



14th ANNUAL USERS CONFERENCE
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Service 101 – Part 1

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SedonaSchedule

SedonaSchedule is comprised of two main elements; the Schedule Board and the Ticket Queue. This session will focus on understanding and configuring the Schedule Board.

SedonaSchedule – Schedule Board

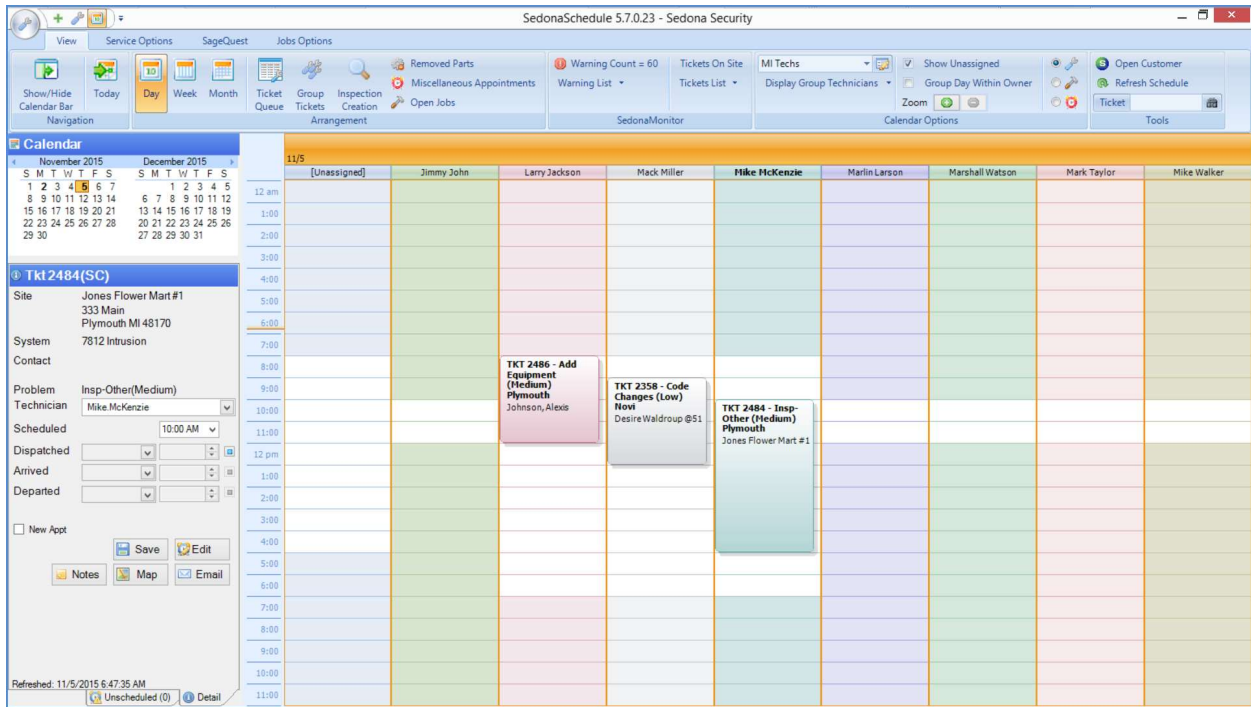
The **Schedule Board** is used to create and manage Technician Appointments. Ticket, Job and Miscellaneous appointments that have been created appear on the Schedule Board.

There are many options and features within the Schedule Board including:

- Creating and Managing Display Groups
- Creating Tickets
- Generating Inspection Tickets
- Scheduling Technician Appointments (Tickets, Jobs, Miscellaneous)
- Dispatching Technician Appointments (Tickets & Jobs)
- Rescheduling Appointments
- Deleting Appointments
- Clock-out & Clock-In on an Appointment

Schedule Board Features/Options

The Schedule Board consists of several components; a Ribbon at the top, the Calendar/Detail Viewer shown on the left and the Display area on the right (Scheduled Appointments). Information that is displayed within Display area is controlled by which option the User clicks on the Ribbon.



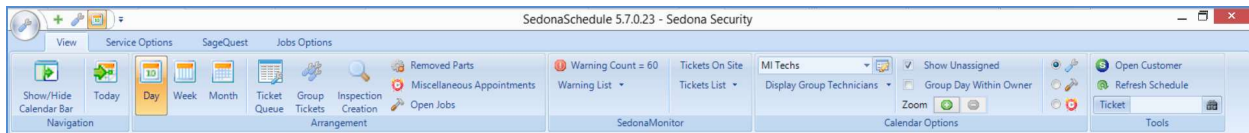
Notes

Terminology

To be able to understand the concepts and instructions provided for SedonaSchedule, It is important to understand the appropriate application terminology. When contacting the SedonaOffice Support Team, it is important to use the correct terminology for faster assistance from a support representative.

The Ribbon

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



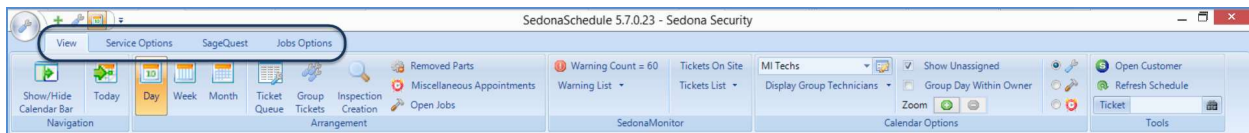
Ribbon Groups

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



Menu Tabs

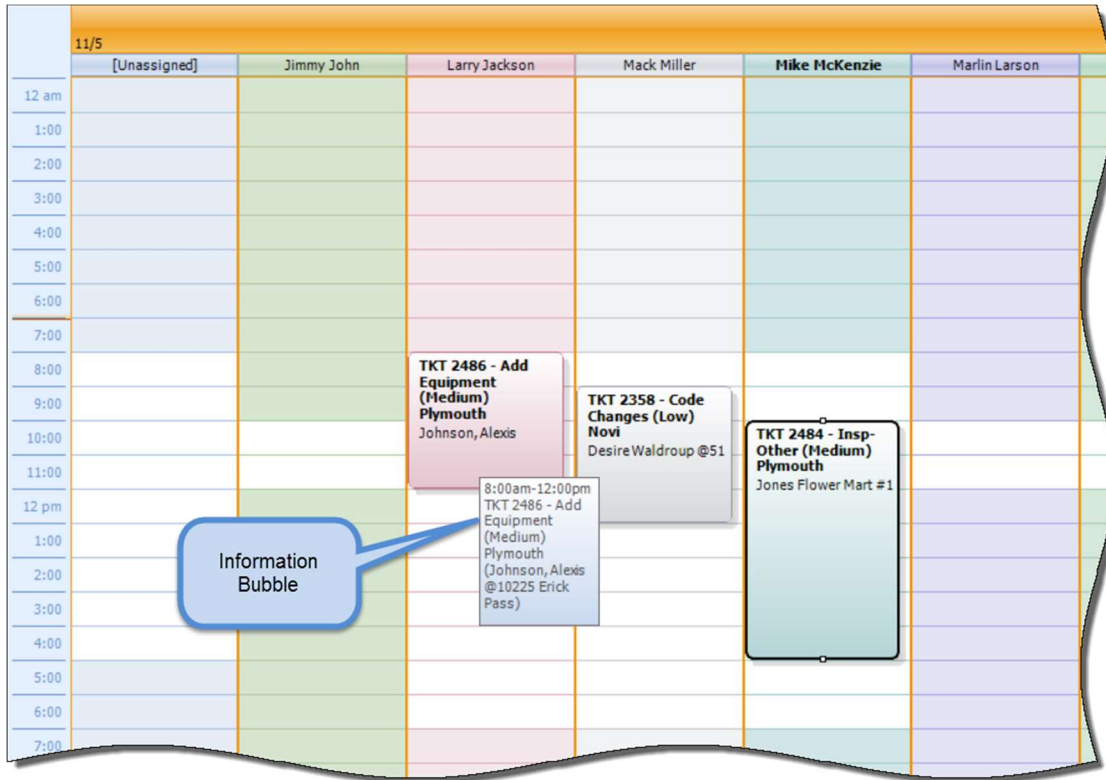
Menu Tabs appear throughout the SedonaSchedule application and contain additional options from which to select. The Menu Tabs appear above the Ribbon.



Notes

Information Bubble

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

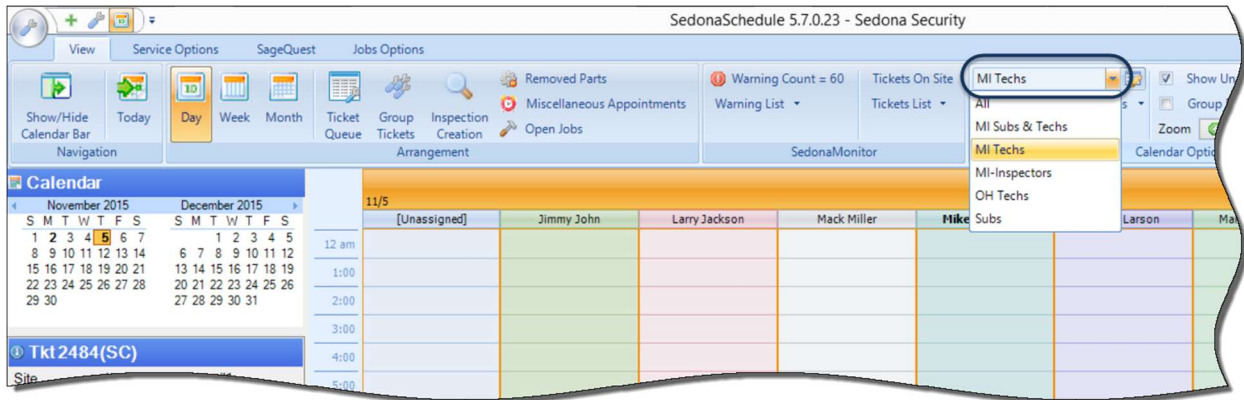


Notes

Display Group

A Display Group is a grouping of one or more Technicians. Within the Schedule Board, you are able to choose to view a single Display Group or all Technicians within the Company. 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 easier.



Notes

The Ribbon Features

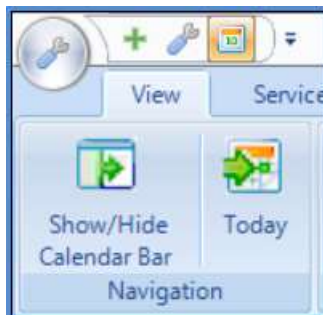
The Ribbon, which is comprised of multiple Ribbon Groups, displays and controls the options for navigating to various functions within SedonaSchedule.



Navigation Ribbon Group

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

- **Show/Hide Calendar Bar** – This is a toggle button which will display or remove the Calendar Bar from view.
- **Today** – selecting this option will outline the current system date in red on the Calendar.

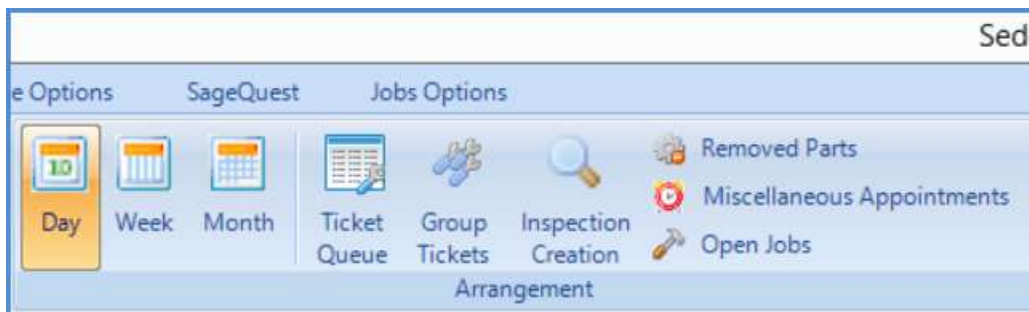


Notes

Arrangement Ribbon Group

This Ribbon Group contains several options as listed below.

- **Day, Week, Month** - selecting one of these options controls the period of time that is displayed in the Schedule Board.
- **Ticket Queue** - selecting this option will display the Ticket Queue.
- **Group Tickets** - selecting this option will display the list of Group Tickets. This feature is not installed unless your company requests activation.
- **Inspection Creation** - Clicking this button will open options for viewing a list of upcoming or past due inspections. New Inspection Tickets are also generated from this option section.
- **Removed Parts** - Selecting this option displays a list of parts that were replaced on tickets. By highlighting a single date or date range on the Calendar will display a list of all parts replaced within the selected date range.
- **Miscellaneous Appointments** - Selecting this option will display a Menu Tab for Miscellaneous Appointments. Selecting this Menu Tab will display a new Ribbon with options for managing, creating, editing and purging Miscellaneous Appointments. Miscellaneous appointments are used to block out time on the Schedule Board where a Technician is not available to be scheduled.
- **Open Jobs (List)** - Clicking this button will display the list of Open Jobs. Job Appointments are created from the Open Jobs List.



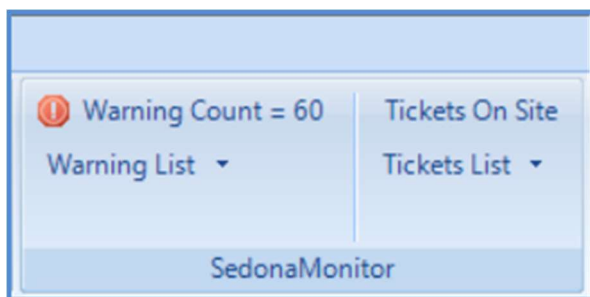
Notes

SedonaMonitor Ribbon Group

The SedonaMonitor Ribbon Group contains critical information for managing Tickets and Technicians. If your company is Live Dispatching Technicians, then this information will be very valuable.

This ribbon group is comprised of four options; *Warning Count*, *Warning List*, *Tickets on Site* and *Ticket List*.

- **Warning Count** – The Warning Count is for Display only; if any scheduled Appointments have not been dispatched by the current date/appointment time, those tickets will be included in the Warning Count. This applies to all types of Tickets.
- **Warning List** – If there is a number displayed to the right of the Warning Count, clicking on the Warning List will display the list of tickets where the Technician has not yet been dispatched by the date/time set for the appointment.
- **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, clicking an appointment within the Schedule Board will display a count of any other open tickets for the same site.
- **Ticket List** – If a count is displayed next to the *Tickets On Site*, clicking on this option will display a list of the other tickets where a Technician is currently on site for the same site.

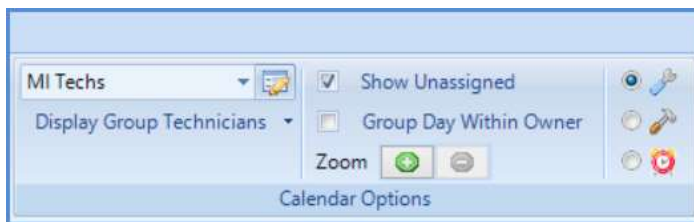


Notes

Calendar Options Ribbon Group

This Ribbon Group contains options for viewing the Schedule Board, as well as shortcut methods for creating new appointments. Several options are contained within this Ribbon Group which are listed below with brief descriptions.

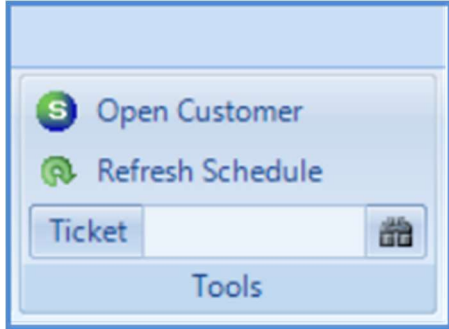
- **Display Group Selector** – Selects which group of Technicians will be displayed within the Schedule Board.
- **Display Group Setup** - Clicking on the icon to the right of the Display Group will open the Display Group setup form; Display Groups are added and maintained from this form.
- **Display Group Technicians** – Displays in a drop-down list, the Technicians that are members of the currently viewed Display Group.
- **Show Unassigned** – Displays or hides the Unassigned Technician as the first column within the Schedule Board.
- **Group Day Within Owner** - Allows you to see multiple dates for Technicians grouped together.
- **Zoom Buttons** - Controls the time slot view within the Schedule Board.
- **New Appointment Radio Buttons**
 - **Wrench** - When selected, double-clicking on a time slot within the Schedule Board will create a new ticket and schedule a Technician Appointment in one step.
 - **Hammer** - When selected, double-clicking on a time slot within the Schedule Board will open the list of open Jobs from which to select for scheduling an Appointment.
 - **Clock** - When selected, double-clicking on a time slot within the Schedule Board will open the Miscellaneous Appointment scheduling form.



Notes

Tools Ribbon Group

This Ribbon Group contains options to quickly locate a Ticket and to open a customer record when highlighting a particular ticket from the Ticket Queue.

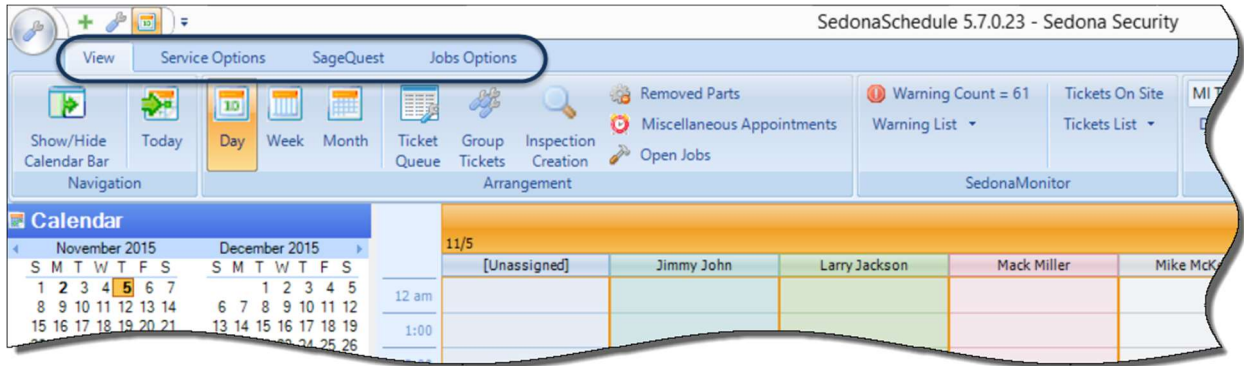


Notes

The Menu Tabs

There are four possible Menu Tabs displayed at the top above the Ribbon:

- View
- Service Options
- SageQuest
- Job Options

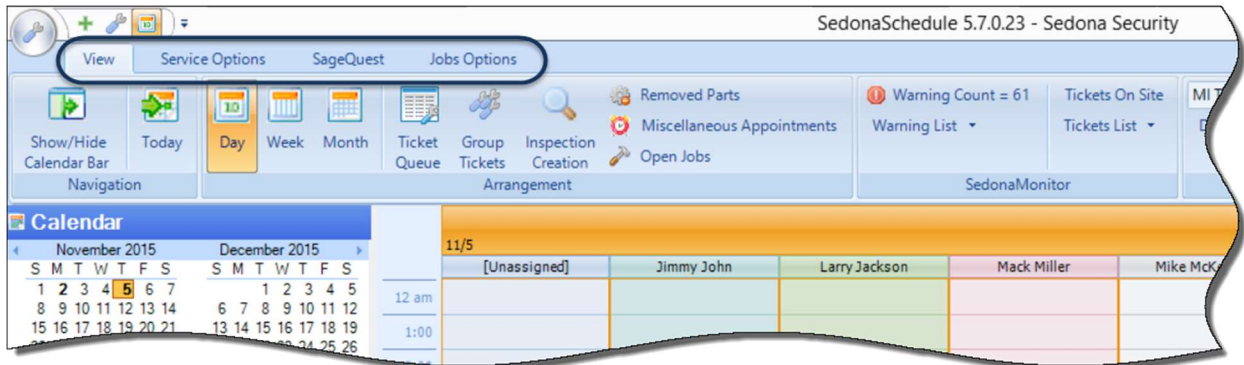


Notes

A large empty rectangular box intended for user notes.

View Menu Tab

Clicking on the View menu tab will return you to the SedonaSchedule main Ribbon.



Notes

Service Options Menu Tab

The Service Options Menu Tab opens a new Ribbon which contains various setup options; some that affect all Users globally and some that are unique to the individual User making a selection. User permissions in SedonaSetup are required to have access to some of the options on this ribbon.

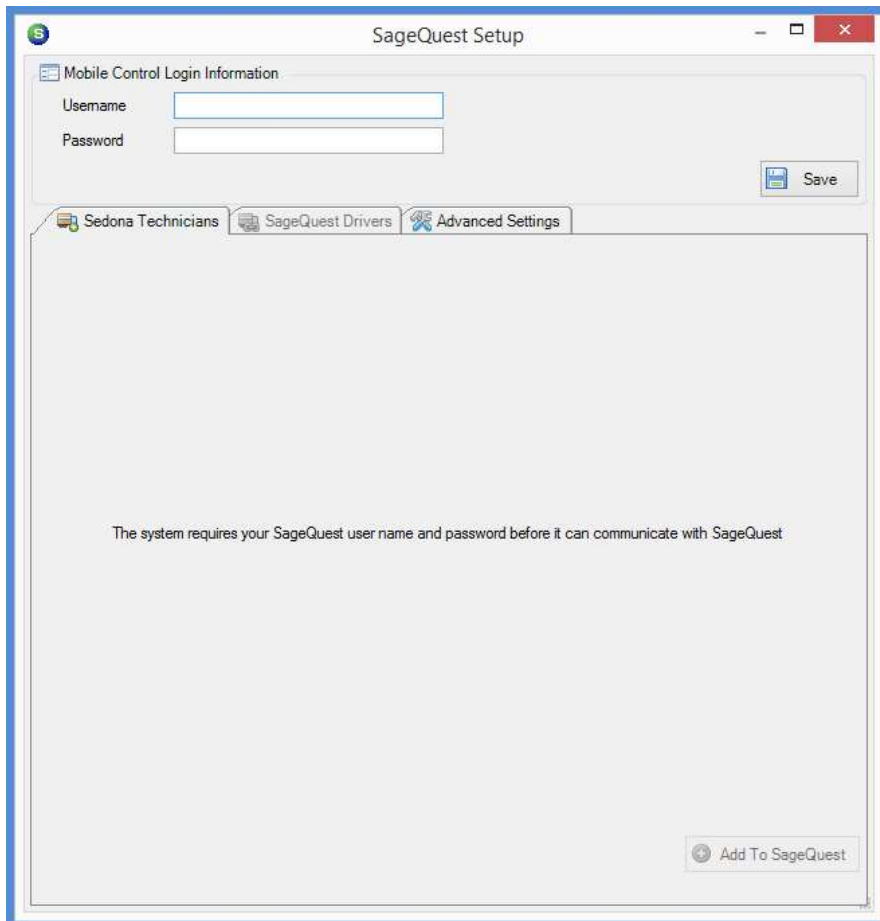


- **Appointment Types** – This option opens the Appointment Type setup list. These appointment types are used only when creating or editing a Miscellaneous Appointment on the Schedule Board.
- **Parts Warehouse** – This option toggles whether Parts used on a Ticket will automatically be issued from the Warehouse assigned to the Technician with an appointment on the ticket or the User would be able to select the desired warehouse for the parts issue.
- **Auto Refresh** – This option controls whether information displayed on the Schedule Board will automatically refresh every few seconds or the User will manually refresh the Schedule Board as desired. The setting of this option is User specific.
- **Map Type** – This option allows the individual User to select which web mapping program will be used when plotting a Technician’s route for the day. This setting is User specific.

Notes

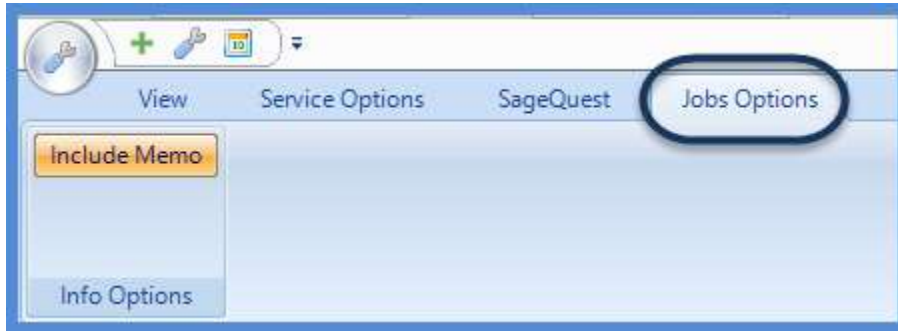
SageQuest Menu Tab

This menu tab is only displayed if your company has subscribed to Fleetmatics GPS tracking (formerly known as SageQuest). The options on this menu tab contain setup options for the Fleetmatics interface.



Job Options Menu Tab

The Job Options Menu Tab opens a new ribbon, Info Options. The only option on this ribbon is Include Memo – this is a toggle button. When the toggle button is illuminated, if any text was entered into the Notes field on the Job Work Order form, that information will be displayed in the Job Appointment on the Schedule Board.



Notes

The Calendar/Detail Viewer

The Calendar

The Calendar controls which day or days will be shown in the display area. When highlighting multiple days within the calendar (either consecutive or non-consecutive), the display area will populate with the dates selected.

Any date on the Calendar which is shown with a bold font, indicates there is at least one appointment scheduled for that date; either a Technician Appointment for a Job or Ticket or a Miscellaneous Appointment.

The screenshot displays the SedonaSchedule 5.7.0.23 interface. At the top, there is a menu bar with 'View', 'Service Options', 'SageQuest', and 'Jobs Options'. Below this is a navigation area with icons for 'Show/Hide Calendar Bar', 'Today', 'Day', 'Week', and 'Month'. The main area is divided into three sections: a calendar, a detail view, and a Gantt chart.

Calendar: Shows a calendar for November and December 2015. The date 11/12 is highlighted with a blue arrow. The days of the week are labeled S, M, T, W, T, F, S.

Detail View (Tkt 2486(SC)): Provides information for a specific ticket. The site is 'Johnson, Alexis' at '10225 Erick Pass, Plymouth MI 48170'. The system is '255-01 Intrusion'. The technician is 'Larry Jackson'. The problem is 'Add Equipment(Medium)'. The scheduled time is '08:00 AM'. There are buttons for 'Save', 'Edit', 'Notes', 'Map', and 'Email'. A 'New Appt' checkbox is also present.

Gantt Chart: A time-based view showing appointments for the date 11/12. The chart is divided into columns for technicians: '[Unassigned]', 'Larry Jackson', 'Mark Taylor', and 'Jimmy J...'. The time slots range from 12:00 am to 11:00 pm. A green box highlights an appointment for 'TKT 2486 - Add Equipment (Medium) Plymouth Johnson, Alexis' starting at 8:00 AM. A pink box highlights an appointment for 'JOB 1118 - R-Intrusion (Parts) Plymouth Memo: Must wear booties while working in home. Johnson, Alexis' starting at 12:00 pm.

Notes

The Detail Viewer

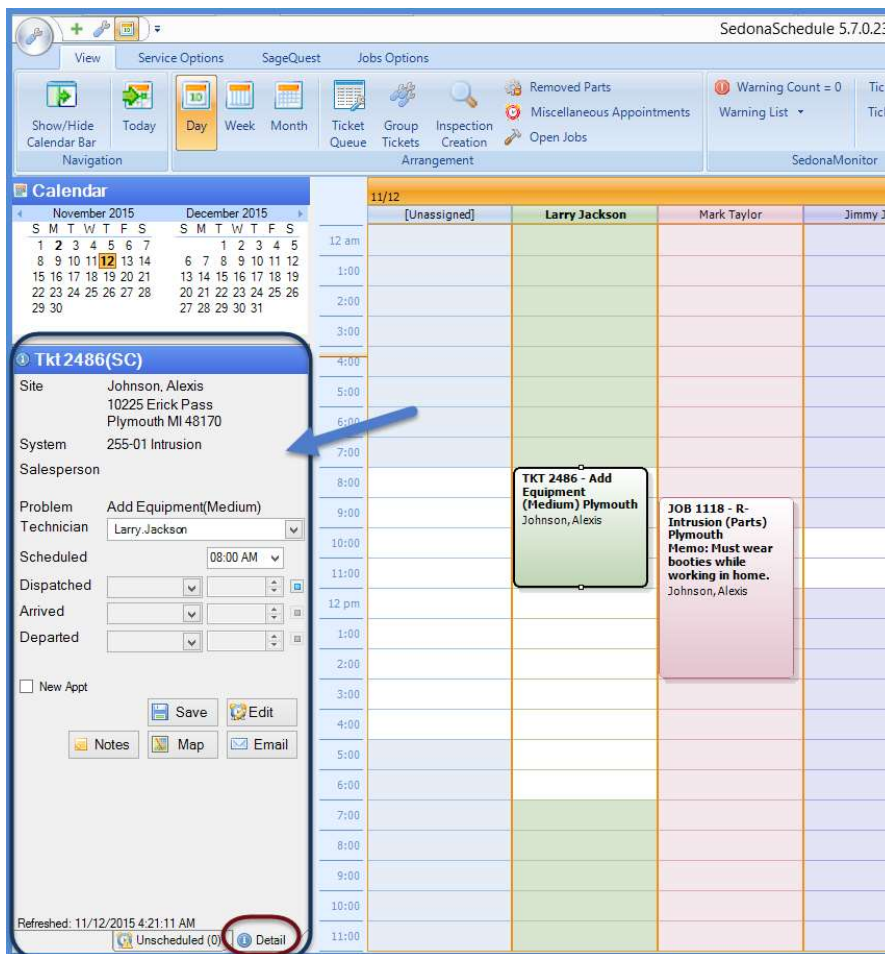
The Detail Viewer contains two tabs (at the bottom); Detail and Unscheduled (Tickets).

Detail Tab

When clicking on an appointment within the display area, summary information for the Ticket or Job appointment is shown in the Detail tab.

Five option buttons are available on the Detail tab when clicking on an Appointment:

- **Save** – you are able to change the Technician or appointment time, then click the Save button to reschedule the appointment.
- **Edit** – this button will open the Dispatch form for viewing or making changes.
- **Notes** – this button will display any notes entered for the Job or Ticket (view only mode)
- **Map** – this button will the Technician’s route for the day.
- **Email** – if an email or text address was setup on a Technician’s setup (SedonaSetup), an email will open with Job to Ticket information that you may send to the Technician.

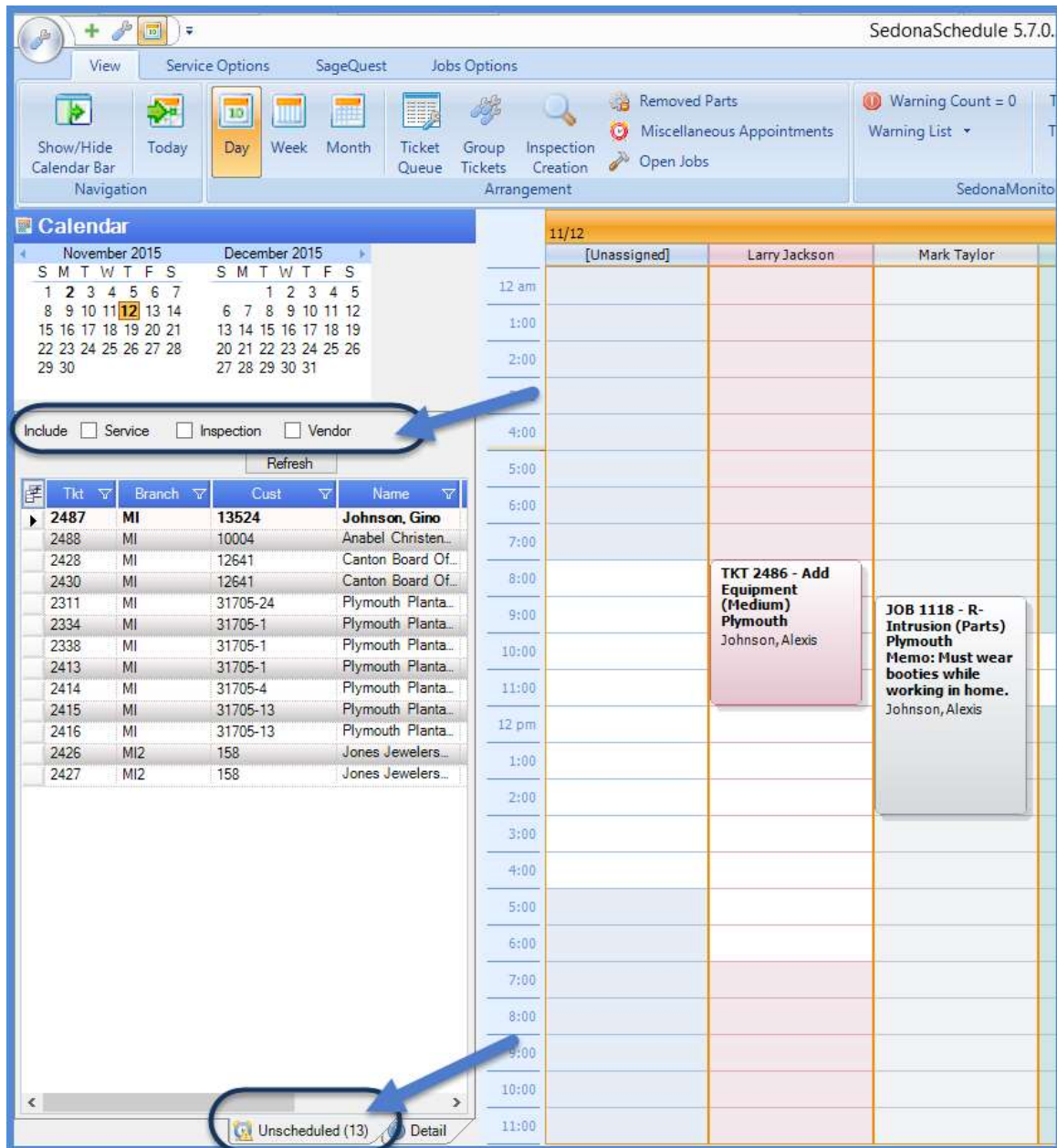


Notes

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for taking notes during the conference.

Unscheduled Tab

The Unscheduled tabs displays Tickets that do not have an appointment scheduled. The three checkboxes at the top of the list control which types of unscheduled tickets are displayed within the list. Tickets may be dragged and dropped directly onto the schedule board to create an appointment.



Notes