

SedonaService Setup & Configuration Version 5.6

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About this Document

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Overview

This document is being provided to explain the setup and configuration of SedonaService which includes the setup of Display Groups, Appointment Types and configuring the Ticket Queue and Customer Search form.



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SedonaService Module Overview

The Service Module which is being introduced with SedonaOffice Version 5.6 has been completely redesigned; this document will explain the basic functionality of how to create, schedule and manage tickets in SedonaService.

The new Service Module is activated within SedonaSetup. Access to this new module is controlled by a new User Group security option. Once permission is granted, when a User logs into SedonaOffice, the Main Menu Tree will only display the options of Service and Print Service Tickets. Clicking on the Service menu option launches the new Service Module. If a User has been granted permission to the new Service Module, they may only work in the new Service Module; the legacy Service Module will no longer be accessible.

The new Service Module incorporates the Schedule Board, Technician Dispatching, Ticket Queues, Inspection Ticket Generation, Technician Dispatching, and new Ticket creation into one application.

A new feature of the new Service Module is Display Groups. Display groups are groupings of Technicians. When viewing the SedonaService Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

The new SedonaService Schedule Board has been designed to be able to view appointments for one day, a week or a month at a time. Multiple tickets may now be assigned to the same Technician for the same timeslot on the same day.

Another new feature of the new Service Module is *Miscellaneous Appointments*; this new feature replaces the Technician Absence option that was available in the legacy Service module.

A new option, the *Unassigned Technician* is also available. This will allow you to schedule an appointment to the "Unassigned Technician" then drag to the appropriate Technician at a later time.



The right-click option is not used in SedonaService. This new module was designed so that all options and functions are viewable and selectable from the Ribbon or a Context menu.



Setup & Configuration

There are two setup tables and two areas available for User defined configuration. The setup tables are Display Groups and Appointment Types. Both setup tables are discussed under the title of Setup within this document.

The User defined configuration is optional; the two areas available for configuration are the Ticket Queue and Customer Search. Configuration settings are saved for each User. Once a User has configured the Queue and/or the Customer Search, these settings will be remembered the next time the User logs into SedonaService. Both user configuration areas are covered under the title of Configuration within this document.



Setup

Display Group Setup

To be able to best manage the new SedonaService Schedule Board, you must first set up Display Groups. A Display Group consists of a list of selected Technicians which you want to display in the Schedule Board as a group. When viewing the SedonaService Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

Your Display Groups may be designed in any logical fashion to make viewing, scheduling and dispatching as easy as possible.

If you do not setup Display Groups, the default display group ALL will be the only choice available; this default group contains all Technicians for the company. If your company does not need to create additional Display Groups, you may edit the default ALL display group to sequence your Technicians in the order you desire the names to be displayed in the SedonaService Schedule Board.

To setup a new display group, you must first launch the SedonaService module from the main Sedona Office application. On the main menu, click on the Service menu option. In a few seconds the SedonaService application will be displayed.





Once the SedonaService application is open, in the display area, the Schedule Board will list the Unassigned Technician and any Service Providers for your company.

To create new Display Groups, click on the *Display Group Edit* button.

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Enter a *Code* and *Description* for the Display Group. In the list of Technicians, check the box to the left of each Technician that will be included in the group. In the Sequence column you may entered the numbered order in which the Technicians will display in the SedonaService Schedule Board.

If Sequence numbers are not entered, Technicians will be displayed alphabetically by last name then first name. When finished selecting Technicians and entering sequence numbers, press the *Save* button located at the lower right of the form.

Continue setting up additional Display Groups by pressing the *New* button and repeating the process.

When finished creating the Display Groups, click on the "X" in the upper right corner of the Display Group form to exit Display Group setup.

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	SamCarlson	Sam Carlson	MI South Insp		5			
	Bailey Barr	Bailey Barr	MI South	MI South	5			
	BillHunt	Bill Hunt	MI South	MI South	5			
	BradDalton	Brad Dalton	MI South	MI South	4			
	JoeMarina	Joe Marina	MI South	MI South	5			
	MichaelBaxter	Michael Baxter	MI South	MI South	4			
	MichaelJohnson	Michael Johnson	MI South	MI South	5			
	MiltonSmith	Milton Smith	MI South	MI South	4			
	PhillipJones	Phillip Jones	MI South	MI South	3			
	RichardFoster	Richard Foster	MI South	MI South	4			
	SteveWilson	Steve Wilson	MI South	MI South	3			
	WalterHarris	Walter Harris	MI North Insp		5			
	AnthonyArruda	Anthony Arruda	MI North	MI North	4			
	EdPhillips	Ed Phillips	MI North	MI North	5			
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Click on the Display Group drop-down arrow to view the list of all your Display Groups. Select the Display Group you wish to view in the Schedule Board.

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The Schedule Board will display the Technicians that are members of the selected Display Group.

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Appointment Type Setup

Miscellaneous appointments are used primarily to indicate a Technician is not available to schedule for a Service or Inspection ticket. When scheduling a Miscellaneous Appointment, an *Appointment Type* must be selected by the User. SedonaService is delivered with seven default Appointment Types; Holiday, Lunch, Meeting, Misc, Other, Sick and Vacation. These default appointment types may not be modified or deleted. You may create as many additional Appointment Types as needed by your company.

To create new Appointment Types, click on the *Service Options* tab located at the upper left of SedonaService. Two new Ribbon Groups will be displayed. On the Service Setup Tables Ribbon Group, click on the *Appointment Types* button.





Appointment Type Setup (continued)

The *Appointment Type* setup form will be displayed. To create a new Appointment Type, click the *New* button located at the lower right of the form. Enter a *Code* and *Description*, then click *Save*. The *Description* field will automatically populate with the value entered in the *Code* field; you may change the Description if desired.

You may add as many appointment types as desired.

)e		
Appointment Type	Description	Inactive	
Holiday	Holiday	N	
Lunch	Lunch	N	
Meeting	Meeting	N	
Misc	Miscellaneous	N	
Other	Other	N	
Sick	Sick Time	N	
Vacation	Vacation	N	
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When finished, to return to the SedonaService Schedule Board, click on the View tab.

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Configuration

Queue Configuration

A great new feature of SedonaService allows each User to organize the Ticket Queue according to their specific preference. When a User logs into the SedonaService 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 Queue, follow the steps below and on the following pages.

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





The 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.

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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.

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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.

Field (Chooser 🛛 🛛	
	Account	System Account (System)
2	City	City (Site)
	Created On	Ticket Creation Date
	Map Code	Map Code (Site)
V	Name	Site Name
V	PR	Priority (Ticket)
	Problem	Problem Code (Ticket)
	Route Code	Route Code (System)
	Scheduled	Last Scheduled Appointment Date
V	Service Lvl	Service Level (Ticket)
V	ST	Ticket Status
	State	State Abbreviation (Site)
	State Name	State Long Name (Site)
	Sub Problem	Secondary Problem Code (Ticket)
V	Svc Co	Service Company
V	Technician	Last Scheduled Technician
V	Ticket	Ticket Number
	X Street	Cross Street (Site)
	Zip/Postal Code	Zip/Postal Code (Site)
	/	



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 SedonaService application.

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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.

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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.

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					0	SA2	8	8	MI-South	👽 🖗 🔻	🕕 Warning Cou	nt = 13 1	ickets Or	Site	Open Custo	mer	
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13 14 15 16	17 18 19	10 11 12 13 1	4 15 16	71	02 11/02/	2009 N	1 RS	11/2/20	009 9:00 AM	3611	Cuady, Lisa	Plymouth	MI	48170	MI-South	Edgar Eden	Keypad Trou
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27 28 29 30 3	31	24 25 26 27 20	8 29 30	10 71	49 10/21/	/2010 1	.o_ SC	10/21/	2010 11:00 AM	1452	Polly's Pies	Plymouth	MI	48170	MI-South	Barney Barber	Code Char
		12345	567	71	50 10/21/	2010	1 SC	10/21/2	2010 2:00 PM	16851	Simply Sandwich	Bad Axe	MI	48413	MI-South	Barney Barber	Add Equi
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Once the Queue is setup to your preference, exit SedonaService to save your settings. Return to SedonaService, click on the Queue button on the Ribbon; the Queue will be displayed with your configuration preferences.





Queue Filters

A new feature of SedonaService 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.

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.

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Drag a colum	n header here to gr	roup by that colur	mn.										
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7078	10/11/2009	M SC	3/23/2011 8:00 AM	9086-01	Eliott St	Plymouth	MI	48170	MI-South	(HonBlanks)		Keypad Trouble	Time an B2
7121	01/04/2010	M_ RS	3/12/2011 9:00 AM	1224	T aylor,	Plymouth	MI	48170	MI-South	Bailey Barr		Can't Set B/A	Time an B2
7126	03/15/2010	M_ SC	3/22/2011 9:00 AM	CCTV	T aylor,	Plymouth	MI	48170	CA-Sou	Ben Bainbridge		Inspection	T&M R C2
7136	06/02/2010	M_ SC	3/21/2011 12:00 PM	3796	Ashley,	Santa Ana	CA	92706	CA-Sou	Cain Cabe		Zone Trouble	Time an B2
7141	08/31/2010	M_ SC	3/23/2011 3:00 PM	10055-BA	DeMars	Dana Point	CA	92629	CA-Sou	EdgarEden		Keypad Trouble	Time an UL
7149	10/21/2010	L SC	3/21/2011 11:00 AM	1452	Polly's_	Plymouth	MI	48170	MI-Sou_	Balph Phillips	-	Code Changes	T&M In_
7155	10/26/2010	M RS	3/24/2011 9:00 AM	2167	Jenny B	Holtville	CA	92250	CA-Sou	Ben Bainbridge		Low Battery	T&M Int
7156	10/28/2010	M RS	3/21/2011 10:00 AM	3333	Michael	Plymouth	MI	48170	CA-Sou	Bailey Barr		AC Power Failure	T&M Int
7157	10/29/2010	M. OP		9020	WORL	Los Angeles	CA	90021	WPB	Barney Barber		AC Power Failure	T&M Int
7164	01/12/2011	M. OP	3/24/2011 9:00 AM	3621	Ashley,	Huntington Bea	CA	92647	CA-Sou	Bailey Barr		Keypad Trouble	T&M Int., B2
7168	03/24/2011	M. OP	3/24/2011 1:00 PM	9138	Ashley,	Huntington Bea	CA	92649	CA-Sou	Bailey Barr		Keypad Trouble	Time an
7169	03/26/2011	M RS	3/25/2011 8:00 AM	9005-001	Johnso	Auburn Hills	MI	48170	MI-South	Barney Barber		Keypad Trouble	T&M Int
7171	03/26/2011	M_ SC	3/29/2011 9:00 AM	9641	Miller,	Plymouth	MI	48170	MI-South	Edgar Eden		Add Equipment	Time an
7172	03/26/2011	M_ OP		10000-1	Sweet	Plymouth	MI	48170	MI-South			Low Battery	Time an
7173	03/27/2011	M_ OP		9127-002	Bonjour	Plymouth	MI	48170	MI-South			Low Battery	Time an F2
7174	03/27/2011	M_ IP	3/25/2011 9:00 AM	3611	Cuddy,	Plymouth	MI	48170	MI-South	Cain Cabe		Keypad Trouble	Time an
7176	03/27/2011	M_ OP		3333	Michael	Plymouth	MI	48170	MI-South			Add Equipment	T&M Int
7177	03/27/2011	M_ OP		9076	Matthe	Plymouth	MI	48170	MI-South			Zone Trouble	Time an
	03/2//2011	M. UF		3076	matrie	Tiymoud	PH	40170	m-South				nille art

Queue filtered on one Technician

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			(###		40	9	Display (Group Technicians	+	Warning List 🔹		Tickets List 🔹	Ticket
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Drag a colum Ticket 7156 7164	n header he	ere to group by ed On マ /2010 /2011	that colu IV ST M RS M OP	mn. Scheduled 3/21/2011 10:0 3/24/2011 9:00) AM AM	マ Account マ 3333 3621	Name ⊽ Michael Ashley,	City ⊽ Plymouth Huntington Bea	State MI CA	マ Zip/Pos マ 48170 92647	Sve C 🏹 CA-Sou CA-Sou	Technician Bailey Barr Bailey Barr	▼ Problem AC Power Failure Keypad Trouble
Drag a colum Ticket 7156 7164 7168	n header he Treate 10/28 01/12 03/24	ere to group by ed On マ /2010 /2011 /2011	that colu IV ST M RS M OP M OP	mn. Scheduled 3/21/2011 10:0 3/24/2011 9:00 3/24/2011 1:00) AM AM PM	▼ Account ▼ 3333 3621 9138	<mark>Name ⊽</mark> Michael Ashley,	<mark>City ⊽</mark> Plymouth Huntington Bea Huntington Bea	State MI CA CA	 ✓ Zip/Pos ✓ 48170 92647 92649 	Sve C V CA-Sou CA-Sou CA-Sou	Technician Bailey Barr Bailey Barr Bailey Barr Bailey Barr	▼ Problem AC Power Failure Keypad Trouble Keypad Trouble Keypad Trouble



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 areas of the ticket queue.

p) +	• •			Se	ervice	e Tickel	Queue	Optio	ns						Sedo	naSer	vice - CJM	Security 1	.0.0.16			
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Show/Hid Calendar B	e To ar	iday	Day	Week	Mo	nth	Queu	e In:	spections	Removed Parts	App	ellaneous pintments	V Ove	erride Display G	roup							
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7078		10/11/2	2009		М	SC	3/	23/20	11 8:00 A	M		9086-01	Eliott St	Plymouth	MI		48170	MI-South	Edgar Eden	Key	pad Trouble	
7121		01/04/2	2010		М	RS	3/	12/20	11 9:00 A	M		1224	T aylor,	Plymouth	MI		48170	MI-South	Egor Earle	Car	i't Set B/A	
7126		03/15/2	2010		М	SC	3/	22/20	11 9:00 A	M		CCTV	T aylor,	Plymouth	MI		48170	CA-Sou	Cain Cabe	Insp	ection	
7136		06/02/2	2010		М	SC	3/	21/20	11 12:00 F	РМ		3796	Ashley,	Santa Ana	CA		92706	CA-Sou	Cain Cabe	Zor	ie Trouble	
7141		08/31/2	2010		М	SC	3/	23/20	11 3:00 P	v		10055-BA	DeMars	Dana Point	CA		92629	CA-Sou	Ralph Phillips	Key	pad Trouble	
7149		10/21/	2010		L	SC	3/	21/2	011 11:00	AM	·····	1452	Polly's_	Plymouth	мі		48170	MI-Sou_	Barney Barber	Co	de Changes	
7155		10/26/2	2010		М	RS	3/	24/20	11 9:00 A	M		2167	Jenny B.	Holtville	CA		92250	CA-Sou	Ben Bainbridge	Low	Battery	
7156		10/28/2	2010		М	RS	3/	21/20	11 10:00 /	٨M		3333	Michael	Plymouth	MI		48170	CA-Sou	Bailey Barr	AC	Power Failure	
7157		10/29/2	2010		М	OP						9020	WORL	Los Angeles	CA		90021	WPB	Barney Barber	AC	Power Failure	
7164	-			-	u_	OP	3/	24/20	11 9:00 Al	vi		3621	Ashley,	Husting		i		CA-Sou	Bailey Barr	Key	pad Trouble	
									44.4.00 P	M_		91.20								Kev	pad Trouble	

Queue Filter Group by Technician

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View	Service Options		Queue			
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Navigation			Arrangement			
Technician A						
+l Technician : (5 item	la.					
⊥ Technician : Barney	Barber (1 item)					1
🖃 Technician : Cain C	abe (2 items)					
Ticket △	∽ Created On	V So	cheduled	V PV	ST 🔽	Account
7126	03/15/2010	3/3	22/2011 9:00 AM	Me.	SC	CCTV
7174	03/27/2011	3/:	25/2011 9:00 AM	Me.	IP	3611
Count	= 2					
🖭 Technician : Edgar I	Eden (2 items)					



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.

B	+ =		Ser	vice Ticket Ç	ueue C	ptions					Sedo	onaService -	CJM Sec	urity 1.0.0	.16					- 0
	View	Service Option	is	Que	eue															
		1 📰				0	883	1	MI-South	-	۵ 🏹	🕕 Warning	g Count =	11 Tick	ets On Site	6	Open Customer			-
						-	30	9	Display	Group Technicia	ns 🔻	Warning Lis	st 👻	Tick	iets List 💌	Tic	tket	66		
Calenda	r Bar	ay Day	week	To r	eturn	to the un-fi	iltered	ntments	V Ove	erride Display Gr	oup									
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Techr	ician 🔺 🔵				the g	jray filter ba	ır.	Januar												
± Techn	cian : (4 items			_	-			-												
🖃 Techn	cian : Bailey E	arr (3 items)																		
译 Ti		♥ Created		V PV	ST					V Name N	7 City			∽ Zip/Po	at 🐨 SvcC	0 V I		💎 Sub F	Pr 🐨 Servic 🐨	Route
71	56	10/28/20	10	Me	RS	3/21/2011	10:00 AM		3333	Michaels	Plymo	outh	М	48170	CA-So	uth /	AC Power Failure		T&M Intr	
71	64	01/12/20	111	Me	OP	3/24/2011	9:00 AM		3621	Ashley,	Hunti	ngton Beach	CA	92647	CA-So	uth I	Keypad Trouble		T&M Intr	B2
71	68	03/24/20	11	Me	OP	3/24/2011	1:00 PM		9138	Ashley,	Hunti	ngton Beach	CA	92649	CA-So	uth	Keypad Trouble		Time an	
	Count	= 3																		
(±) echn	cian : Barney	Barber (3 items	s)																	
± Techn	cian : Ben Ba	nbridge (1 item	1)																	
土 Techn	cian : Cain Ca	be (3 items)																		
土 Techn	cian : Edgar E	den (2 items)																		
土 Techn	cian : Egor Ea	rle (1 item)																		
土 Techn	cian : Ralph F	'hillips (1 item)																		



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.

When selecting the *Custom*, from the drop-down list within a particular field of the ticket queue, the *Custom Filter* form will be displayed. 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 City field in the Queue is selected for a Custom filter. We want to see all tickets where the site City is Plymouth or Canton. To produce a list of tickets that meet this requirement, we need to create two rows of conditions and set the Filter Based On 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 selected Plymouth. For the second condition row, in the Operator field, we selected Equals and in the Value field we selected Canton.





Customer Search Configuration

A great new feature of SedonaService allows each User to organize the Customer Search form according to their specific preferences. When a User logs into the SedonaService application, whatever configuration settings were selected, will be remember the next time the User logs into the application.

Customer Search Configuration Options

- Fields to be displayed in the Customer Search results
- Arrangement of fields in the Customer Search results

To configure the Customer Search form, follow the steps below and on the following pages.

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





You must first perform a Customer Search to display the fields within the results area. Select a Search Criteria option, then enter a search value in the search text box, then press the green search arrow.

🔇 Customer Search											_ 🗆 ×
🞢 Search Criteria 🛛 —											
C Customer #	C System	Account					Branch Selection				
Name	🔿 Job Nur	mber	Select 🔽	Branch	Description	Inactive					-
C Address	O Service	Ticket		CA	California	N					
C Telephone	O Invoice	#		CHI	CHI	N					
C Bill Contact	C Credit #		N V	FI	FI	N					
C Site Contact	C Check 1	ŧ		ISI	ISI	N					-
							4			6	
System Level		(johnson							(<u>⇒</u>)
Show Cancelled											
		Customer					Bill To				
i ^書 Number	Name	Customer Type	Branch	Status	Bill /	Address 1	Bill Address 2	Bill Address 3	Site Name	Site Number	Site.
10059	Johnson, Micha	Residential	CA	AB	325	Lake Road			Johnson, Micha_	1	325
10059	Johnson, Michael	Residential	CA	AR	325	Lake Road			Johnson, Michael	1	3251
9005	Johnson, Amanda	Residential	PA	AR	452	2 Wheaton			Johnson, Amanda	1	4522
9028	Subway Sandwi	Restaurant	CA	AR	133	62 Magnolia			Subway Sandwi	1	1336
9041	Carolyn Johnson	Residential	CA	ANR	267:	2 Hans Lane			Carolyn Johnson	1	2672
•											F
									0	Select 😫	Close

Configuring Customer Search Fields

To select which Fields to display in the Customer Search results, click on the Field Chooser button located in the upper left corner of the Customer Search results area.

	Customer #	C System	Account					
	Name	🔿 Job Nur	mber	Select 🔽	Branch		Description	
	C Address	C Service	Ticket	•	CA		California	
	C Telephone	C Invoice	#		CHI		CHI	
	C. Bill Contact	C Credit #			UL I EI		ULI FI	
	C Site Contact	C Check i	+	V V	ISI		ISI	٩.
	_							_
	🗹 System Level			Johnson				
	Show Cancelled							
			Customer					
f	Number	Name	Customer Type	Branch		Status	E	Sill Add
•	10059	Johnson, Micha_	Residential	CA		٩R	3	25 La
	10059	Johnson, Michael	Residential	CA	,	٩R	3	25 La
	9005	Johnson, Amanda	Residential	PA	1	٩R	4	522
	9028	Subway Sandwi	Restaurant	CA	,	٩R	1	33
	9041	Carolyn Johnson	Residential	CA	1	ANR	2	61



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, 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.

Field (hooser 🛛 🛛
	Bill Address 1
	Bill Address 2
	Bill Address 3
	Branch
	Customer Type
	Name
	Number
	Site Address 1
	Site Address 2
	Site Address 3
	Site City
	Site Name
	Site Number
	Status
	System Account
∇	System Code



Configuring Customer Search Field Arrangement

Once the desired Fields have been selected, you may now rearrange the fields and width of the fields to your preference. You may drag individual fields or an entire group to the preferred location.

Hold down the left button of the mouse while positioned on one of the field headers, and then drag the field or field group to the desired location. Release the mouse when you reach the preferred location.

💭 Search Criteria												_ _ 2
C Customer #	C System	Account					Branch S	election				
 Name Address 	C Job Nu C Service	mber e Ticket	Select 🔽	Branch CA	Description California	Inactive N						-
C Telephone C Bill Contact	C Invoice C Credit ‡	; # ‡	 <th>CLT FL</th><th>CLT</th><th>N N</th><th></th><th></th><th></th><th></th><th></th><th>-</th>	CLT FL	CLT	N N						-
C Site Contact	C Check	#		ISI	ISI	N						-
Show Cancelle	ed		Jonnson									₹
₹ Number	Name	Customer Tupe	Branck	Status	Si	te Number	Site	Site Address	Site	Site Address 3	Site Citu	Bi
9041 9005	Carolyn Johnson Johnson, Amanda	Residential Residential	CA	ANR AR	1		Carolyn Johnson Johnson, Amanda	2672 Hans Lane 1522 Wheaton			Riverside Auburn Hills	26 45
10059 9028	Johnson, Michael Subway Sandwi	Residential Restaurant	CA CA	AR AR AR	1 1 1		Johnson, Michael Subway Sandwi	325 Lake Road 325 Lake Road 13362 Magnolia			Loma Linda Riverside	32 32 13



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.

Customer #	C System Accou	nt				Branch Selection					
Name	O Job Number	Select [Branch	Description	Inactive						-
C Address	C Service Ticket		CA	California	N						
C. Telephone	C. Invoice #	V	CHI	CHI	N						
	C o n.e		CLT	CLT	N						
Bill Contact	C Lredit #		FL	FL	N						
👌 Site Contact	C Check #		ISI	ISI	N						
			1							1	
	Ste		S	ystem		Cus	tomer				E
Site Name	Site Site	Site City	System Account	ystem System Code	Number	Cus Name	tomer Customer Type	Branch	Status	Bill Address 1	E Bill Add
Site Name Johnson, Micha	el 325 Lake Road	Site City Loma Linda	System Account 8797	ystem System Code Intrusion	Number 10059	Cus Name Johnson, Micha	tomer Customer Type Residential	Branch CA	Status AR	Bill Address 1 325 Lake Road	Bill Add
Site Name Johnson, Micha Johnson, Michael	Site Site 325 Lake Road 325 Lake Road	Site City Loma Linda Loma Linda	System Account 8797 10059	ystem System Code Intrusion Cell Back-up	Number 10059 10059	Cus Name Johnson, Micha_ Johnson, Michael	tomer Customer Type Residential Residential	Branch CA CA	Status AR AR	Bill Address 1 325 Lake Road 325 Lake Road	E Bill Add
Site Name Johnson, Michae Johnson, Michael Johnson, Amanda	el Site 325 Lake Road 325 Lake Road 4522 Wheaton	Site City Loma Linda Loma Linda Auburn Hills	System Account 8797 10059 9005-001	ystem System Code Intrusion Cell Back-up Intrusion	Number 10059 10059 9005	Cus Name Johnson, Micha_ Johnson, Michael Johnson, Amanda	tomer Customer Type Residential Residential Residential	Branch CA CA PA	Status AR AR AR	Bill Address 1 325 Lake Road 325 Lake Road 4522 Wheaton	Bill Add
Site Name Johnson, Michae Johnson, Amanda Johnson, Amanda Subway Sandwich	Site Sit	Site City Loma Linda Loma Linda Auburn Hills Riverside	System Account 8797 10059 9005-001 365-3691	ystem System Code Intrusion Cell Back-up Intrusion Intrusion	Number 10059 10059 9005 9028	Cus Name Johnson, Micha Johnson, Michael Johnson, Amanda Subway Sandwi	tomer Customer Type Residential Residential Residential Restaurant	Branch CA CA PA CA	Status AR AR AR AR AR	Bill Address 1 325 Lake Road 325 Lake Road 4522 Wheaton 13362 Magnolia	Bill Add

Once all configuration settings have been completed, exit out of the Customer Search to save your preferences. Click on the "X" in the upper right corner of the Customer Search form to exit.

ustomer Search												_
🗑 Search Criteria 🛛												
Customer # C System Account							Branch Selection					15
Name	C Job Number		Select 🔽	Branch	Description	Inactive					1	
C Address	C Service Ticket		~	CA	California	N						
Telephone	C Invision #		~	CHI	CHI	N						
releprione	C invoice #		~	CLT	CLT	N						
Bill Contact	C Credit #		•	FL	FL	N						
Site Contact	C Check #	L	V	ISI	ISI	N						
System Level		ŀ	Johnson									
Show Cancelled												
Site				S	ystem	Customer						
Site Name	Site Address 1	Site City		System Account	System Code	Number	Name	Customer Type	Branch	Status	Bill Address 1	Bill Ad
Johnson, Michael	325 Lake Road	LomaLi	nda	8797	Intrusion	10059	Johnson, Micha	Residentia	CA	AR	325 Lake Road	
Johnson, Michael	325 Lake Road	Loma Lin	da	10059	Cell Back-up	10059	Johnson, Michael	Residential	CA	AR	325 Lake Road	
Johnson, Amanda	4522 Wheaton	Auburn H	lills	9005-001	Intrusion	9005	Johnson, Amanda	Residential	PA	AR	4522 Wheaton	
Subway Sandwiches	13362 Magnolia	Riverside		365-3691	Intrusion	9028	Subway Sandwi	Restaurant	CA	AR	13362 Magnolia	
Carolyn Johnson	2672 Hans Lane	Riverside		71255	Intrusion	9041	Carolyn Johnson	Residential	CA	ANR	2672 Hans Lane	
Caluiyn Jonitson	2072 Harris Lane	niverside		71200	THUUSION	3041	Carolyn Sorinson	nesilentiai			2072 Harrs Larte	
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