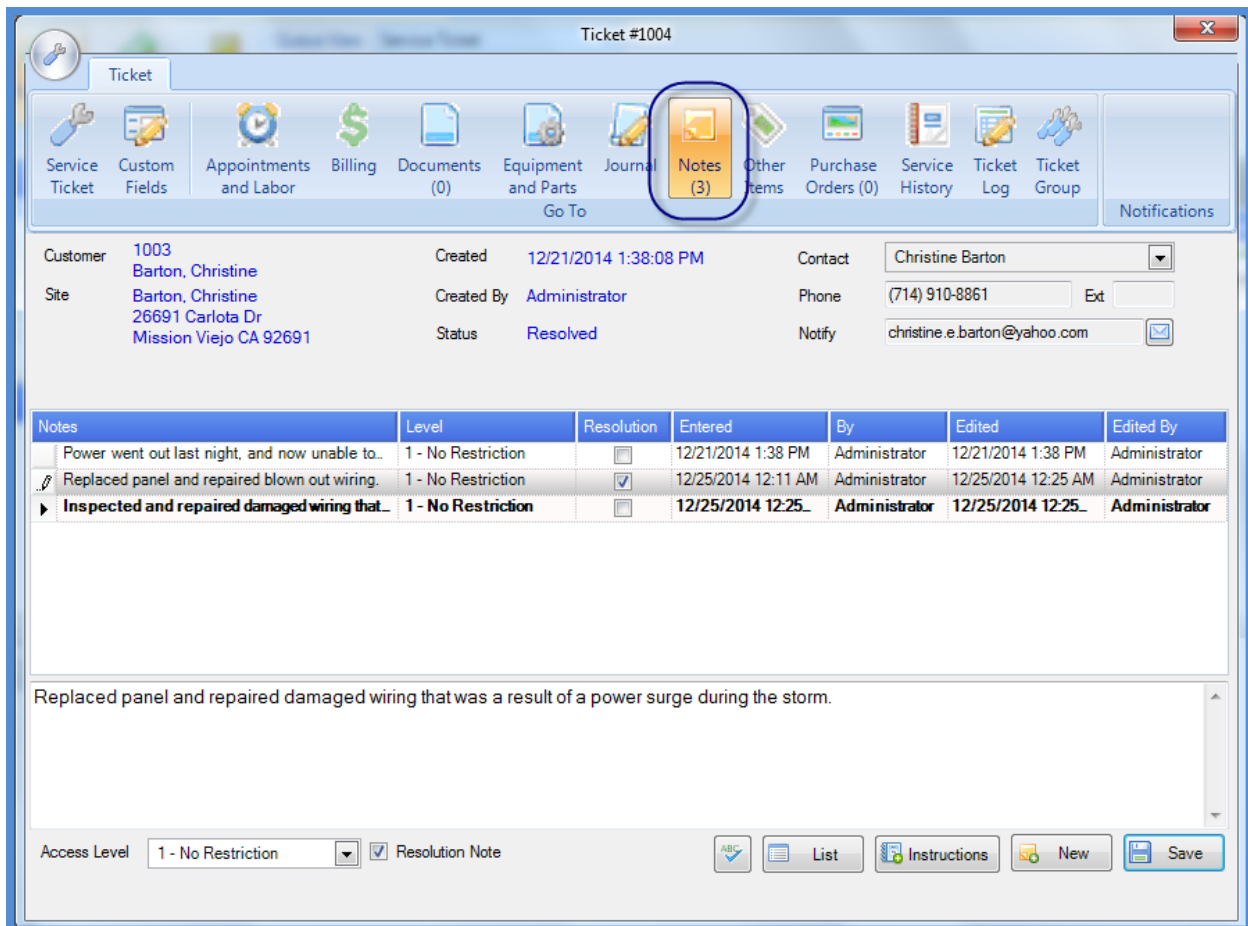


Reviewing Ticket for Invoicing (continued)

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.

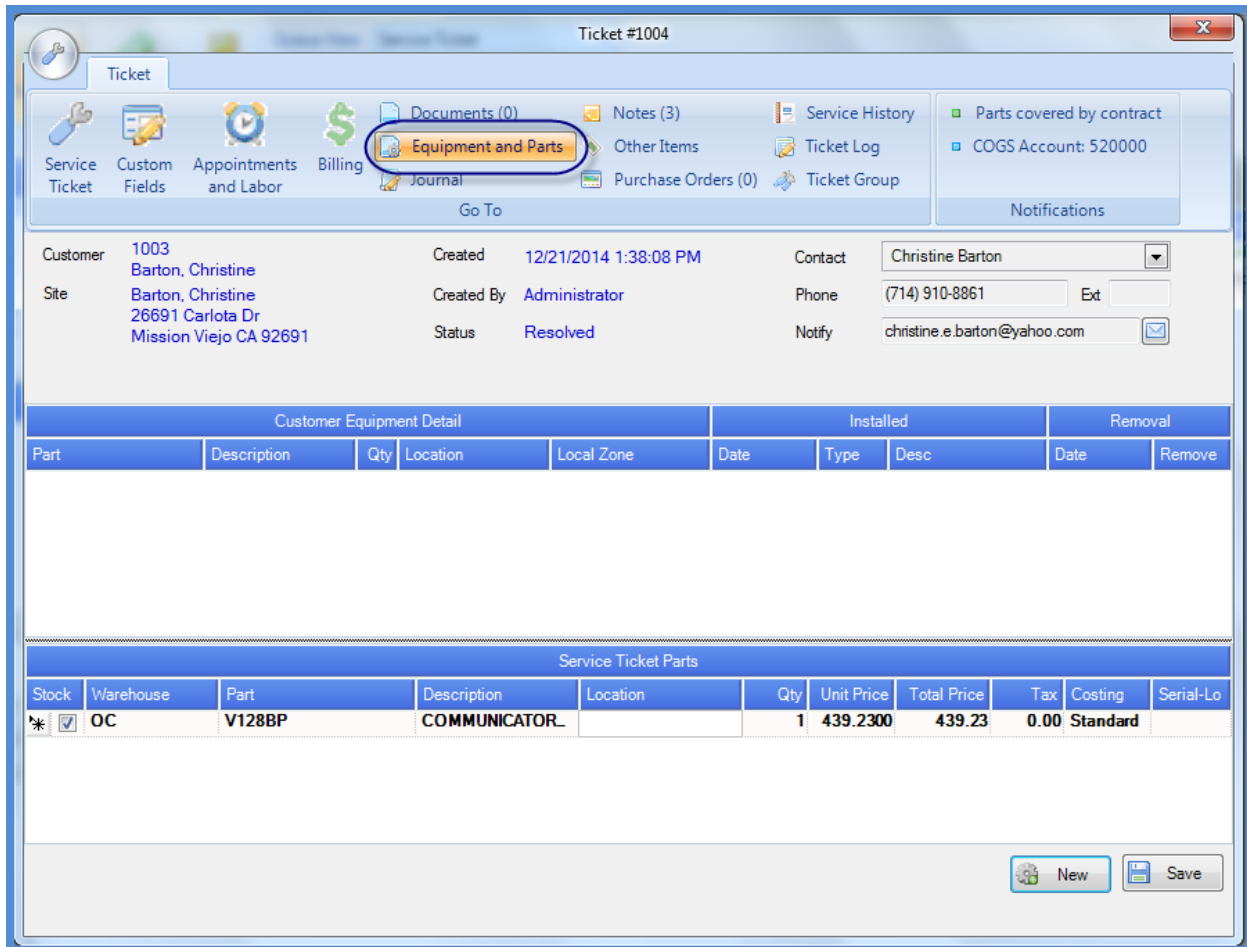


Reviewing Ticket for Invoicing (continued)

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)

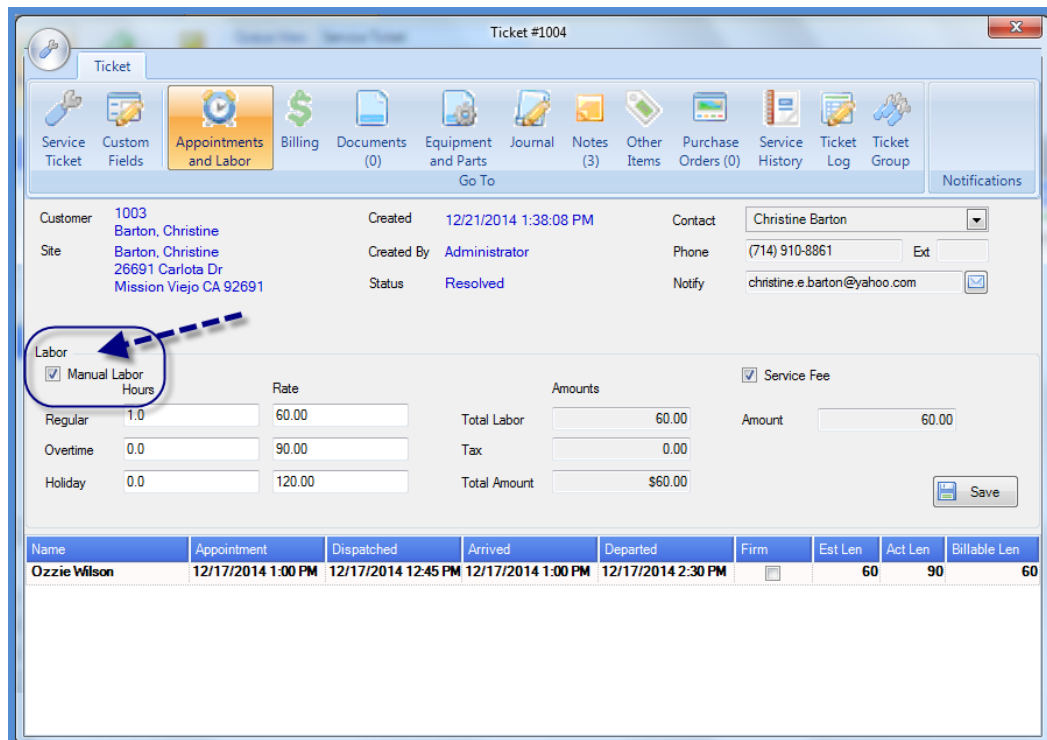
Review Labor

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.

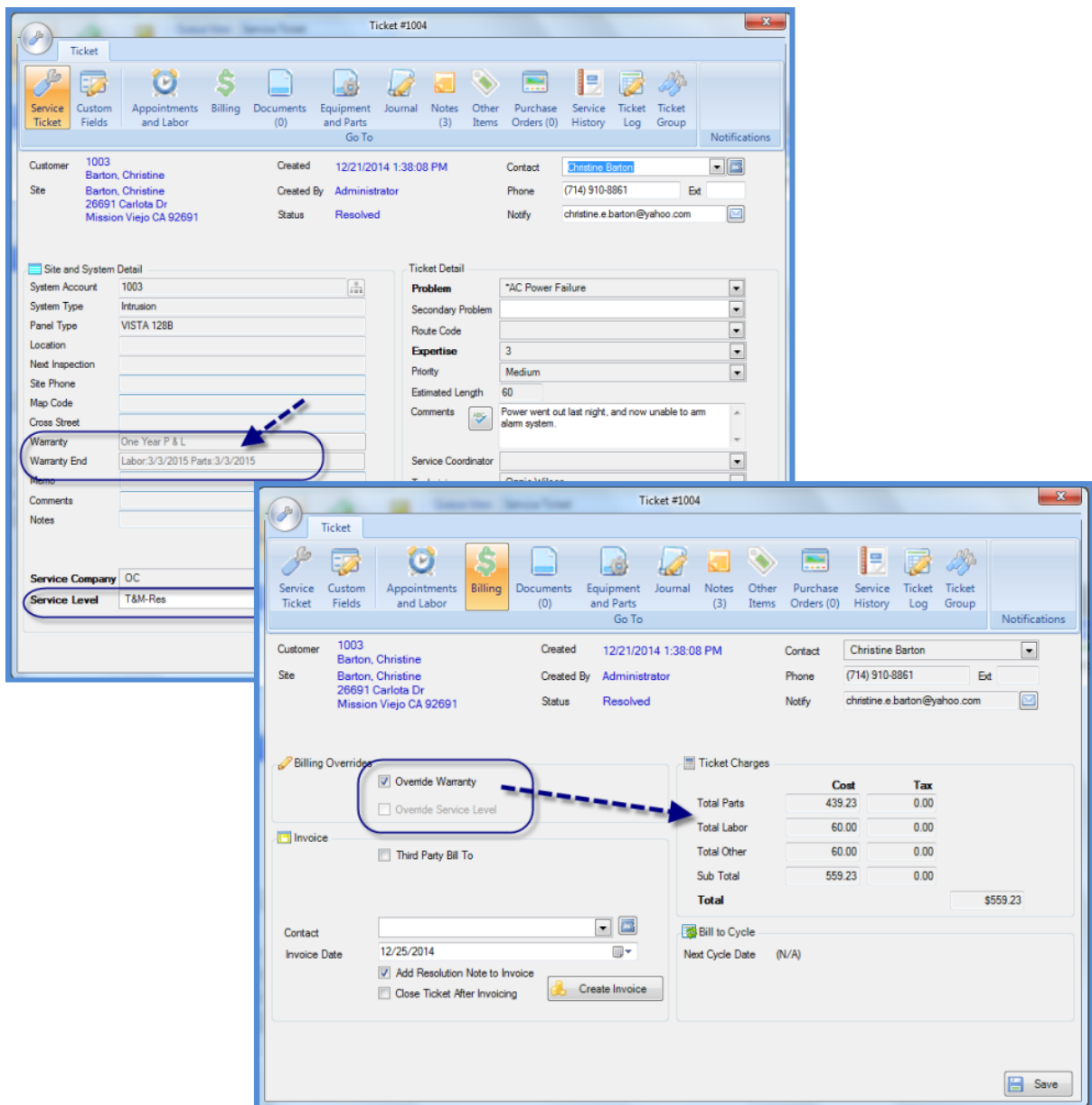
Note: Any automatically calculated charges may be manually overridden by the User if the appropriate user security permissions have been granted to the User.



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.

The screenshot shows the 'Ticket #1004' window. The ribbon at the top includes buttons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (3), Other Items (circled), Purchase Orders (0), Service History, Ticket Log, and Ticket Group. Below the ribbon, customer and contact information is displayed. A table lists items with columns for Item Code, Description, Qty, Unit Price, Total Price, and Tax. One item is listed: Part-Service, Wire, 1, 15.50, 15.50, 0.00. The 'Wire' description is circled, and a callout points to the drop-down arrow next to it, stating: 'Click on the drop-down arrow to select an Invoice Item Code'. Another callout points to the 'Wire' text, stating: 'The default Invoice Item Description may be overridden - this will print on the Invoice.' At the bottom right, there are 'New' and 'Save' buttons.

Item Code	Description	Qty	Unit Price	Total Price	Tax
* Part-Service	Wire	1	15.50	15.50	0.00

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.

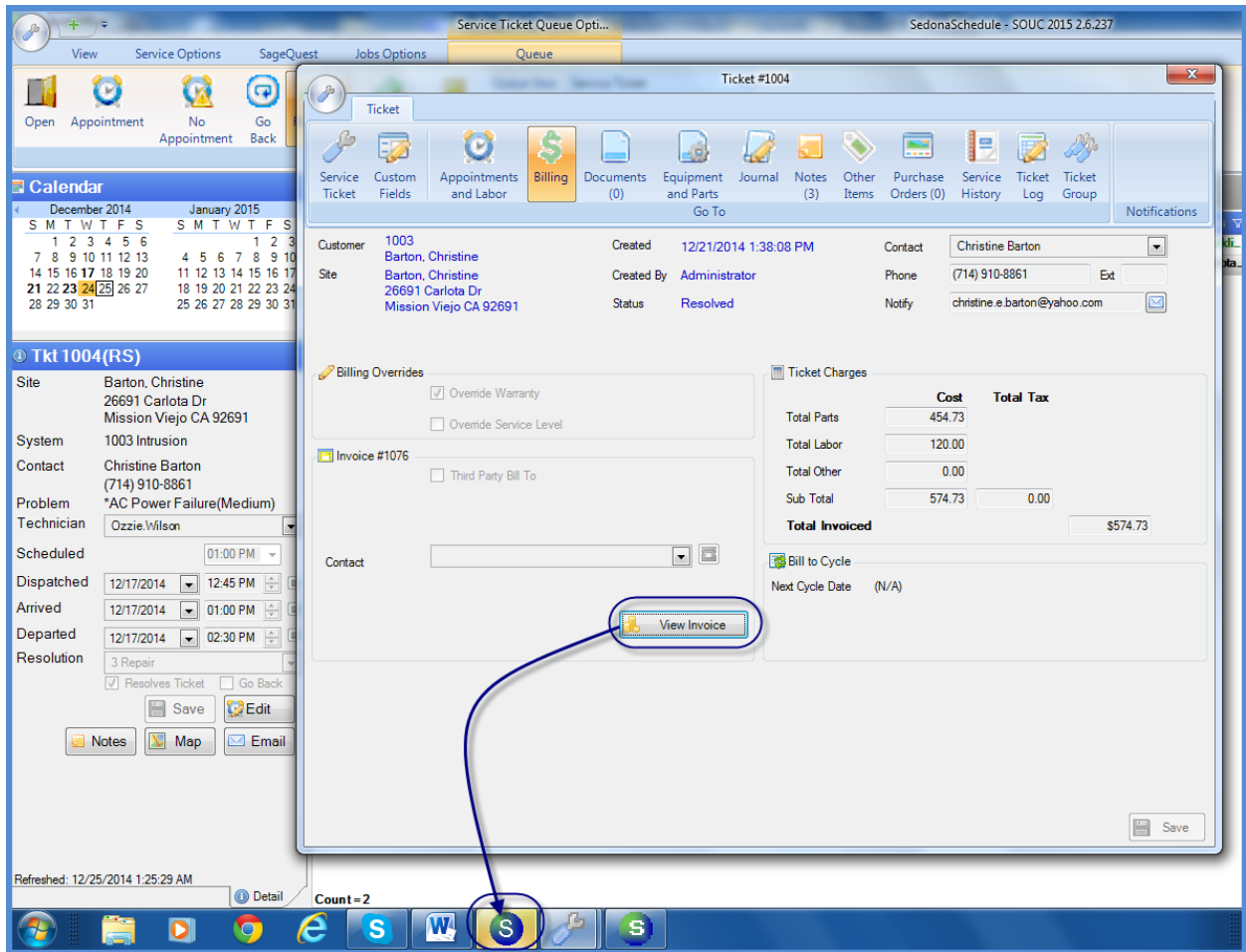
Once options have been selected, click on the *Create Invoice* button.

The screenshot displays the 'Ticket #1004' window in SedonaOffice. The 'Billing' tab is active, and the 'Billing' button on the ribbon is circled in blue. Below the ribbon, the 'Billing Overrides' section has 'Override Warranty' checked. The 'Invoice' section has 'Third Party Bill To' unchecked. The 'Ticket Charges' table shows a total of \$574.73. The 'Bill to Cycle' section has 'Next Cycle Date' set to (N/A). At the bottom, the 'Add Resolution Note to Invoice' and 'Close Ticket After Invoicing' checkboxes are circled in blue, along with the 'Create Invoice' button.

	Cost	Tax
Total Parts	439.23	0.00
Total Labor	60.00	0.00
Total Other	75.50	0.00
Sub Total	574.73	0.00
Total		\$574.73

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.

The screenshot displays the 'Invoice (SOUC 2015)' window. At the top, it shows fields for Customer ID (1003), Category (Service), A/R Account (110000), and Tax Group (Mission Viejo). The invoice number is 1076, dated 12/18/2014. The customer is identified as Barton, Christine, located at 26691 Carlota Dr, Mission Viejo, CA 92691. The invoice includes a table of items with columns for Item, Description, Qty, Rate, Amount, and Memo. A blue circle highlights the 'Items \$135.50' and 'Parts \$439.23' summary at the top of the item list. Below this, a detailed 'Part List' is shown, listing a part 'V128BP' with a description 'COMMUNICATOR', a quantity of 1, a unit rate of 439.23, and a total amount of 439.23. The main window also shows a memo: 'Replaced panel and repaired damaged w... a power surge during the storm.' and checkboxes for 'Complete' and 'Add to Print Queue'.

Reviewing Ticket for Invoicing (continued)

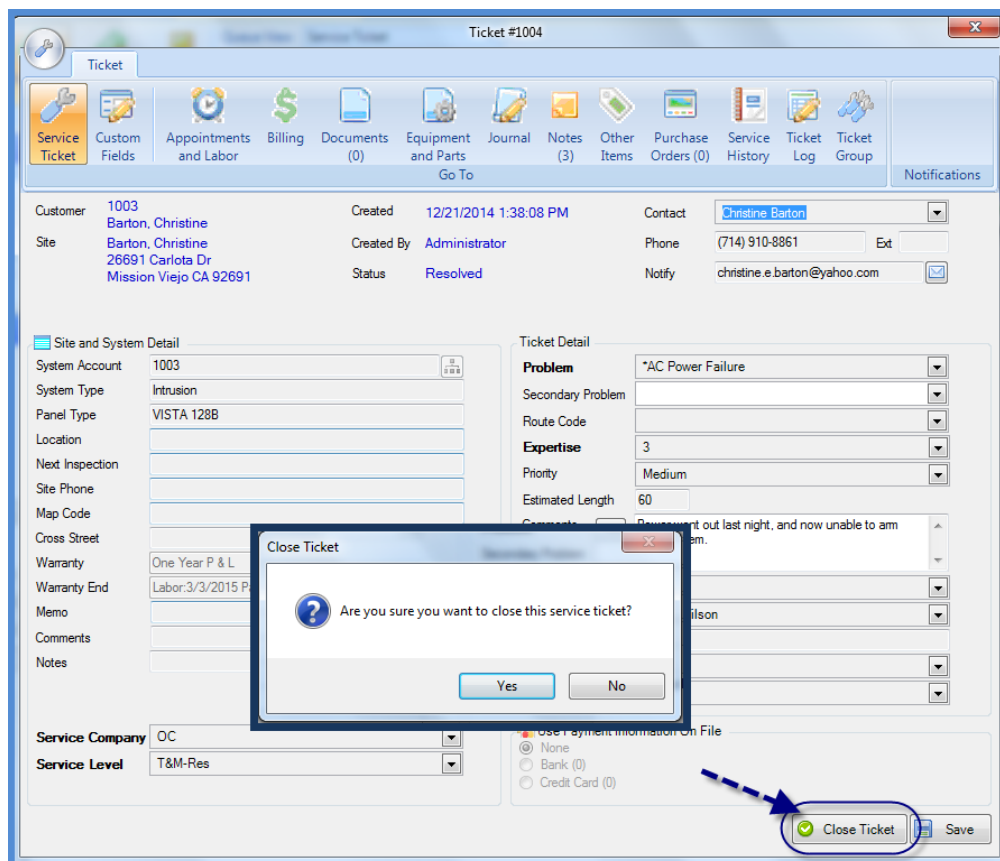
Closing a Ticket

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, a 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.

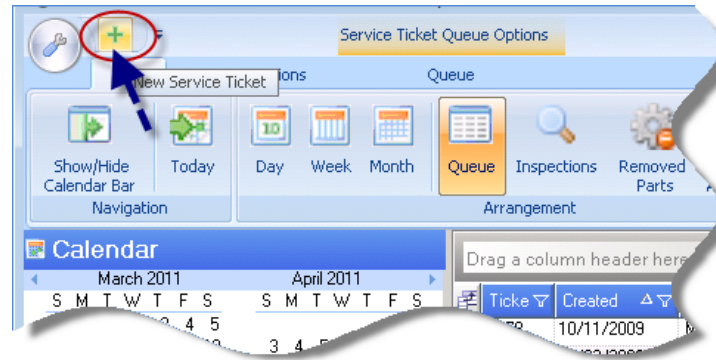
For Inspections, a Service Provider may be setup as the default Service Company if it is typical the Inspection is performed by a Service Provider. The Inspection Record for the System contains the setup where the service company is selected.

The screenshot shows the 'System Inspections' window with the following details:

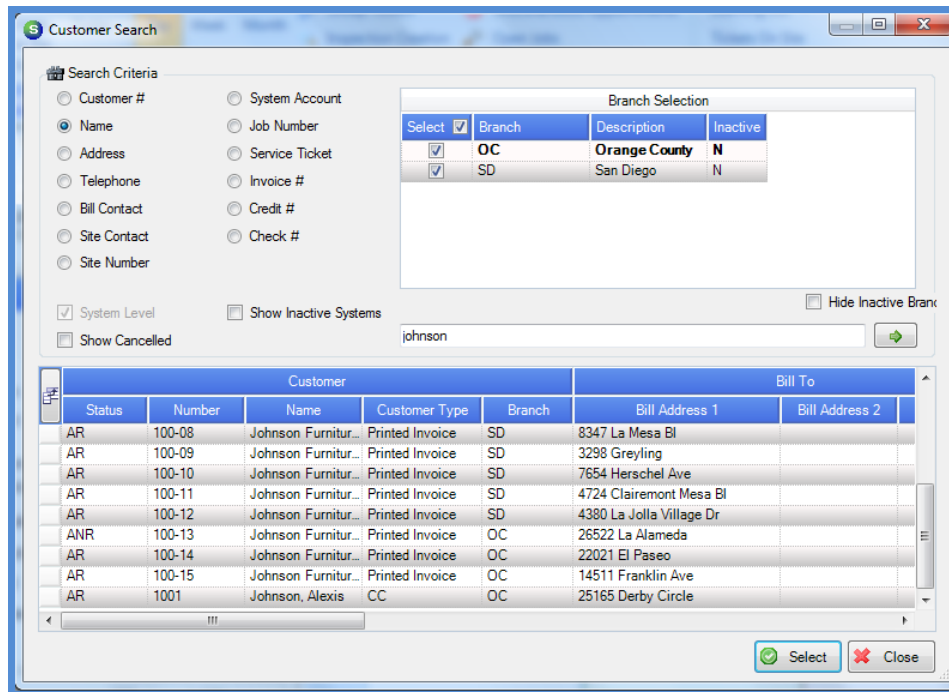
- Site: Johnson Furniture #11, 5812 E Sahara
- System: 10-1100 Intrusion
- Navigation: Detail | Equipment | Inspection Items
- Section: Inspection
- Fields:
 - Description: Annual Intrusion
 - Frequency: Annual
 - Service Problem Code: Insp-Intrusion
 - Service Level: INSP T&M-Com
 - Service Company: AllStar Alarm (highlighted with a blue circle)
 - Last Inspection: [Calendar icon]
 - Next Inspection: 10/31/2015 [Calendar icon]
 - Service Tech: [Dropdown]
 - Group Number: [Text]
 - Estimated Hours: [Text]
 - High Frequency Bypass: [Checkbox]
 - Exclude from High Frequency Check: [Checkbox]
 - Notes: [Text area]
- Section: Charges
- Fields:
 - Inspection Item: Labor-Insp
 - Amount: 175.00
- Buttons: Save, Terminate, Cancel

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.

The screenshot shows the 'New Ticket' form in SedonaOffice. The form is divided into several sections:

- Customer Information:** Customer: 100-11 Johnson Furniture #11, Site: Johnson Furniture #11, 5812 E Sahara, Las Vegas NV 89142-.
- Created Information:** Created: 12/25/2014 2:16:11 AM, Created By: Administrator, Status: Open.
- Contact Information:** Contact: Marty Shaw, Phone: (619) 325-1011, Notify: martin.shaw@johnsonfurniture.com.
- Site and System Detail:** System Account: 10-1100, System Type: Intrusion, Panel Type: VISTA 128B, Location: , Next Inspection: , Site Phone: (619) 325-1011, Map Code: , Cross Street: , Warranty: One Year P & L, Warranty End: Labor:10/1/2015 Parts:10/1/2015, Memo: , Comments: , Notes: .
- Ticket Detail:** Problem: *AC Power Failure, Secondary Problem: , Route Code: , Expertise: 3, Priority: Medium, Estimated Length: 60, Comments: Communication failure reported by central station., Service Coordinator: , Technician: AllStar Alarm, PO #: , Category: Service, Resolution: .
- Payment Information:** Use Payment Information On File: None, Bank (0), Credit Card (0).

A blue dashed arrow points to the 'Service Company' dropdown menu, which is currently set to 'AllStar Alarm'. Below the dropdown, the text 'Vendor Service' is displayed in a blue oval. The 'Save' button is located at the bottom 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.

The screenshot shows the 'Ticket #1012' form in the SedonaOffice application. The 'Custom Fields' tab is selected in the top navigation bar. The form displays the following information:

- Customer:** 100-11 Johnson Furniture #11
- Site:** Johnson Furniture #11, 5812 E Sahara, Las Vegas NV 89142-
- Created:** 12/25/2014 2:16:11 AM
- Created By:** Administrator
- Status:** Open
- Contact:** Marty Shaw
- Phone:** (619) 325-1011
- Notify:** martin.shaw@johnsonfurniture.com

The 'Tables' section contains three dropdown menus:

- Cause:** Cause
- Source:** Phone call
- User Table 3:** (empty)

The 'Text' section contains five text input fields labeled 'User Text 1' through 'User Text 5', all of which are empty.

The 'Checkboxes' section contains five checkboxes labeled 'Check Box 1' through 'Check Box 5', all of which are unchecked.

The 'Money' section contains two money labels with values of 0.00:

- Money Label 1: 0.00
- Money Label 2: 0.00

The 'Dates' section is empty.

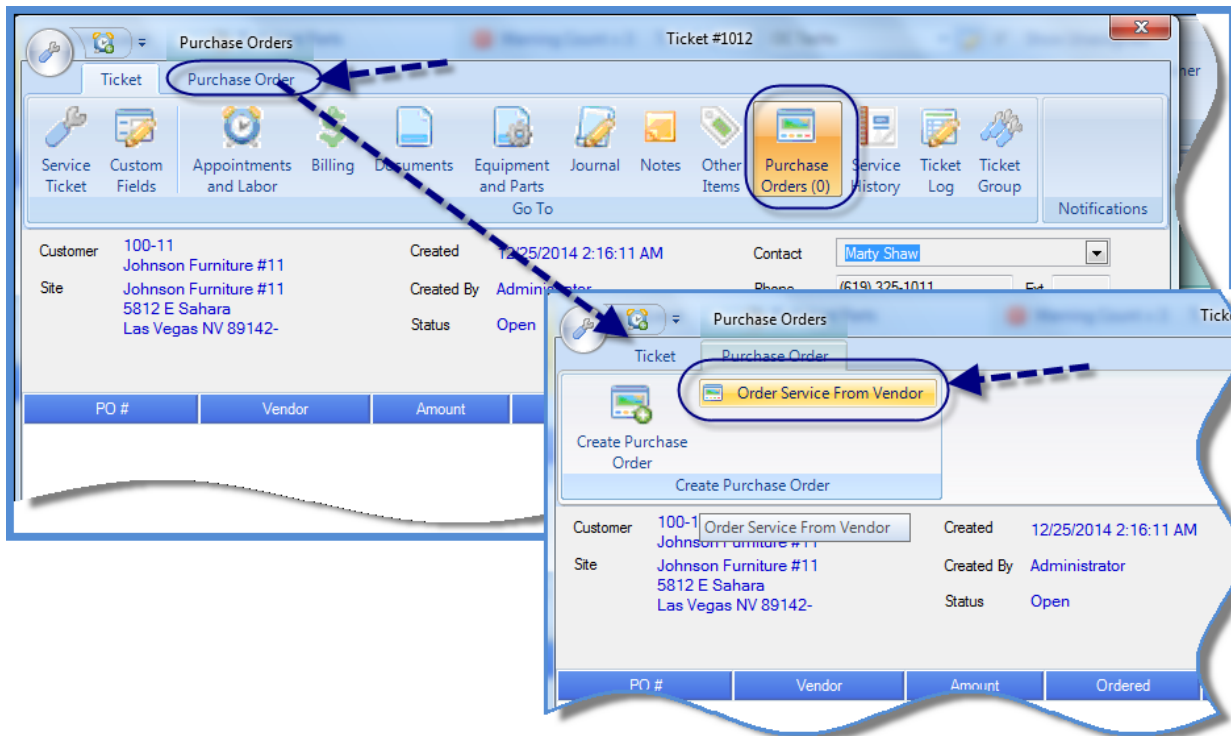
A 'Save' button is located at the bottom right of the form.

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.

New Purchase Order

Vendor: AllStar Alarm | Category: Service | Print Now | Direct Expense

Purchase Order

Vendor Address: AllStar Alarm, 4581 W Warm Springs Rd, Las Vegas NV 89118, (800) 325-9600

Ship To: 22691 Trabuco Canyon, Mission Viejo CA 92691

PO #: 3012 | Branch: OC | Ordered: 12/25/2014

Tracking #: | Ship: | Method: | Ticket: 1012

Parts Due: | Acknowledged: | Created By: | Last Updated:

Parts \$0.00 | Expenses \$150.00 | Documents

General Ledger			Job Costing		
Account	Description	Amount	Category	Ticket	Type
▶ 520020	COS- Service-Subcontractor	\$150.00	Service	1012	S

Memo: Service for Johnson Furniture #11, 5812 E Sahara, Las Vegas, NV 89142, Contact: Marty Shaw 619-325-1011

Total: \$150.00 | Received:

Closed | | |

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.

The screenshot illustrates the 'Schedule Ticket # 1012' interface. At the top, the 'New Appointment' button is highlighted with a blue callout. Below this, the ticket details are shown: Customer (100-11 Johnson Furniture #11), Site (Johnson Furniture #1, 5812 E Sahara, Las Vegas NV 89142), Created (12/25/2014 2:22:03 AM), Created By (Administrator), and Status (Open). The main area features a calendar view for December 2014 and January 2015. A table of service providers is displayed, with columns for 'Select', 'Code', 'Name', and 'Service Co'. The 'Schedule Board' is a grid with time slots (2:00 to 11:00) and service provider columns (AllStar Alarm, Henderson Security Service, Tempe Security). A callout box points to a specific time slot in the AllStar Alarm column, with the text 'Double-click on the desired Service Provider time-slot'. A 'Create Appointment' dialog box is shown, asking 'Are you ready to create an appointment for AllStar Alarm at 12/29/2014 9:00:00 AM?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a blue callout.

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.

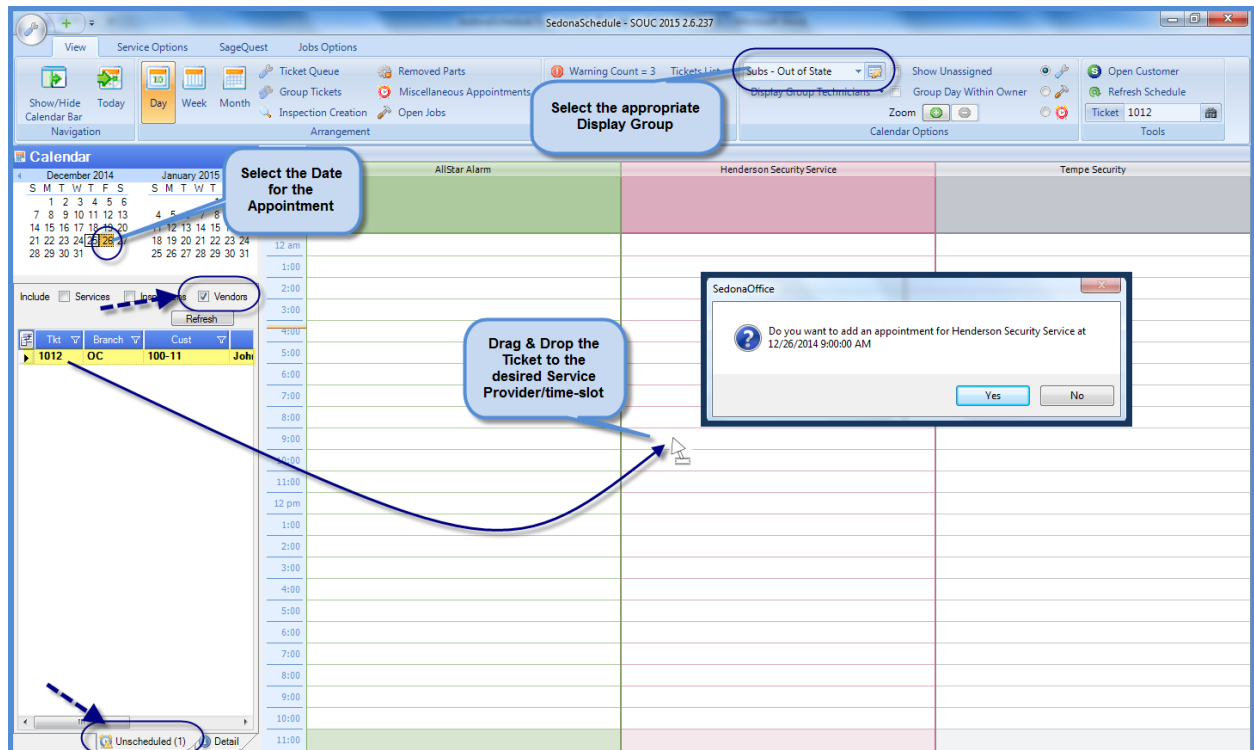
You must have the *Day* view selected from the Ribbon to be able to drag and drop a Vendor Ticket onto the Schedule Board.

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

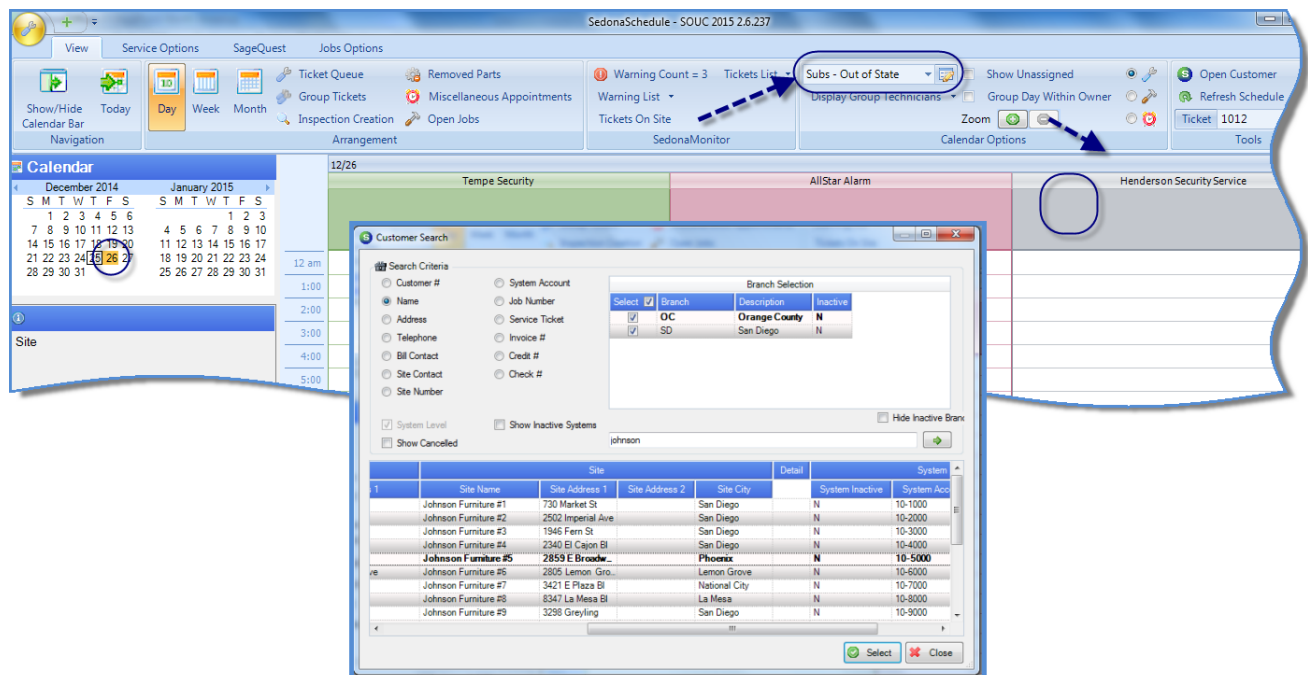
Vendor Tickets may be created and scheduled from the Schedule Board by “Double-Click to Add” method, the same as regular Service Tickets.

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

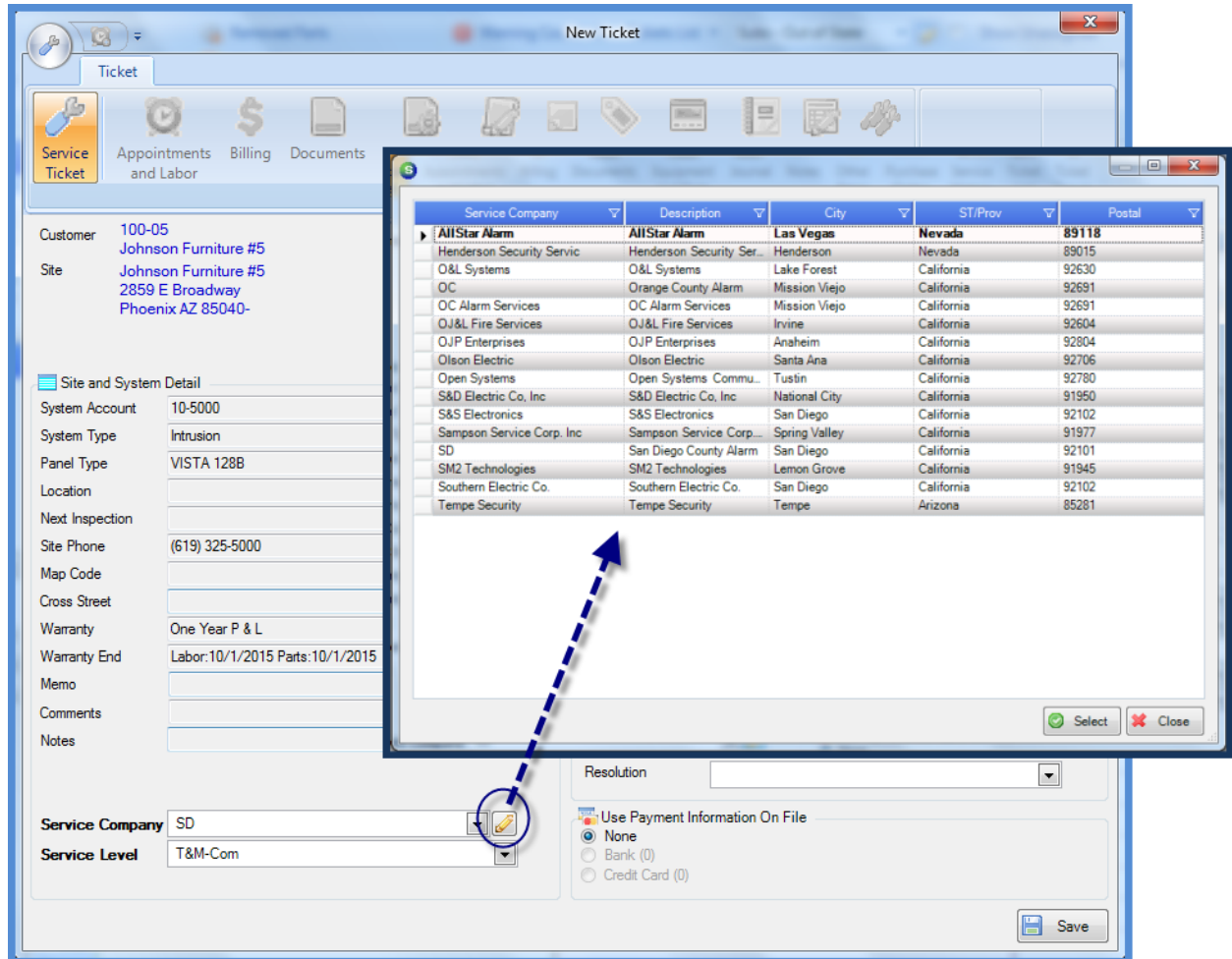
Determine which Service Provider and time-slot will be used for the appointment, and then double-click at that location on the Schedule Board. The Customer Search form will be displayed for locating the account for which the Ticket/Appointment will be created.

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

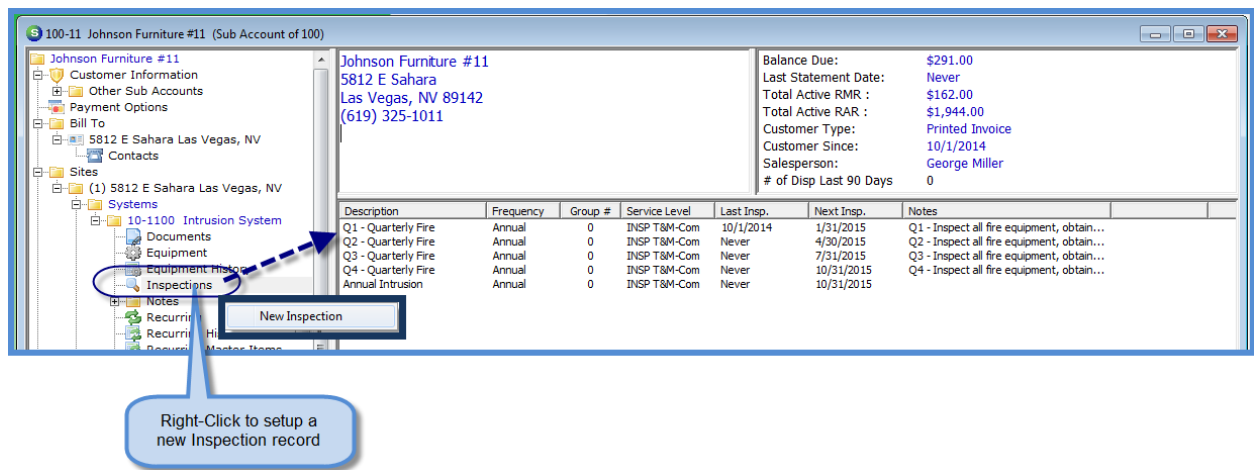
This section is designed to provide information on how to generate bulk Inspection Tickets. This section includes the following topics:

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

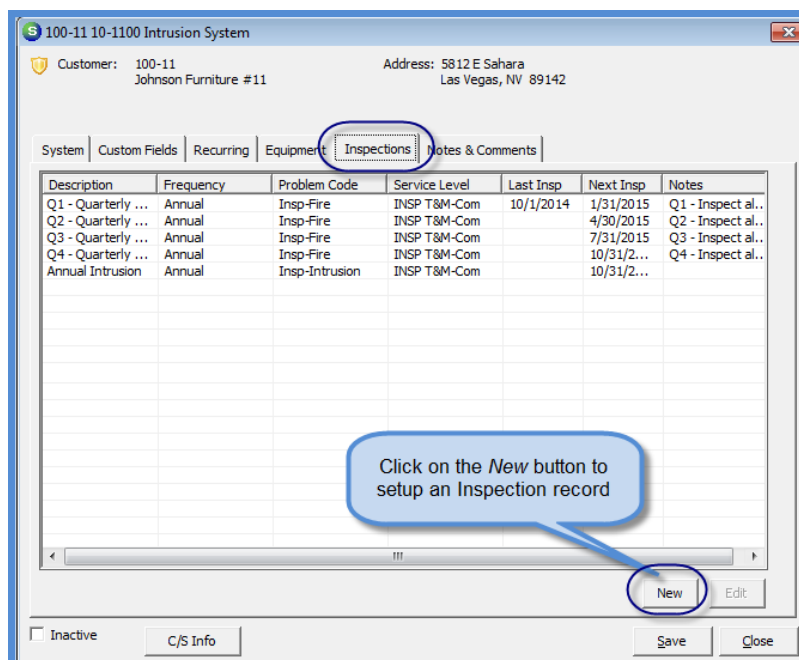
Inspection Setup

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 be 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.

The screenshot shows the 'System Inspections' window with the 'Detail' tab selected. The form is divided into several sections:

- Site Information:** Site: Johnson Furniture #11, 5812 E Sahara; System: 10-1100, Intrusion.
- Navigation:** Detail (selected), Equipment, Inspection Items.
- Inspection Section:**
 - Description: Annual Intrusion
 - Frequency: Annual
 - Service Problem Code: Insp-Intrusion
 - Service Level: INSP T&M-Com
 - Service Company: AllStar Alarm
 - Last Inspection: [Empty]
 - Next Inspection: 10/31/2015
 - Service Tech: [Dropdown]
 - Group Number: 0
 - Estimated Hours: 0
 - High Frequency Bypass: [Unchecked]
 - Exclude from High Frequency Check: [Unchecked]
 - Notes: [Text Area]
- Charges Section:**
 - Inspection Item: Labor-Insp
 - Amount: 175.00
- Buttons:** Save, Terminate, Cancel.

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.

The screenshot shows the 'System Inspections' window with the following data:

- Site: Johnson Furniture #11, 5812 E Sahara
- System: 10-1100 Intrusion
- Tab: Detail
- Section: Inspection
 - Description: Annual Intrusion
 - Frequency: Annual
 - Service Problem Code: Insp-Intrusion
 - Service Level: INSP T&M-Com
 - Service Company: AllStar Alarm
 - Last Inspection: (empty)
 - Next Inspection: 10/31/2015
 - Service Tech: (empty)
 - Group Number: 0
 - Estimated Hours: 0
 - High Frequency Bypass:
 - Exclude from High Frequency Check:
 - Notes: (empty)
- Section: Charges
 - Inspection Item: Labor-Insp
 - Amount: 175.00

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.

The screenshot shows the 'System Inspections' window with the following details:

- Site:** Johnson Furniture #11, 5812 E Sahara
- System:** 10-1100 Intrusion
- Inspection Tab:** Description: Annual Intrusion, Frequency: Annual, Service Problem Code: Insp-Intrusion, Service Level: INSP T&M-Com, Service Company: AllStar Alarm, Last Inspection: (empty), Next Inspection: 10/31/2015
- Service Tech:** (empty dropdown)
- Group Number:** 0
- Estimated Hours:** 0
- High Frequency Bypass:**
- Exclude from High Frequency Check:**
- Notes:** (empty text area)
- Charges:** Inspection Item: Labor-Insp, Amount: 175.00

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.

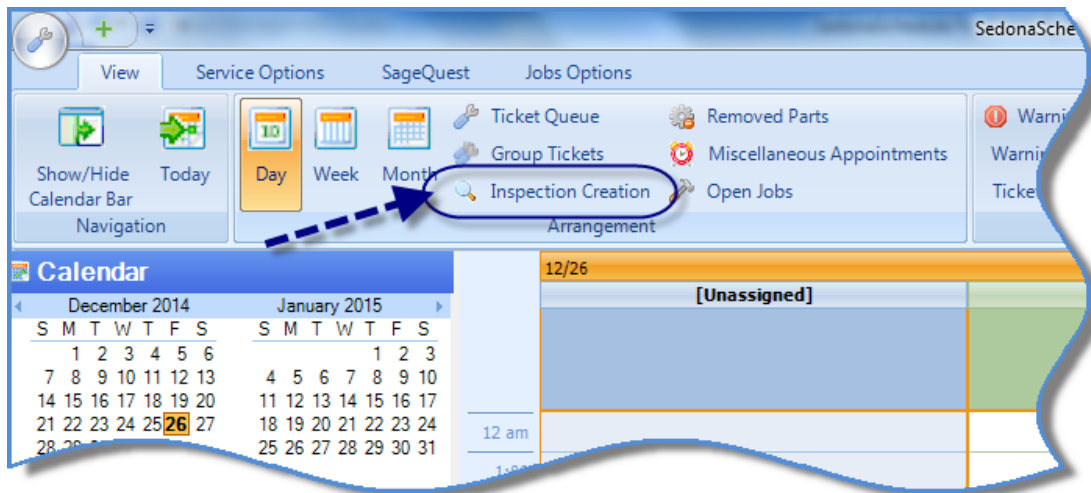
The screenshot shows the 'System Inspections' window with the following details:

- Site:** Johnson Furniture #11, 5812 E Sahara
- System:** 10-1100, Intrusion
- Inspection Details:**
 - Description: Annual Intrusion
 - Frequency: Annual
 - Service Problem Code: Insp-Intrusion
 - Service Level: INSP T&M-Com
 - Service Company: AllStar Alarm
 - Last Inspection: (empty)
 - Next Inspection: 10/31/2015
 - Service Tech: (dropdown)
 - Group Number: 0
 - Estimated Hours: 0
 - High Frequency Bypass:
 - Exclude from High Frequency Check:
 - Notes: (empty text area)
- Charges:**
 - Inspection Item: Labor-Insp
 - Amount: 175.00

Buttons at the bottom: Save, Terminate, Cancel.

Creating Inspection Tickets

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

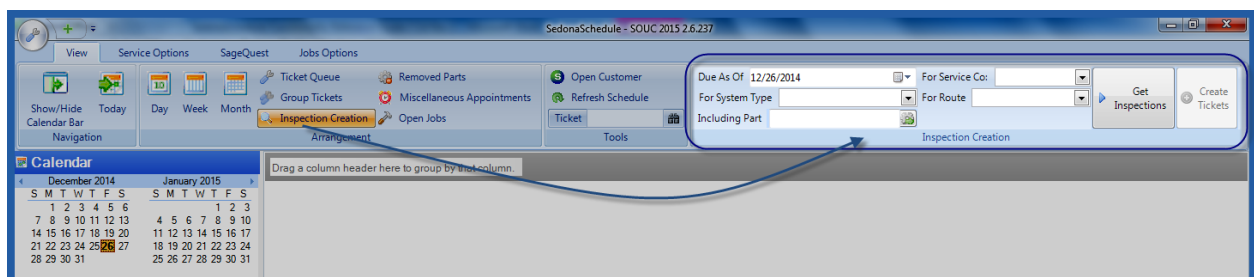


A new Ribbon Group, labeled “Inspection Creation” will be displayed. The fields on this Ribbon Group are used to select which Inspections Tickets will be created.

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, uncheck 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.

The screenshot shows the SedonaSchedule - SOUC 2015 2.6.237 application window. The interface includes a top navigation bar with options like 'View', 'Service Options', 'SageQuest', and 'Jobs Options'. Below this is a toolbar with various icons and buttons, including 'Get Inspections' and 'Create Tickets' (which is circled in blue). The main area displays a table of inspection records. A callout box with a blue border and white background points to the checkboxes in the first column of the table, containing the text: 'Check this box to select all Inspection Record for Ticket Creation'. The table has columns for Account, Service Co, System, Site, Address, Date, and Route Code. The 'Date' column shows '01/31/2015' for all entries. The 'Route Code' column shows 'N/A' for most entries, with one entry for 'Johnson Furniture #14' showing '22021 El Paseo'.


Account	Service Co	System	Site	Address	Date	Route Code
<input checked="" type="checkbox"/> 10-2000	All County Fire	Intrusion/Fire	Johnson Furniture #2	2502 Imperial Ave	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-3000	All County Fire	Intrusion	Johnson Furniture #3	1946 Fern St	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-4000	All County Fire	Intrusion	Johnson Furniture #4	2340 El Cajon Bl	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-5000	Tempe Security	Intrusion	Johnson Furniture #5	2859 E Broadway	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-6000	All County Fire	Intrusion	Johnson Furniture #6	2805 Lemon Grove Ave	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-7000	All County Fire	Intrusion	Johnson Furniture #7	3421 E Plaza Bl	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-8000	All County Fire	Intrusion	Johnson Furniture #8	8347 La Mesa Bl	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-9000	All County Fire	Intrusion	Johnson Furniture #9	3298 Greyling	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-1010	All County Fire	Intrusion	Johnson Furniture #10	7654 Herschel Ave	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-1200	All County Fire	Intrusion	Johnson Furniture #12	4380 La Jolla Village Dr	01/31/2015	N/A
<input checked="" type="checkbox"/> 20-1300	VFS Fire Protection, Inc.	Intrusion	Johnson Furniture #13	26522 La Alameda	01/31/2015	N/A
<input checked="" type="checkbox"/> 20-1400	VFS Fire Protection, Inc.	Intrusion	Johnson Furniture #14	22021 El Paseo	01/31/2015	N/A
<input checked="" type="checkbox"/> 20-1500	VFS Fire Protection, Inc.	Intrusion	Johnson Furniture #15	14511 Franklin Ave	01/31/2015	N/A
<input checked="" type="checkbox"/> 10-1000	Western Fire Prevention	Intrusion/Fire	Johnson Furniture #1	730 Market St	01/31/2015	N/A

Creating Inspections Tickets (continued)

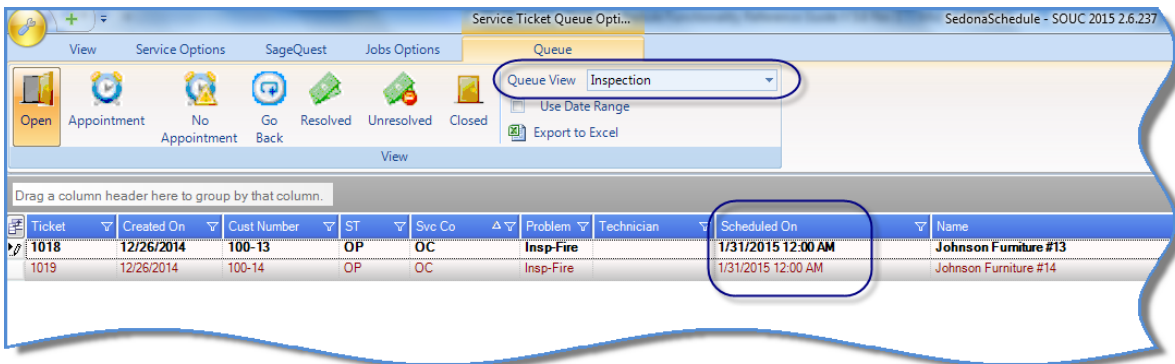
Once the Inspection Tickets have been created, they are viewable from the Ticket Queue(s).

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.

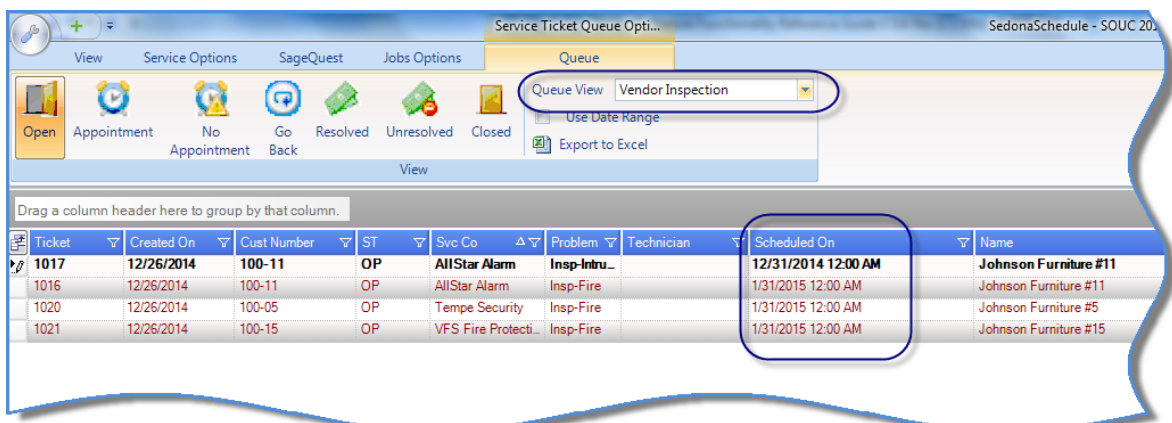
 **Important Note:** If the Inspection Ticket is not completed and closed on a timely basis, the next Inspection Ticket may not be created when needed. For example, if Inspections are due quarterly, if the current Inspection Ticket is not completed and Closed prior to the next due date, a quarter will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

Ticket Queue - Company Inspection Tickets



Ticket	Created On	Cust Number	ST	Svc Co	Problem	Technician	Scheduled On	Name
1018	12/26/2014	100-13	OP	OC	Insp-Fire		1/31/2015 12:00 AM	Johnson Furniture #13
1019	12/26/2014	100-14	OP	OC	Insp-Fire		1/31/2015 12:00 AM	Johnson Furniture #14

Ticket Queue - Vendor Inspection Tickets



Ticket	Created On	Cust Number	ST	Svc Co	Problem	Technician	Scheduled On	Name
1017	12/26/2014	100-11	OP	AllStar Alarm	Insp-Intru...		12/31/2014 12:00 AM	Johnson Furniture #11
1016	12/26/2014	100-11	OP	AllStar Alarm	Insp-Fire		1/31/2015 12:00 AM	Johnson Furniture #11
1020	12/26/2014	100-05	OP	Tempe Security	Insp-Fire		1/31/2015 12:00 AM	Johnson Furniture #5
1021	12/26/2014	100-15	OP	VFS Fire Protect...	Insp-Fire		1/31/2015 12:00 AM	Johnson Furniture #15

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.

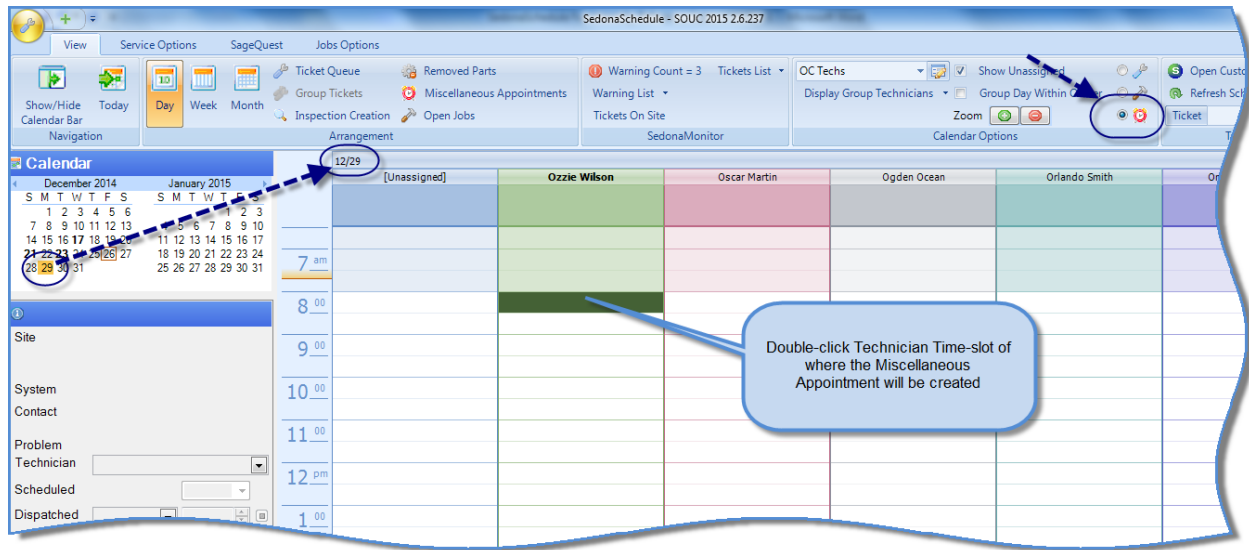
You may schedule a miscellaneous appointment for one or multiple Technicians at a time. These appointments may be for a single day, a portion of a day or several consecutive days. For example if several Technicians will be attending a meeting on the same date and time, you may setup all of these appointments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

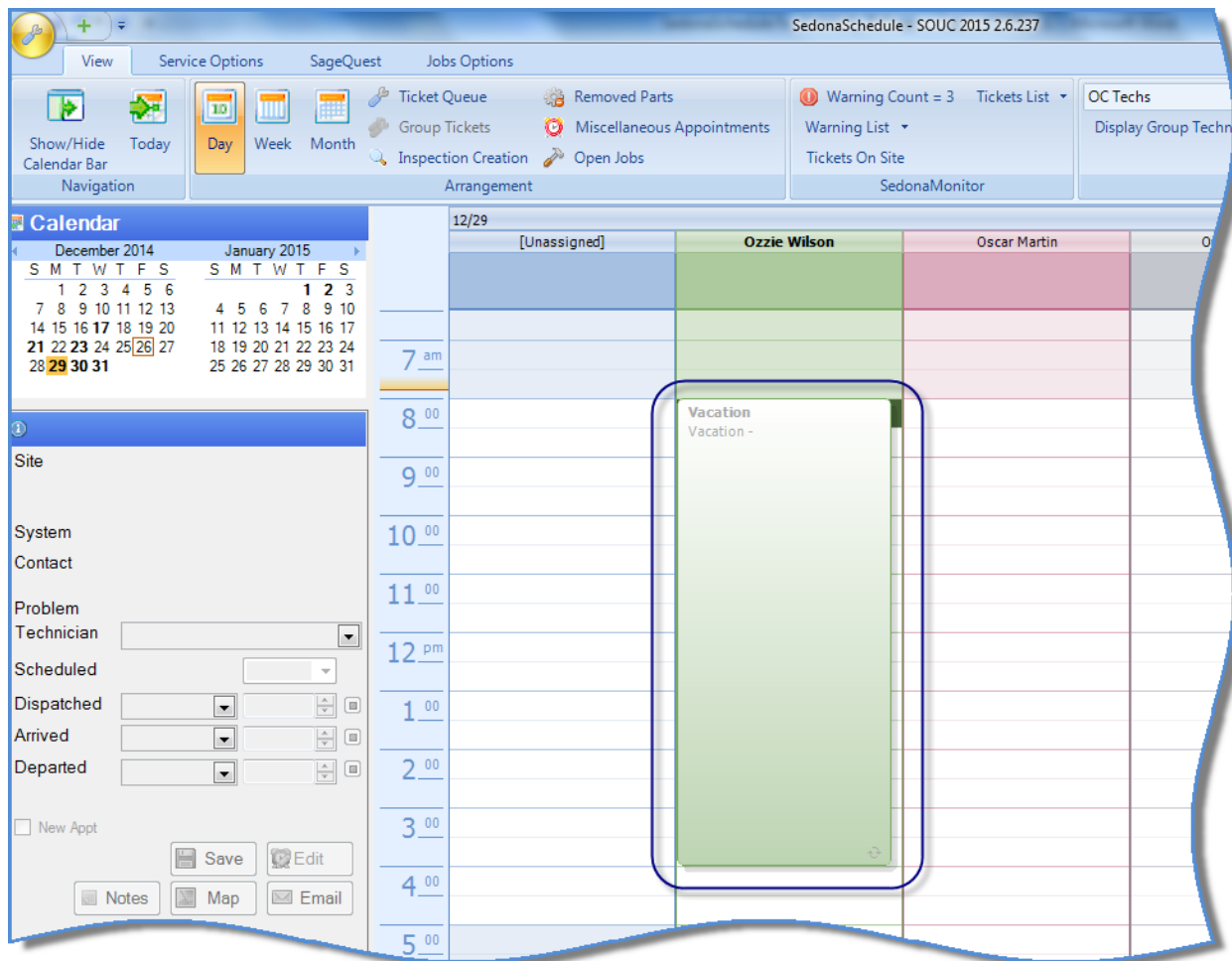
The screenshot shows the 'Appointment' window with the following details:

- Type:** Vacation
- Description:** Vacation
- Notes:** (Empty text area)
- Day Range:** 12/29/2014 to 01/02/2015
- Time Range:** 08:00 AM to 04:00 PM
- Technicians Table:**

In Group	Code	Name	Service Co	Install Co
<input type="checkbox"/>	Ogden.Ocean	Ogden Ocean	OC	OC
<input type="checkbox"/>	Orlando.Smith	Orlando Smith	OC	OC
<input type="checkbox"/>	Orson.Goodman	Orson Goodman	OC	OC
<input type="checkbox"/>	Oscar.Martin	Oscar Martin	OC	OC
<input checked="" type="checkbox"/>	Ozzie.Wilson	Ozzie Wilson	OC	OC
<input type="checkbox"/>	Sam.Miller	Sam Miller	SD	SD
<input type="checkbox"/>	Sean.Taylor	Sean Taylor	SD	SD
<input type="checkbox"/>	Shawn.McKenzie	Shawn McKenzie	SD	SD
<input type="checkbox"/>	Sheldon.Walker	Sheldon Walker	SD	SD
<input type="checkbox"/>	Sheridan.Smith	Sheridan Smith	SD	SD
- Buttons:** Save, Delete, Close

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.

The screenshot shows the SedonaSchedule - SOUC 2015 2.6.237 interface. The 'Miscellaneous Appointments' ribbon is active, with the 'Miscellaneous Appointments' button highlighted. The main window displays a list of appointments grouped by type. The 'Vacation' group is expanded, showing a list of appointments for Ozzie Wilson. The 'Meeting' group is also expanded, showing a list of appointments for various technicians including Orson Goodman, Oscar Martin, Ogden Ocean, Orlando Smith, Sam Miller, Sean Taylor, Shawn McKenzie, Sheldon Walker, Sheridan Smith, Steve Watson, and Stuart Larson.

Type	Description	Notes	Start Date	End Date	Start Time	End Time	Entered By	Entered	Edited By	Edited
Vacation	Vacation		12/29/2014	01/02/2015	08:00 AM	04:00 PM	Administrator	12/26/2014	Administrator	12/26
Code	Name	Is_Result_Of_Clock_Out	Clock_Out_Dispatch							
	Ozzie Wilson	<input type="checkbox"/>								
Meeting	Safety Meeting		12/29/2014	12/29/2014	08:00 AM	08:30 AM	Administrator	12/26/2014	Administrator	12/26/20
Code	Name	Is_Result_Of_Clock_Out	Clock_Out_Dispatch							
	Orson Goodman	<input type="checkbox"/>								
	Oscar Martin	<input type="checkbox"/>								
	Ogden Ocean	<input type="checkbox"/>								
	Orlando Smith	<input type="checkbox"/>								
Meeting	Safety Meeting		12/29/2014	12/29/2014	08:00 AM	08:30 AM	Administrator	12/26/2014	Administrator	12/26/2014
Code	Name	Is_Result_Of_Clock_Out	Clock_Out_Dispatch							
	Sam Miller	<input type="checkbox"/>								
	Sean Taylor	<input type="checkbox"/>								
	Shawn McKenzie	<input type="checkbox"/>								
	Sheldon Walker	<input type="checkbox"/>								
	Sheridan Smith	<input type="checkbox"/>								
	Steve Watson	<input type="checkbox"/>								
	Stuart Larson	<input type="checkbox"/>								

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.

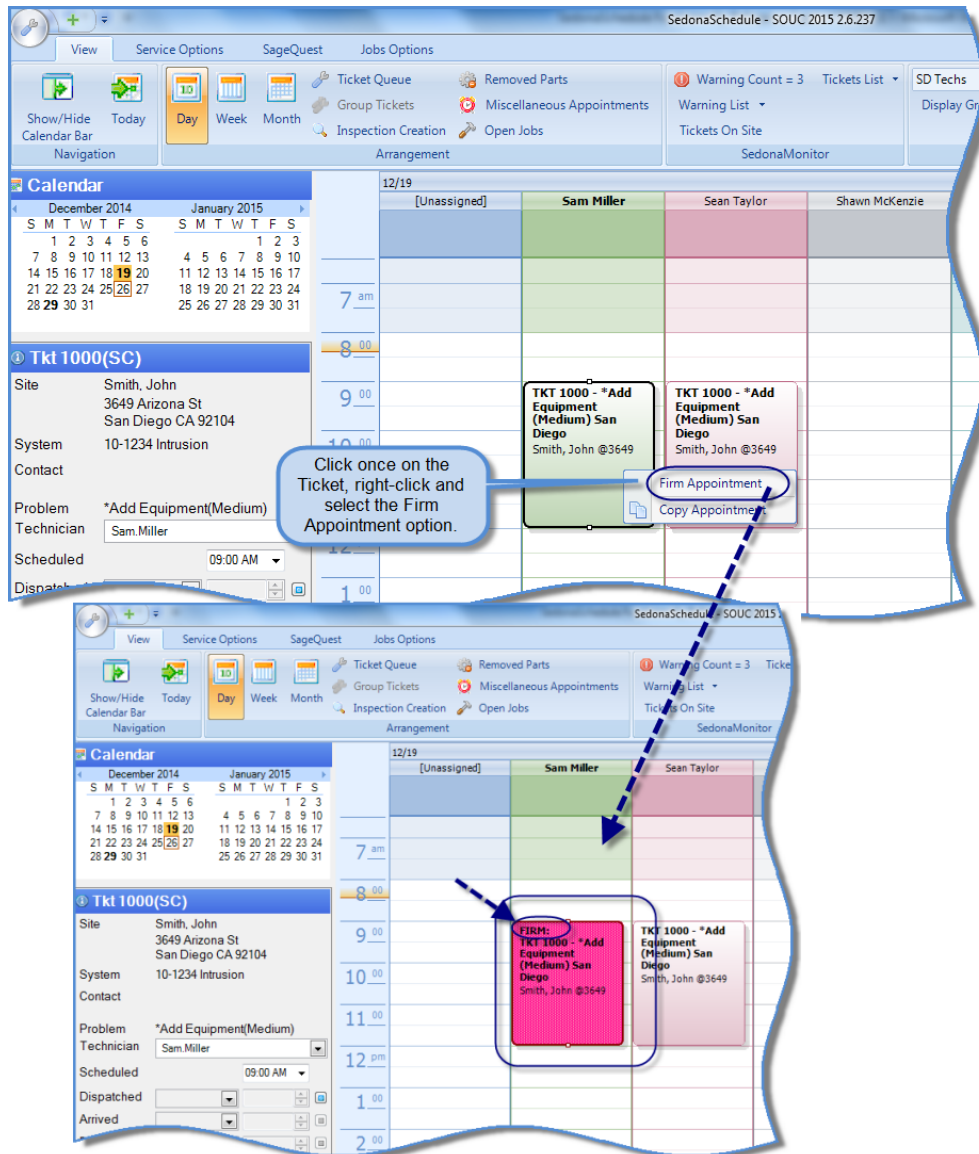
Marking an appointment as Firm, locks down the date/time and Technician for the appointment. While that appointment is locked, several restrictions are put into place by the software:

- 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”

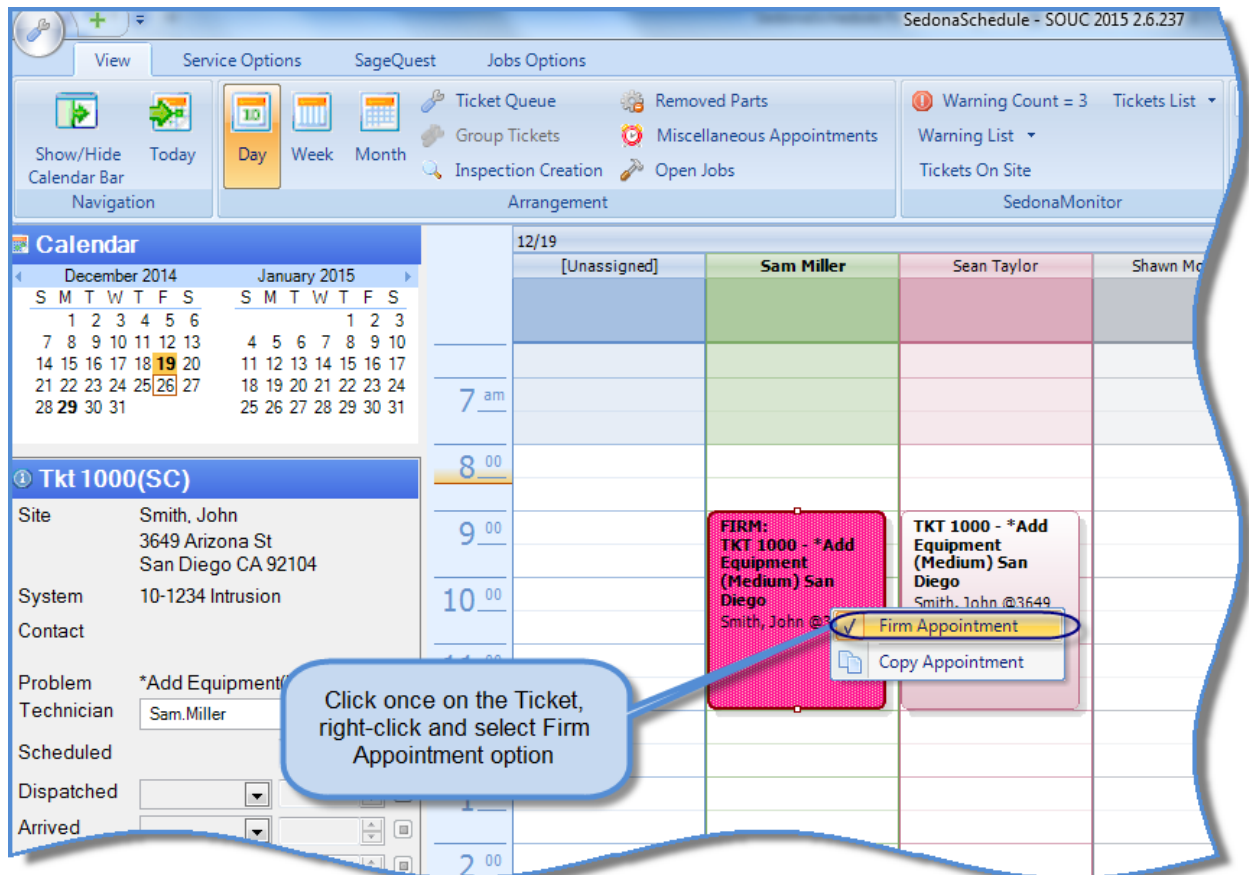
Flagging an appointment as “Firm” is performed from the Schedule Board while the Day view selected. Click once on the appointment, right-click and select the Firm Appointment option. The background color of the appointment will change to bright pink and the word “Firm” will be display above the Ticket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

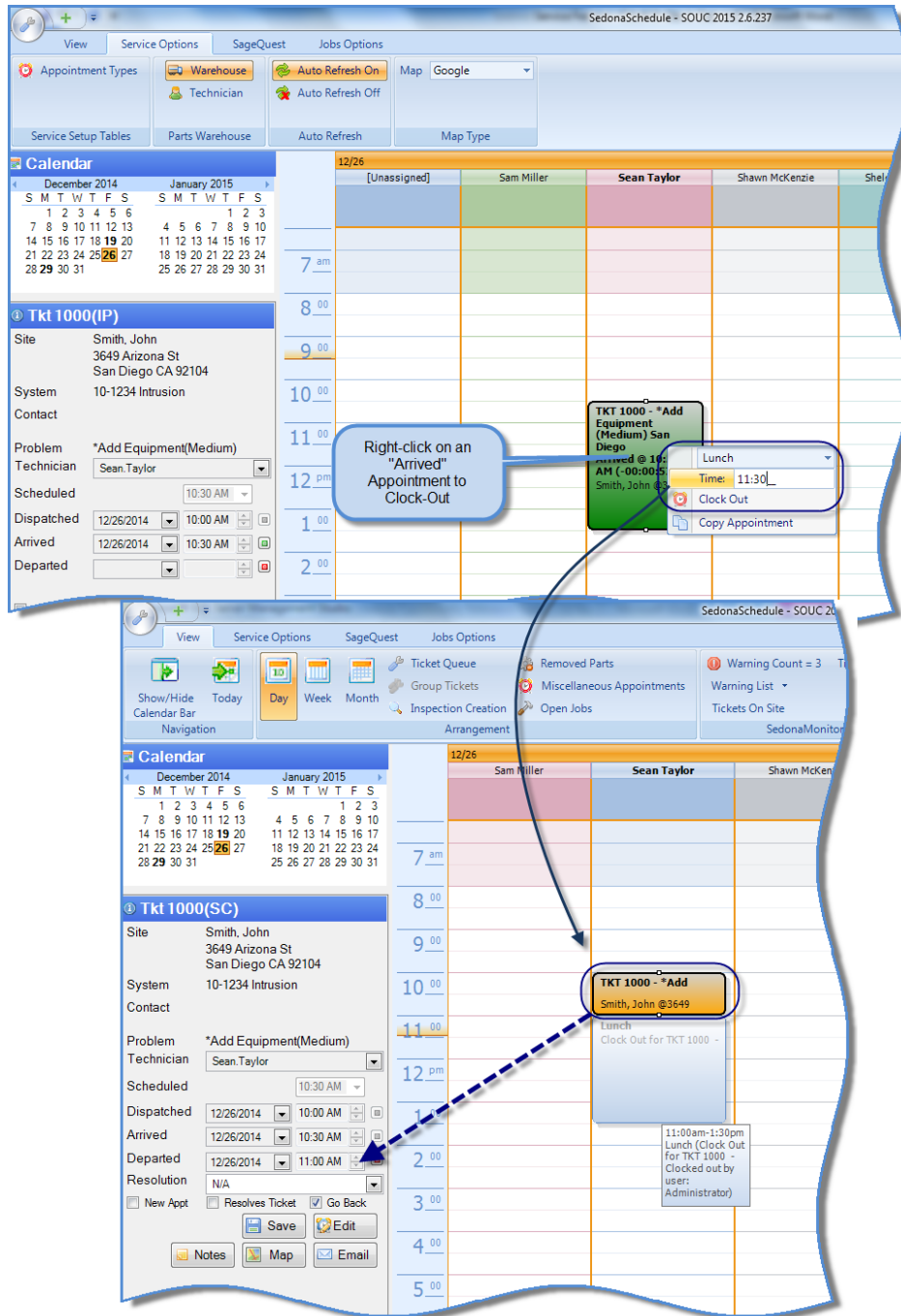
Contrary to the previously mentioned restraints, you can clock-out and clock-in after the regularly scheduled end of the appointment—whether it’s a ticket, job, or miscellaneous appointment.

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

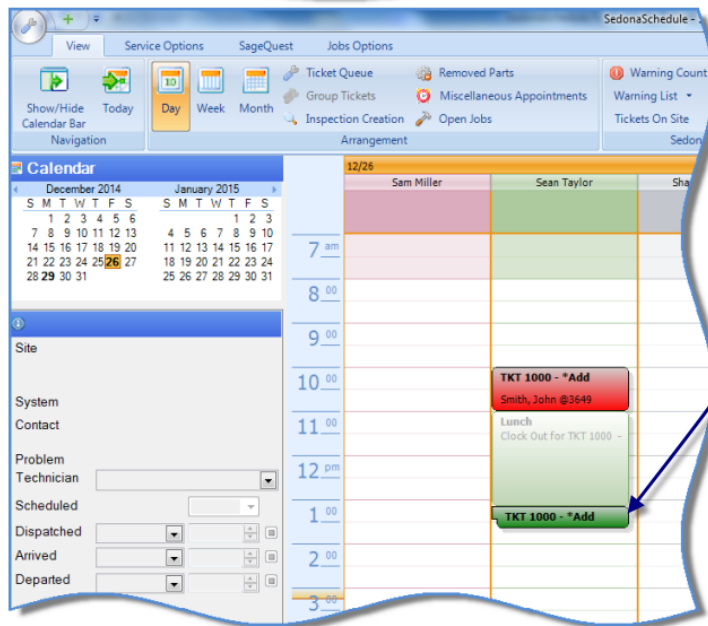
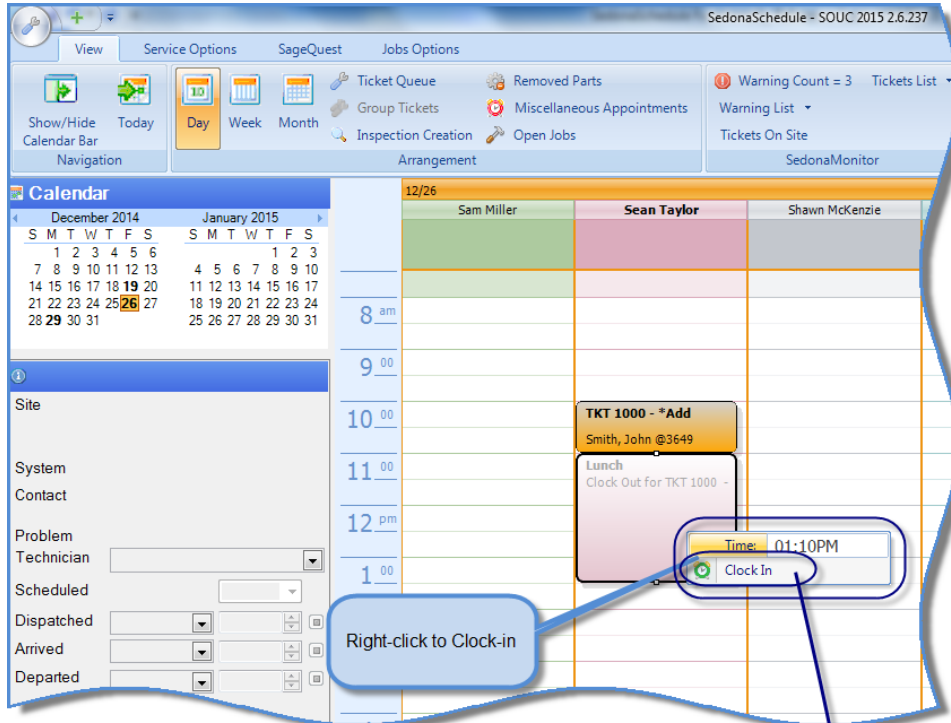
From the *Day* view of the Schedule Board, click once on the appointment then right-click to open the Clock-Out form. Within the Clock-out form, select the Clock-out type and enter the clock-out time.



Appointment Clock-out & Clock-in (continued)

Appointment Clock-in

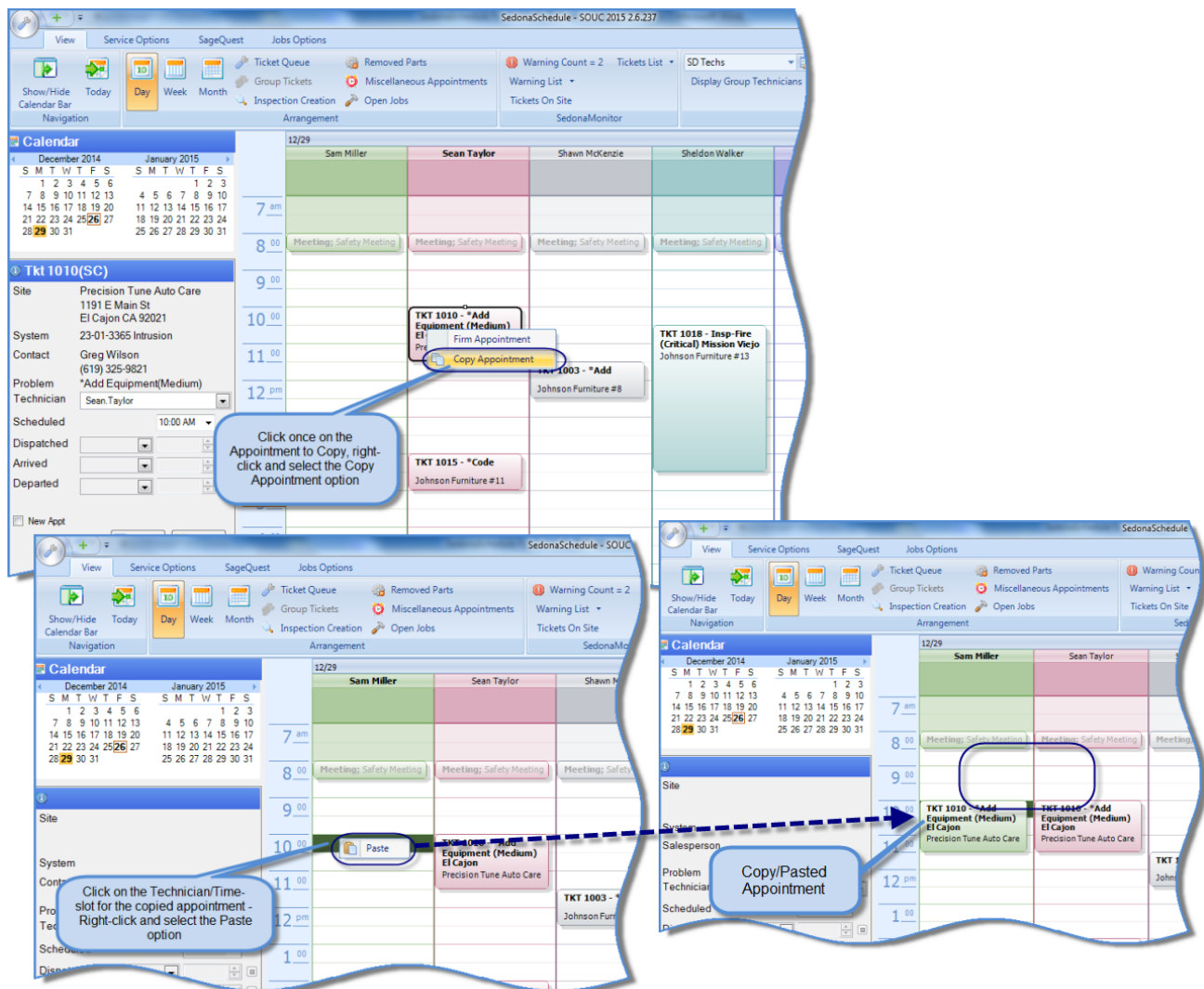
When ready to Clock-in to the appointment, click once on the Appointment, right-click to enter the clock-in time and then click on the *Clock In* button.



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 accomplished 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.

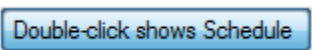
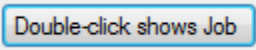
The Job List is configured with the Field Chooser, which functions just as the Field Chooser in the Ticket Queues.

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

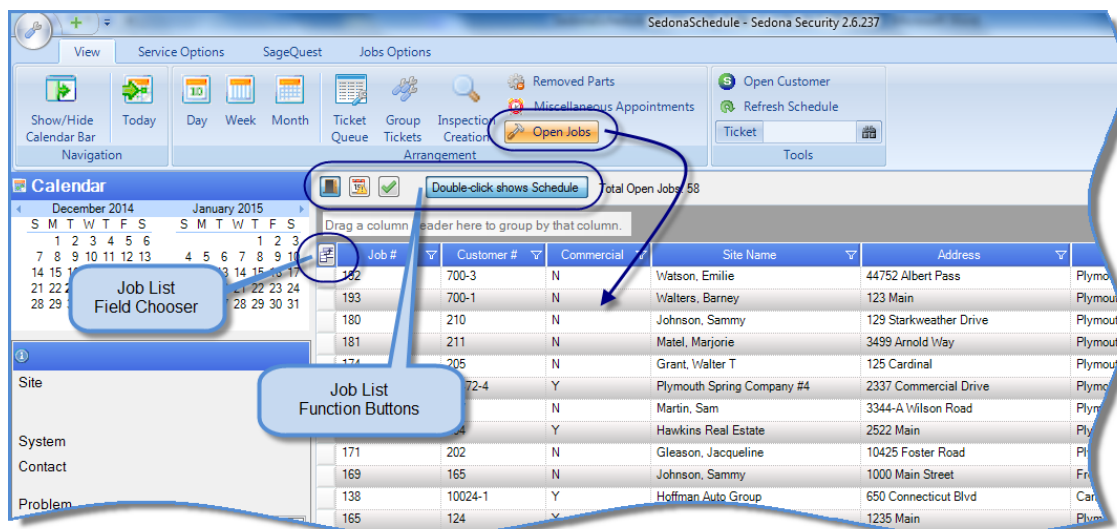
Open Door button  – when clicking on this button, the list is refreshed with all Open Jobs.

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   - 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.

Schedule Job Number 147

Job: 147
Type: R-Intrusion
Status: Prewire

Customer: 104
Carter, Kathy

Job Hours
Estimated Total Hours: 12.00
Hours Used: 0.00
Proposed Hours: 8.00
Hours Remaining: 4.00

Site: Carter, Kathy
44625 Joy Road
Plymouth MI
(734) 555-7000

Job Task: Prewire Labor Task: Prewire

Start Date: 12/29/2014 End Date: 12/29/2014

Start Time: 08:30 AM End Time: 12:30 PM

Exclude Sat Exclude Sun

Select installers to schedule below: Group: MI Techs

Installer	Service Company	Install Company
Larry Jackson	Testing	MI
Mack Miller	MI-INSP Cont	MI
Marlin Larson	MI-T&M	MI
Mike McKenzie	MI-INSP Cont	MI

Showing: Conflicts Proposed Previous Auto Refresh:

Installer	Job Number	Scheduled	Est Length
⚠ Mark Taylor	TCK 2399	12/29/2014 8:00:00 AM	240
✅ Marshall Watson		12/29/2014 8:30:00 AM	240

Calendar view: December 2014, January 2015, February 2015. Date 12/29/2014 is selected.

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.

Schedule Job Number 147

Job: 147
Type: R-Intrusion
Status: Prewire

Customer: 104
Carter, Kathy

Job Hours
Estimated Total Hours: 12.00
Hours Used: 0.00
Proposed Hours: 8.00
Hours Remaining: 4.00

Site: Carter, Kathy
44625 Joy Road
Plymouth MI
(734) 555-7000

Job Task: Prewire Labor Task: Prewire

Start Date: 12/29/2014 End Date: 12/29/2014

Start Time: 08:30 AM End Time: 12:30 PM

Exclude Sat Exclude Sun

Select installers to schedule below: Group: MI Techs

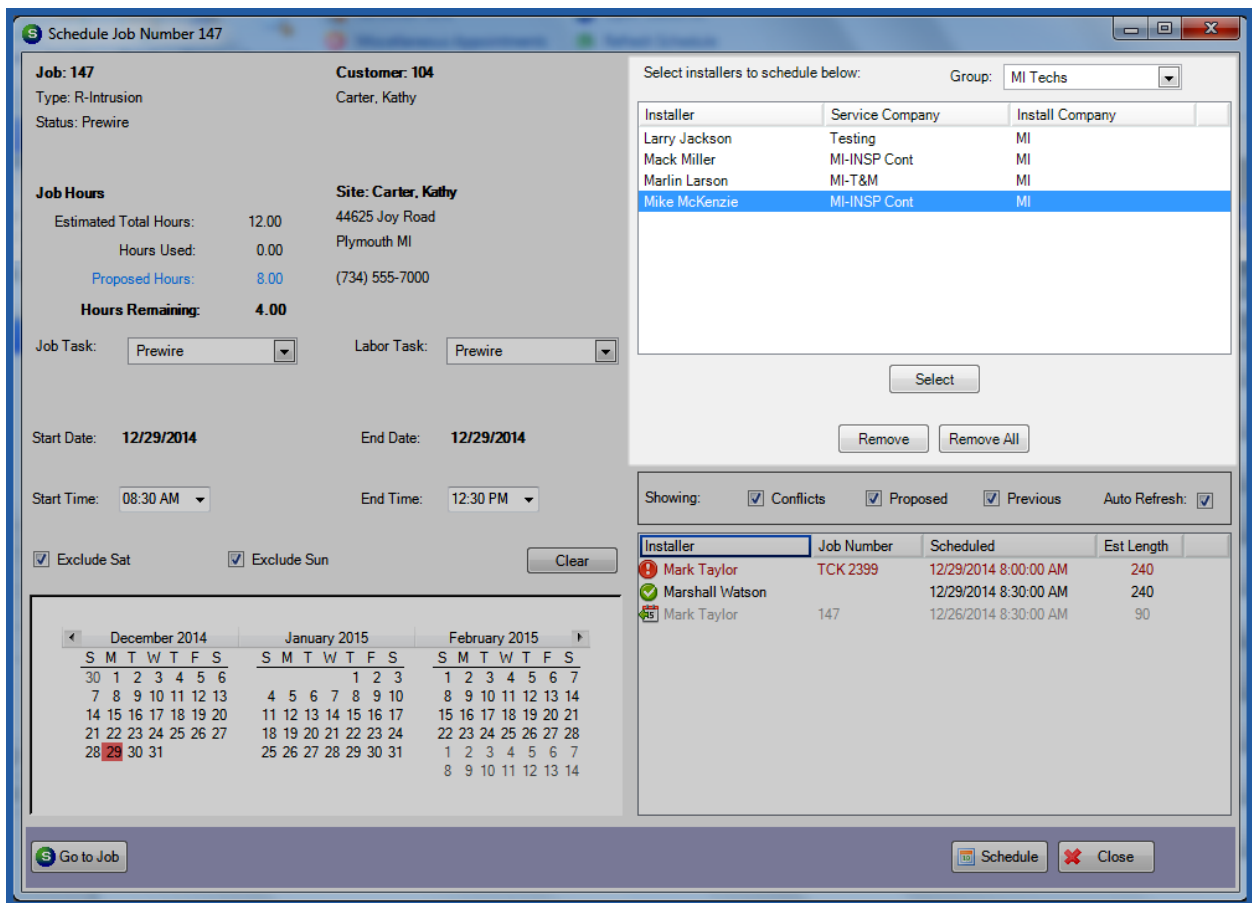
Installer	Service Company	Install Company
Larry Jackson	Testing	MI
Mack Miller	MI-INSP Cont	MI
Marlin Larson	MI-T&M	MI
Mike McKenzie	MI-INSP Cont	MI

Showing: Conflicts Proposed Previous Auto Refresh:

Installer	Job Number	Scheduled	Est Length
Mark Taylor	TCK 2399	12/29/2014 8:00:00 AM	240
Marshall Watson		12/29/2014 8:30:00 AM	240

The Job Scheduling Form (continued)

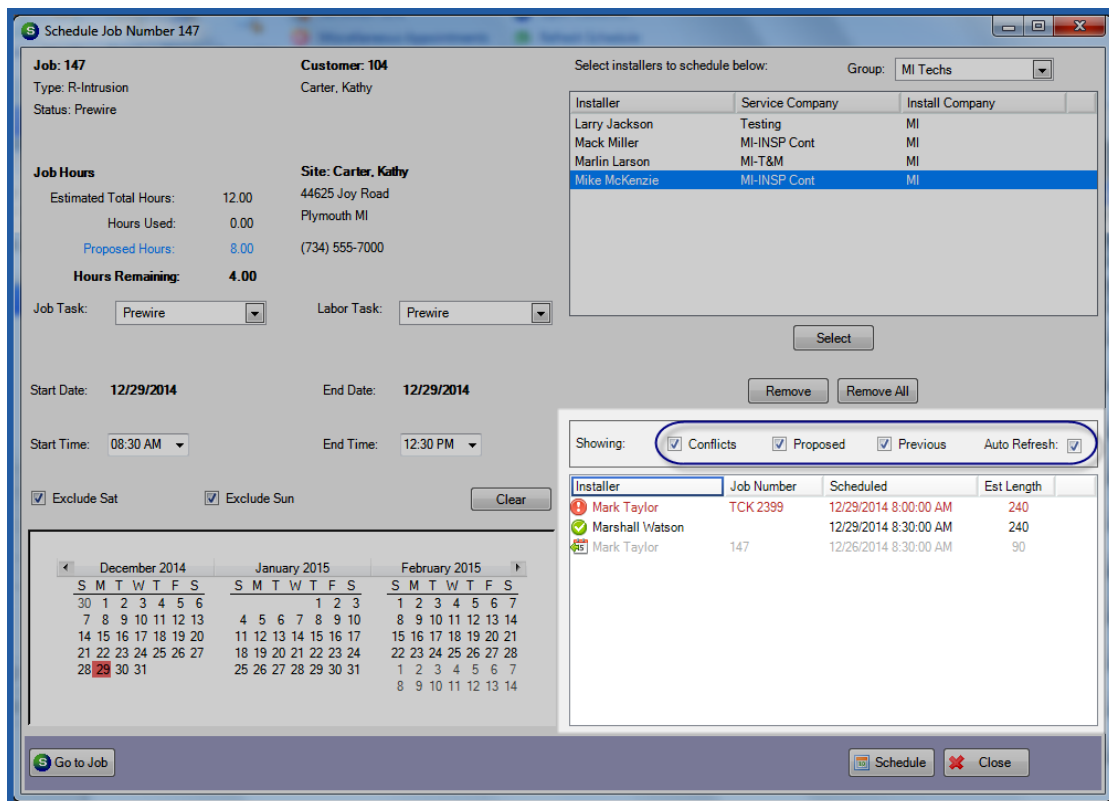
- Installer Selector** – The right side of the form is used to select one or multiple Installers to perform the work. The names of Installers displayed in the upper tier are determined by the Display Group selected at the upper right of the form. These are the same Display Groups used on the Schedule 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.

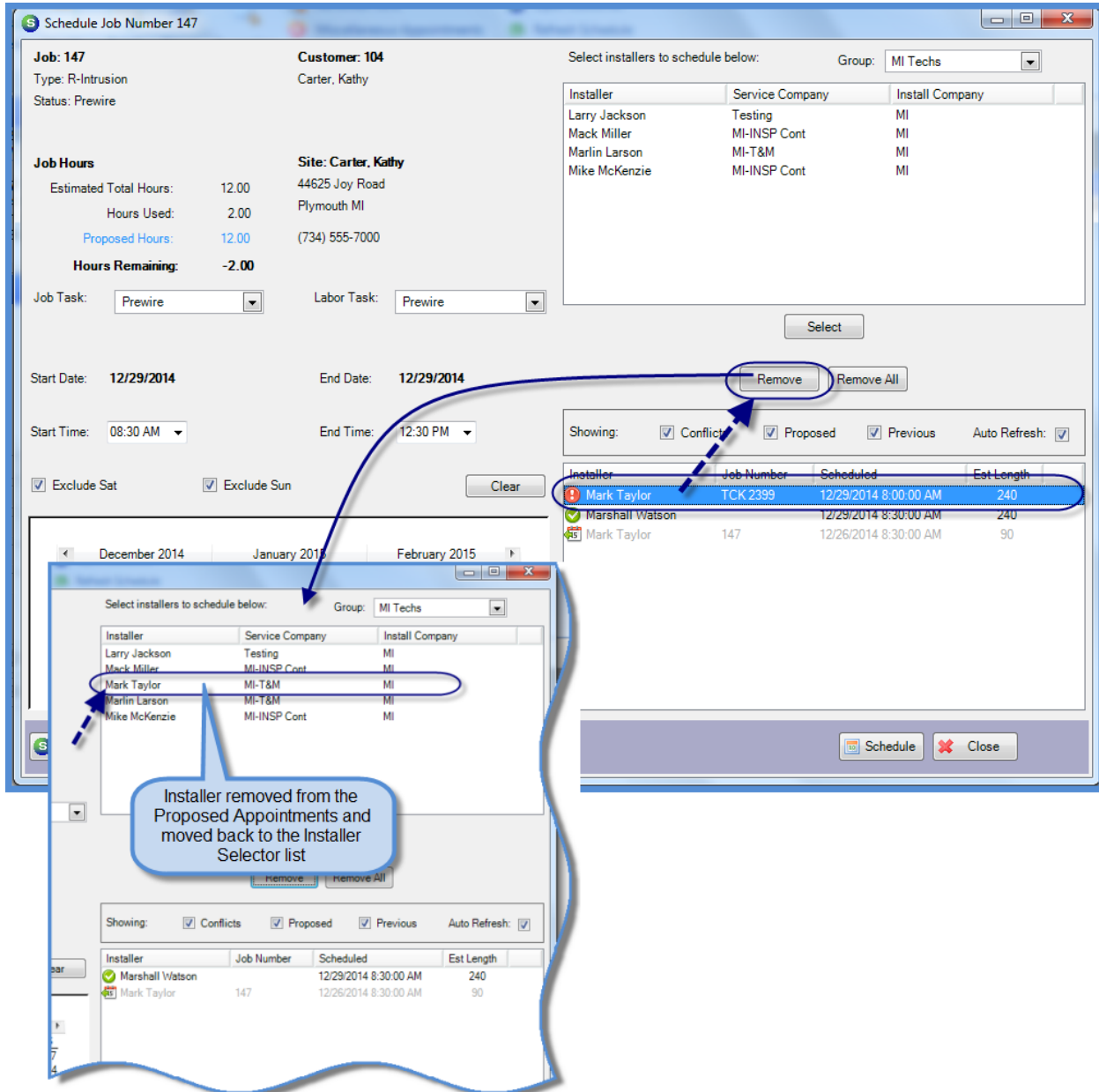
In the below example, one of the selected Installers is already scheduled for a Ticket on the proposed appointment date/time.



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 screenshot displays the 'Schedule Job Number 147' window. The job details include Job: 147, Type: R-Intrusion, Status: Prewire, Customer: 104 (Carter, Kathy), and Site: Carter, Kathy. Job hours show 12.00 estimated, 2.00 used, and -2.00 remaining. The start and end dates are 12/29/2014, with a start time of 08:30 AM and an end time of 12:30 PM. The labor task is set to 'Prewire'.

The 'Select installers to schedule below:' section shows a list of installers from the 'MI Techs' group:

Installer	Service Company	Install Company
Larry Jackson	Testing	MI
Mack Miller	MI-INSP Cont	MI
Marlin Larson	MI-T&M	MI
Mike McKenzie	MI-INSP Cont	MI

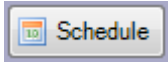
The 'Proposed' appointments list shows:

Installer	Job Number	Scheduled	Est Length
Mark Taylor	TCK 2399	12/29/2014 8:00:00 AM	240
Marshall Watson		12/29/2014 8:30:00 AM	240
Mark Taylor	147	12/26/2014 8:30:00 AM	90

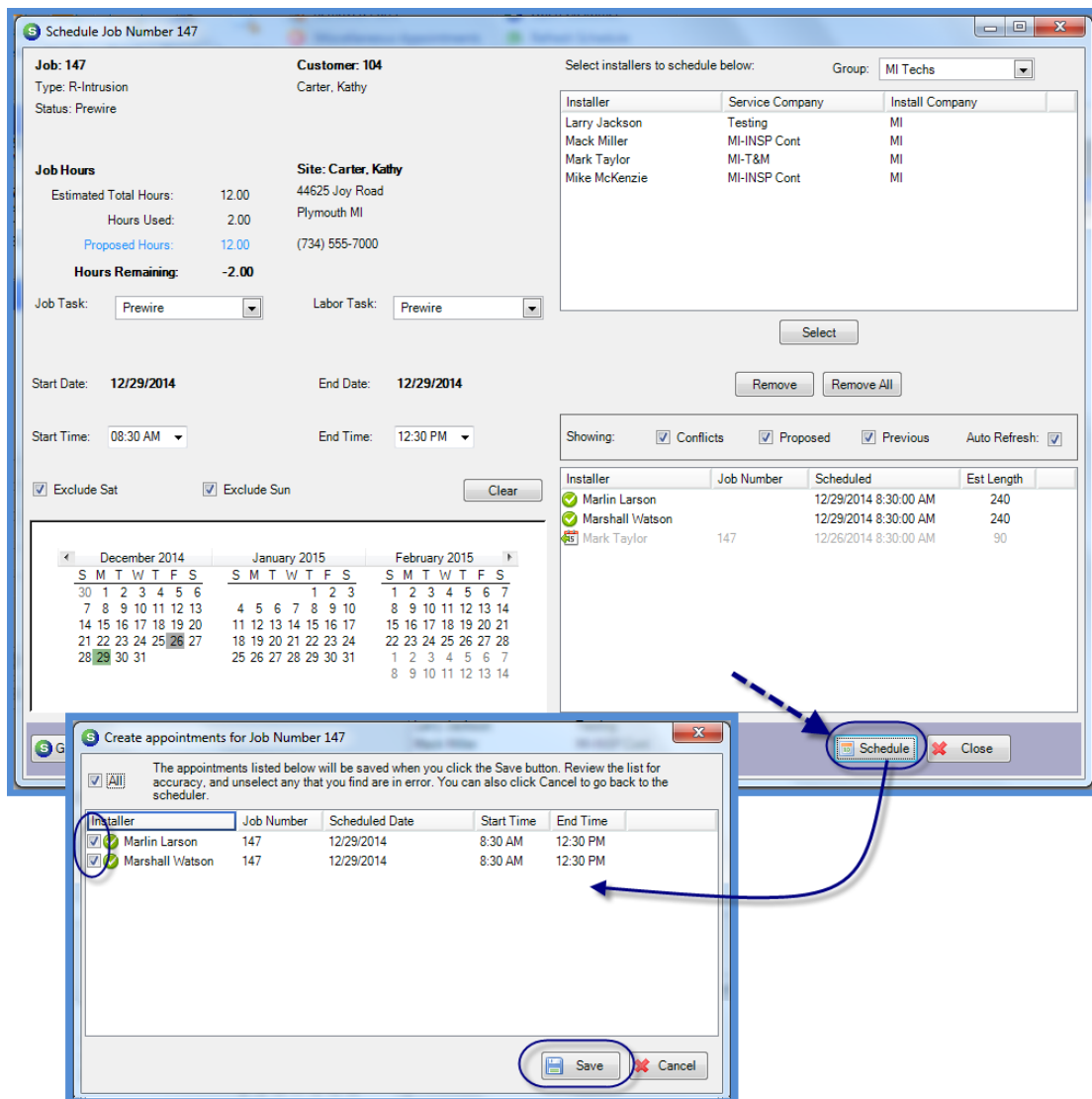
Annotations in the image include a blue circle around the 'Remove' button in the 'Proposed' list, a blue arrow pointing from it to the 'Remove' button in the 'Select installers' list, and a callout box stating: 'Installer removed from the Proposed Appointments and moved back to the Installer Selector list'. The 'Select installers' list in the callout shows Mark Taylor and Marlin Larson circled in blue.

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.

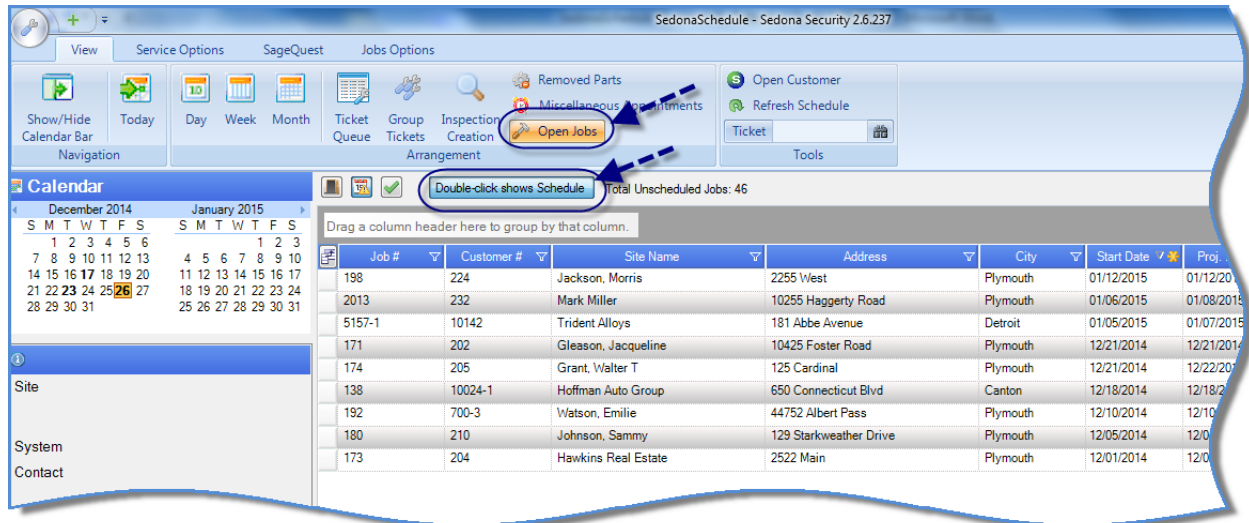
If you are ready to create the Job Appointment(s), click on the *Schedule*  button located at the lower right of the Job Schedule form.

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).

The screenshot displays the 'Schedule Job Number 192' window. The job details include Job: 192, Type: R-Intrusion, Status: Parts, Customer: 700-3 (Watson, Emilie), and Site: Watson, Emilie (44752 Albert Pass, Plymouth MI). Job hours are set to 6.00. The job task is 'Installation' and the labor task is 'Equipment Install'. The start date is 12/22/2014, end date is 12/22/2014, start time is 09:00 AM, and end time is 03:00 PM. A calendar view shows the date 12/22/2014 selected. A table of installers is shown with 'Marlin Larson' selected. A confirmation dialog box is open, listing the appointment for Mark Taylor on 12/22/2014 from 9:00 AM to 3:00 PM. The 'Save' button is highlighted with a blue circle and a dashed arrow.

Job Details:
Job: 192
Type: R-Intrusion
Status: Parts
Customer: 700-3
 Watson, Emilie
Site: Watson, Emilie
 44752 Albert Pass
 Plymouth MI
Job Hours:
 Estimated Total Hours: 6.00
 Hours Used: 0.00
 Proposed Hours: 6.00
 Hours Remaining: 0.00
Job Task: Installation
Labor Task: Equipment Install
Start Date: 12/22/2014
End Date: 12/22/2014
Start Time: 09:00 AM
End Time: 03:00 PM
 Exclude Sat Exclude Sun

Select installers to schedule below: Group: MI Techs

Installer	Service Company	Install Company
Larry Jackson	Testing	MI
Mack Miller	MI-INSP Cont	MI
Marlin Larson	MI-T&M	MI
Marshall Watson	MI-T&M	MI
Mike McKenzie	MI-INSP Cont	MI

Showing: Conflicts Proposed Previous Auto Refresh:

Installer	Job Number	Scheduled	Est Length
<input checked="" type="checkbox"/> Mark Taylor		12/22/2014 9:00:00 AM	360

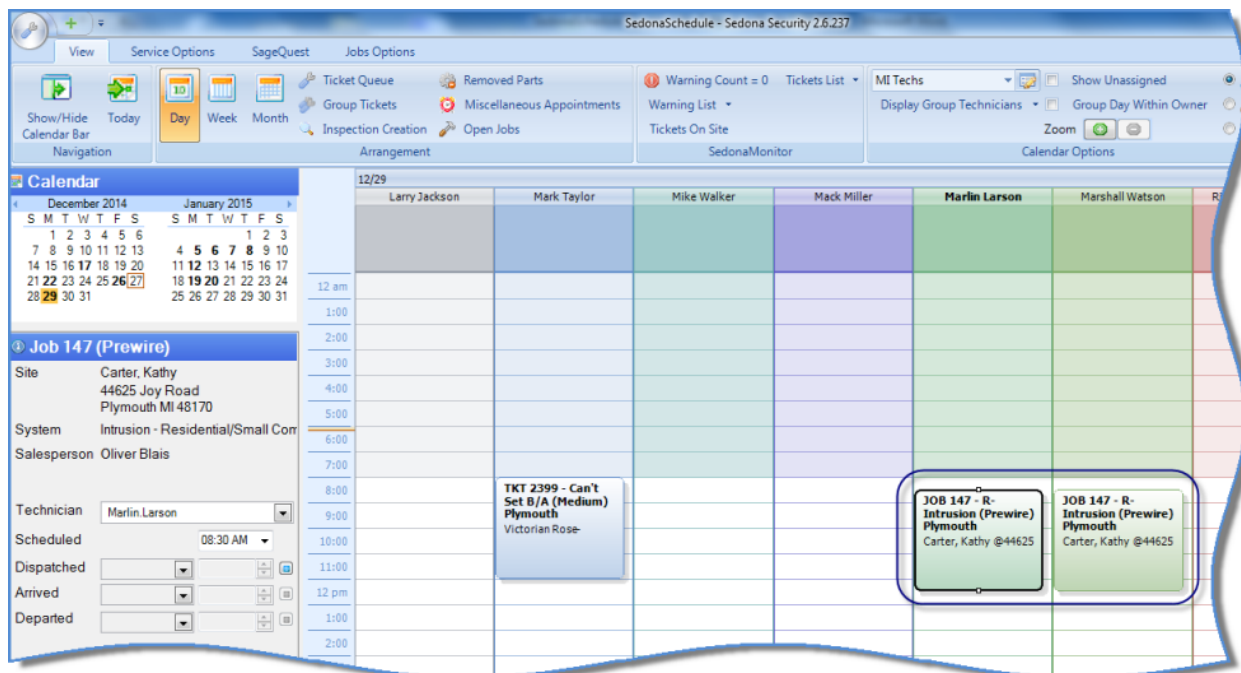
Create appointments for Job Number 192

The appointments listed below will be saved when you click the Save button. Review the list for accuracy, and unselect any that you find are in error. You can also click Cancel to go back to the scheduler.

Installer	Job Number	Scheduled Date	Start Time	End Time
<input checked="" type="checkbox"/> Mark Taylor	192	12/22/2014	9:00 AM	3:00 PM

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.

Install Company Setup Inactive

Install: Parts WIP:

Description: Misc WIP:

Labor To GL Overhead

Labor Expense Type: Expense at time of entry
 Expense thru WIP

Labor Expense: COS - Jobs-Labor

Labor Deferred: Deferred Labor - J

Labor WIP: WIP - Job Labor

Overhead Debit:

Overhead Credit:

Appointment Options

Dispatch: Yes
 No (Completed Only)

Sunday Manual

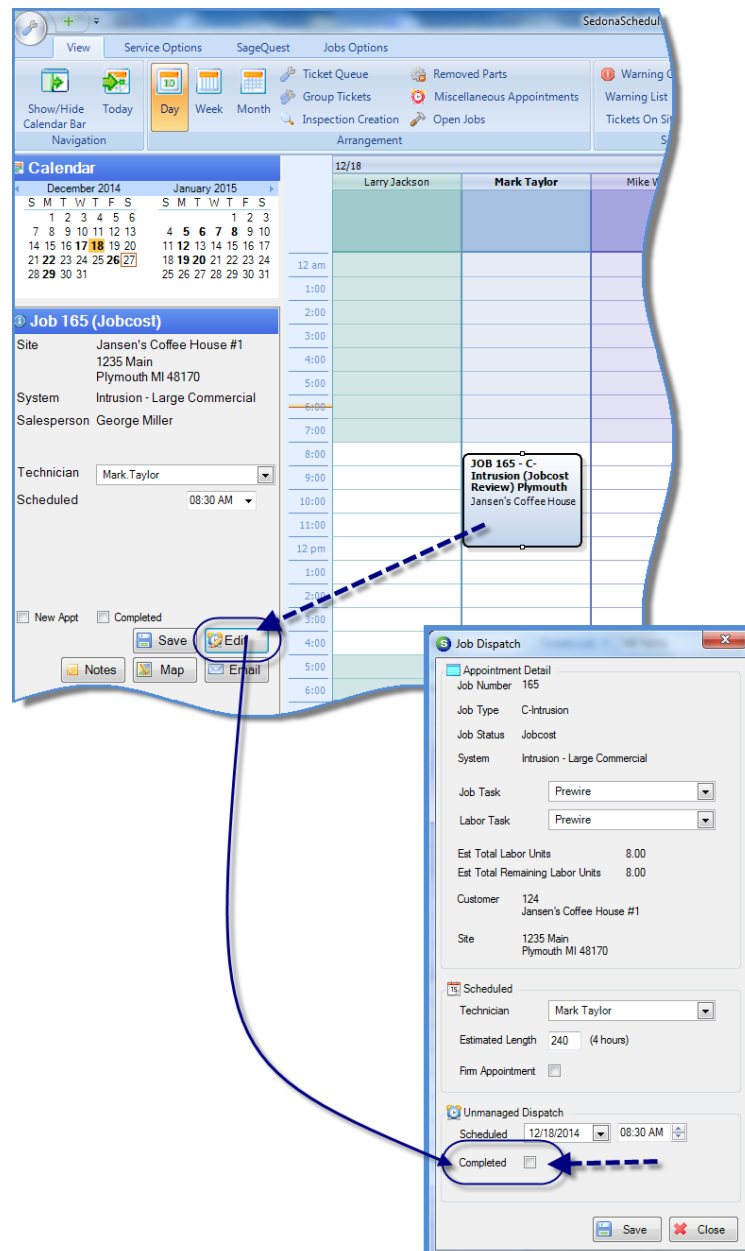
If this option is selected for the Install Company, the dispatcher would only need to check a box to confirm the appointment was completed.

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.

The image displays three sequential screenshots of the SedonaSchedule software interface, illustrating the process of live dispatching a job appointment for 'Job 165 (Jobcost)'.

Top Screenshot: Shows the 'Dispatched' field set to 08:00 AM. A callout box indicates: 'JOB 165 - C- Intrusion (Jobcost Review) Plymouth Dispatched @ 8:00 AM (08:22:55) Jansen's Coffee House'. A blue arrow points to the 'Dispatched' button.

Middle Screenshot: Shows the 'Arrived' field updated to 08:25 AM. A callout box indicates: 'JOB 165 - C- Intrusion (Jobcost Review) Plymouth Arrived @ 8:25 AM (08:22:31) Jansen's Coffee House'. A blue arrow points to the 'Arrived' button.

Bottom Screenshot: Shows the 'Departed' field updated to 11:45 AM. A callout box indicates: 'JOB 165 - C- Intrusion (Jobcost Review) Plymouth Departed @ 11:45 AM Jansen's Coffee House'. A blue arrow points to the 'Departed' button.

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.

