



SedonaSchedule

Group Tickets

Reference Document

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About this Document

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This document is being provided to explain the new SedonaSchedule Group Tickets feature available for release with the SedonaOffice application as of Version 5.6.125.

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SedonaSchedule Group Tickets Overview

This document is designed to describe new functionality contained with SedonaSchedule that will be available in SedonaOffice version 5.6.125 and higher.

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

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

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

Group Tickets Concepts

Group Tickets processing was designed primarily for use with Inspections, however this functionality may be used with regular Service Tickets as well. Inspection Ticket Groups are pre-defined within the Inspection Setup records.

When Inspection Group Tickets are created, one Ticket is considered the “Master Ticket”, and to it one or many other Tickets are attached.

Group Tickets are designed primarily to invoice a customer for services performed on multiple tickets on one invoice. Appointments may be scheduled and dispatched for the “Ticket Group” utilizing a special scheduling form within the Master Ticket of the group.

Once the Inspection Tickets are generated into their pre-defined groups, a User has the option of either removing one or more tickets from the group or adding one or more tickets to an existing group. Both Regular Service Tickets and Inspection Tickets may be manually added to an existing Ticket Group as long as the Tickets are within the same customer Site.

Regular Service Tickets must be manually grouped if this is desired for the purpose of scheduling, dispatching and invoicing the tickets together as a group.

Inspection Linked to Recurring Item

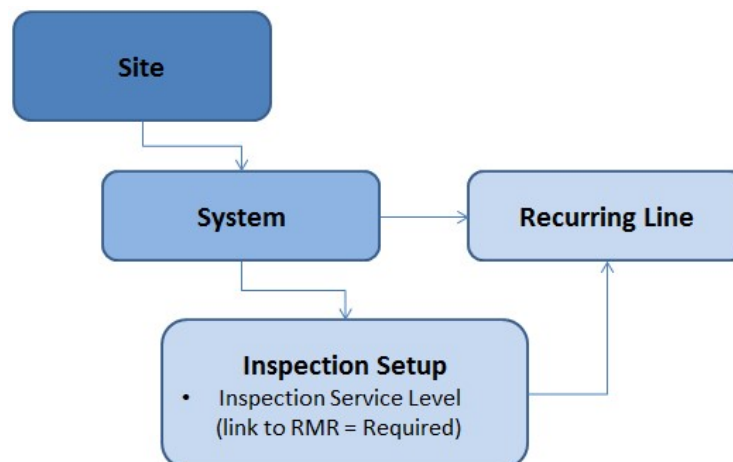
There are two basic options available when determining how to use Group Inspection Tickets:

Link an Inspection Record to a Recurring Line

Setup Inspection without a Link to a Recurring Line

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

If an Inspection Setup record is linked to a Recurring Line, when the ticket(s) is closed, the recurring line to which the Inspection Setup record is linked will be flagged as ready to invoice.



Inspection Groups & Inspection Linked to a Recurring Item

Fields are available on the Inspection Setup and the Service Level Setup forms to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Line.

The screenshot displays the 'System Inspections' form. The top section shows site and system information for 'Plymouth Plantation-Visitor/Pavillon (Fire)'. Below this are tabs for 'Detail', 'Equipment', 'Inspection Items', and 'Reports'. The 'Inspection' section contains various fields:

- Description: A-Fire System
- Frequency: Annual
- Service Problem: Insp-Fire
- Service Level: INSP Cont-LC (highlighted with a callout)
- Service Company: MI-INSP Cont
- Last Inspection: 1/12/2016
- Next Inspection: 6/1/2016
- Next Inspection At: Ticket Closed
- Recurring Item Link: INSP Cont (highlighted with a callout)
- Cycle Amount: 780.00
- Service Tech: [Dropdown]
- Group Number: 1
- Estimated Hours: 40
- High Frequency Bypass: [Checkbox]
- Exclude from High Frequency Check: [Checkbox]
- Notes: [Text Area]

A callout box points to the 'Service Level' and 'Recurring Item Link' fields with the text: "These two fields are only visible when the Service Level requires a link to a Recurring Line".

The 'Service Level Edit' dialog is also shown, with the 'Inspection' part selected under 'General'. It features a checkbox for 'RMR Link to Customer Recurring is Required' and a note: "*This option is used in Service Inspections to force a link between the inspection and customer RMR." Buttons for 'Apply', 'New', and 'Delete' are at the bottom.

Inspection Groups & High Frequency Inspections

Inspection Groups are used to group multiple Inspections and invoice the group of inspection tickets on a single invoice for charges that are not billed through the cycle billing process. A new feature, High Frequency Omit, manages Inspection Ticket creation where multiple inspections are performed at different frequencies.

For example, your customer has contracted with your company to inspect their Fire System. This contract requires that your company perform:

- Quarterly visual and physical test of the fire pump monitored points
- Semi-annual test of sprinklers, water flow switches
- Annual test of all equipment including sprinklers and water flow switches.

You would set up each of these as separate inspections and flagged as High Frequency Inspections. If all Inspections were to begin on June 1st, when you generate your inspection tickets for June, the only ticket created will be the annual inspection since it is the least frequent. The quarterly and semi-annual inspection records will be advanced to the next logical inspection date. When Inspection Tickets are generated for the month of September, only the quarterly inspection ticket will be created.

Group Tickets Setup

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

Service Level Setup

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

Service Level Edit Inactive

Service Level: INSP Cont-LC Description: Inspection Contract - Large Com

General | Parts | **Inspection**

RMR Link to Customer Recurring is Required

**This option is used in Service Inspections to force a link between the inspection and customer RMR.*

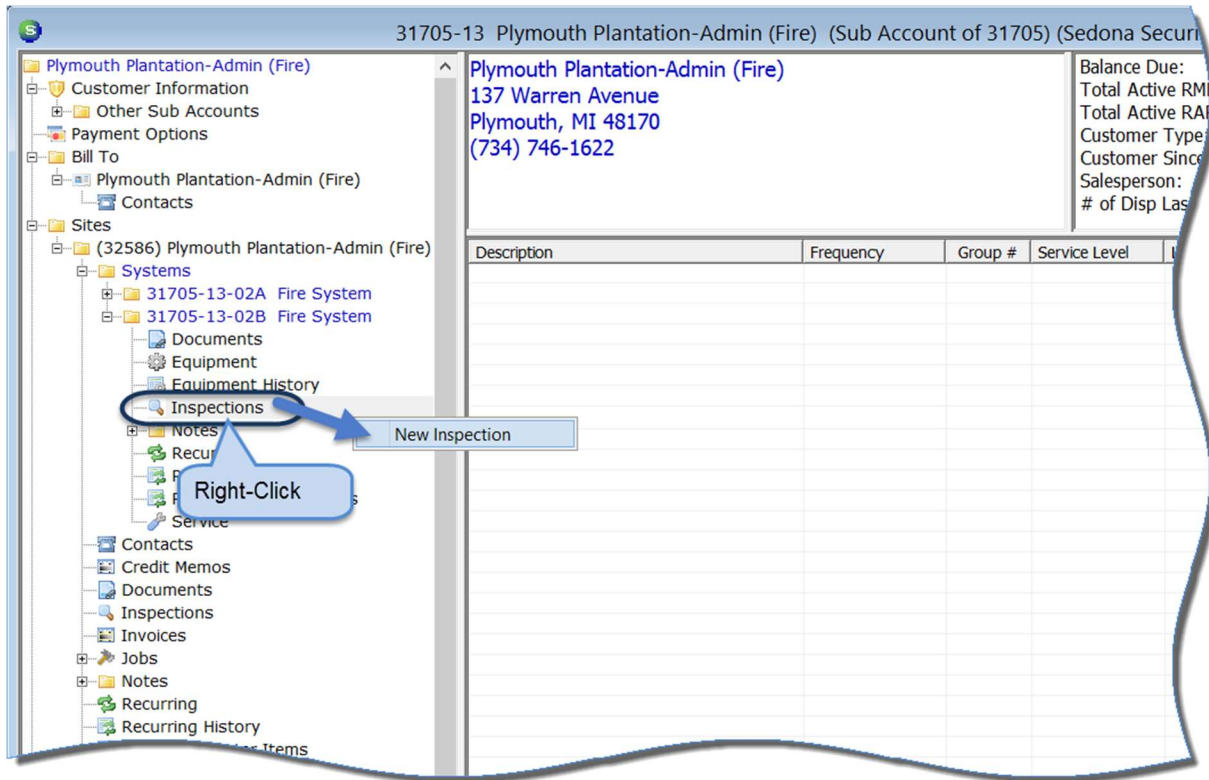
Apply New Delete

Inspection Record Setup

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

Creating a New Inspection Record

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



The Inspection Setup Form

There are three key fields on the Inspection Setup form pertaining to the Group Tickets functionality:

- Group Number
- High Frequency Bypass
- Exclude from High Frequency Check

Depending on which inspections need to be generated and when determine how these fields will be used.

The screenshot shows the 'System Inspections' form for 'Plymouth Plantation-Admin (Fire)'. The form is divided into several sections: 'Detail', 'Equipment', 'Inspection Items', and 'Reports'. The 'Inspection' section is active, showing fields for Description, Frequency, Service Problem, Service Level, Service Company, Last Inspection, Next Inspection, and Next Inspection At. The 'Group Number' is set to 2. The 'High Frequency Bypass' checkbox is checked, and the 'Exclude from High Frequency Check' checkbox is unchecked. The 'Charges' section at the bottom has fields for 'Inspection Item' and 'Amount'. Three callouts provide additional information: 'The Group for the Inspection' points to the 'Group Number' field; 'Should this Inspection be skipped if there is another Inspection due on the same date that is less frequent' points to the 'High Frequency Bypass' checkbox; and 'This box is selected if you always want to generate an Inspection Ticket for this Inspection record' points to the 'Exclude from High Frequency Check' checkbox.

Field	Value
Site	Plymouth Plantation-Admin (Fire) 137 Warren Avenue
System	31705-13-02B Fire
Description	Monthly Fire - Visual
Frequency	Monthly
Service Problem	Insp-Fire
Service Level	INSP T&M-LC
Service Company	MI-INSP T&M
Last Inspection	
Next Inspection	6/1/2015
Next Inspection At	Ticket Closed
Group Number	2
Estimated Hours	2
High Frequency Bypass	<input checked="" type="checkbox"/>
Exclude from High Frequency Check	<input type="checkbox"/>

The Group Number assigned to Inspection records tells the software which inspections should become part of a Group Ticket. Below are two scenarios on how to set the Group Number.

Scenario 1:

There is one system to be inspected with three individual Inspection records setup. A monthly visual inspection and two annual inspections (one for fire sprinklers and the other for water flow test). We always want to generate an Inspection Ticket for both the annual inspections, however, do not generate the monthly inspection ticket when it falls on the same month for the annual inspections.

Type of Inspection	Group #	High Frequency Bypass	Exclude from High Frequency Check
Monthly Visual	1	√	
Annual Sprinklers	1		√
Annual Water Flow	1		

Scenario 2:

There are two systems to be inspected at the same site, with three individual Inspection records setup for each system. A monthly visual inspection and two annual inspections (one for fire sprinklers and the other for water flow test). We always want to generate an Inspection Ticket for both the annual inspections, however, do not generate the monthly inspection ticket when it falls on the same month for the annual inspections. We also want to generate an inspection ticket(s) for each unique system.

Type of Inspection	Group #	High Frequency Bypass	Exclude from High Frequency Check
System A - Monthly Visual	1	√	
System A - Annual Sprinklers	1		√
System A - Annual Water Flow	1		
System B – Monthly Visual	2	√	
System B – Annual Sprinklers	2		√
System B – Annual Water Flow	2		

Below would be the Inspection Setup records for Scenario 1 on the previous page.

The image displays three overlapping screenshots of the 'System Inspections' software window. Each window shows the configuration for a specific inspection type at the site 'Plymouth Plantation-Admin (Fire)'. The site address is '137 Warren Avenue' and the system ID is '31705-13-02B Fire'. The windows are arranged in a cascading fashion, with the top window showing 'Monthly Fire - Visual', the middle window showing 'Annual - Sprinklers', and the bottom window showing 'Annual - Water Flow'.

Inspection 1: Monthly Fire - Visual

- Description: Monthly Fire - Visual
- Frequency: Monthly
- Service Problem: Insp-Fire
- Service Level: INSP T&M-LC
- Service Company: MI-INSP T&M
- Last Inspection: [Empty]
- Next Inspection: 6/1/2015
- Service Tech: [Empty]
- Group Number: 2
- Estimated Hours: 2
- High Frequency Bypass:
- Exclude from High Frequency Check:

Inspection 2: Annual - Sprinklers

- Description: Annual - Sprinklers
- Frequency: Annual
- Service Problem: Insp-Sprinkler
- Service Level: INSP T&M-LC
- Service Company: MI-INSP T&M
- Last Inspection: [Empty]
- Next Inspection: 6/1/2015
- Service Tech: [Empty]
- Group Number: 2
- Estimated Hours: 8
- High Frequency Bypass:
- Exclude from High Frequency Check:

Inspection 3: Annual - Water Flow

- Description: Annual - Water Flow
- Frequency: Annual
- Service Problem: Insp-Waterflow
- Service Level: INSP T&M-LC
- Service Company: MI-INSP T&M
- Last Inspection: [Empty]
- Next Inspection: 6/1/2015
- Next Inspection At: Ticket Closed
- Service Tech: [Empty]
- Group Number: 2
- Estimated Hours: 8
- High Frequency Bypass:
- Exclude from High Frequency Check:
- Notes: [Empty]

The bottom window also includes a 'Charges' section with fields for 'Inspection Item' and 'Amount', and buttons for 'Save', 'Terminate', and 'Cancel'.

Generating the Group Tickets

Generating Group Tickets occurs at the same time regular Inspection Tickets are created.

Once the Due As Of date has been selected and you click the *Get Inspections* button, the grid will fill in with all of the inspections due by the date selected. Check the box to the left of the inspection that you want to generate or check the box in the header above the inspection checkbox selection to select all inspection records.

The screenshot shows the SedonaSchedule 5.7.0.26 - Sedona Security interface. The 'Due As Of' date is set to 6/30/2015. The 'Get Inspections' button is highlighted with a red circle and an arrow. The grid below shows a list of inspection records with checkboxes in the first column.

Account	Service Co	System	Site	Address	Date	City	Service Level	Route Code
<input type="checkbox"/> SR6402	MI-INSP Cont	Intrusion	Detroit Education Dept.	357 Park Place	07/01/2013	Detroit	INSP T&M-LC	N/A
<input checked="" type="checkbox"/> 3-705-13-02A	MI-INSP T&M	Fire	Plymouth Plantation-Ad...	137 Warren Avenue	06/01/2015	Plymouth	INSP T&M-LC	N/A
<input checked="" type="checkbox"/> 3-705-13-02B	MI-INSP T&M	Fire	Plymouth Plantation-Ad...	137 Warren Avenue	06/01/2015	Plymouth	INSP T&M-LC	N/A
<input checked="" type="checkbox"/> 3-705-13-02A	MI-INSP T&M	Fire	Plymouth Plantation-Ad...	137 Warren Avenue	06/01/2015	Plymouth	INSP T&M-LC	N/A
<input checked="" type="checkbox"/> 3-705-13-02A	MI-INSP T&M	Fire	Plymouth Plantation-Ad...	137 Warren Avenue	06/01/2015	Plymouth	INSP T&M-LC	N/A
<input checked="" type="checkbox"/> 3-705-13-02B	MI-INSP T&M	Fire	Plymouth Plantation-Ad...	137 Warren Avenue	06/01/2015	Plymouth	INSP T&M-LC	N/A

Next click the *Create Tickets* button. A list of “proposed tickets” will be displayed in a grid. In the example below, the first row is a regular inspection ticket. The remaining rows are group ticket related. The *Action* column in the grid tells us what the software will do when clicking on the *Create* button.

In the example below, there are two monthly inspections that will not have inspection tickets created due to the fact that an annual inspection is due on the same date for the same group.

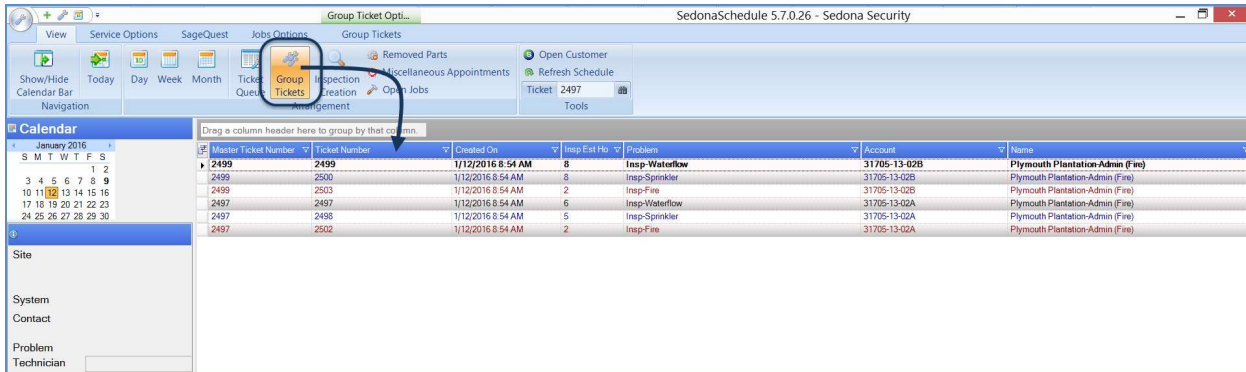
The screenshot shows a window titled "Create Inspection Tickets" with a table of "Inspections Selected". The table has the following data:

Action	Site	Group Num	Account	System	Inspection	Next Insp Date
Create Ticket	Detroit Education Dept.	0	SR6402	Intrusion	ByRequestOnly	7/1/2013
Set Next Insp	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Monthly	6/1/2015
Create Group	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Annual	6/1/2015
Create Group	Plymouth Plantation-Admin (Fire)	1	31705-13-02A	Fire	Annual	6/1/2015
Set Next Insp	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Monthly	6/1/2015
Create Group	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Annual	6/1/2015
Create Group	Plymouth Plantation-Admin (Fire)	2	31705-13-02B	Fire	Annual	6/1/2015

At the bottom of the dialog box, there are two buttons: "Create" (with a green plus icon) and "Cancel" (with a red X icon).

Working in the Group Tickets Queue

Once Group Tickets have been created, they are viewable in both the Group Ticket Queue and the Regular Ticket Queue.



Tickets appointments may be created from within each Ticket, by dragging and dropping on the Schedule Board or by using the *Group Ticket Dispatch Appointment Scheduler*.

Appointments created for individual tickets are dispatched the same as regular tickets. Appointments created from the Group Ticket Dispatch Appointment Scheduler are dispatched from that same location.

The screenshot displays the 'Ticket #2504' window in SedonaOffice. The interface includes a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (0), Other Items, Purchase Orders (0), Service History, Ticket Log, and Ticket Group. Below this is a summary section for the ticket, including Customer (31705-1), Site (Plymouth Plantation-Carriage (Fire & Burg)), Created (1/12/2016 12:36 PM), and Status (Open). A table titled 'Other Tickets in Group' lists tickets 2505 through 2509 with their respective dates, statuses, systems, and resolutions. At the bottom of the ticket window, a 'Dispatch...' button is circled in blue. A blue arrow points from this button to a 'Dispatch' dialog box that is open. The dialog box contains a table titled 'Appointments for Group' with columns for Name, Scheduled, Dispatched, Arrived, Departed, Est Len, Res Code, and Note. Two appointments are listed: Mack Miller (1/12/2016 8:30 AM) and Mike McKenzie (1/12/2016 8:30 AM). Below the table, the 'Add...' button is highlighted with a blue circle and a blue arrow. The dialog also includes fields for Technician, Estimated Length, Appointment Resolution, and Notes, along with 'Open Ticket...', 'Save', and 'Close' buttons.

Resolving Group Tickets

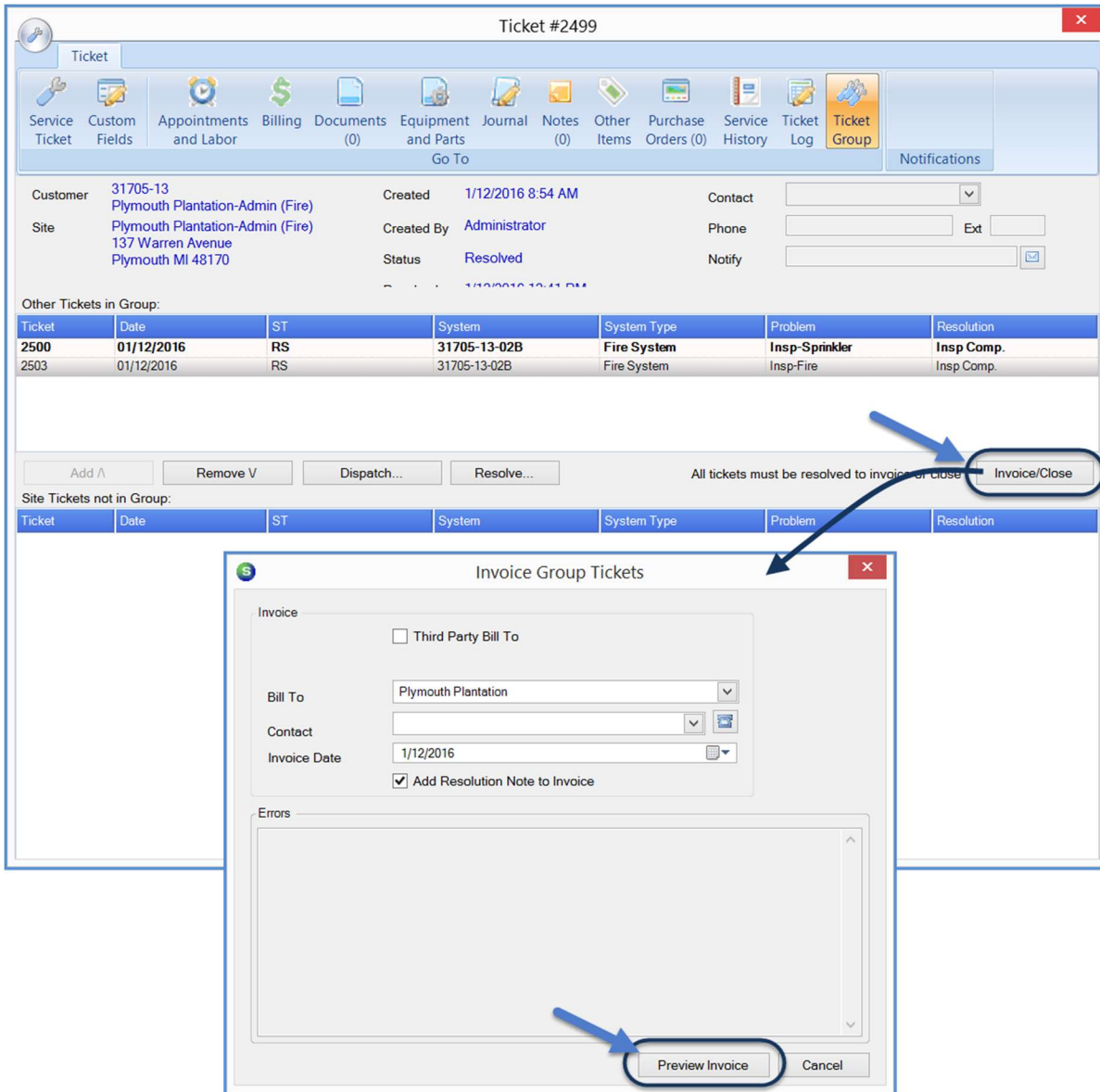
To be able to invoice and close or just close the group ticket if non-billable, you must first use the Resolve option button on the Group Ticket form. This form will ask for a resolution code and you have a field available for notes that may be printed on the customer's invoice.

The screenshot displays the 'Ticket #2499' form in the SedonaOffice software. The 'Ticket Group' button in the top navigation bar is highlighted with a blue circle. Below the navigation bar, the form shows customer information for '31705-13 Plymouth Plantation-Admin (Fire)' and a 'Resolved' status. A table lists 'Other Tickets in Group' with columns for Ticket, Date, ST, System, System Type, Problem, and Resolution. The 'Resolve...' button in the main form is highlighted with a blue circle and a blue arrow pointing to a 'Resolve' dialog box. The dialog box contains a 'Resolution' dropdown set to 'Insp Comp.', a checked 'Overwrite existing Resolution on tickets' checkbox, and a 'Notes' field with the text 'Monthly Fire Visual, Fire Sprinklers and Water Flow inspections completed.' The 'Resolve' button in the dialog is also highlighted with a blue circle.

Ticket	Date	ST	System	System Type	Problem	Resolution
2500	01/12/2016	RS	31705-13-02B	Fire System	Insp-Sprinkler	Insp Comp.
2503	01/12/2016	RS	31705-13-02B	Fire System	Insp-Fire	Insp Comp.

Invoicing & Closing Group Tickets

After Resolving the Group Tickets, you will proceed to the Invoice / Close step. Click on the Invoice/Close button on the Group Ticket form. This will open a form to enter the Invoice Date or accept the default date. If there is more than one billing address on file for the customer, you may select a different Bill To from the drop-down list. Click the *Preview Invoice* button when finished.



Group Ticket Invoice Preview

Below is an example of the Group Ticket Invoice Preview. This is not how the final invoice will actually print – when you print the invoice, you will be selecting your preferred Invoice Form.

The purpose of the Invoice Preview is to review the charges to make certain everything that should be billed is included and correct prior to posting the invoice.

If you are satisfied with the charges displayed, click the *Invoice & Close* button; this will post the invoice and close all tickets associated with the Ticket Group. If you need to make changes to the charges, click the Cancel button, make the necessary corrections on the Ticket, then repeat the process (as shown on the previous page) of clicking on *Invoice/Close* button on the Group Ticket form.

Group Ticket #2503 - Invoice Preview

Invoice & Close Cancel

SedonaSecurity
417 Forest
Plymouth, MI 48170
(734) 414-0760

Preview

Customer Plymouth Plantation
Customer Number 31705
Invoice Number Pending
Invoice Date 1/12/2016

CALCULATED CHARGES

Description	Amount
<i>Ticket # 2503, Monthly Fire - Visual 31705-13-02B - Fire System</i>	
1.50 Service Labor	80.00 120,00
1.00 Minimum Service Call Charge	80.00 80,00
<i>Ticket # 2499, Annual - Water Flow 31705-13-02B - Fire System</i>	
1.00 Minimum Service Call Charge	80.00 80,00
6.50 Service Labor	80.00 520,00
<i>Ticket # 2500, Annual - Sprinklers 31705-13-02B - Fire System</i>	
1.00 Minimum Service Call Charge	80.00 80,00
8.50 Service Labor	80.00 680,00
Subtotal:	1,560.00
Tax:	0.00
Charges Due:	\$1,560.00