SedonaOffice®

The #1 Financial Software for Security Companies

SedonaSchedule

Navigation

Reference Guide

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About this Document

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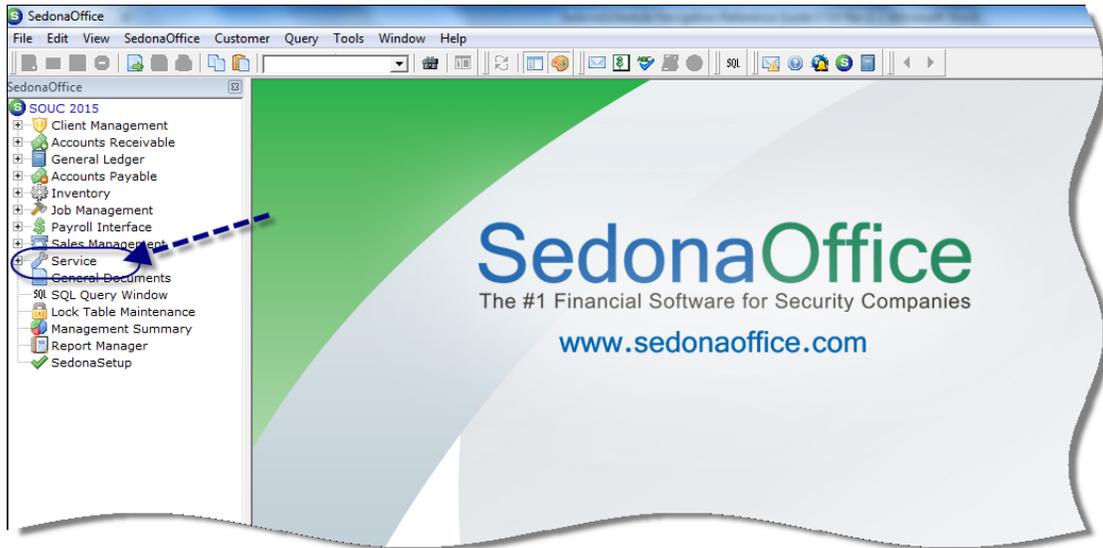
SedonaSchedule Overview

This document is designed to assist Users in understanding the layout, concepts and terminology, and general navigation of the SedonaSchedule application. Creating and managing Tickets is covered in a separate Reference Document.

Major Topics covered in this document include:

- The Ribbon Functions & Options
- The Schedule Board
  - Display Groups – Setup & Viewing
  - Calendar Bar
  - Ticket Detail Viewer
- Open Job List
  - Viewing & Customizing Fields within the Job List
  - View Options
- Ticket Queue
  - Queue Ribbon
  - Queue Selection
  - Viewing & Customizing Fields within the Queue

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.
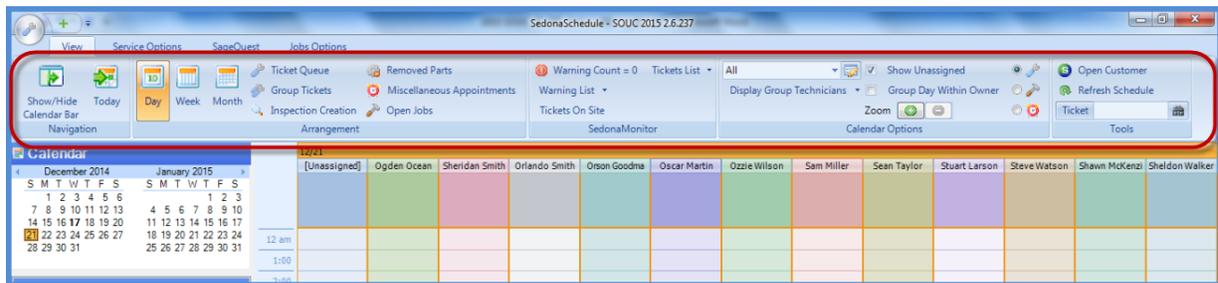

The SedonaSchedule application will open displaying the view last displayed when exiting the application. When opening SedonaSchedule for the first time, the Schedule Board will be displayed.
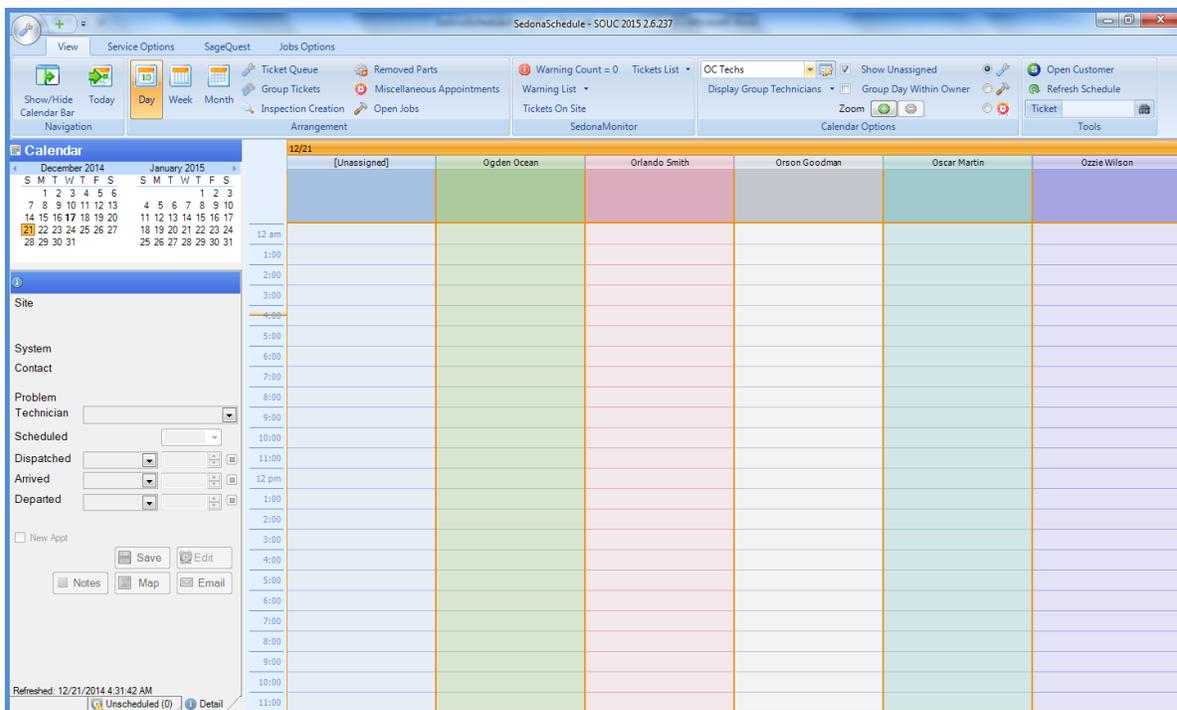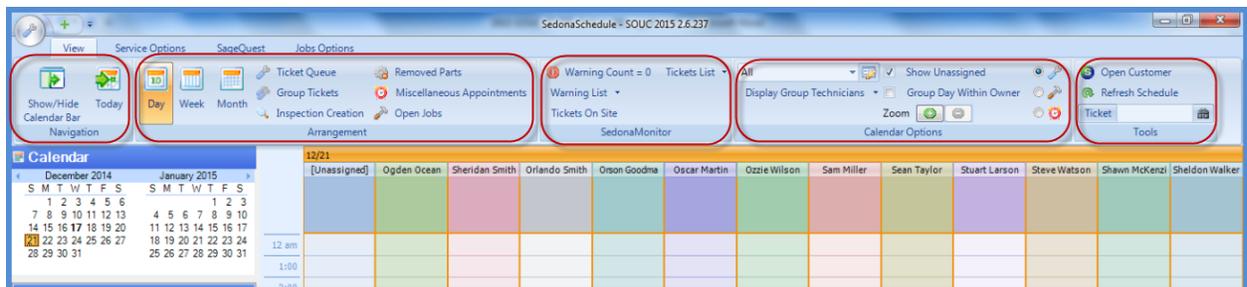
Terminology

There are several terms which are unique to the SedonaSchedule application. This list of terms will assist in understanding the contents of this document.

Ribbon – The Ribbon is located at the top of the SedonaSchedule application and contains options from which the User clicks to activate an option.

Ribbon Group – Within the Ribbon are various groups of functions; these are referred to as Ribbon Groups.
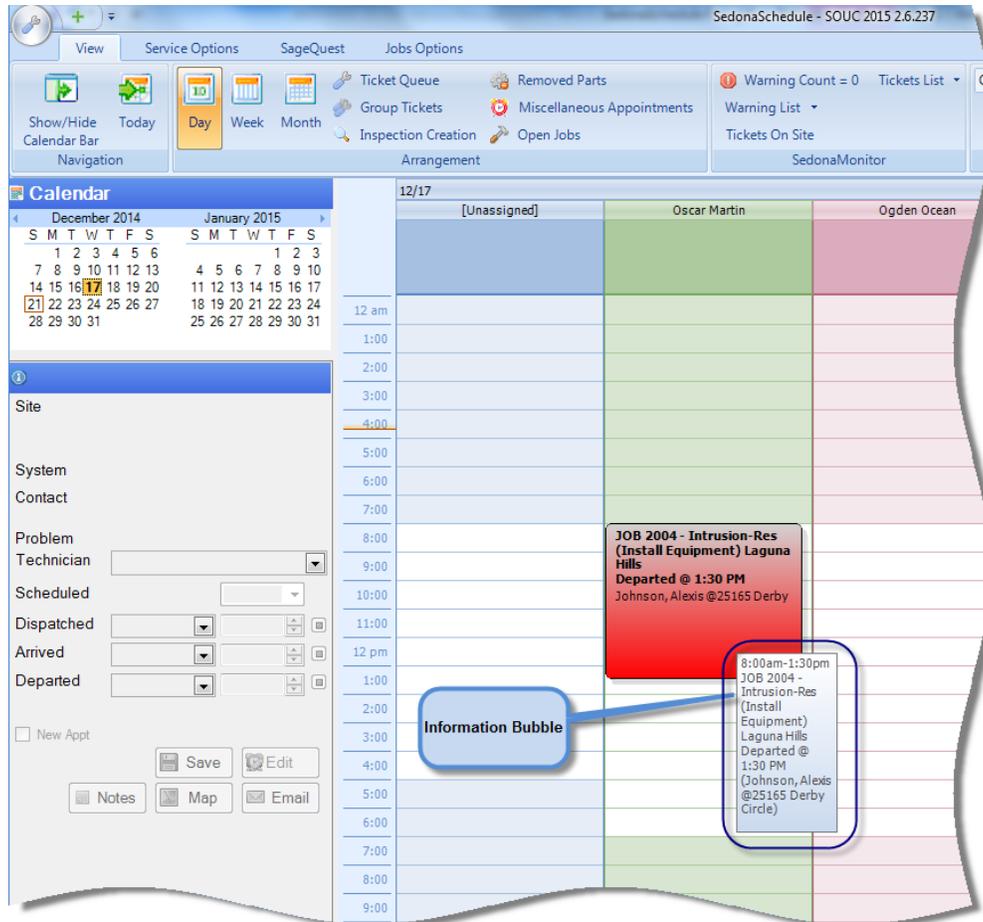

Context Menu – Context Menus appear throughout the SedonaSchedule application and contain additional options from which to select. A context menu appears as a tab above a Ribbon.
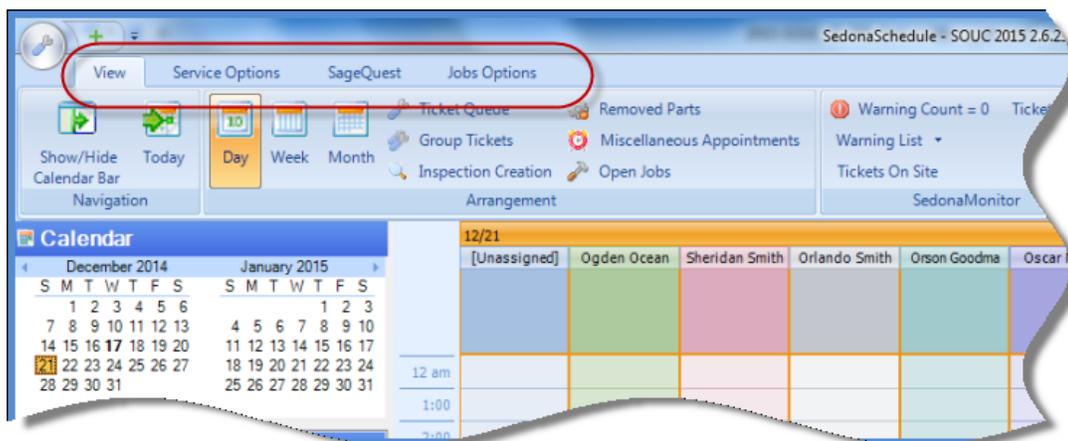

Terminology (continued)

Information Bubble – When hovering over an appointment on the Schedule Board, additional information is displayed within the Information Bubble.

Terminology (continued)

Display Group – A Display Group is a group of one or more Technicians. Within the Schedule Board, the User is able to choose to view the Display Group of choice. A Technician may be associated with one or multiple Display Groups. Your company creates the Display Groups to which your Users will have access.

A Display Group could contain all or selected Technicians in a Service Company, a geographical area, a service Route or any logical grouping of Technicians to make scheduling and dispatching easier.
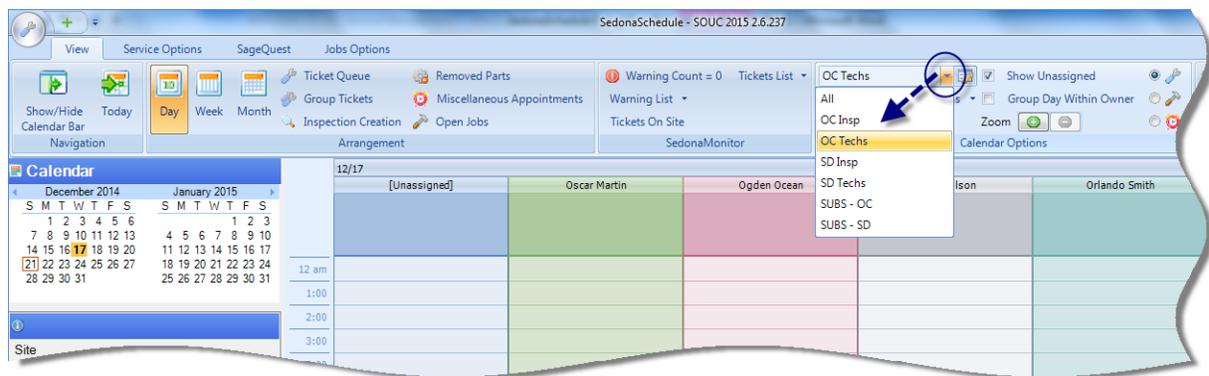
SedonaSchedule Components

When first accessing SedonaSchedule from the main application, several major components will be displayed; the Context Menus, a Ribbon at the top, the Calendar and Ticket/Job Viewer on the left and the Display area on the right. Information that is displayed within Display area is controlled by which option the User clicks on the Ribbon. The following pages will describe each major component of SedonaSchedule.
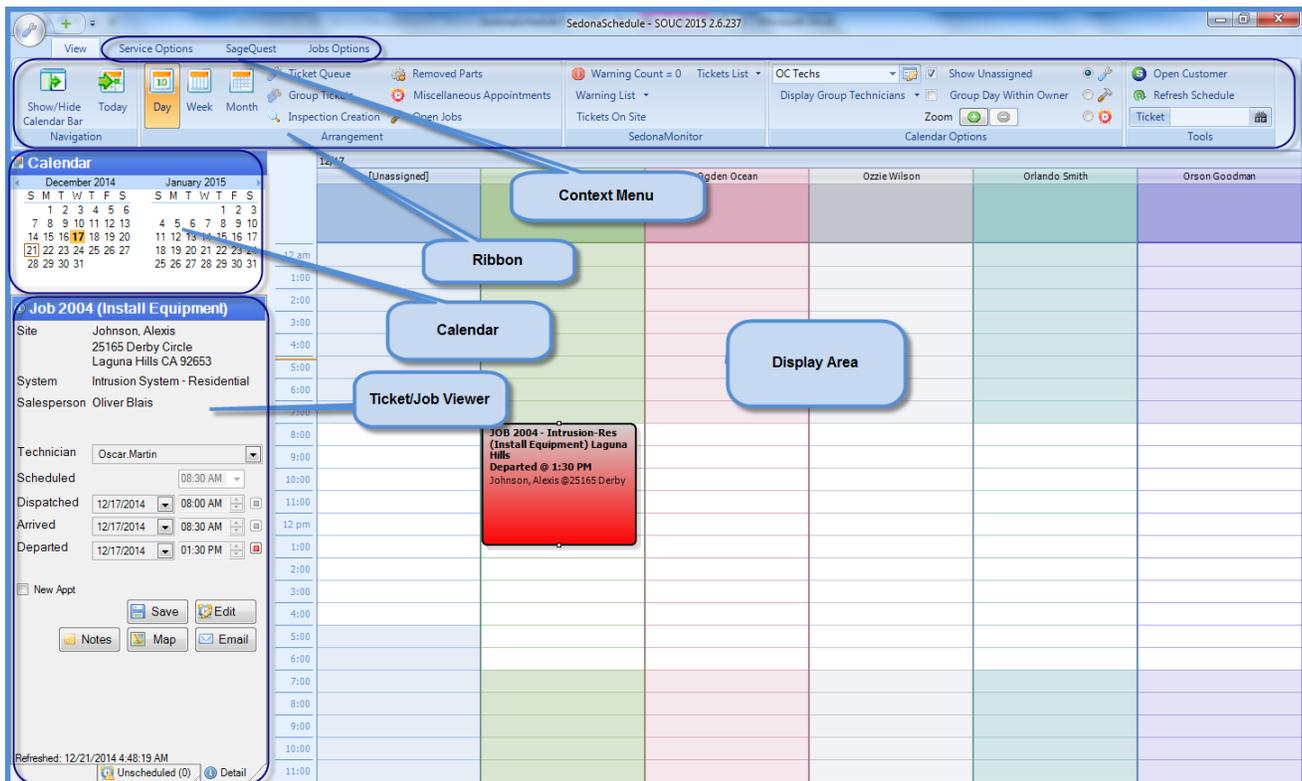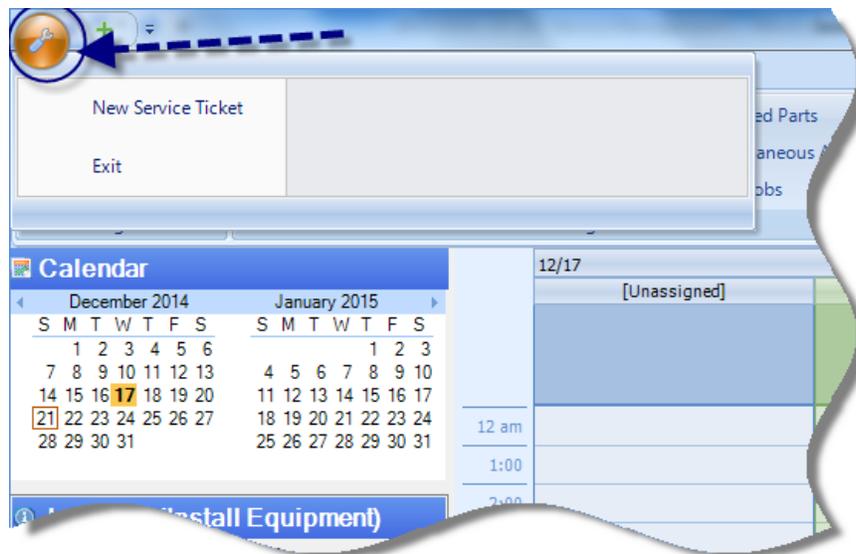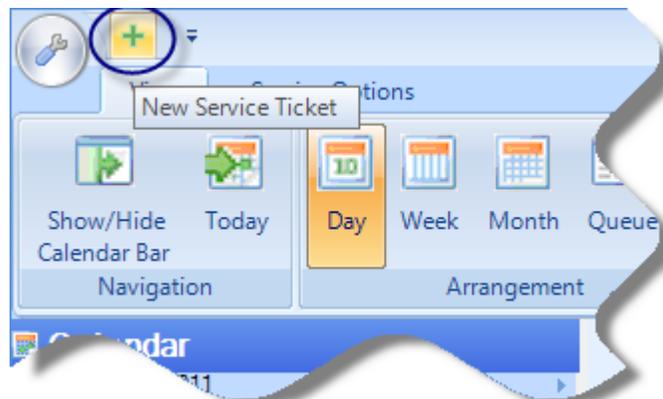
Context Menu and Options

Above the Ribbon are Context Menus and other options. Most of the Context Menus will navigate to Setup options for SedonaSchedule.

SedonaSchedule Icon – Clicking on the SedonaSchedule icon will open ribbon group with two options; New Service Ticket and Exit. Selecting the New Service Ticket option will open the Customer Lookup form to locate the customer for which a Service Ticket will be created. Selecting the Exit option will close SedonaSchedule. The main SedonaOffice application will still be running after exiting SedonaSchedule.

Plus Symbol – A shortcut for creating a new Ticket. Clicking on the Plus Symbol will open the Customer Search form to locate the customer for which a Ticket will be created.
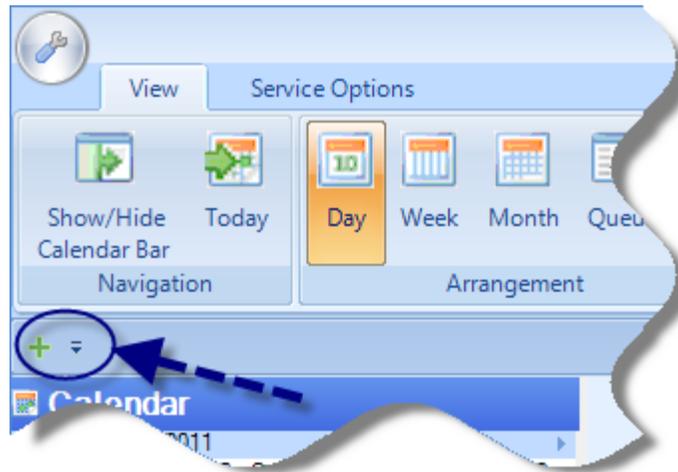
Context Menus and Options (continued)

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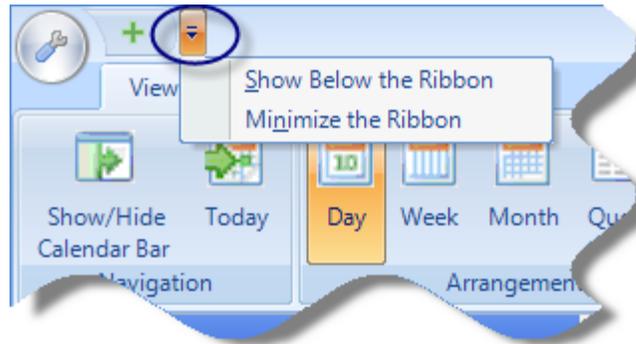

Show Below the Ribbon - When selecting this option, the Plus Symbol (create new service ticket) and Ribbon Control options ⊞ ▼ will be displayed below the Ribbon.


Minimize the Ribbon – Selecting this option will remove the Ribbon from display. If you want to re-display the Ribbon, click on the Ribbon Control option and de-select the Minimize the Ribbon option.

Context Menus and Options (continued)

Service Options *Context Menu* – Selecting this context menu will display a new Ribbon with additional Ribbon Groups; *Service Setup Tables, Parts Warehouse, Auto Refresh, and Map Type*.
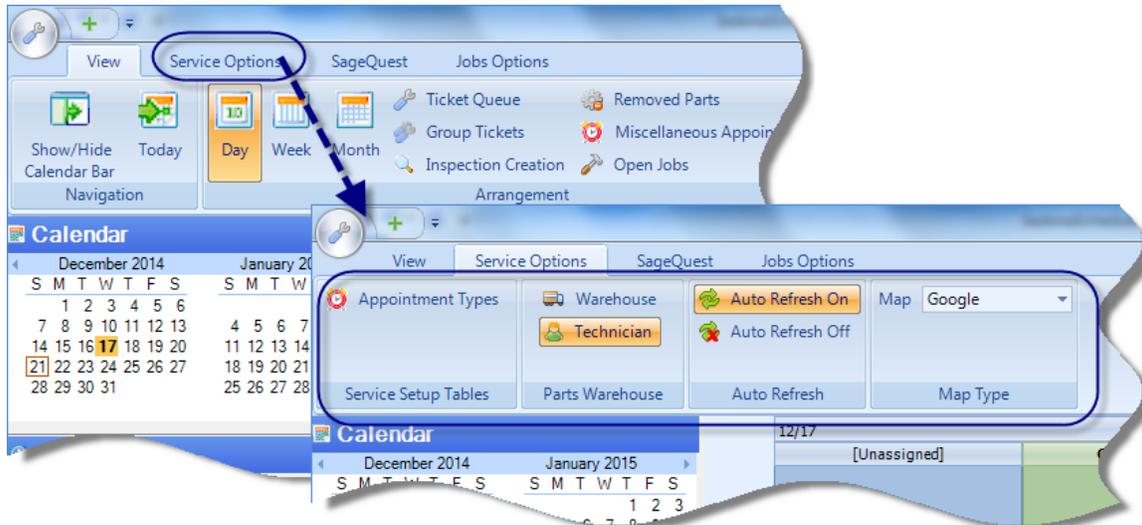
Service Setup Tables Ribbon Group – There is one option available within this ribbon group, *Appointment Types*. Appointment Types are used when creating a Miscellaneous Appointment for a Technician; this defines the reason for the Miscellaneous Appointment. You may add additional Appointment Types to this setup table.
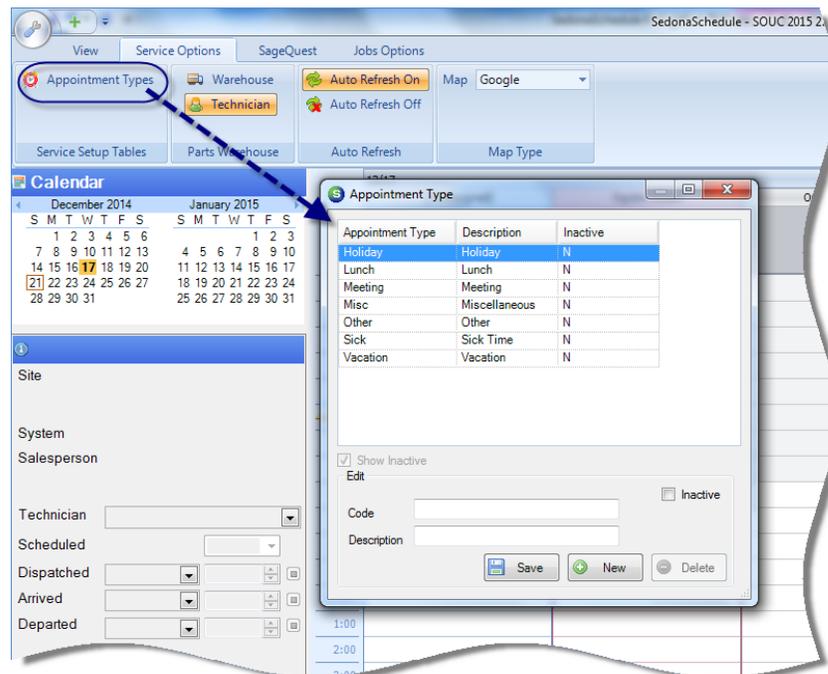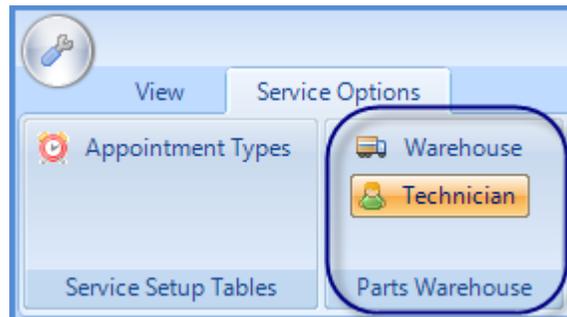
Context Menus and Options (continued)

Parts Warehouse Ribbon Group – There are two options available within this ribbon group, *Warehouse* and *Technician*.   These options control which warehouse parts used on a ticket will be removed.

When the Technician option is selected, parts will always be relieved from the Warehouse linked to the Technician on the Ticket. If the Warehouse option is selected, the User may then choose to relieve parts inventory from any warehouse.

If the Warehouse option is selected, when adding a part to the Ticket, if a Technician appointment was scheduled for the Ticket, the warehouse will default to that of the Technician; however the User may override this and select a different warehouse if desired.

Context Menus and Options (continued)

SageQuest *Context Menu* – This menu will only be displayed if your company has purchased the add-on SageQuest (GPS vehicle tracking) module.

Selecting the context menu will open a Ribbon with one option; SageQuest Setup.
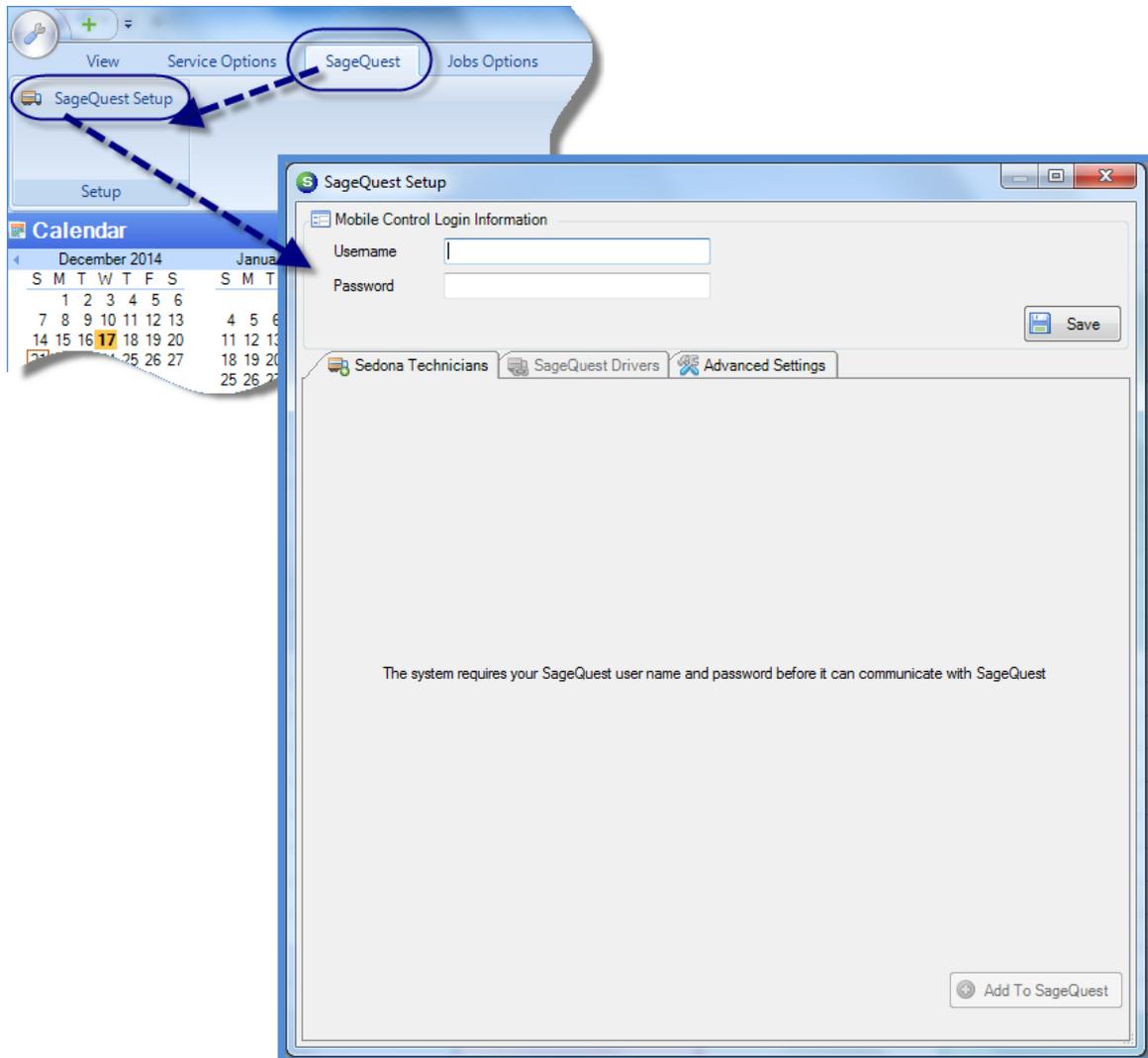
Context Menus and Options (continued)

Job Options *Context Menu* – Selecting the context menu will open a Ribbon Group (Info Options) with one option; Include Memo. This is an on/off toggle button; when the button is illuminated, the option is on. When turning this option on, any information typed into the Memo field of the Job Work Order will be displayed within the Information Bubble when clicking on a Job Appointment on the Schedule Board.
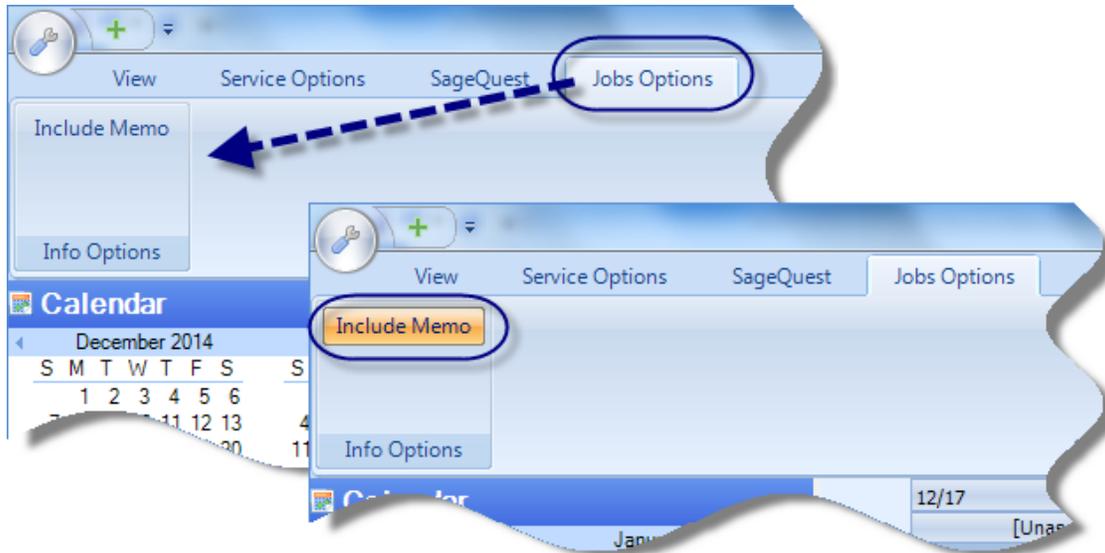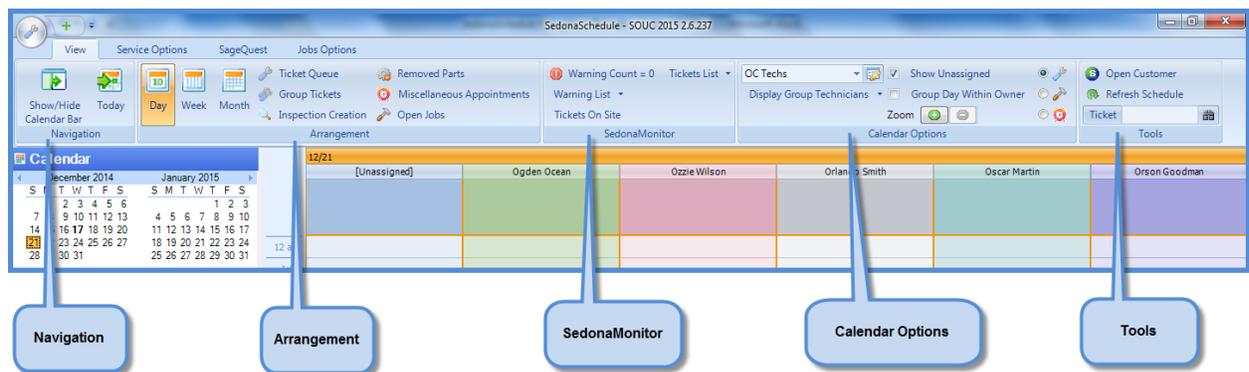
The Ribbon

The Ribbon displays and controls all the options for navigating to various functions of SedonaSchedule. Contained within the Ribbon are Ribbon Groups which contain multiple related options.
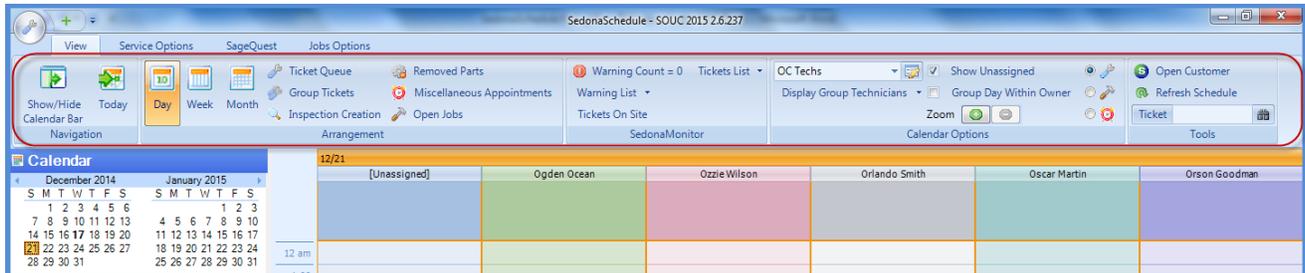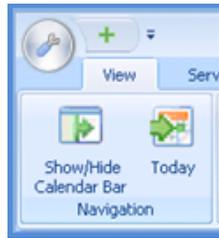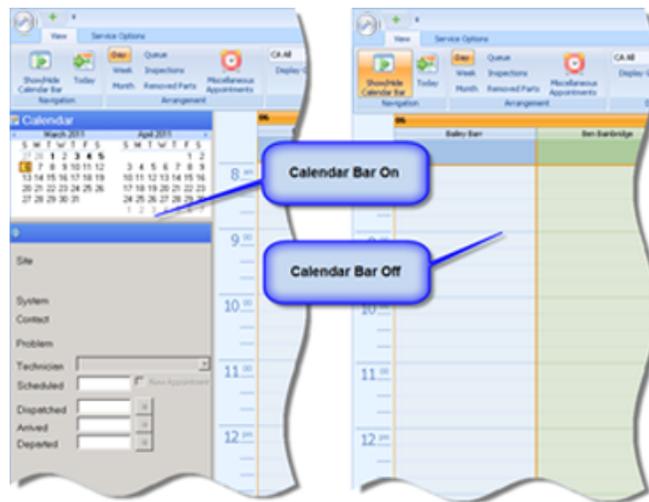

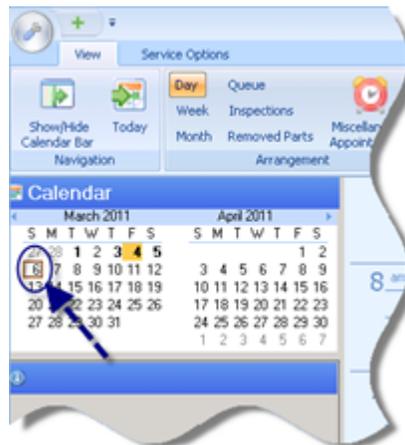Ribbon Groups

The Ribbon (continued)

Navigation Ribbon Group – This Ribbon Group contains two options; *Show/Hide Calendar Bar* and *Today*.

Show/Hide Calendar Bar – selecting this option will remove the Calendar Bar from view.

Today – selecting this option will outline the current system date in red on the Calendar.
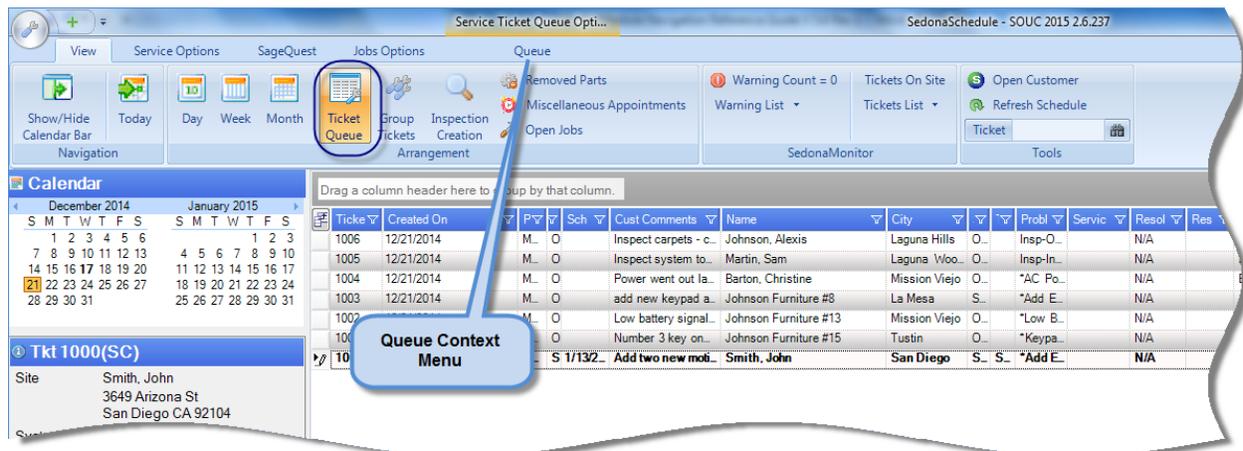

The Ribbon (continued)

Arrangement Ribbon Group – This Ribbon Group contains several options; *Day, Week, Month, Ticket Queue Group Tickets (if activated), Inspection Creation, Removed Parts, Miscellaneous Appointments, and Open Jobs.*


Day, Week, Month – selecting one of these options controls the period of time that is displayed in the Schedule Board.

Ticket Queue – selecting the Ticket Queue option will display the Ticket Queue that was last viewed; i.e. Service Tickets, Inspection Tickets, Vendor Service Tickets, Vendor Inspection Tickets, or All Tickets. Also when selecting the Ticket Queue option, a new Context Menu labeled Queue, will be displayed above the Ribbon. Selecting the Queue context menu will open a new Ribbon with additional options, which will be covered later in this document.

The Ribbon (continued)

Group Tickets – This option is only available if your company has activated this special feature. Group Tickets are a feature of the Inspections program which creates and groups multiple inspection tickets together for the purpose of invoicing multiple tickets on one invoice.
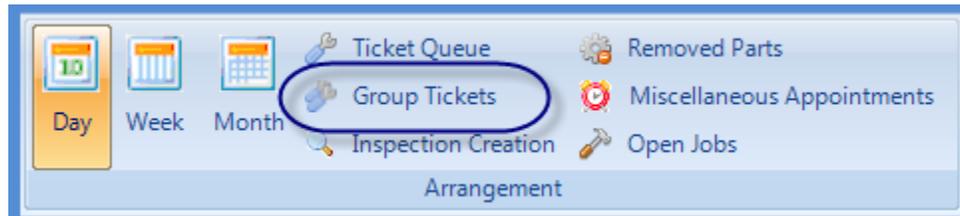
Inspection Creation – Selecting the Inspection Creation option will open a new Ribbon which is used to view your upcoming Inspections and generate Inspection Tickets (in bulk).
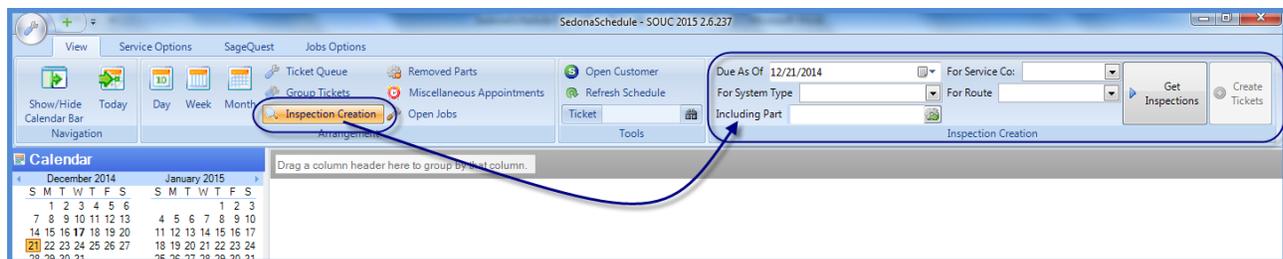
Removed Parts – Selecting this option allows you to view a list of parts that were replaced on tickets. Highlighting a single date or date range on the Calendar will display a list of all parts replaced within the date(s) selected.

This feature provides your company with a list of parts to obtain from Technicians which were removed during a service call so that they may be returned to the Vendor for credit or repair if applicable.
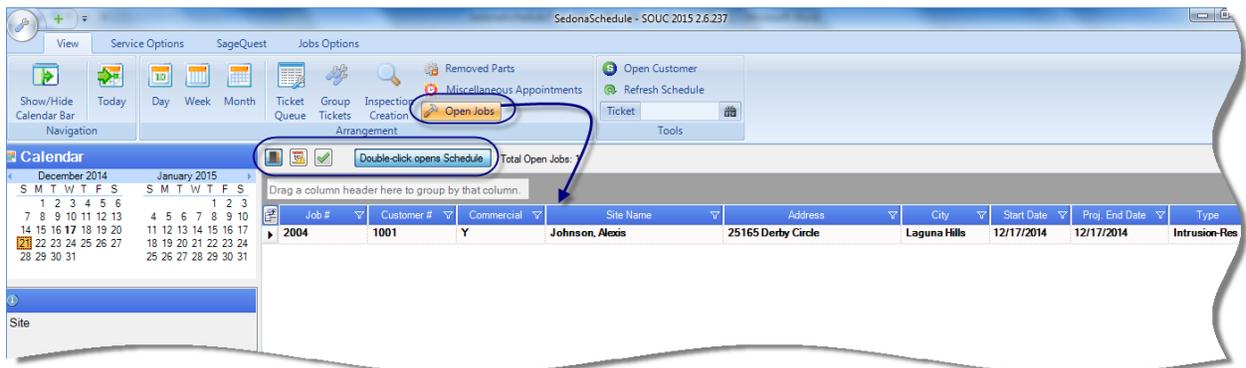
The Ribbon (continued)

Miscellaneous Appointments – Selecting this option will display a Context Menu for Miscellaneous Appointments. Selecting this context menu will display a new Ribbon with options for managing, creating, editing and purging Miscellaneous Appointments.

Miscellaneous appointments are used to block out time on the Schedule Board where a Technician is not available to be scheduled.
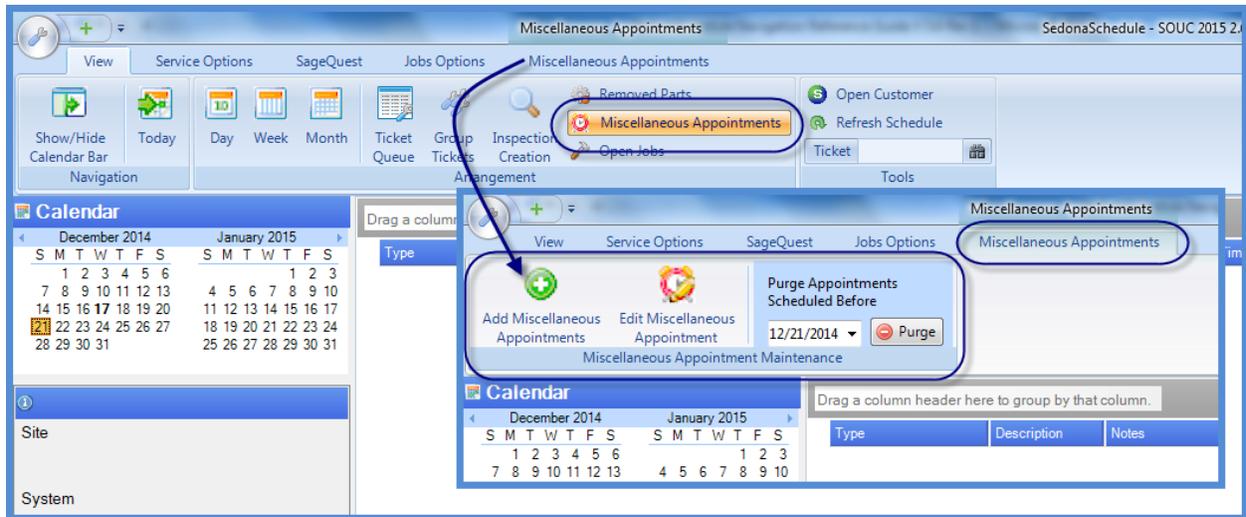
Open Jobs – Selecting this option will display a list of all open Jobs, which is organized similar to the Job Queue in the Main SedonaOffice application. Other options are available in the header area above the open job listing.
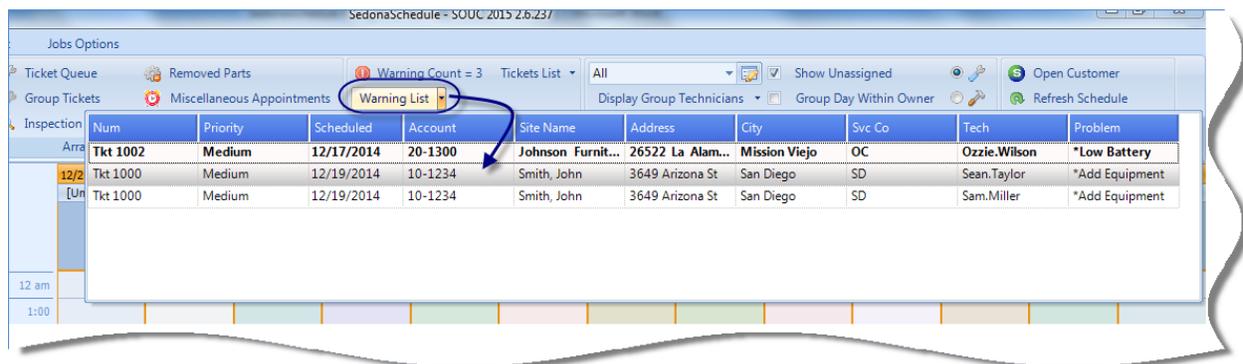

The Ribbon (continued)

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

Warning Count – The Warning Count is for Display only; if any scheduled Appointments have not been dispatch by the current date/appointment time, those tickets will be included in the Warning Count. This applies to all types of Tickets.


Warning List – If there is a number displayed to the right of the Warning Count, clicking on the Warning List will display the list of tickets where the Technician has not yet been dispatched by the date/time set for the appointment.
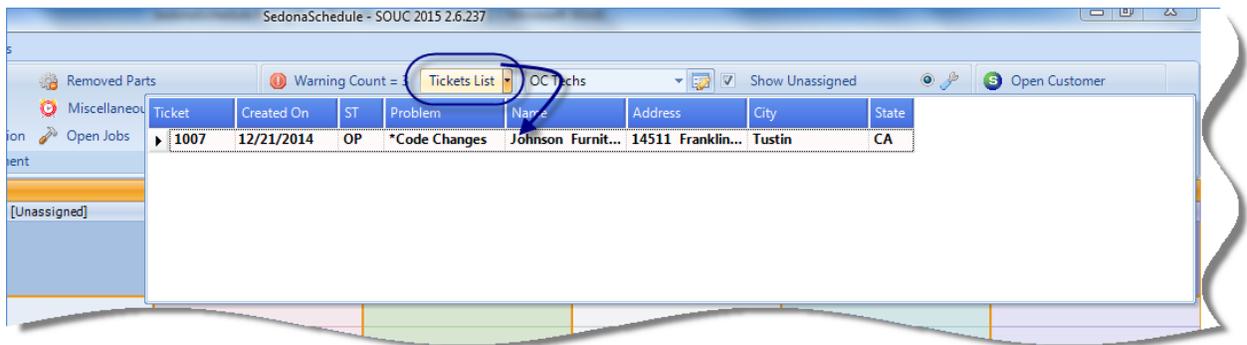
The Ribbon (continued)

Tickets On Site – This option functions when working in a Ticket Queue or the Schedule Board. When working from a Ticket Queue, and highlighting a particular ticket in the list, if there are any other open Tickets for the same site, a count of those Tickets will display to the right of the Tickets On Site option. When working from the Schedule Board, highlighting an appointment on the Schedule Board will display a count of any other open Tickets for the same site.
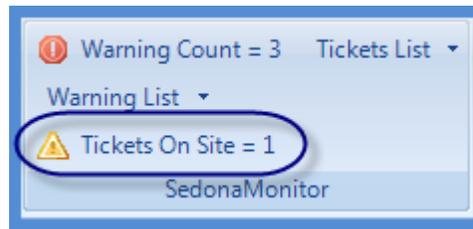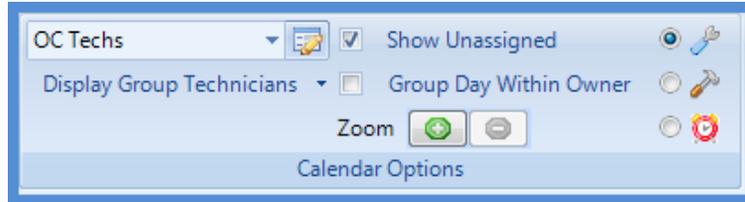

Ticket List – If a count is displayed next to the *Tickets On Site*, clicking on this option will display a list of the other open Tickets for the same site.
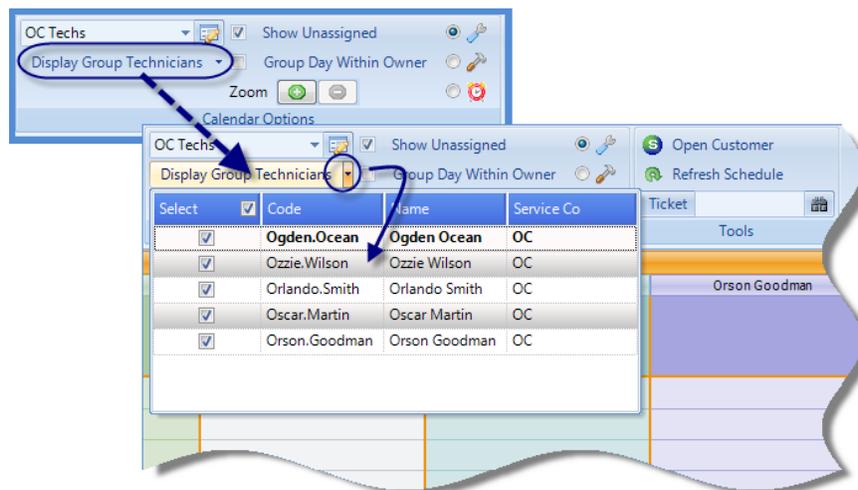
The Ribbon (continued)

Calendar Options Ribbon Group – This Ribbon Group contains several options for managing the Schedule Board.

Display Group (Drop-Down List) – Clicking on the arrow will display a list of all available Display Groups from which the User may select. Selecting a Display Group will display all the Technicians associated with the Group within the Schedule Board.
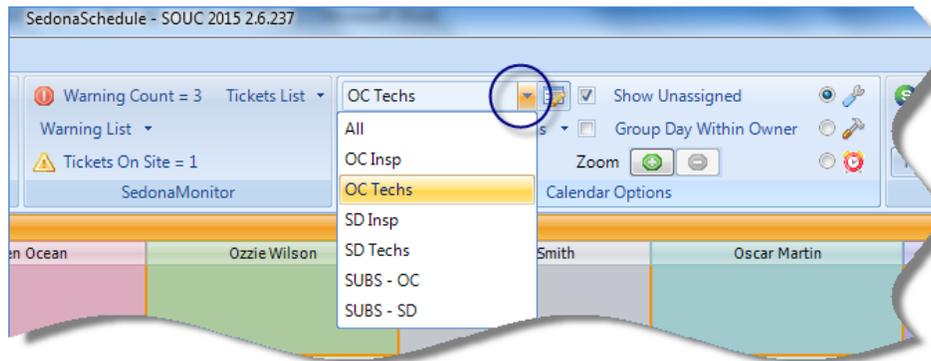
Display Group Technicians – Clicking on this option displays a list of all Technicians currently displayed within the Schedule Board. The User may un-check one or more Technician names if they do not want to include them in Schedule Board currently being viewed.
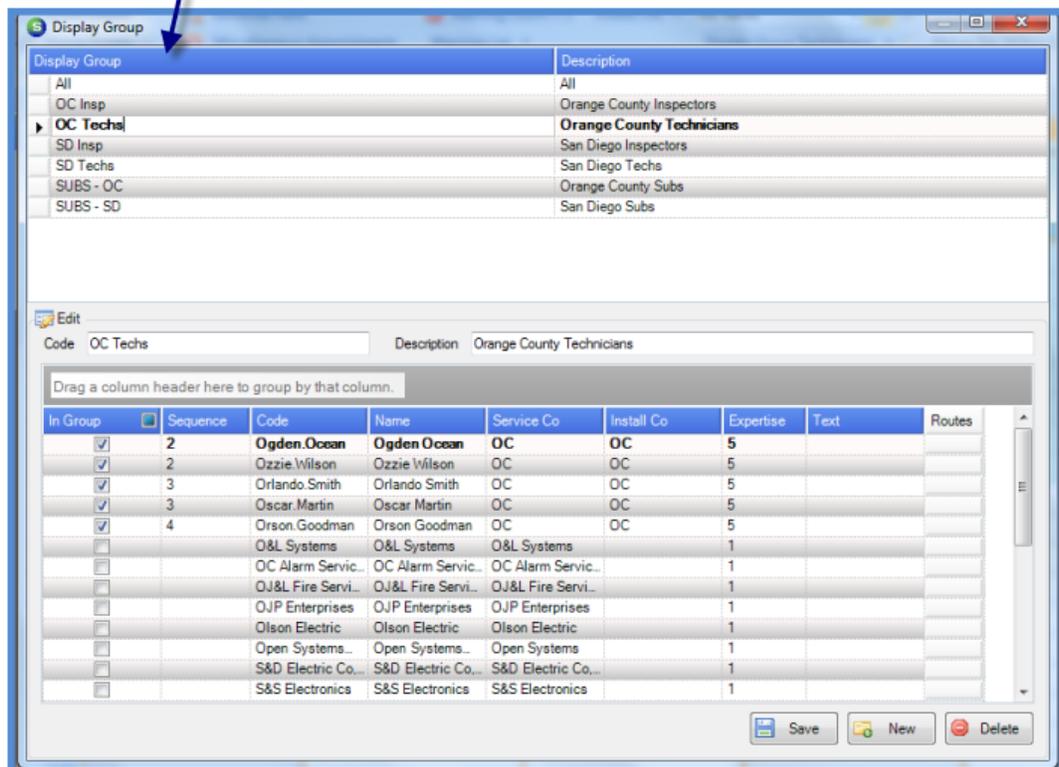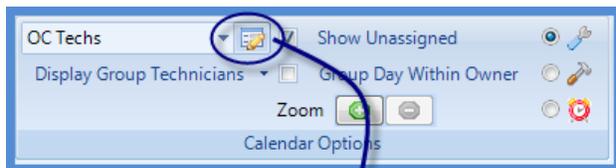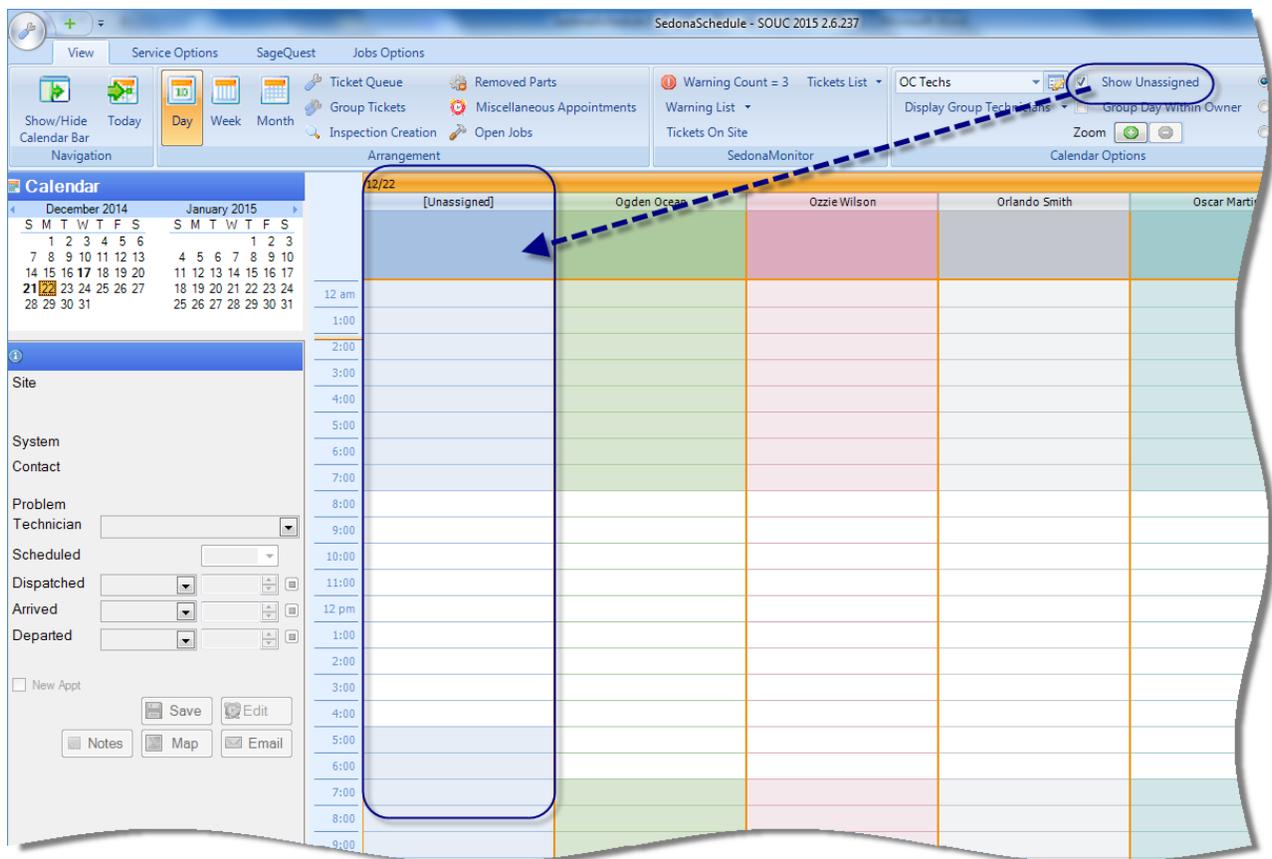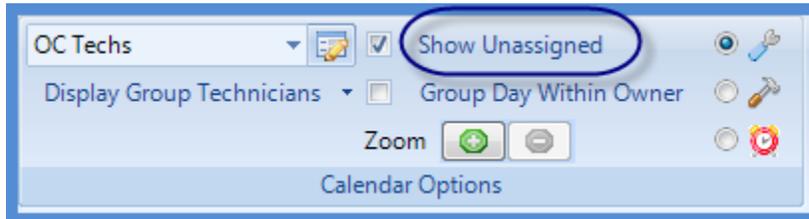
The Ribbon (continued)

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

New Display Groups may be created, modified or deleted from this form.

The Ribbon (continued)

Show Unassigned – If this option is selected, the" Unassigned Technician" will be displayed as the first column in the Schedule Board. Appointments may be scheduled with the Unassigned Technician, and then dragged to a company Technician at a later time. This option may be toggled on or off at any time. Multiple appointments within the same time slot may be created for the Unassigned Technician.
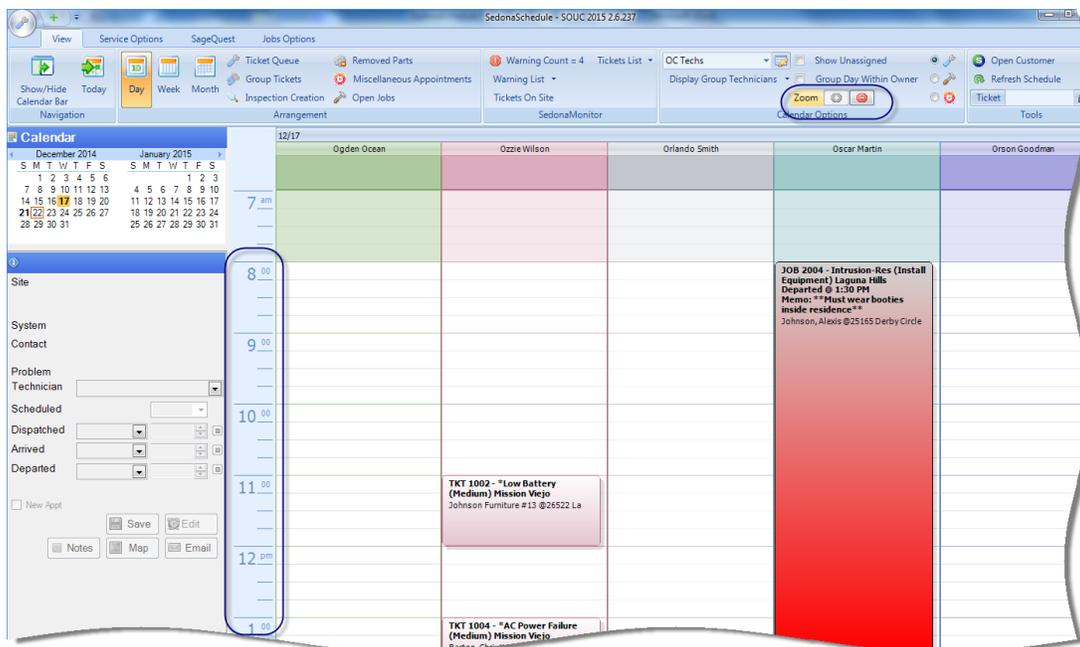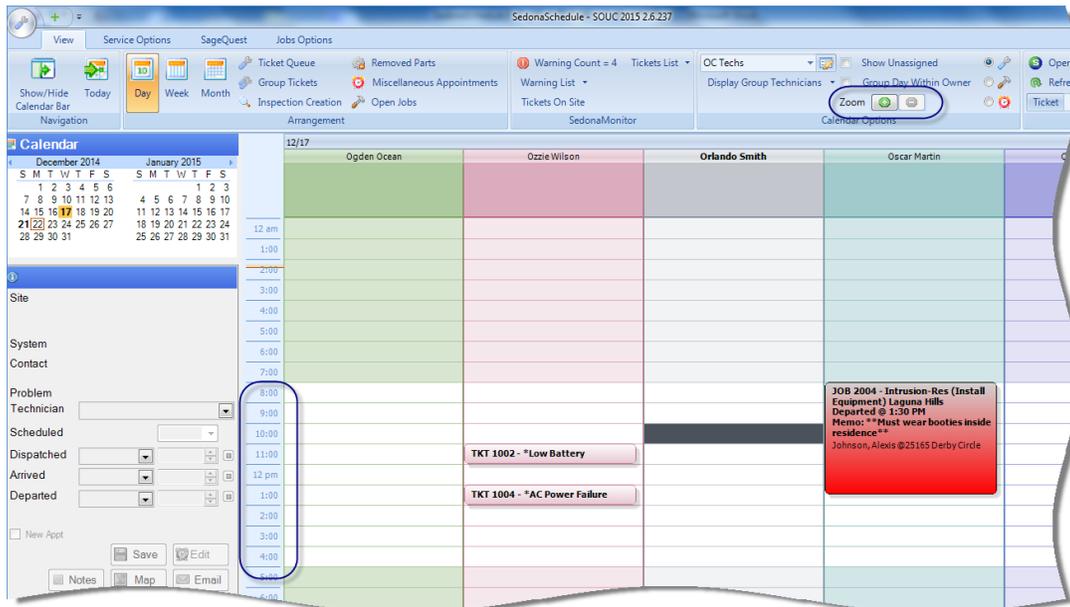
The Ribbon (continued)

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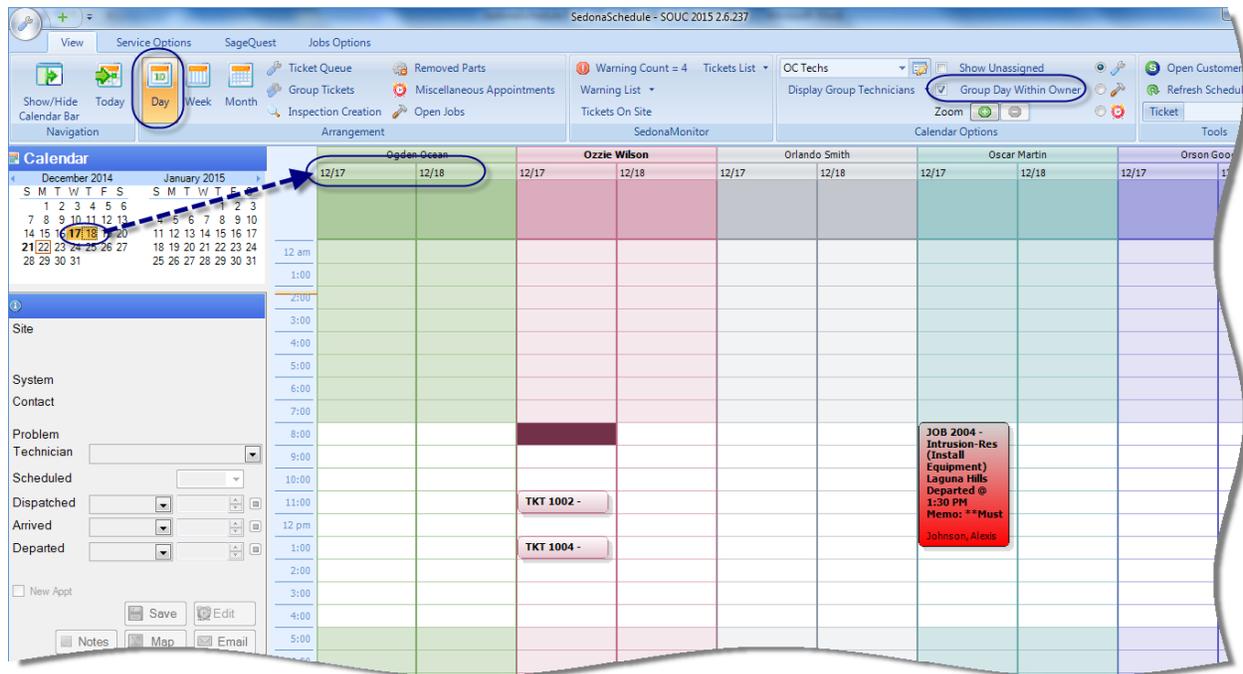
The Ribbon (continued)

Zoom – This option the time slots displayed on the Schedule Board; each click on the green plus button will increase the time slots from one hour up to quarter-hour time slots. Clicking on the red negative button will decrease the number of time slots displayed.

The Ribbon (continued)

Double Click to Add – This is a shortcut method for scheduling a Ticket, Job or Miscellaneous Appointment.
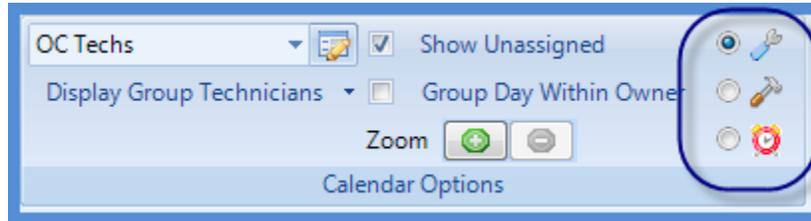
Ticket - When selecting the Ticket option then double clicking on an area within the Schedule Board, the Customer Lookup form will be displayed for locating a customer for which a new Ticket will be created and scheduled.

Job - When selecting the Job option then double clicking on an area within the Schedule Board, the Open Jobs List will be displayed from which to select for scheduling an appointment.

Miscellaneous Appointment - When selecting the Miscellaneous Appointment option then double clicking on an area within a particular Technician's column on the Schedule Board, the Miscellaneous Appointment form will be displayed for scheduling.

The Ribbon (continued)

Tools Ribbon Group – This Ribbon Group contains three options; *Open Customer, Refresh Schedule* and *Ticket (lookup)*. Each option will be explained below.
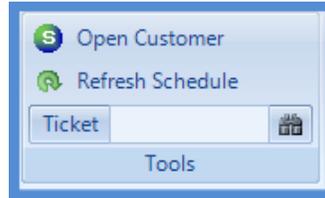

Open Customer – This option works while working within the Schedule Board or within a Ticket Queue. When working within the Schedule Board, clicking on a particular Technician Appointment then clicking on the Open Customer will open the customer associated with the Ticket or Job in the main SedonaOffice application. When the Open Customer option is clicked, the main application will be highlighted on your Windows Tray; double click on the main application button to view the Customer Explorer for the Ticket.
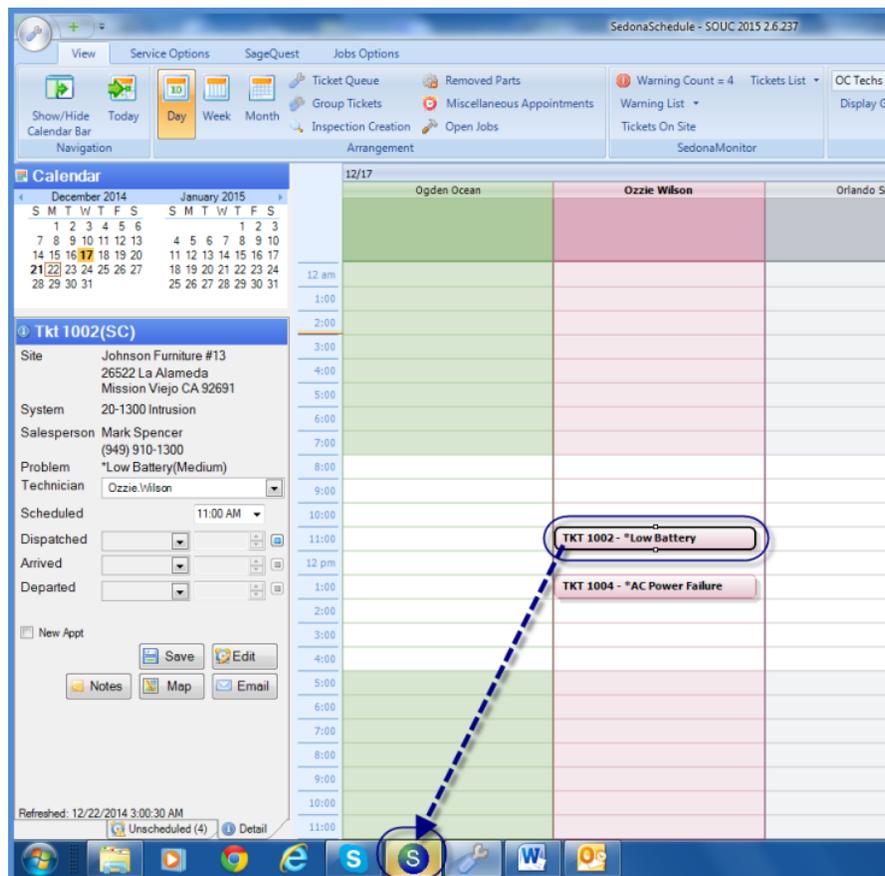
The Ribbon (continued)

Refresh Button – Clicking on the Refresh option will immediately update the Schedule Board.

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

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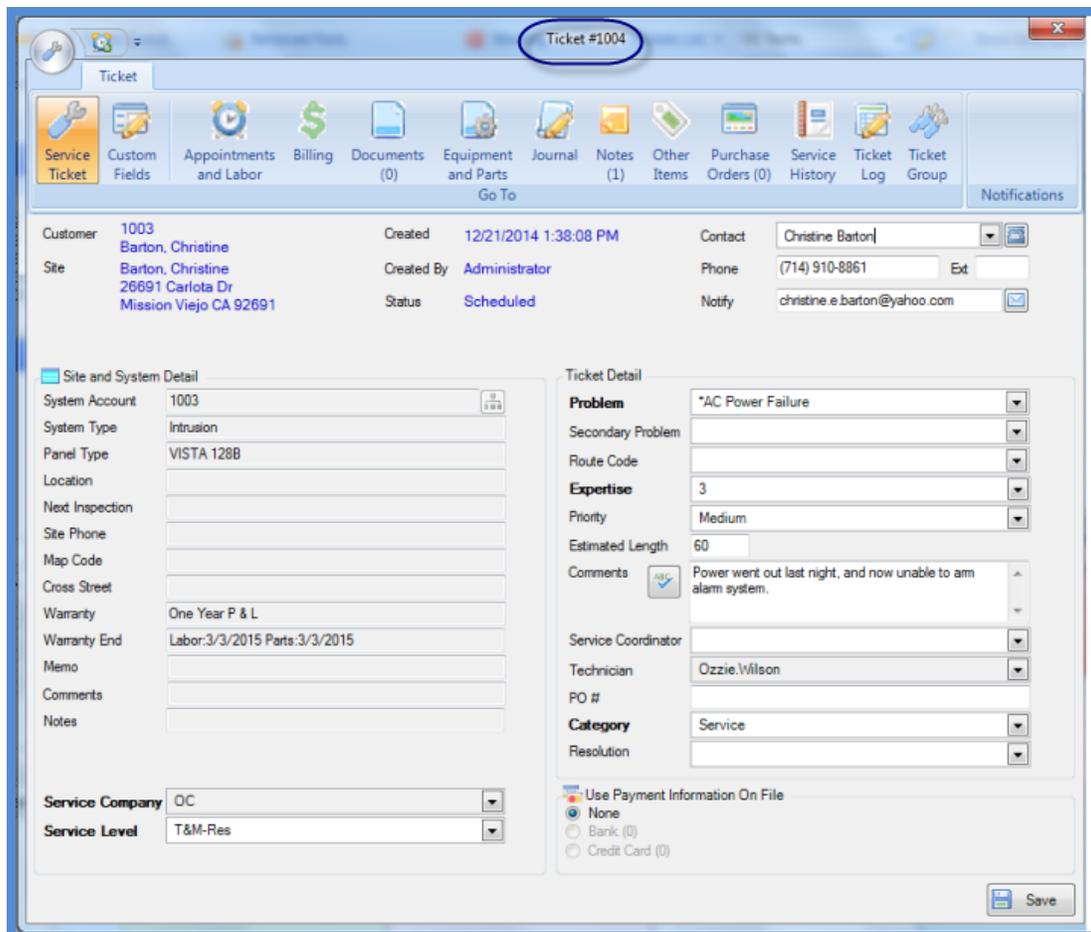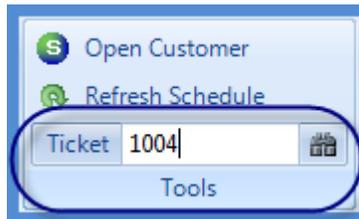
Calendar Bar

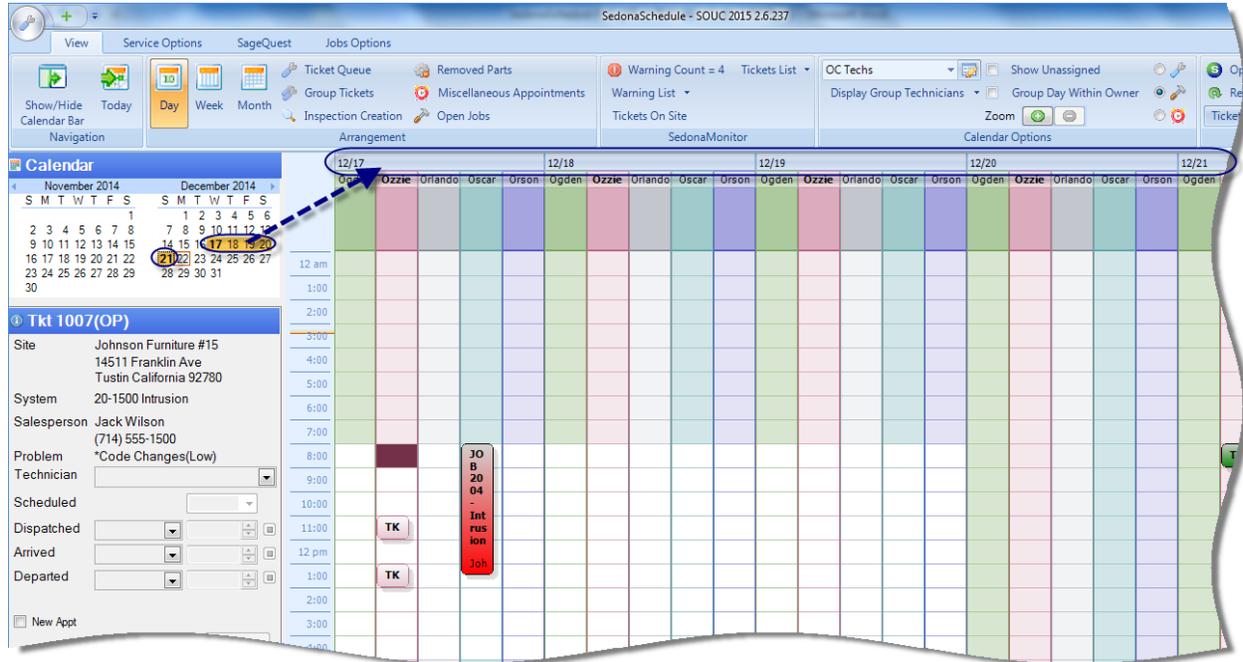The Calendar Bar is comprised of two components; the *Calendar* and the *Detail Information Viewer*. The Calendar may be used when working in the Schedule Board or within a Ticket Queue.

Calendar Bar (continued)

When working in the Schedule Board, the date or dates highlighted on the *Calendar* controls which dates are displayed within the Schedule Board.

When working within a Ticket Queue, the *Calendar* is used to select Tickets created within a particular date range.
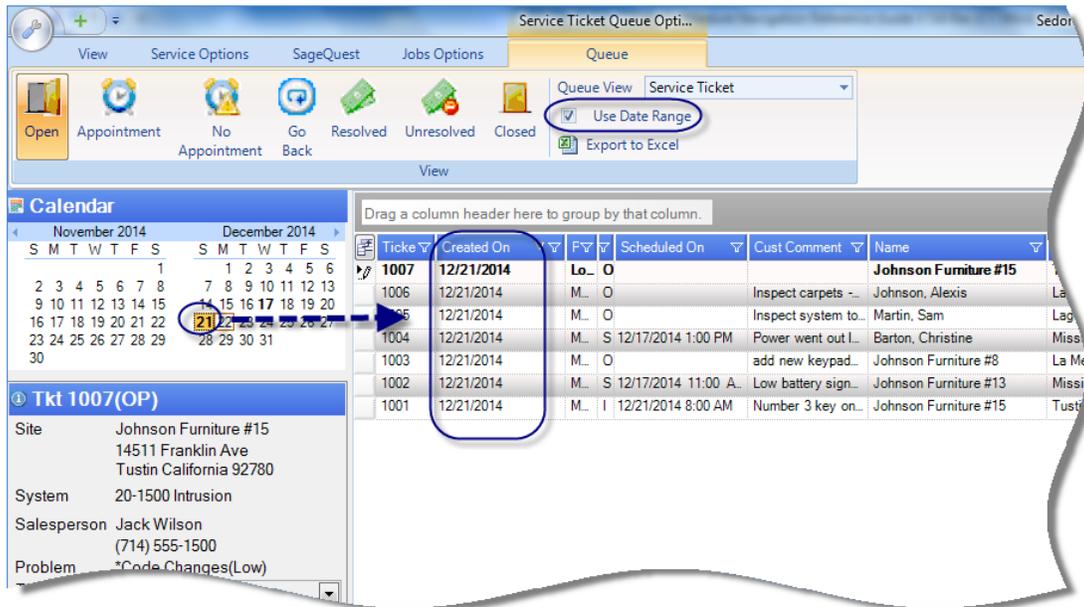
Detail Information Viewer

The Detail Information Viewer is used while working in either the Schedule Board or in one of the Ticket Queues. This Detail Viewer is comprised of two tabs located at the bottom; *Unscheduled* and *Detail*. The Unscheduled tab displays a list of all unscheduled Tickets. The Detail tab will display the information of the Ticket or Job that is currently highlighted within the Schedule Board or within a Ticket Queue.

Detail Tab

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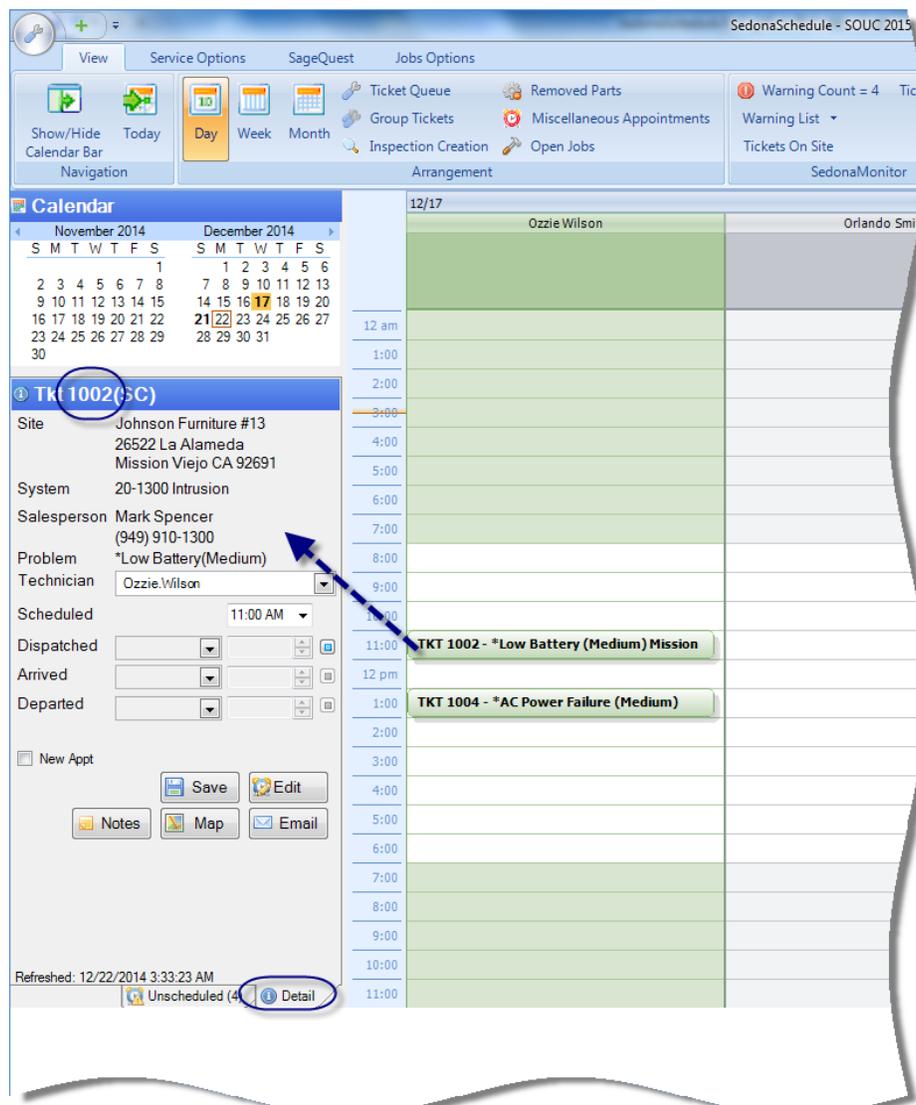
Detail Information Viewer (continued)

Unscheduled Tab

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

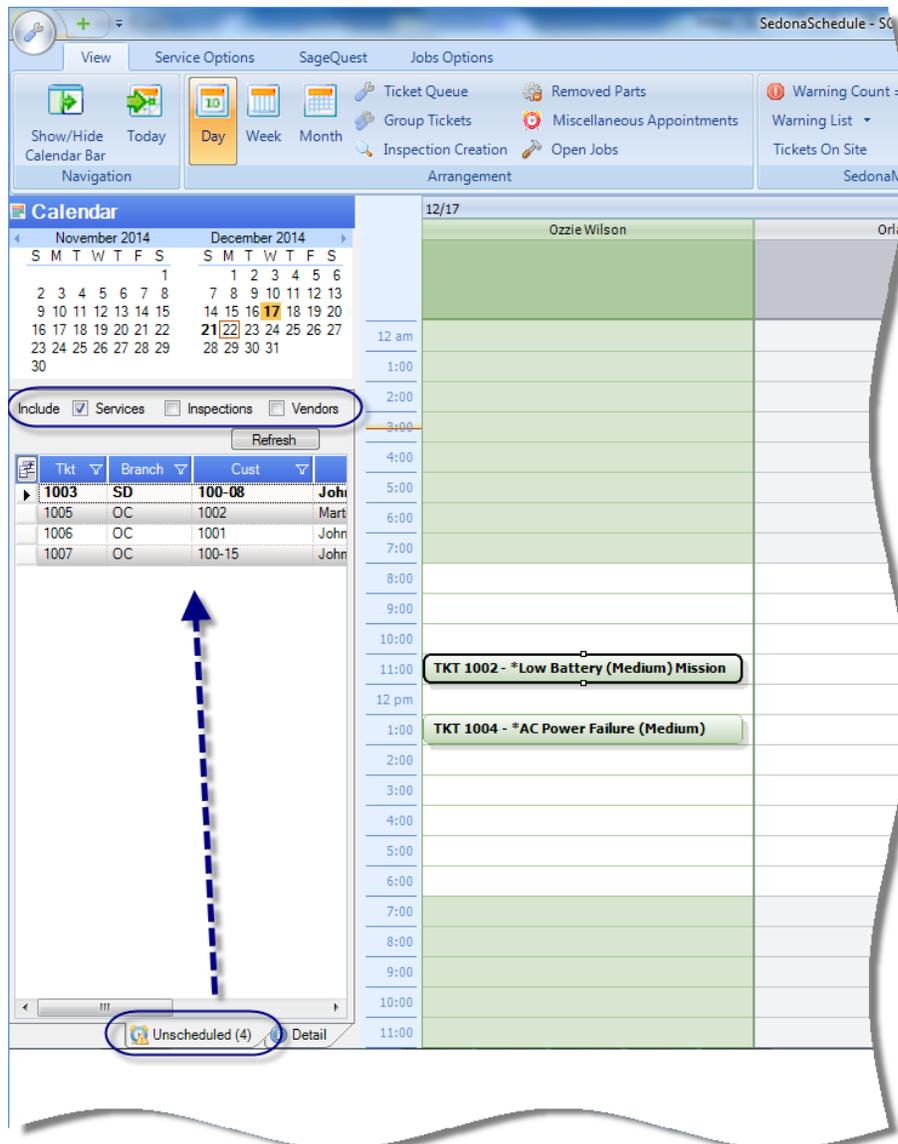Tickets in the Unscheduled list may be dragged onto the Schedule Board to create and appointment.

Display Area

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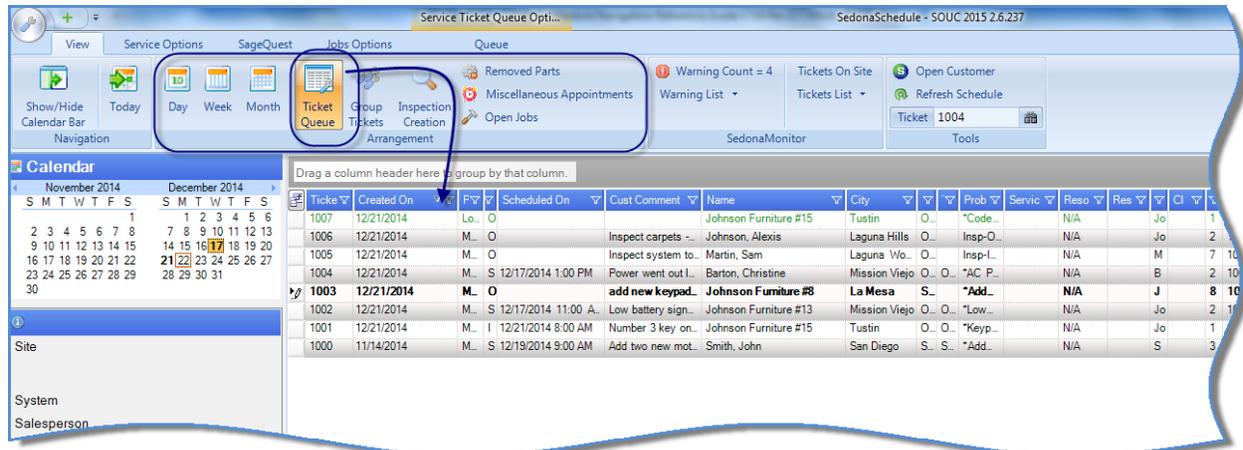
Customer Search

The Customer Search form is configurable for each individual User. The configuration set by the User will be remembered for the next login session. User configurable options include:

- **Field Selection** - The ability to select which columns are displayed on the search results list. These settings are saved to each User's preference.
- **Column Arrangement** - The ability to re-arrange the columns displayed on the search results. These settings are saved to each User's preference.

Customer Search (continued)

User Configurable Columns

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

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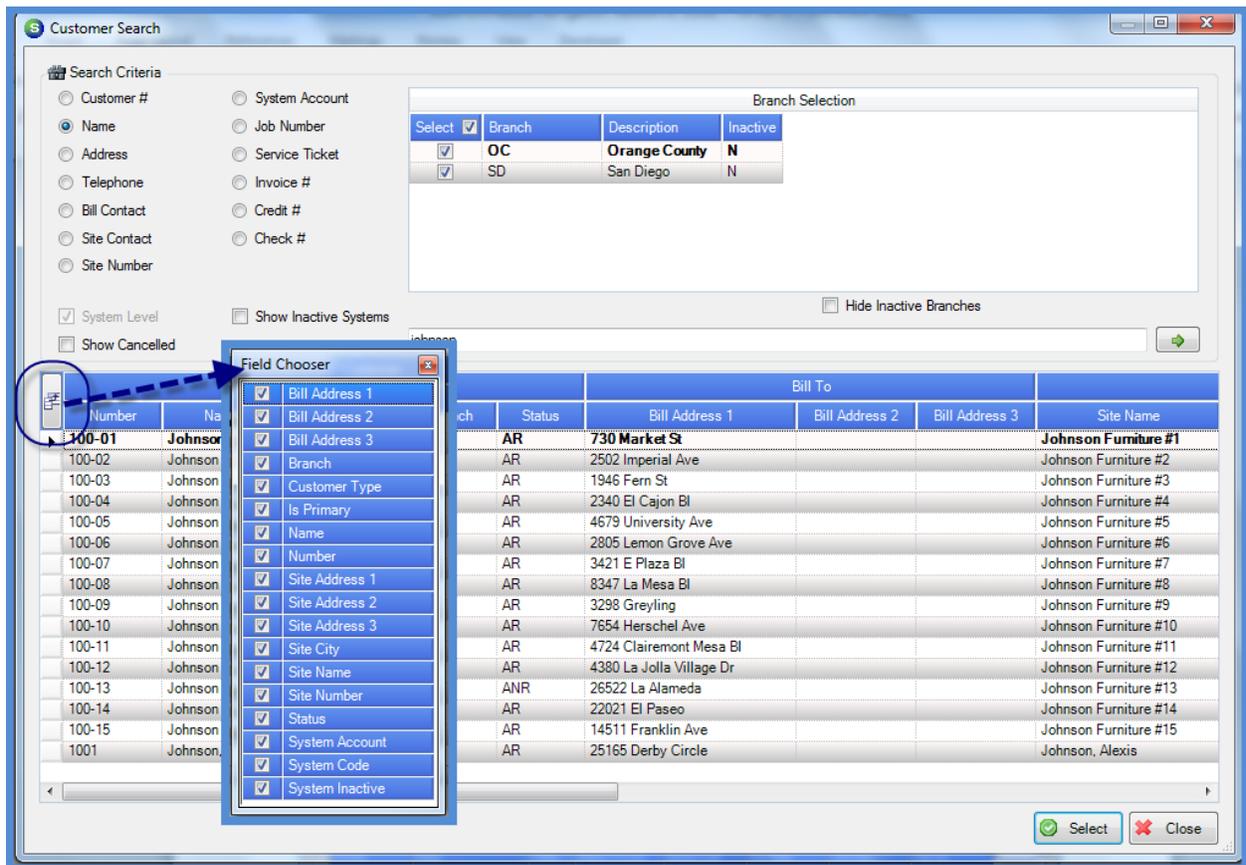
Customer Search (continued)

User Configurable Column Arrangement

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

Then next time the User performs a Customer Search, the column order selections will be remembered.
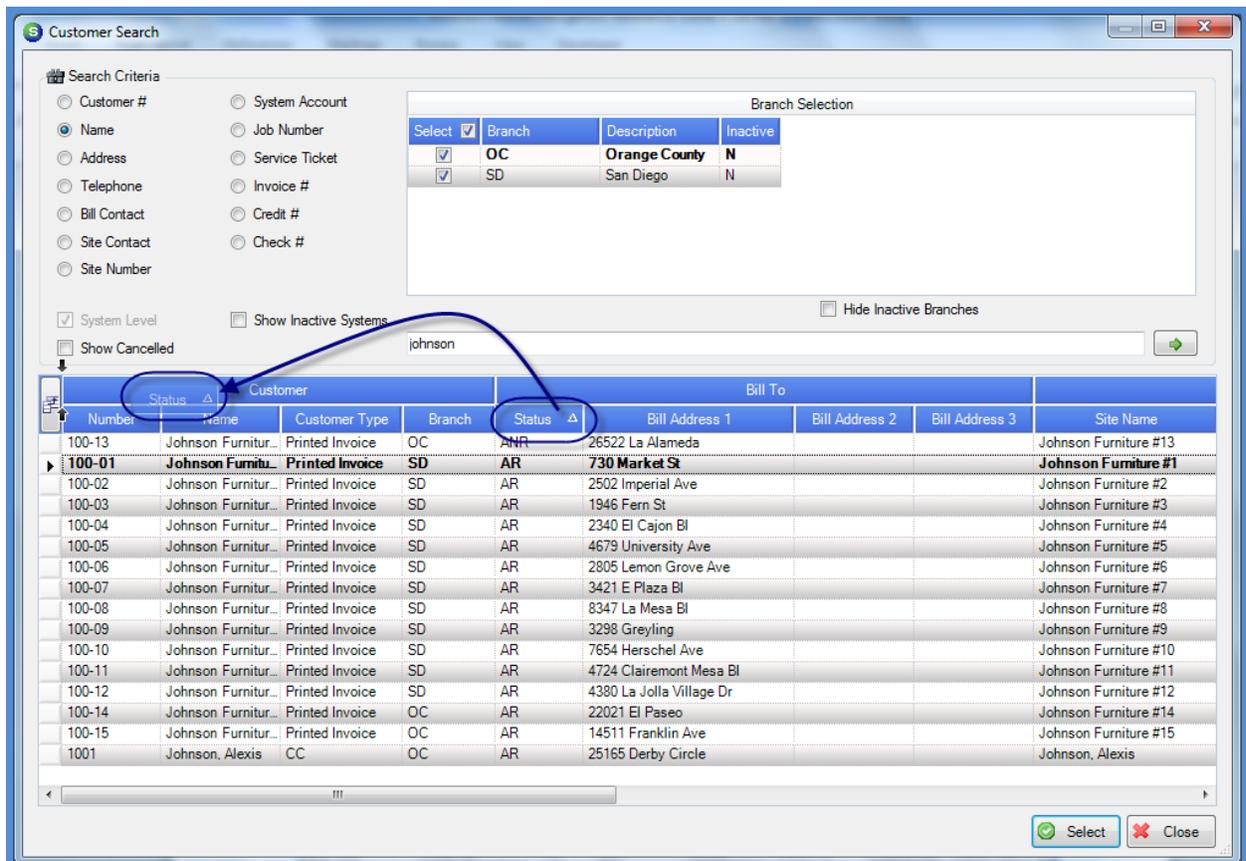
Ticket Queues

This section is designed to provide information on the basics of how to navigate within the various Ticket Queues. Topics in this section include:

- Queue Selection
- Queue Options
- Queue Sorting
- Queue Filters

Ticket Queues (continued)

Accessing the Ticket Queues

To view the Ticket Queues, click on the *Ticket Queue* button within the *Arrangement* Ribbon Group.
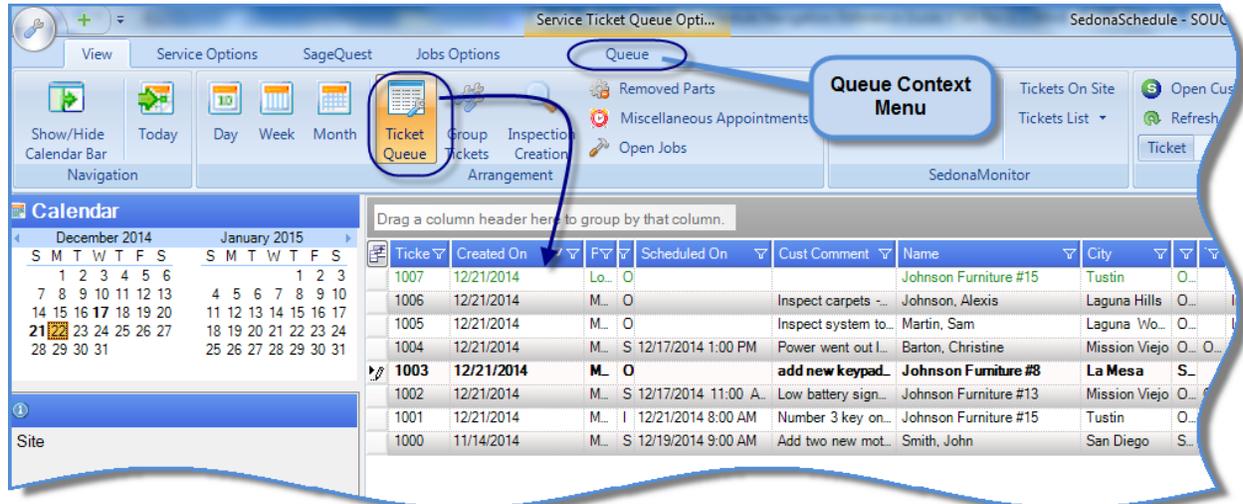
Once the Queue is displayed, you may click on the *Queue Context Menu* for additional Queue options.
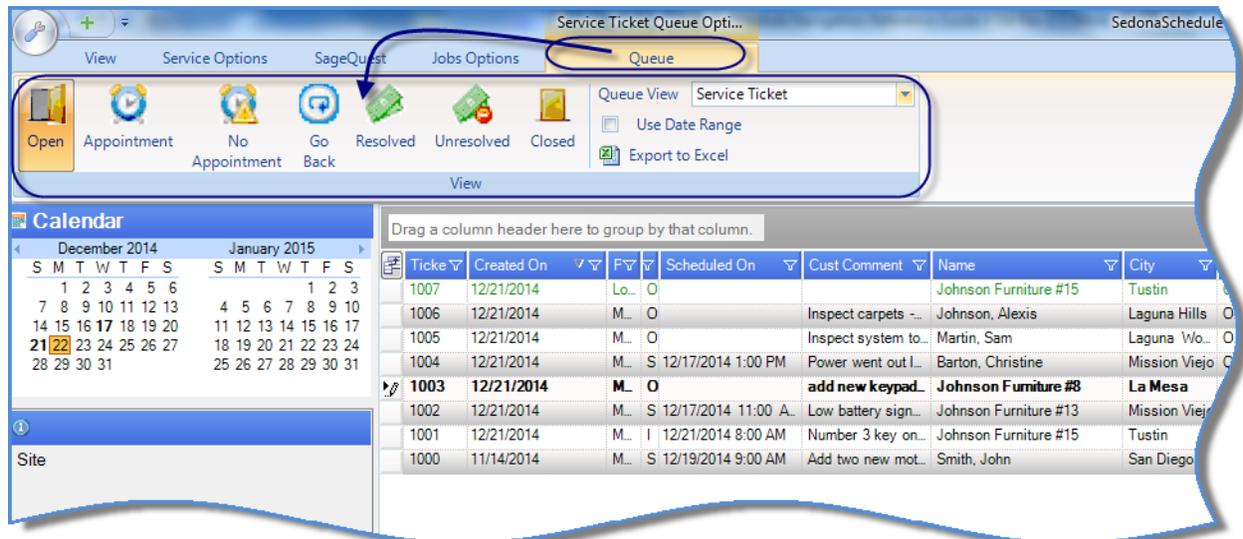
Ticket Queues (continued)

Queue Options

A new Ribbon labeled *View*, is displayed at the top of the SedonaSchedule application with several options. Each option on this ribbon will be covered below.

The list of tickets displayed in the Ticket Queue is determined by the Type of Ticket Queue selected and one of the seven View option buttons selected.

When clicking on the drop-down arrow in the Queue View field, the User has a choice of selecting one specific Ticket Type (Service Ticket, Inspection, Vendor Service, or Vendor Inspection) or the All option.
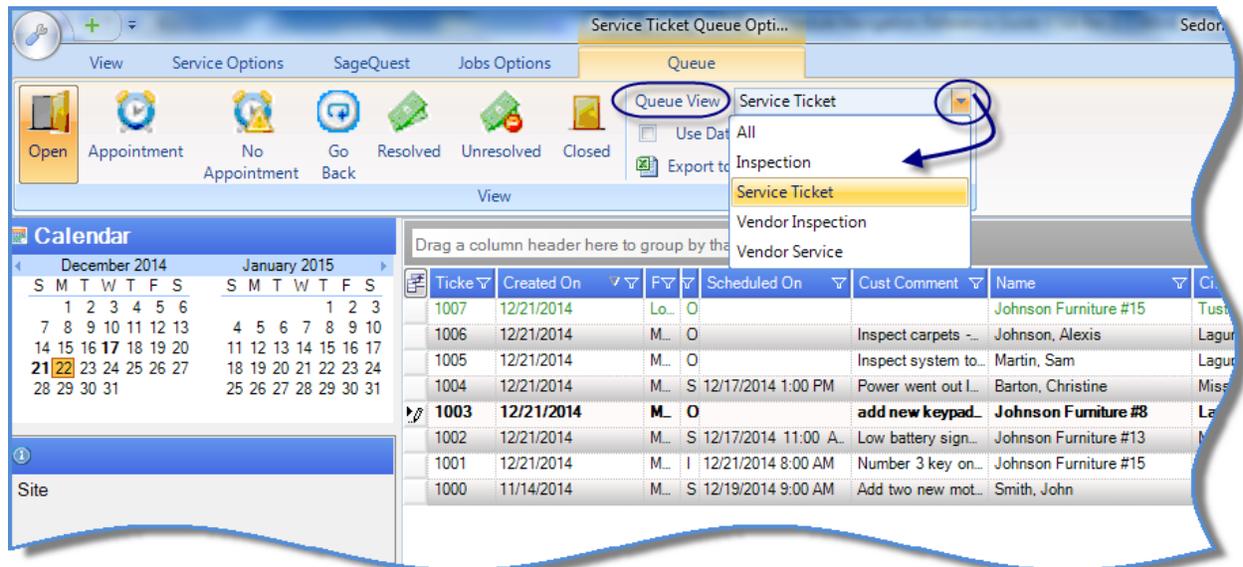
Ticket Queues (continued)

Use Date Range – When selecting this checkbox, the list of tickets displayed in the Ticket Queue is determined by the Type of Ticket Queue selected and one of the seven View option buttons selected.
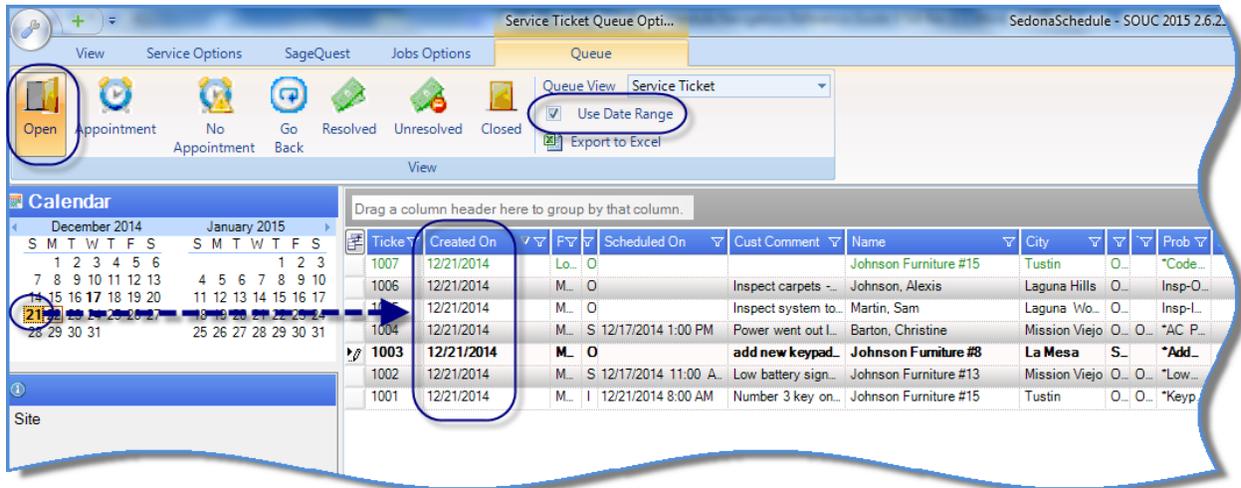
 - Tickets where the Created (on) date is within the date range selected.
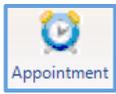
 - Tickets with a scheduled appointment on or within the date range selected.

 - Tickets without an appointment where the Created (on) date is within the date range selected.

 - Tickets marked as Go-Back where the Created (on) date is within the date range selected.

 - Tickets that have been "resolved" where the Created (on) date is within the date range selected.

Ticket Queues (continued)

Unresolved - Tickets that have a completed Technician appointment, but no Resolution Code was selected where the Created (on) date is within the date range selected.

Closed - Tickets that have been Closed where the Closed (on) date is within the date range selected.

Ticket Queues (continued)

Queue View Buttons
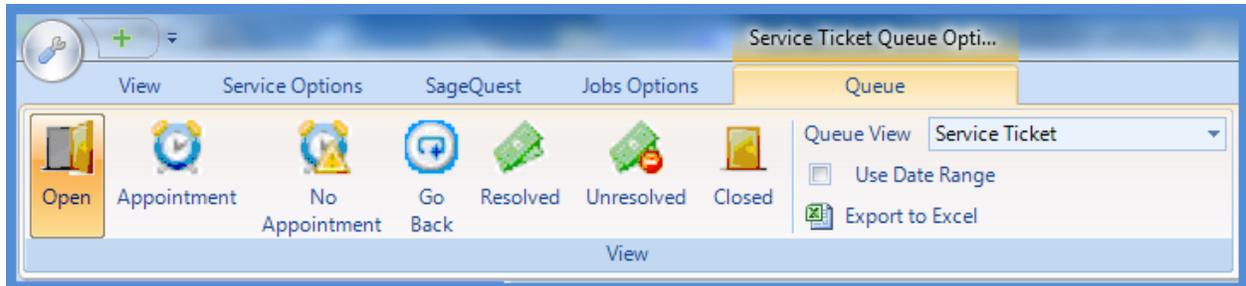
 Open Button - When clicking on the *Open* button, all tickets that have not been closed will be listed in the Queue.
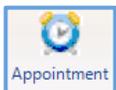
 Appointment Button - When clicking on the *Appointment* button, all tickets that have an appointment scheduled with a Technician will be listed in the Queue.

 No Appointment Button - When clicking on the *No Appointment* button, all tickets that have never been scheduled with a Technician will be listed in the Queue.

 Go Back Button - When clicking on the *Go Back* button, all tickets that were marked as a Go Back when completing the dispatching information for a Technician will be listed in the Queue.

 Resolved Button - When clicking on the *Resolved* button, all tickets that were marked as Resolved when completing the dispatching information for a Technician will be listed in the Queue. These are the tickets that are ready to review for invoicing and closing if non-billable

Ticket Queues (continued)

Un-Resolved Button - When clicking on the *Un-Resolved* button, all tickets that were not marked as Resolved when completing the dispatching information for a Technician will be listed in the Queue.

Closed - When clicking on the *Closed* button, all tickets that **have been Closed will be listed** since the time your company began using SedonaOffice. The Date Range selector is typically used when wanting to view a list of Closed Tickets.

Queue Configuration

A great feature of SedonaSchedule allows each User to configure the Ticket Queue according to their specific preference. When a User logs into the SedonaSchedule application, whatever configuration settings were selected, will be remember the next time the User logs into the application.

Queue Configuration Options

- Fields to be displayed in the Queue
- Arrangement of fields in the Queue

To configure the Ticket Queue, follow the steps below and on the following pages.

To open the Ticket Queue, click on the *Ticket Queue* button located within the *Arrangement* ribbon group.
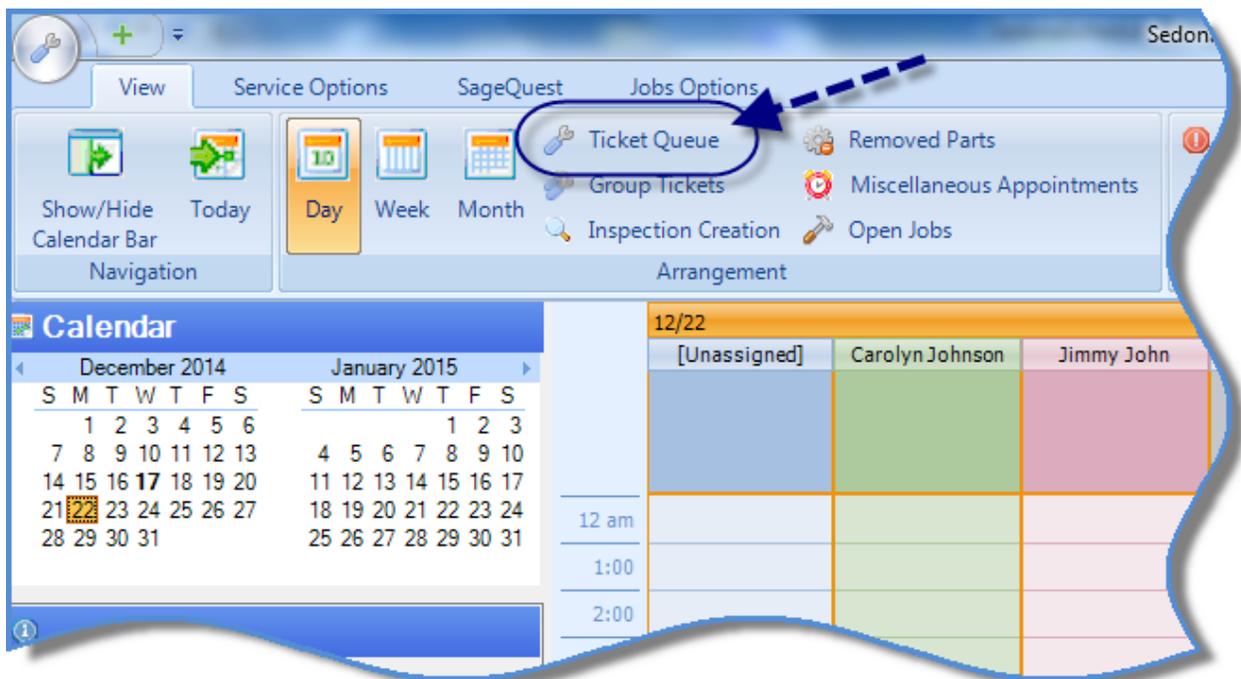
Ticket Queue Configuration (continued)

The Ticket Queue will be displayed. There are many columns available within the Queue; to make it easier to configure the Queue, click on the Show/Hide Calendar Bar to turn off the Calendar Bar.
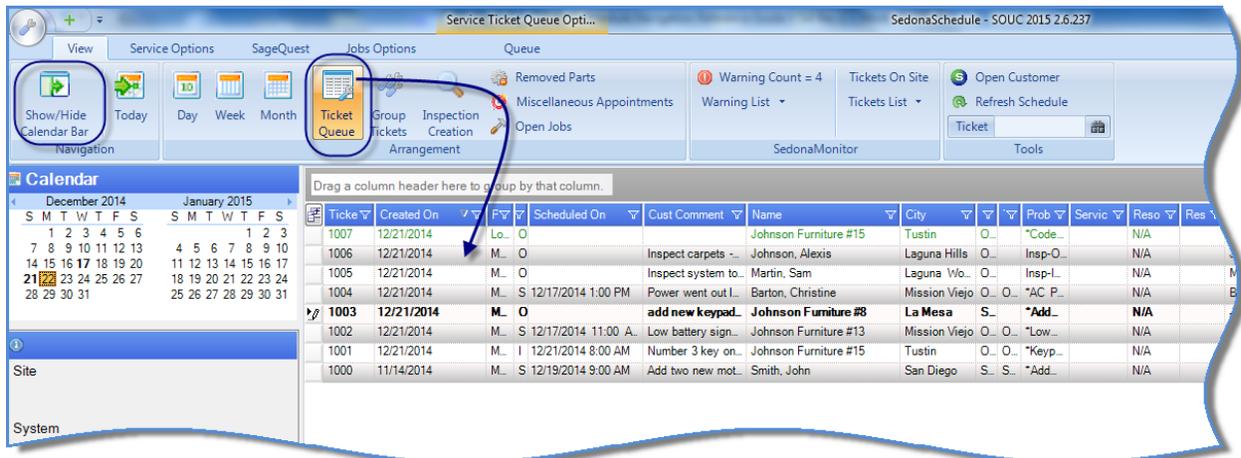
Ticket Queue Configuration (continued)

Configuring Queue Fields

To select which Fields to display in the Queue, click on the *Field Chooser* button located in the upper left corner of the Queue. The Field Chooser list will be displayed. This is a listing of all the available fields from which the User may select. All fields are checked on by default; if certain fields are not needed for viewing while in the Queue, un-check the box to the left of the fields not to be displayed. When finished, click the "X" in the upper right corner of the Field Chooser to exit.

The definition of each field is shown on the next two pages.
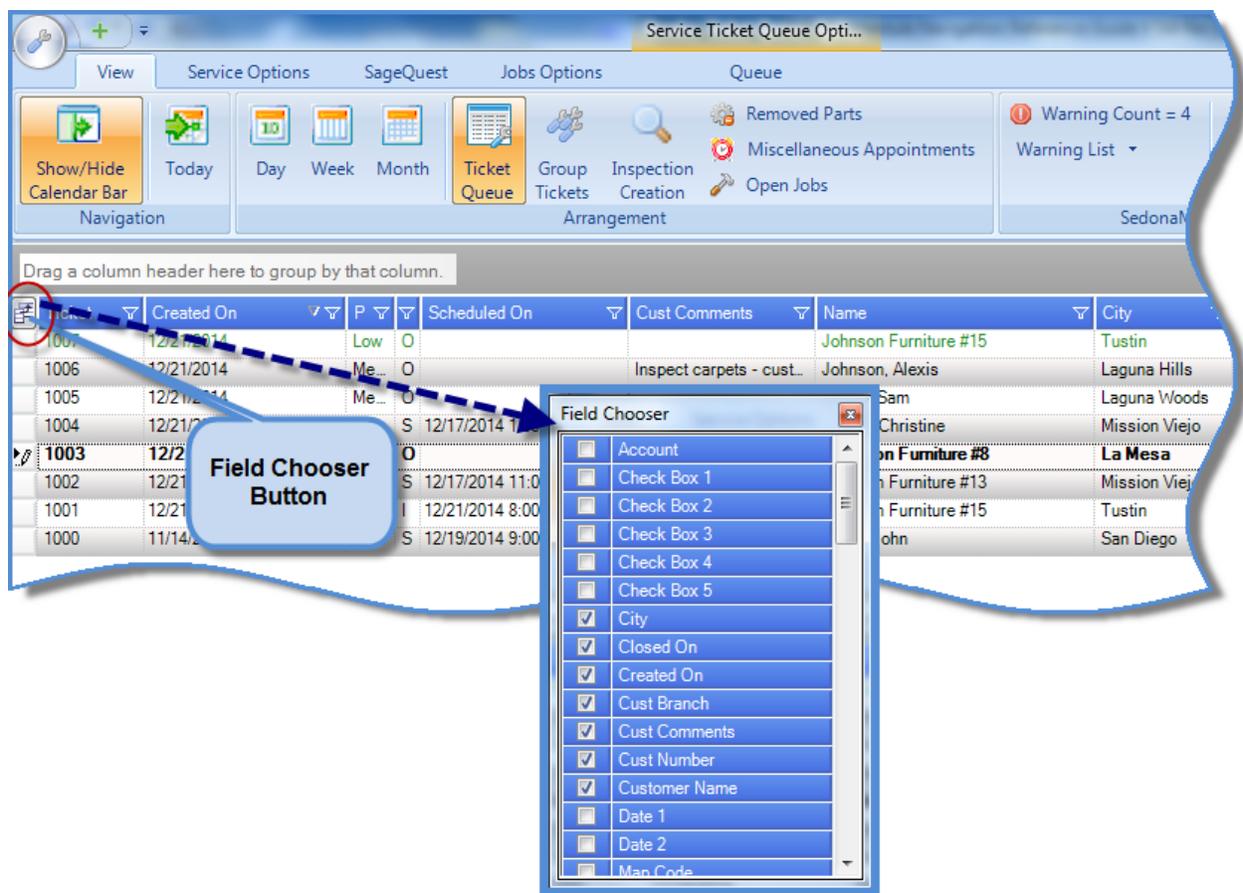
Ticket Queue Configuration (continued)

Field Name	Description	Data Source
Account	Monitoring Account Number	System Information
Check Box 1	Service Ticket Custom Field	SedonaSetup
Check Box 2	Service Ticket Custom Field	SedonaSetup
Check Box 3	Service Ticket Custom Field	SedonaSetup
Check Box 4	Service Ticket Custom Field	SedonaSetup
Check Box 5	Service Ticket Custom Field	SedonaSetup
City	Site City	Site Information
Closed On	Closed Date	Ticket
Created On	Creation Date	Ticket
Cust Branch	Customer Branch	Customer Information
Cust Comments	Comments Field	Service Ticket form
Cust Number	Customer Number	Customer Information
Customer Name	Customer Name	Customer Information
Date 1	Service Ticket Custom Field	SedonaSetup
Date 2	Service Ticket Custom Field	SedonaSetup
Map Code	Map Code	Site Information
Money Label 1	Service Ticket Custom Field	SedonaSetup
Money Label 2	Service Ticket Custom Field	SedonaSetup
Name	Site Name	Site Information
Panel	Panel Type	System Information
PR	Priority	Ticket
Problem	Problem Code	Ticket
Resolution Code	Resolution Code	Ticket
Resolved On	Resolved Date	Ticket
Route Code	Route Code	System Information
Scheduled On	Most Recent Tech Appointment Date	Ticket
Service Coordinator	Service Coordinator Field	Service Ticket form
Service Lvl	Service Level	Service Ticket form
Site Address	Site Address Line 1	Site Information
Site Branch	Site Branch	Site Information
ST	Status	Ticket
State	Site State Abbreviation	Site Information
State Name	Site State Name	Site Information

Ticket Queue Configuration (continued)

| **Field Name**	**Description**	**Data Source**
Sub Problem	Secondary Problem Field	Service Ticket form
Svc Co	Service Company	Service Ticket form
Technician	Technician Name	Service Ticket form
Ticket	Ticket Number	Ticket
User Table 1	Service Ticket Custom Field	SedonaSetup
User Table 2	Service Ticket Custom Field	SedonaSetup
User Table 3	Service Ticket Custom Field	SedonaSetup
User Text 1	Service Ticket Custom Field	SedonaSetup
User Text 2	Service Ticket Custom Field	SedonaSetup
User Text 3	Service Ticket Custom Field	SedonaSetup
User Text 4	Service Ticket Custom Field	SedonaSetup
User Text 5	Service Ticket Custom Field	SedonaSetup
X Street	Cross Street	Site Information
Zip/Postal Code	Site Zip/Postal Code	Site Information

Ticket Queue Configuration (continued)

Configuring Queue Field Arrangement

Once the desired Queue Fields have been selected, you may now rearrange the fields and width of the fields to your preference.

Prior to configuring the arrangement of fields, turn the Calendar Bar back on, since this will normally be present when working within the Queue. This way you will see how the Queue will look as you make changes to the Queue Field Arrangement.
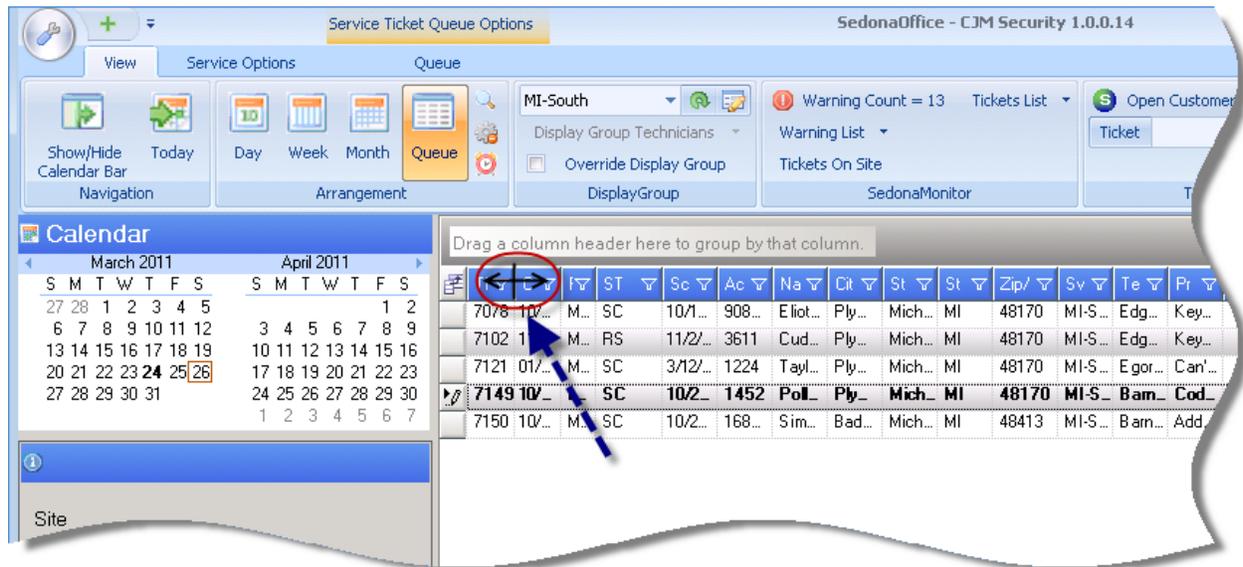
Press the Show/Hide Calendar Bar button from the Navigation ribbon group at the upper left of the SedonaSchedule application.
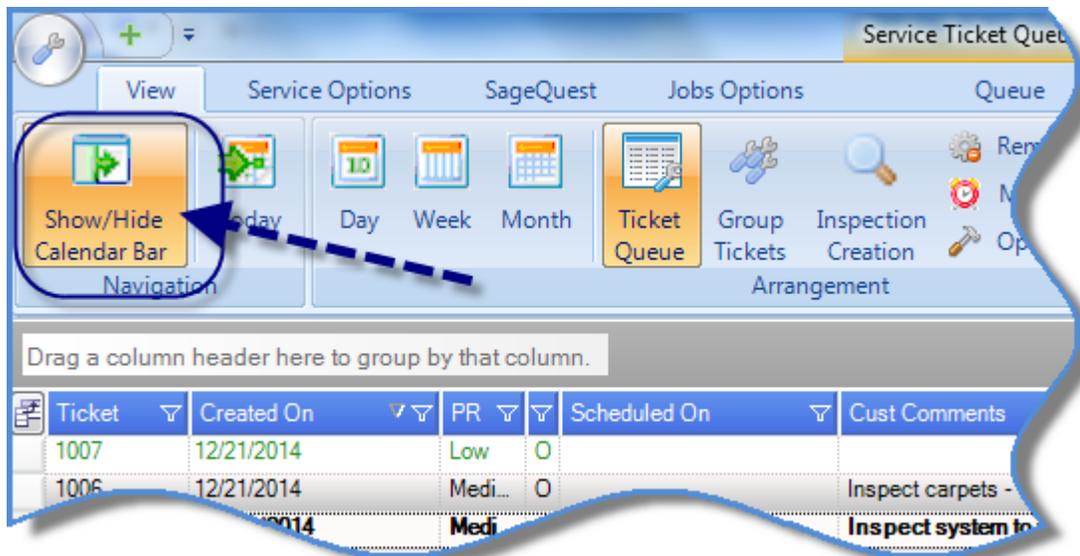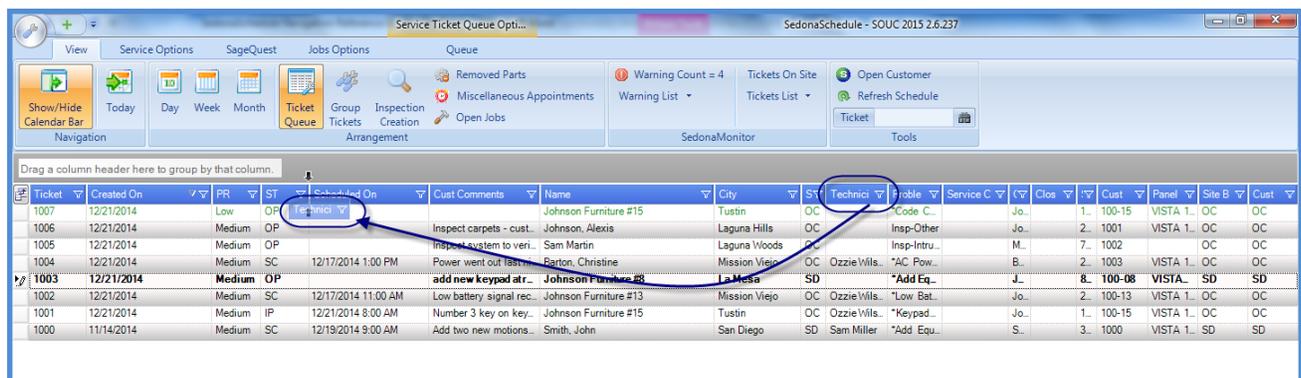
Ticket Queue Configuration (continued)

Adjusting Field Width

To make a field wider or narrower, position your mouse to the right of the field to change, hold down the left mouse button and drag the field header to the desired width.


Rearrange Fields

You may move fields into any preferred order. Hold down the left button of the mouse while positioned on one of the field headers, and then drag the field to the desired location. Release the mouse when you reach the preferred location.

Ticket Queue Configuration (continued)

Once the Queue is setup to your preference, exit SedonaSchedule to save your settings. Return to SedonaSchedule, click on the Queue button on the Ribbon; the Queue will be displayed with your configuration preferences.
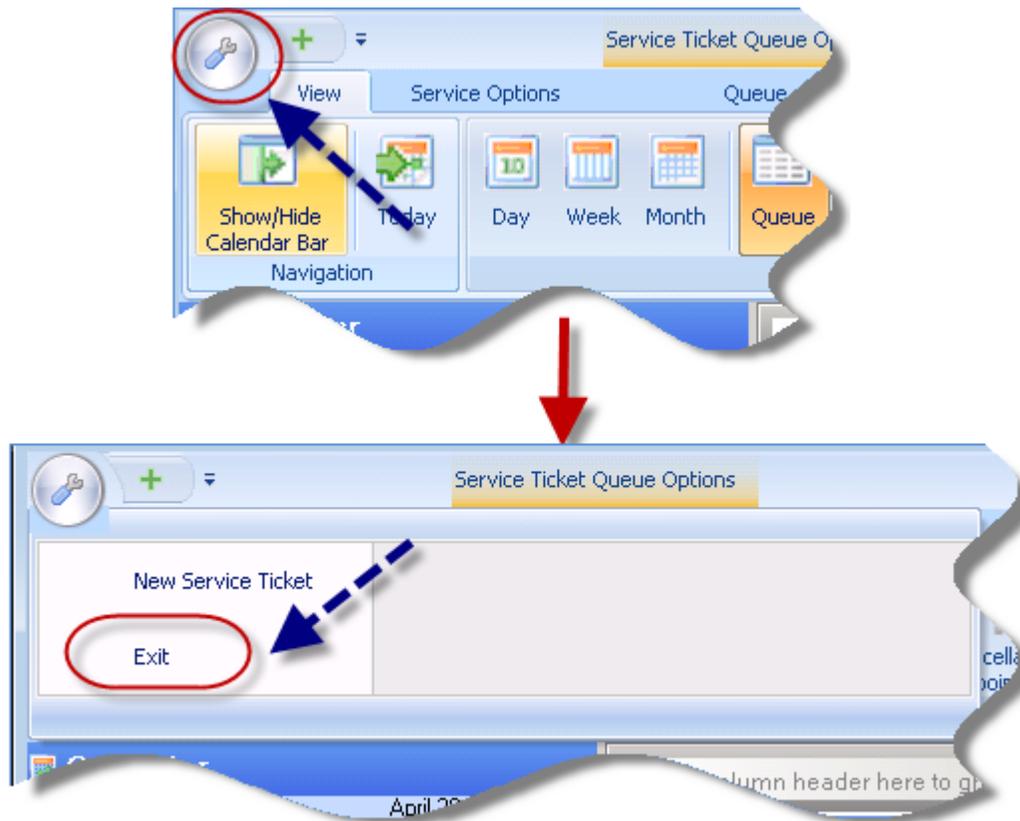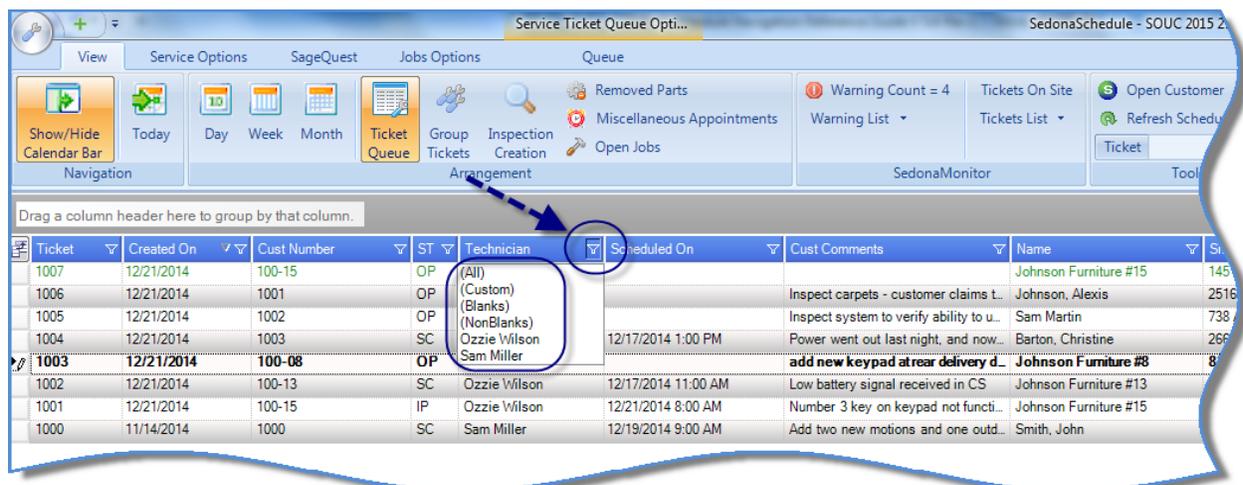
Queue Filters

A feature of SedonaSchedule allows each User to filter a Ticket Queue based on any of the available fields within the Queue. There are three ways to use Filters within the Queue; using *Drop-Down Filters, Filter Groups* or *Custom Filters*. Each filtering option will be described below and on the following pages.

Drop-Down Filters

Within a Queue, in the header of each field is a filter button. Clicking on the filter button will display a list of all the possible values based on all tickets currently displayed in the Queue.

For example, you want to view the tickets for one particular Technician, click on the filter button, and then click on the desired Technician's name. The Queue will refresh with the tickets of the selected Technician.
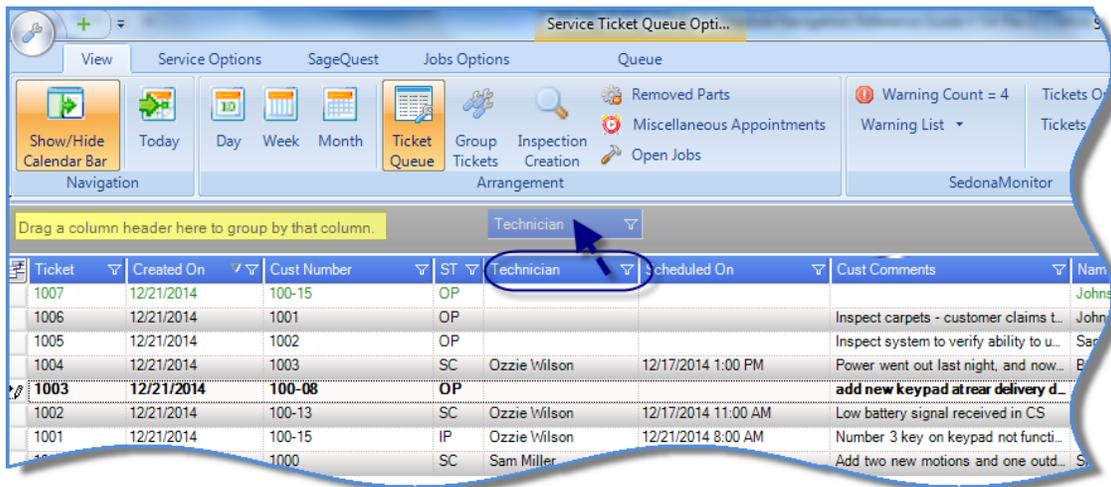

Queue filtered on one Technician
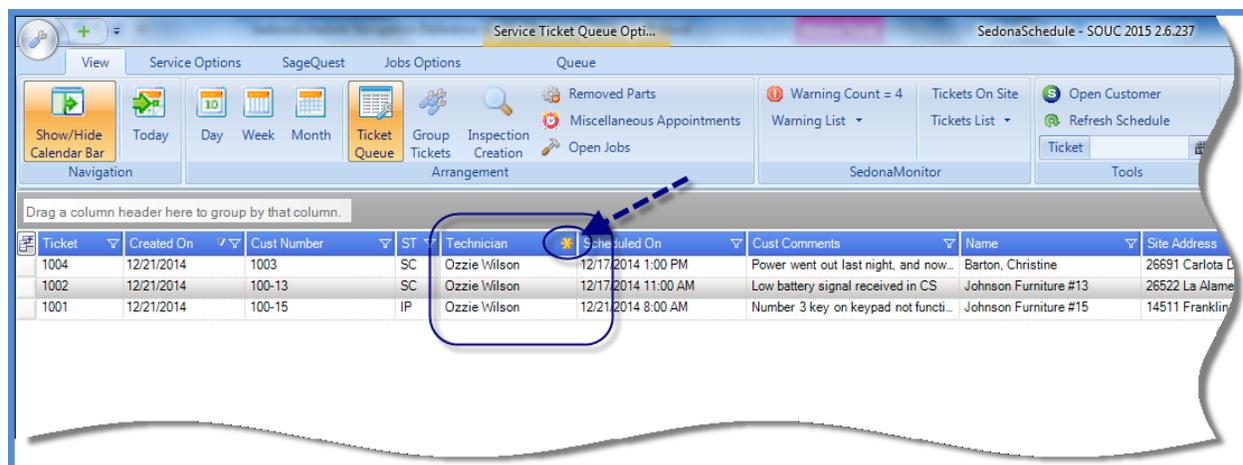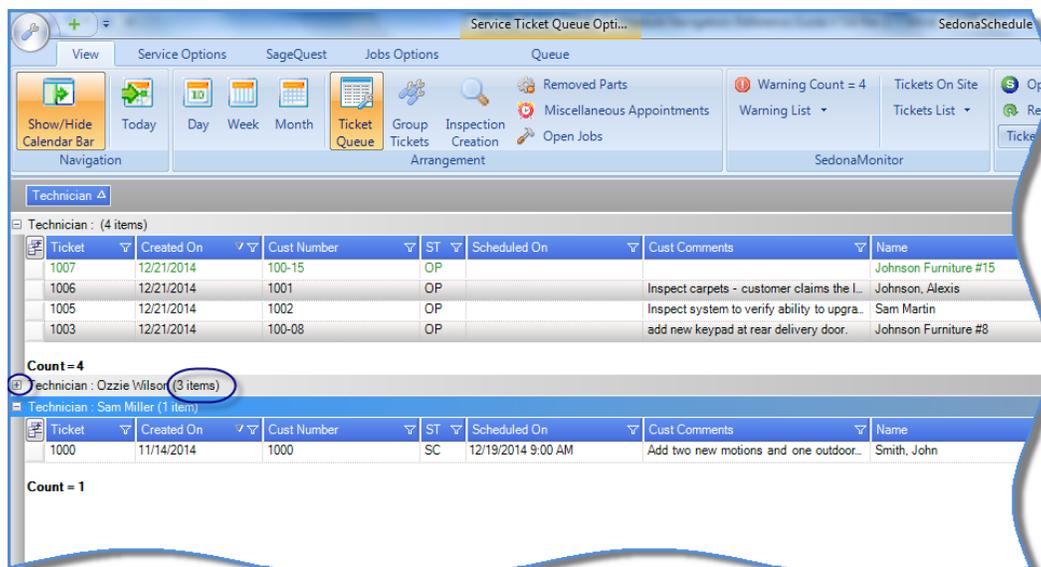
Queue Filters (continued)

Filter Groups

Within a Queue, you may view the tickets in *Filter Groups*. When using Groups the view of the Ticket Queue changes to a tree structure. After creating a Filter Group, each line displayed within the Ticket Queue may be expanded to show the tickets that belong to that filter group.

To create a Filter Group, drag and drop the desired field to the gray Filter Bar located above the field names area of the ticket queue.
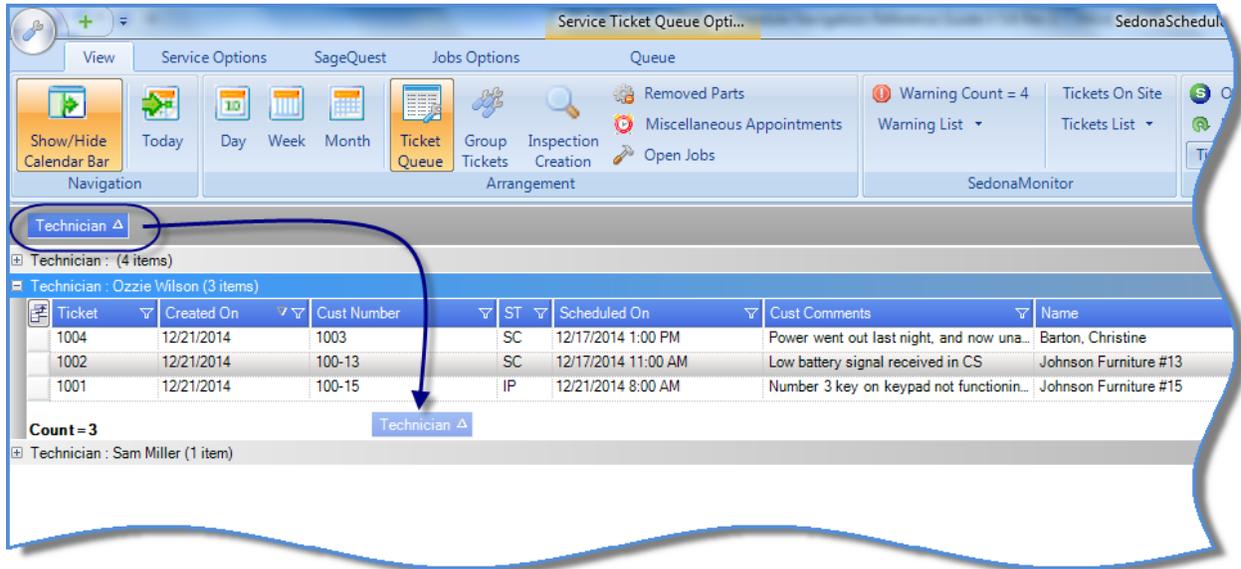

Queue Filter Group by Technician

Queue Filters (continued)

To remove a filter and return to the full Ticket Queue view, drag the Filter name displayed in the gray filter bar down into the list of tickets then release the mouse button.

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Queue Filters (continued)

Custom Filters

Within a Queue, in the header of each field is a filter button. Within the Filter Drop-Down list is the *Custom* option. The Custom option provides several ways to define what tickets you wish to display in the Queue. This form allows the User to select an *Operator* and a *Value* for the application use to determine which tickets to display in the queue.

An Operator is a search condition and a Value is specifically what you want to see.

Example: The Site City field in the Queue is selected for a Custom filter. We want to see all tickets where the Site City = Laguna Hills or Laguna Woods. To produce a list of tickets that meet this requirement, we need to create two rows of conditions and set the *Filter Based On* option to Any; which means that the rows of conditions entered can apply to any ticket.

For the first condition row, in the Operator field, we selected Equals and in the Value field we entered Laguna Hills. For the second condition row, in the Operator field, we selected Equals and in the Value field we entered Laguna Woods. Click OK when finished.