

SedonaSchedule Navigation Reference Guide

Last Revised: December 2014

About this Document

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Accessing the Ticket Queues



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
 - o Calendar Bar
 - o Ticket Detail Viewer
- Open Job List
 - o Viewing & Customizing Fields within the Job List
 - o View Options
- Ticket Queue
 - o Queue Ribbon
 - o 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.

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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.

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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.

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Show/Hide Today Calendar Bar Navigation	الله الله الله الله الله الله الله الله	Queue 🍓 Removed Part: Tickets 🧿 Miscellaneous ion Creation 🎤 Open Jobs Arrangement	s Appointments	 Warning Cou Warning List * Tickets On Site Sedo 	nt = 0 Tickets List 🔻
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Problem Technician	8:00 9:00		JOB 2004 - Int (Install Equips Hills Departed @ 1:	trusion-Res nent) Laguna 30 PM	
Scheduled	10:00		Johnson, Alexis	@25165 Derby	
Departed V A	1:00 2:00			8:00am-1:30p JOB 2004 - Intrusion-Res (Install Equipment)	m
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	6:00 7:00 8:00			Circle)	
	9:00				



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.





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 redisplay the Ribbon, click on the Ribbon Control option and de-select the Minimize the Ribbon option.



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.*

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21 22 23 24 25 26 27	18 19 20 21					
28 29 30 31	20 26 27 28	Service Setup Tables	Parts Warehouse	Auto Refresh	Map Type	
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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.

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	Tashaisian	Auto Pafrash Off			
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Calendar		12/17			
December 2014	January 2015	🖉 🌀 Appointment Typ	e .		
SMTWTFS	SMTWTFS		4	1	(
1 2 3 4 5 6	1 2 3	Appointment Type	Description	Inactive	
7 8 9 <u>10</u> 11 12 13	4 5 6 7 8 9 10	Holiday	Holiday	N	
14 15 16 17 18 19 20	11 12 13 14 15 16 17	Lunch	Lunch	N	
21 22 23 24 25 26 2/	18 19 20 21 22 23 24	Meeting	Meeting	N	
20 23 30 31	23 20 27 20 23 30 31	Misc	Miscellaneous	N	
		Other	Other	N	
1)		Sick	Sick Time	N	
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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 <u>Technician</u> 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 <u>Warehouse</u> 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.





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

Selecting the context menu will open a Ribbon with one option; SageQuest Setup.

View Service Options	SageQuest Jobs Options
Setup	S SageQuest Setup
	Mobile Control Login Information
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<u>SMTWTFS</u> <u>SMT</u> 123456	Password
7 8 9 10 11 12 13 4 5 6 14 15 16 17 18 19 20 11 12 13 25 26 27 18 19 20 25 26 27	Save Sedona Technicians SageQuest Drivers & Advanced Settings
	The system requires your SageQuest user name and password before it can communicate with SageQuest



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.

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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.

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View Servi	ce Options SageQue	st Jobs Option	;								
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		🧼 Group Tickets	🧿 Miscellaneou	s Appointments	Warning List	•	Display Group Technicians 🔹	Group Day Within Owne	r 💿 🎤	🔞 Refresh Schedule	
Calendar Bar	Day Week Month	🔍 Inspection Creat	on 🌛 Open Jobs		Tickets On Site		2	loom 🔕 💿	0 🖸	Ticket	**
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Calendar		12/21									
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1 2 3 4 5 6	1 2 3										
14 15 16 17 18 19 20	4 5 6 7 8 9 10										
21 22 23 24 25 26 27	18 19 20 21 22 23 24	12 am									
28 29 30 31	25 26 27 28 29 30 31	1.00									

Ribbon Groups





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.

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

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Show/Hide Today Calendar Bar Navigation	Day Queue Week Inspections Month Removed Parts Ap Arrangement	0
Calendar Match 2011 S M T W T F S 3 1 2 3 4 5	April 2011	
15 17 8 9 10 11 12 13 11 15 16 17 18 19 20 22 23 24 25 26 27 28 23 30 31	3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 4 5 6 7	8_*
		5

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 Wee	ek Month	 Ticket Queue Group Tickets Inspection Creation 	 Removed Parts Miscellaneous Appointments Open Jobs
		Arrangement	t

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.

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14 15 16 17 18 19 20 11 12 13 14 15 16 17	1005 12/21/2014 M	O Inspect system to O Power went out la	Barton Christine N	aguna Woo… Ο… Mission Vieio Ω	*AC Po N/	Δ
21 22 23 24 25 26 27 18 19 20 21 22 23 24 28 29 30 31 25 26 27 28 29 30 31	1003 12/21/2014 M	O add new keypad a	Johnson Furniture #8 L	a Mesa S	*Add EN/	A
	1002	O Low battery signal.	Johnson Furniture #13 N	lission Viejo O	*Low B N/	A
® Tkt 1000(SC)	10 Queue Context	O Number 3 key on S 1/13/2_ Add two new moti.	Johnson Furniture #15 T Smith, John S	Tustin O San Diego S. S.	*Keypa N/ . *Add E N/	A
Site Smith, John 3649 Arizona St San Diego CA 92104						-(

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.



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.

<u>_</u> + =	Miscellaneous Appointments SedonaSchedule - SOUC 2015 2
View Service Options SageQue	est Jobs Options Miscellaneous Appointments
Show/Hide Calendar Bar Navigation	Ticket Group Inspection Open Jobs Ueue Tickets Creation Open Jobs Anangement Tools
Calendar Cecember 2014 January 2015	Drag a column
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System	

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.

<u>}+</u> =		_	-	Sedona	Schedule - SOUC 2015 2.6.	237			_	
View Service	e Options SageQue	t Jobs Options								
Show/Hide Calendar Bar	Day Week Month	Ticket Group Queue Tickets	Arrow Creation Creation	Parts Leous Appointments	 Open Customer Refresh Schedule Ticket 	100 H				1
Navigation		Arrar	ngement		Tools					
Calendar	(📕 🖻 🗹 【	Double-click opens Schedule	Total Open Jobs: 1						
December 2014 S M T W T F S 1 2 2 4 5 6	SMTWTFS	Drag a column hea	ader here to group by that c	olumn.						
7 8 9 10 11 12 13	4 5 6 7 8 9 10	[루 Job # 5	7 Customer# ∀ Com	mercial 🗸	Site Name	√ Address	∽ City	∽ Start Date ⊽	Proj. End Date	7 Type
14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	> 2004	1001 Y	Johnsor	n, Alexis	25165 Derby Circle	Laguna Hills	12/17/2014	12/17/2014	Intrusion-Res
1										
Site										7

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 = 3 Tickets List 🝷
Warning List 👻
🛕 Tickets On Site = 1
SedonaMonitor

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 Count = 3 Tickets List •
Warning List 💌
🛕 Tickets On Site = 1
SedonaMonitor
·

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.

vet Queue 🛛 👸 I	Removed Parts Miscellaneous Appoi	intments Warnin	ng List	5 110	Disp	ay Group Techniciar	ns 🔹 📃 Group	Day Within Owner	 ○ ○ ◇ ○ ◇ ○ ○<th>n Customer esh Schedule</th>	n Customer esh Schedule
spection Num	Priority	Scheduled	Account		Site Name	Address	City	Svc Co	Tech	Problem
Arra Tkt 1002	Medium	12/17/2014	20-1300	1	Johnson Furnit	26522 La Alam	Mission Viejo	OC	Ozzie.Wilson	*Low Battery
12/2 Tkt 1000	Medium	12/19/2014	10-1234	-	Smith, John	3649 Arizona St	San Diego	SD	Sean.Taylor	*Add Equipment
[Un Tkt 1000	Medium	12/19/2014	10-1234		Smith, John	3649 Arizona St	San Diego	SD	Sam.Miller	*Add Equipment



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.

Warning Count = 3 Tickets List •
Warning List 👻
Tickets On Site = 1
SedonaMonitor

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.

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	<u></u>	Removed Par	ts	🕕 Warni	ng Coun	t = :	OC Techs	- 🔯 🔽	Show Unassigned		• 🎤	Open Customer	
	Ø	Miscellaneou	Ticket	Created On	ST	Problem	Narre	Address	City	State			
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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.

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O Warning Count = 3 Tickets List ▼	OC Techs	🚺 🗷 Show U	nassigned	۲	/
Warning List 👻	All	s 🝷 📃 🛛 Group 🛛	Day Within Owner	0 🎤 📲	
🛕 Tickets On Site = 1	OC Insp	Zoom 📀		00	
SedonaMonitor	OC Techs	Calendar Options			\backslash
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n Ocean Ozzie Wilson	SD Techs	Smith	Oscar Mart	in	1
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	SUBS - SD				
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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.

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	OC Techs Display Group T	echnician	Show Unassigned	● 🌽 Owner 🔿 🎤	Open (Refresh)	Customer n Schedule
	Select 🛛 🗹	Code	Jame	Service Co	Ticket	譜
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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.

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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.





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.





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.

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Double Click to Add – This is a shortcut method for scheduling a Ticket, Job or Miscellaneous Appointment.

OC Techs 🗸 📝 🔽 Show Unassigned	(• <i>}</i>
Display Group Technicians 🔻 🔲 Group Day Within Owne	· 🔘 🎤
Zoom 🙆 🤤	00
Calendar Options	\bigcirc

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.



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

6 Opt	en Customer							
Refresh Schedule								
Ticket		諧						
Tools								

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.

() +	1.000	-	_			SedonaSchedule - SOUC 2015	2.6.237	
View	Service Options SageQu	est Jo	bs Options					
Show/Hide Calendar Bar Navigat	Today Usek Month	الله الله الله الله الله الله الله الله	Queue 🍪 Tickets 🖸 ction Creation 🎤 Arrangement	Removed Parts Miscellaneous Appoi Open Jobs	intments	Warning Count = 4 Tic Warning List Tickets On Site SedonaMonitor	kets List 🔻	OC Techs Display Gri
Calenda			12/17			•		
December S M T W 1 2 3 7 8 9 10 14 15 16 122 23 24 28 29 30 31	z014 January 2015 T F S M T F S 4 5 6 1 2 3 11 12 3 4 5 6 7 8 9 10 18 19 20 11 12 13 14 15 16 7 2 23 24 25 26 27 18 19 20 21 22 23 24 25 26 27 28 29 30 31	12 am 1:00	Ogd	en Ocean		Ozzie Wilson		Orlando Sm
Tkt 1002 Site	(SC) Johnson Furniture #13 26522 La Alameda Mission Viejo CA 92691	2:00 3:00 4:00						
System	20-1300 Intrusion	5:00						
Salesperson	Mark Spencer (949) 910-1300	6:00						_
Problem	*Low Battery(Medium)	8:00						
Schodulod	11.00 AM -	9:00						
Dispetahod		10:00		(THT 100	2. *Low Battery		
Arrived		12 nm						
Departed		1:00			TKT 100	04 - *AC Power Failure		
Dopanoa		2:00)		
New Appt		3:00						
	🖹 Save 😥 Edit	4:00						
	lotes 🚺 Map 🖂 Email	5:00		1				
		6:00		1				
		7:00						
		8:00		1				
		9:00		1				
Refreshed: 12/22	2/2014 3:00:30 AM	10:00	1	1				
	Unscheduled (4) Detail	11:00						
@	🗒 🖸 🧔	e	SS	A 💌				



R

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, in that Ticket [if it exists] will be displayed. The Ticket Search may be used to locate both open and closed tickets.



Ticket				Ticke	et #1004)	e + 183	-		97	×
Service Ticket	Appointments and Labor	Documents (0)	Equipment and Parts Go To	Journal	Notes (1)	Other Items	Purchase Orders (0)	Service History	Ticket Log	Jy Ticket Group	Notifications
Customer 1003 Barton,	, Christine	Created	12/21/20	014 1:38:	08 PM		Contact	Christine B	arton		•
Site Barton, 26601	Christine	Created B	y Adminis	trator			Phone	(714) 910-8	861	Ext	
Missio	n Viejo CA 92691	Status	Schedul	led			Notify	christine.e.b	barton@ya	ahoo.com	
Site and System I System Account System Type Panel Type Location	Detail 1003 Intrusion VISTA 128B			F	icket Detail Problem econdary P loute Code Expertise	roblem	*AC Power F	ailure			
Next Inspection				P	riority		Medium				•
Site Phone				E	stimated Le	ngth	60				
Map Code Cross Street				c	omments	A85	Power went or alarm system.	ut last night, i	and now u	unable to arm	*
Warranty Warranty	One Year P & L	16									-
Warranty End	Labor:3/3/2015 Parts:3/3/20	10		3	ervice Coor	dinator	0.1.1.0				
Commente					echnician		Uzzie.Wilso	n			
Notes			_		0# 		Canilan				
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Service Level	T&M-Res			0) Bank (0)						
) Credit Car	d (0)					
											E Save



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.

🗷 Calenda	r	
✓ Decembe <u>SMTW</u> 123 78910	r 2014 January 2015 → TFS SMTWTFS 456 1 2 3 11 12 13 4 2 6 7 8 9 10	
14 15 16 17 21 22 23 24 28 29 30 31	18 19 20 11 12 13 14 15 16 1/ 25 26 27 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Calendar
③ Tkt 1002	(SC)	
Site	Johnson Furniture #13 26522 La Alameda Mission Viejo CA 92691	
System	20-1300 Intrusion	
Salesperson	Mark Spencer (949) 910-1300	
Problem	*Low Battery(Medium)	
Technician	Ozzie.Wilson	🔄 Detail 📄
Scheduled	11:00 AM 👻	Information
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Dispatched Arrived		Viewei
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Dispatched Arrived Departed New Appt	✓ ✓ ✓ </th <th></th>	



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.

B	+)	Ŧ .							-	-	S	ervice	Ticke	t Q	ueue Opti	te option failures	a local of the local data	Sedon
	View	Se	ervice Op	otions	5	Sa	geQu	est	Job	s Optior	s		Q	ueu	e			
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🗷 Cale	endar	-						D	rag a co	lumn he	ader he	ere to g	group	by	that column.			
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9 10	11 12	13 14 18		15 1	6 17	18 1	9 20		25	12/21/	2014		M	0		Inspect system to	Martin, Sam	Lad
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③ Tkt	1007	(OP)							1001	12/21/	2014		М	1	12/21/2014 8:00 AM	Number 3 key on.	Johnson Furniture #15	Tusti
Site		Johnso 14511 Tustin	on Furni Franklin Californ	ture i Ave ia 92	#15 9 2780													1
System		20-150	0 Intrusi	on														
Salesp	erson	Jack V (714) 5 *Code	Vilson 55-1500 Change) es(Lo	(wc													
				- office								-	-	-				1



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.

+	=	-	-	_	-		_	-	SedonaSchedule - SG
View	Serv	ice Options	SageQue	est Jo	obs Options				
	57			🌽 Ticket	t Queue	<u></u>	Removed Parts		Warning Count =
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Calendar Bar	rouay	Day Wee	K Monu	🔍 Inspe	ction Creation	ð	Open Jobs		Tickets On Site
Navigati	on				Arrangement				SedonaM
- 🗷 Calendar					12/17				
< November	r 2014	December	2014 🔹 🕨				Ozzie Wilson	_	Orla
SMTW	<u>TFS</u>	<u>SMTW</u> 123	TFS						
2345	678	7 8 9 10	11 12 13						
9 10 11 12	13 14 15	14 15 16 17	18 19 20						
23 24 25 26	27 28 29	28 29 30 3	1 20 20 27	12 am					
30				1:00					
Include V Ser	vices	Inspections	Vendors	2:00					
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1005	OC	1002	Mart	6:00					1
1006	OC	1001	John	7:00					1
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(Unso	cheduled (4)	Detail	11:00					
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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).

(<u>)</u> ++	-	Service	e Ticke	t Queue Opti	-	Sec.	- Look - St No.	S	edonaSchedu	ile - S	ouc	2015 2.6	.237				
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🖻 🏯 (🗉 🗖 🦉		13 5		Removed Parts]	Warr	ning Count = 4	Tickets O	n Site 🏼 🧕	Ope	n Cu	stomer					
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1 1 2 3 4 5 6	1007	12/21/2014	Lo	0			Johnson Furnitur	re #15	Tustin	O		*Code		N/A		Jo	1
2 3 4 5 6 7 8 7 8 9 10 11 12 13	1006	12/21/2014	М	0	Inspect of	arpets	Johnson, Alexis		Laguna Hills	0		Insp-O		N/A		Jo	2
16 17 18 19 20 21 22 21 22 23 24 25 26 27	1005	12/21/2014	M	0	Inspect s	ystem to	Martin, Sam		Laguna Wo.	0		Insp-I_		N/A		м	7 1
23 24 25 26 27 28 29 28 29 30 31	1004	12/21/2014	M	S 12/17/2014 1:00 PM	Power w	ent out I	Barton, Christine		Mission Viej	o O	0	*AC P		N/A		В	2 10
30	►Ø 1003	12/21/2014	М.,	0	add new	keypad_	Johnson Furnit	ure #8	La Mesa	S_		*Add_		N/A		J	8 1
	1002	12/21/2014	M	S 12/17/2014 11:00 A	Low batte	ery sign	Johnson Furnitur	re #13	Mission Viej	o O	0	*Low		N/A		Jo	2 1/
•	1001	12/21/2014	М	I 12/21/2014 8:00 AM	Number	3 key on	Johnson Furnitur	re #15	Tustin	0	0	*Keyp_		N/A		Jo	1
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System									-				-				1
Salespeison					-	-		-		-							_

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.

-	a												
Customer #	Syst	em Account				Branch	Selection						
Name	🔘 Job	Number	Select 🔽	Branch	Description	Inactive							
Address	Serv	ice Ticket		DC	Orange County	N							
 Telephone 		ice #	V	SD	San Diego	Ν							
Bill Contact	Cred	it #											
Site Contact	Che	ck #											
Site Number													
							🔲 i kala kasatia	- Deserbas					
✓ System Leve	Sho	w Inactive Systems					Hide Inactiv	e brancnes					
Show Cance	elled		johnson										
F		Customer					Bill To						
Number	Name	Customer Type	Branch	Status	Bill Address		Bill Address 2	Bill Address 3	Site Name				
100-01	Johnson Furnitu_	Printed Invoice	SD	AR	730 Market St				Johnson Furniture #1				
100-02	Johnson Furnitur	Printed Invoice	SD	AR	2502 Imperial Ave				Johnson Furniture #2				
100-03	Johnson Furnitur	Printed Invoice	SD	AR	1946 Fern St				Johnson Furniture #3				
100-04	Johnson Furnitur	Printed Invoice	SD	AR	2340 El Cajon Bl				Johnson Furniture #4				
100-05	Johnson Furnitur	Printed Invoice	SD	AR	4679 University Ave				Johnson Furniture #5				
100-06	Johnson Furnitur	Printed Invoice	SD	AR	2805 Lemon Grove A	/e			Johnson Furniture #6				
100.07	Johnson Furnitur	Printed Invoice	SD	AR	3421 E Plaza Bl				Johnson Furniture #7				
100-07	Johnson Furnitur	Printed Invoice	SD	AR	8347 La Mesa Bl				Johnson Furniture #8				
100-07	Johnson Furnitur	Printed Invoice	SD	AR	3298 Greyling				Johnson Furniture #9				
100-07			SD	AR	7654 Herschel Ave				Johnson Furniture #10				
100-07 100-08 100-09 100-10	Johnson Furnitur	Printed Invoice			7654 Herschel Ave				Johnson Furniture #11				
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100-08 100-09 100-10 100-11 100-12 100-13	Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur	Printed Invoice Printed Invoice Printed Invoice Printed Invoice	SD SD OC	AR AR ANR	4/24 Clairemont Mes 4380 La Jolla Village 26522 La Alameda	Dr			Johnson Furniture #12 Johnson Furniture #13				
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100-07 100-08 100-09 100-10 100-11 100-12 100-13 100-14 100-15	Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur	Printed Invoice Printed Invoice Printed Invoice Printed Invoice Printed Invoice	SD SD OC OC	AR AR ANR AR AR	4/24 Clairemont Mes 4380 La Jolla Village 26522 La Alameda 22021 El Paseo 14511 Franklin Ave	a bi			Johnson Furniture #12 Johnson Furniture #13 Johnson Furniture #14 Johnson Furniture #15				
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100-09 100-09 100-10 100-11 100-12 100-13 100-14 100-15 1001	Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson Furnitur Johnson, Alexis	Printed Invoice Printed Invoice Printed Invoice Printed Invoice Printed Invoice CC	SD SD OC OC OC OC	AR AR ANR AR AR AR AR	4724 Clarremont Mes 4380 La Jolla Village 26522 La Alameda 22021 El Paseo 14511 Franklin Ave 25165 Derby Circle	Dr			Johnson Furniture #12 Johnson Furniture #13 Johnson Furniture #14 Johnson Furniture #15 Johnson, Alexis				

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.

S Customer Search		-				
📸 Search Criteria						
Customer #	System Account		Bran	ich Selection		
Name	Job Number	Select 🔽 Branch	Description Inactive			
Address	Service Ticket	OC	Orange County N			
		SD	San Diego N	-		
I elephone	Invoice #					
Bill Contact	Credit #					
Site Contact	Check #					
Site Number						
J System Level	Show Inactive Systems			Hide Inactiv	re Branches	
	- Show indexive systems	ieboen				
Show Cancelled	Field Chooser					~
				Bill To		
E .	Bill Address 1					
Number N	la 🛛 🔽 Bill Address 2	ch Status	Bill Address 1	Bill Address 2	Bill Address 3	Site Name
100-01 Johns	or IV Bill Address 3	AR	730 Market St			Johnson Furniture #1
100-02 Johnso	n 🛛 🗹 Branch	AR	2002 Imperial Ave			Johnson Furniture #2
100-03 Johnso	Customer Type		2240 EL Caise Pl			Johnson Furniture #3
100-04 Johnso	Is Primary		4679 University Ave			Johnson Furniture #5
100-05 Johnso	🛛 Name	AR	2005 Lange Carva Ave			Johnson Furniture #5
100-06 Johnso	Number	AR	2421 E Dises Di			Johnson Furniture #6
100-07 Johnso	Site Address 1		9247 La Masa Pl			Johnson Furniture #7
100-00 Johnso	Site Address 2	An	2299 Growling			Johnson Furniture #9
100-10 Johnso	Site Address 3	An	7654 Herechel Ave			Johnson Furniture #10
100-10 Johnso	Diffe Address 5	AR	4724 Clairemont Mesa RI			Johnson Furniture #11
100-12 Johnso		AR	4380 La Jolla Village Dr			Johnson Furniture #12
100-12 Johnso	Site Name	ANR	26522 La Alameda			Johnson Furniture #13
100-14 Johnso	Site Number	AR	22021 El Paseo			Johnson Furniture #14
100-15 Johnso	n Status	AR	14511 Franklin Ave		-	Johnson Furniture #15
1001 Johnso	n System Account	AR	25165 Derby Circle			Johnson, Alexis
	System Code					
•	System Inactive					Þ
						💟 Select 🗱 Close

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.

Search Criteria Customer # Customer # Address Telephone Bill Contact Site Contact Site Number Show Cancelled Customer C	 System Job N Servic Invoic Credit Credit Check Show ed 	m Account lumber ce Ticket ce # # kc # Inactive Systems mer	Select 💟 💟	Branch OC SD	Bra Description Inactive Orange County N San Diego N	Inch Selection	e Branches	
Customer #	 ○ Syster ○ Job N ○ Servic ○ Invoic ○ Credit ○ Credit ○ Check □ Show ed 	m Account lumber ce Ticket ce # # k # Inactive Systems	Select 🗹 🗸	Branch OC SD	Bra Description Inactive Orange County N San Diego N	nch Selection	e Branches	
Name Address Telephone Bil Contact Site Contact Site Number Show Canceller Number 100-13	 Job N Servic Invoic Credit Credit Check Show ed 	lumber ce Ticket te # ff inactive Systems mer	Select V V	Branch OC SD	Description Inactive Orange County N San Diego N	Hide Inactiv	e Branches	
Address Telephone Bill Contact Site Contact Site Number System Level Show Cancelled Number 100-13	 Servic Invoic Credit Credit Check 	ce Ticket ce # # Inactive Systems mer	iohnson	OC SD	Orange County N San Diego N	Hide Inactiv	e Branches	
 ✓ Telephone Bill Contact Site Contact Site Number ✓ System Level Show Cancellect Number 100-01 	ed	hactive Systems	johnson	SD	San Diego N	Hide Inactiv	e Branches	
I elephone Bill Contact Site Contact Site Number V System Level Show Cancellect Number 100-13	© Invoic © Credit © Check © Show ed tus △ Custor →alme	H H k Inactive Systems	johnson	7	811	Hide Inactiv	e Branches	
 Bill Contact Site Contact Site Number System Level Show Cancellect Number 100-01 	Credit Check Show ed	# k # Inactive Systems	johnson	7	811	Hide Inactiv	e Branches	•
Site Contact Site Number System Level Show Cancelled Number 100-13	© Check ☐ Show ed tus A Custor Halme	k # Inactive Systems	johnson		811	Hide Inactiv	e Branches	•
Site Number System Level Show Canceller Number 100-13	Ed Custor	Inactive Systems	johnson		811	Hide Inactiv	e Branches	•
System Level Show Canceller Show Canceller Unumber I00-13	Custor	Inactive Systems	johnson	7	Bili	Hide Inactiv	e Branches	•
System Level Show Canceller Number 100-13	ed atus A Custor	Inactive Systems	johnson	\sum	Bill 1			•
Show Canceller	ed atus ∆ Custor Warne	mer	johnson	\geq	Bill 1			•
Sta Number 100-13	atus 🛆 Custor Name	mer			Bill '	0		
€ Sta Number 100-13 J	atus A Custor	mer		\rightarrow	Bill			
Number 100-13	Name							
100-13		Customer Type	Branch	Status	▲ Bill Address 1	Bill Address 2	Bill Address 3	Site Name
100-01	Johnson Furnitur	Printed Invoice	OC	ANR	26522 La Alameda			Johnson Furniture #13
	Johnson Furnitu_	Printed Invoice	SD	AR	730 Market St			Johnson Furniture #1
100-02	Johnson Furnitur	Printed Invoice	SD	AR	2502 Imperial Ave			Johnson Furniture #2
100-03 、	Johnson Furnitur I	Printed Invoice	SD	AR	1946 Fern St			Johnson Furniture #3
100-04	Johnson Furnitur	Printed Invoice	SD	AR	2340 El Cajon Bl			Johnson Furniture #4
100-05	Johnson Furnitur	Printed Invoice	SD	AR	4679 University Ave			Johnson Furniture #5
100-06	Johnson Furnitur	Printed Invoice	SD	AR	2805 Lemon Grove Ave			Johnson Furniture #6
100-07 ,	Johnson Furnitur I	Printed Invoice	SD	AR	3421 E Plaza Bl			Johnson Furniture #7
100-08	Johnson Furnitur	Printed Invoice	SD	AR	8347 La Mesa Bl			Johnson Furniture #8
100-09	Johnson Furnitur	Printed Invoice	SD	AR	3298 Greyling			Johnson Furniture #9
100-10	Johnson Furnitur	Printed Invoice	SD	AR	7654 Herschel Ave			Johnson Furniture #10
100-11	Johnson Furnitur	Printed Invoice	SD	AR	4724 Clairemont Mesa Bl			Johnson Furniture #11
100-12	Johnson Furnitur	Printed Invoice	SD	AR	4380 La Jolla Village Dr			Johnson Furniture #12
100-14	Johnson Furnitur	Printed Invoice	OC	AR	22021 El Paseo			Johnson Furniture #14
100-15	Johnson Eurnitur	Printed Invoice	00	AR	14511 Eranklin Ave		-	Johnson Eurniture #15
1001 ,	Johnson, Alexis	CC	0C	AR	25165 Derby Circle			Johnson, Alexis
•								
								Select 🗱 Close



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



Accessing the Ticket Queues

To view the Ticket Queues, click on the *Ticket Queue* button within the *Arrangemen*t Ribbon Group.

β + =				Service	Tick	et Queue Opti			S	edonaSchedu	le - SC	DUC
View Servio	e Options SageQue	st	Jobs	s Options	Q	lueue						
Show/Hide Calendar Bar	Day Week Month		Ticket Queue	Group Inspection Dickets Creation	(3) (0) /~	Removed Parts Miscellaneous Appoint Open Jobs	tments Queue	Context	Tickets O Tickets Li	n Site S st • R Tic	Open Refre ket	n Cus Ish
Navigation	l		_	Arrangement				SedonaMon	itor			L
Calendar		D	rag a col	lumn header here to g	grou	p by that column.						
December 2014 SMIT WITES	January 2015	Æ	Ticke⊽		Fγ		Cust Comment 😽	Name	V	City 😽		
123456	1 2 3		1007	12/21/2014	Lo	0		Johnson Furniture	#15	Tustin	0	
7 8 9 10 11 12 13	4 5 6 7 8 9 10		1006	12/21/2014	М	0	Inspect carpets	Johnson, Alexis		Laguna Hills	O	
14 15 16 17 18 19 20 21 22 23 24 25 26 27	11 12 13 14 15 16 1/ 18 19 20 21 22 23 24		1005	12/21/2014	М.,,	0	Inspect system to	Martin, Sam		Laguna Wo.	O	
28 29 30 31	25 26 27 28 29 30 31		1004	12/21/2014	М	S 12/17/2014 1:00 PM	Power went out I	Barton, Christine		Mission Viejo	0 (0
		2	1003	12/21/2014	М_	0	add new keypad_	Johnson Furnitu	re #8	La Mesa	S_	
			1002	12/21/2014	М	S 12/17/2014 11:00 A	Low battery sign	Johnson Furniture	e #13	Mission Viejo	0	1
0			1001	12/21/2014	М	I 12/21/2014 8:00 AM	Number 3 key on	Johnson Furniture	e #15	Tustin	0	
Site			1000	11/14/2014	М	S 12/19/2014 9:00 AM	Add two new mot	Smith, John		San Diego	S	
					_							7

Once the Queue is displayed, you may click on the *Queue Context Menu* for additional Queue options.

		_	Service	e Tick	et Queue Opti	a print failures	CARD IN THE OWNER.	SedonaSchedule
View Service Options SageQu	est	Jobs	Options	- q	ueue			
Open Appointment No Go R Appointment Back	esolv	ed Unre	solved Closed	Queur	e View Service Ticket Use Date Range Kport to Excel			
		Vi	ew				/	
🖬 Calendar		rag a col	umn header here to	grou	by that column.			
	F	Ticke ⊽	Created On 🛛 🗸 🖓	₽∆	⊽ Scheduled On ⊽	Cust Comment 🛛	Name	⊽ City ⊽
1 2 3 4 5 6 7 8 9 10 11 12 13 4 5 6 7 8 9 10		1007	12/21/2014	Lo	0	1	Johnson Furniture #15	Tustin
14 15 16 17 18 19 20 11 12 13 14 15 16 17 21 23 24 25 26 27 18 19 20 21 22 23 24		1005	12/21/2014	M	0	Inspect carpets Inspect system to	Martin, Sam	Laguna Hills Laguna Wo
28 29 30 31 25 26 27 28 29 30 31		1004	12/21/2014	М	S 12/17/2014 1:00 PM	Power went out I	Barton, Christine	Mission Viejo
	2	1003	12/21/2014	M_	0	add new keypad_	Johnson Furniture #8	La Mesa 🛛
A		1002	12/21/2014	М	S 12/17/2014 11:00 A	Low battery sign	Johnson Furniture #13	Mission Viej
		1001	12/21/2014	М	I 12/21/2014 8:00 AM	Number 3 key on	Johnson Furniture #15	Tustin
Site		1000	11/14/2014	М	S 12/19/2014 9:00 AM	Add two new mot	Smith, John	San Diego
				_				

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.





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.

B	+)=						Service	Ficket	Queue Opti			A Design of the local division	S	edonaSchedul	e - SOU(2015 2.6.2
	View	Service Options	SageQ	uest	Jobs	Options		Que	ue							
Open	ppointmer	nt No Appointme	Go F nt Back	Resolve	d Unre Vi	esolved Clo	osed	ueue V Us Exp	iew Service Tick e Date Range ort to Excel	et	•					
Cale	endar			D	rag a col	umn header	here to g	roup b	y that column.							
De S M	cember2014 TWTF:	Januai S SM T	w TFS		Ticke	Created On		FV V	Scheduled On	∇	Cust Comment V	Name	V	City 🗸	\ \ \ \	Prob 🔽
1	2 3 4 5	6	1 2 3		1007	12/21/2014		Lo C				Johnson Furniture #15		Tustin	0	*Code
78	9 10 11 12	13 4 5 6	7 8 9 10		1006	12/21/2014		M C)		Inspect carpets	Johnson, Alexis		Laguna Hills	0	Insp-O
21	16 17 18 19	20 11 12 13	14 15 16 1/		1	12/21/2014		M C)		Inspect system to	Martin, Sam		Laguna Wo	O	Insp-I
28 29	30 31	25 26 27	28 29 30 31		1004	12/21/2014		M S	12/17/2014 1:00 P	M	Power went out I	Barton, Christine		Mission Viejo	0 0	*AC P
				10	1003	12/21/2014		м_ с)		add new keypad_	Johnson Furniture #8		La Mesa	S_	*Add_
					1002	12/21/2014		M S	12/17/2014 11:00	A.,	Low battery sign	Johnson Furniture #13		Mission Viejo	0 0	*Low
					1001	12/21/2014		M I	12/21/2014 8:00 A	М	Number 3 key on	Johnson Furniture #15		Tustin	0 0	*Keyp
Site																



- Tickets where the Created (on) date is within the date range selected.



Appointment - Tickets with a scheduled appointment on or within the date range selected.



Appointment - 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.



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

Queue View Buttons

B	+ =			-			Service Ticket Queue Opti
	View	Service Options	Sage	Quest	Jobs Options		Queue
Open	Q Appointme	nt No Appointment	Go Back	Resolved	(Unresolved	Clos	Queue View Service Ticket Use Date Range Sed Export to Excel
					View		



Open Button - When clicking on the *Open* button, all tickets that have not been closed will be listed in the Queue.



Appointment **Appointment Button** - When clicking on the *Appointment* button, all tickets that have an appointment scheduled with a Technician will be listed in the Queue.



Appointment **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.



Back 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





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.





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 <u>off</u> the Calendar Bar.

<u>}</u> + ₹	-			S	ervice	licke	t Queue Opti				S	edonaSchedul	le - S	OUC 201	5 2.6.237	_	
View Service	e Options SageQue	est	Jobs	Options		Q	ueue										
		(all C		<u>.</u>	Removed Parts		🕕 Warr	ning Count = 4	Tickets O	n Site 🛛 🕥	Оре	n Custo	ner		
					0	Ø	Miscellaneous Appoint	tments	Warning	g List 🔹	Tickets Lis	st 🔹 🙉	Refr	esh Sche	dule		
Calendar Bar	Day Week Month		licket Queue	Group Inspec Tickets Creat	tion	N	Open Jobs					Ticl	ket		*		
Navigation		6	$ \ge $	Arrangemen	t	1				SedonaMor	itor			Tools			
Calendar		6)rag a co	lumn header he	re to a		by that column										
December 2014 S M T W T E S	January 2015 ►		Ticke V	Created On	77	FV	Scheduled On	Cust Co	mment 🔽	Name	V	City 🔽	∇	'⊽ Pr	h ∀ Servic	V Reso V	Res 3
1 2 3 4 5 6	1 2 3		1007	12/21/2014		Lo.	0			Johnson Furnitur	e #15	Tustin	0_	*Co	de_	N/A	
7 8 9 10 11 12 13	4 5 6 7 8 9 10		1006	12/21/2014	1	M	0	Inspect	carpets	Johnson, Alexis		Laguna Hills	0	Ins	p-O	N/A	
21 22 23 24 25 26 27	18 19 20 21 22 23 24		1005	12/21/2014		М	0	Inspect	system to	Martin, Sam		Laguna Wo	0	Ins	p-I	N/A	N
28 29 30 31	25 26 27 28 29 30 31		1004	12/21/2014		М	S 12/17/2014 1:00 PM	Power v	ent out I	Barton, Christine		Mission Viejo	0_	0 *A0	P	N/A	E
		2	1003	12/21/2014		M_	0	add new	v keypad_	Johnson Furnit	ıre #8	La Mesa	S_	*A	d_	N/A	1
			1002	12/21/2014		M	S 12/17/2014 11:00 A.	Low bat	ery sign	Johnson Furnitur	e #13	Mission Viejo	0_	0 *Lo	w	N/A	
0			1001	12/21/2014		М	I 12/21/2014 8:00 AM	Number	3 key on	Johnson Furnitur	e #15	Tustin	0	0 *Ke	ур	N/A	
Site			1000	11/14/2014		М	S 12/19/2014 9:00 AM	Add two	new mot	Smith, John		San Diego	S	S *Ac	d	N/A	
_																	
System								_	-			_					
ystem			_						-		-						

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)



SedonaSchedule Navigation *Reference Guide*

Field Name

Account
Check Box 1
Check Box 2
Check Box 3
Check Box 4
Check Box 5
City
Closed On
Created On
Cust Branch
Cust Comments
Cust Number
Customer Name
Customer Name
Date 1
Date 2
Monoy Label 1
Money Label 2
Name
Panel
PR
Problem
Resolution Code
Resolved On
Route Code
Scheduled On
Service Coordinator
Service Lvl
Site Address
Site Branch
ST
State
State Name

Description

Monitoring Account Number Service Ticket Custom Field Site City **Closed Date Creation Date Customer Branch Comments Field Customer Number Customer Name** Service Ticket Custom Field Service Ticket Custom Field Map Code Service Ticket Custom Field Service Ticket Custom Field Site Name Panel Type Priority **Problem Code Resolution Code Resolved Date Route Code** Most Recent Tech Appointment Date Service Coordinator Field Service Level Site Address Line 1 Site Branch Status Site State Abbreviation Site State Name

Data Source

System Information SedonaSetup SedonaSetup SedonaSetup SedonaSetup SedonaSetup Site Information Ticket Ticket Customer Information Service Ticket form Customer Information Customer Information SedonaSetup SedonaSetup Site Information SedonaSetup SedonaSetup Site Information System Information Ticket Ticket Ticket Ticket System Information Ticket Service Ticket form Service Ticket form Site Information Site Information Ticket Site Information Site Information



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

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.

B +=	-				-	Service	e Ticket Queu
View	Service Options	Sag	eQuest	Job	s Options		Queue
					affe	Q	🔅 Rem
Show/Hide Calendar Bar	oday Day	Week M	onth	Ticket Queue	Group Tickets	Inspection Creation	Ορ
Navigatio	6	-			Arran	gement	
Drag a column h	eader here to group	o by that co	olumn.				
🚰 Ticket 🛛 🗸 (Created On 🛛 🔻	V PR V	∀ Sch	eduled Or	1	√ Cust Co	mments
1007 1	2/21/2014	Low	0				
1006 1	2/21/2014	Medi	0	_		Inspect of	carpets -
-	~~14	Medi				Inspect	system to

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.

<u>}</u> + ₹	Service Ticket	Queue Opti	ons					Sedo	naOffic	e - CJM	1 Securit	y 1.0.0	.14	1
View Servi	ice Options Q	ueue												
Show/Hide Today Calendar Bar Navigation	Day Week Month Qu Arrangement		MI-South Display (Ove	Group Teo rride Disp DisplayGro	+ 🕅	p	🕕 Wa Warnin Tickets	rning Co Ig List On Site Se	ount = 1 • •	3 Tic	kets List	T) Open cket	Customer T
Calendar March 2011 SMTWTFS	April2011 ▶ SMTWTFS	Drag a		aderhe	re to gro Sc ⊽	up by Ac ⊽	that col	umn. Cit V	St 🔽	St 🔽	Zip/ ▽	Sv 🗸	Te ⊽	Pr 🐨
27 28 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23	7078	107 M 1 M 017 M	SC RS SC	10/1 11/2/ 3/12/	908 3611 1224	Eliot Cud Tayl	Ply Ply Ply	Mich Mich Mich	MI MI MI	48170 48170 48170	MI-S MI-S MI-S	Edg Edg Egor	Key Key Can'
27 28 29 30 31	24 25 26 27 28 29 30 1 2 3 4 5 6 7	7149 7150	9 10/ 10/ M.	SC SC	10/2_ 10/2	1452 168	Po∎_ Sim…	Ply_ Bad	Mich	MI MI	48170 48413	MI-S_ MI-S	Barn	Cod_ Add
© Site				Ì	_	_	_							(

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.

0	B) +) =		-		Caller Second	Service	Ticket Queue Opti	-	-	-	SedonaS	chedule - SO	UC 2015 2.6.	237	-	-) <u> </u>
	View	v Service	e Options	SageQ	uest	Jobs Options		Queue												
		see				1 <i>M</i>	9	 Removed Parts Miscellaneous Application 	opointments	Warning Count Warning List •	= 4 Tickets Tickets	On Site	OpenRefres	Customer h Schedule						
c	alendar Bai	Today	Day We	ek ivioin	Q	ueue Tickets	Creation	췕 Open Jobs					Ticket		68					
	Navig	ation				Arrang	jement			Sedo	naMonitor			Tools						
D	rag a colun	nn header her	e to group by	that colu	nn.	ŧ														
F	Ticket ⊽	Created On	$\Delta \Delta$	PR 🗸 🗸	ST		∇	Cust Comments V	Name		7 City	√ S7	Technici 🗸	Froble 😽	Service C 🗸 (🗤	Z Clos マ :⊽	Cust	⊽ Panel ⊽	Site B 🕤	Cust 🗸
	1007	12/21/2014		Low	OP(Technici 🗸 🔵			Johnson Furni	ture #15	Tustin	OC	4	Code C	Jo	. 1.	100-15	VISTA 1.	OC	OC
	1006	12/21/2014		Medium	OP			Inspect carpets - cust	Johnson, Alex	is	Laguna Hills	00		Insp-Other	Jo	- 2	1001	VISTA 1.	OC	OC
	1005	12/21/2014		Medium	OP			Inspect system to veri	Sam Martin		Laguna Wood	s 🔎		Insp-Intru	M.,	. 7	1002		OC	OC
	1004	12/21/2014		Medium	SC	12/17/2014 1:00	0 PM	Power went out last nin	Barton, Christi	ne	Mission Vieio	OC	Ozzie Wils	*AC Pow	В.,	2_	1003	VISTA 1.	OC	OC
12	1003	12/21/2014		Medium	OP			add new keypad atr_	Johnson Fur	niture #8	LaMesa	SD		*Add Eq_	J_	8_	100-08	VISTA_	SD	SD
	1002	12/21/2014		Medium	SC	12/17/2014 11:0	00 AM	Low battery signal rec	Johnson Furni	ture #13	Mission Viejo	OC	Ozzie Wils	*Low Bat	Jo	_ 2_	100-13	VISTA 1.	OC	OC
	1001	12/21/2014		Medium	IP	12/21/2014 8:00	0 AM	Number 3 key on key	Johnson Furni	ture #15	Tustin	OC	Ozzie Wils	*Keypad	Jo	_ 1_	100-15	VISTA 1.	OC	OC
	1000	11/14/2014		Medium	SC	12/19/2014 9:00	0 AM	Add two new motions	Smith, John		San Diego	SD	Sam Miller	"Add Equ	S	3	1000	VISTA 1.	SD	SD



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.

B) +)=				Serv	ice Ticket Queue Opti		SedonaS	chedule - SOUC 2015 2
Vi	ew Servic	e Options	SageQuest	t Jobs	Options	Queue			
Show/Hid Calendar B	le Today	Day Week	Month	Ticket Oueue	Group Inspectio	 Removed Parts Miscellaneous Appointments Popen Jobs 	 Warning Count = 4 Warning List * 	Tickets On Site Tickets List 🔹	 Open Customer Refresh Schedu Ticket
Navi	igation				Arrangement		SedonaMoni	tor	Tool
	1				4				
	-			_	4				
Ticket	√ Created 0 12/21/2014	n ∇∇ Cust	Number 5	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	T 🔽 Technician	Scheduled On V	Cust Comments	√ Name	⊽ Si
Ticket 1007 1006		In V⊽ Cust 100-1	Number 5	ST 01 01	T Technician P (All) P (Custom)	Scheduled On V	Cust Comments	☑ Name Johnson Fu mst.	
[±] Ticket 1007 1006 1005	✓ Created 0 12/21/2014 12/21/2014 12/21/2014	In VT Cust 100-1 1001 1002	Number 5	⊽ S1 OF OF	T ▼ Technician P (AII) P (Custom) (Blanks) P (NorPlanka)	Scheduled On V	Cust Comments Inspect carpets - customer clair Inspect system to verify ability t	☑ Name Johnson Fu ms t Johnson, Al to u Sam Martin	▼ Si rniture #15 14 exis 25 73
Ticket 1007 1006 1005 1004	▼ Created 0 12/21/2014 12/21/2014 12/21/2014 12/21/2014 12/21/2014	In / V Cust 100-1 1001 1002 1002	Number 5	⊽ ST OF OF SC SC	T Technician P (All) (Custom) P (Blanks) (NonBlanks) C Ozzie Wilson	Scheduled On V 12/17/2014 1:00 PM	Cust Comments Inspect carpets - customer clain Inspect system to verify ability t Power went out last night, and	☑ Name Johnson Fu Johnson, Al- to u Sam Martin now Barton, Chri	▼ Si rniture #15 14 exis 25 73 istine 26
	▼ Created 0 12/21/2014 12/21/2014 12/21/2014 12/21/2014 12/21/2014	Image: Cust Cust 100-1 100-1 1001 1001 1002 1003 14 100-1	Number 5 08	▼ 51 01 01 01 01 01 01 01 01 01 01 01 01 01	P (All) (Custom) (Blanks) (NonBlanks) Ozzie Wilson Sam Miller	Scheduled On 12/17/2014 1:00 PM	 Cust Comments Inspect carpets - customer clair Inspect system to verify ability t Power went out last night, and add new keypad atrear delive 	Vame Johnson Fu ns t Johnson, Al to u Sam Martin now Barton, Chri ry d Johnson F	▼ Si rniture #15 14 exis 25 rsi 73 istine 26 umiture #8 8
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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.

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	1006	12/21/2014	1001	OP			Inspect carpets - customer claims	stJohnj
	1005	12/21/2014	1002	OP			Inspect system to verify ability to	u Sar
	1004	12/21/2014	1003	SC	Ozzie Wilson	12/17/2014 1:00 PM	Power went out last night, and no	ow B
0	1003	12/21/2014	100-08	OP			add new keypad atrear delivery	/ d_
	1002	12/21/2014	100-13	SC	Ozzie Wilson	12/17/2014 11:00 AM	Low battery signal received in CS	S
	1001	12/21/2014	100-15	IP	Ozzie Wilson	12/21/2014 8:00 AM	Number 3 key on keypad not fun	cti
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Queue Filter Group by Technician

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1006	12/21/2014	1001	OP			Inspect carpe	s - customer claims the I	Johnson, Alexis	
1005	12/21/2014	1002	OP			Inspect system	n to verify ability to upgra	Sam Martin	
1003	12/21/2014	100-08	OP			add new keyp	ad at rear delivery door.	Johnson Furniture #8	\$
Count = 4 Dechnician : 0: Technician : Sa Ticket	zzie Wilsor (3 items) am Miller (1 item) V Created On	✓ ▼ Cust Number	ম st)n V	Cust Commer	ts V	Name	
1000	11/14/2014	1000	SC	12/19/2014 9	:00 AM	Add two new	motions and one outdoor	Smith, John	
Count = 1						λ			



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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1001 12/21	2014 10	00-15 📕	IP	12/21/2014 8	00 AM	Number 3 key	on keypad not functionin	Johnson Furniture #1	5
Count = 3 Technician : Sam Miller (1	item)	Technician A							

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.

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