

SedonaOffice

13TH ANNUAL USERS CONFERENCE

January 12-14, 2015 | Coronado Bay, CA

SedonaOffice 101 Service Management II

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Session Overview

This session is designed to explain the basic functionality of SedonaSchedule. This session will cover creating new tickets, scheduling, dispatching, managing tickets, etc. The ***SedonaSchedule Functionality Reference Guide*** will be referred to throughout this session. Listed below are the topics and pages to which the class presenter will be referring.

Major Topics covered during this class include:

Topic	Page Numbers
Ticket Types / Appointment Types	7
How/Where to begin a new Ticket	10 - 12
Creating a new Ticket	13 - 24
Appointment Scheduling <ul style="list-style-type: none"> • From a Ticket • From the Schedule Board 	25 – 27 28 - 29
Appointment Dispatching	35 - 44
Ticket Parts <ul style="list-style-type: none"> • Adding Parts to a Ticket • Part Replacements • Ordering Parts (from Ticket) 	45 – 47 48 – 49 52 - 54
Ticket Notes	55
Ticket Journal	56 – 59
Review Ticket / Invoicing / Close Ticket	60 – 70
Schedule Board – Other Features <ul style="list-style-type: none"> • Firm Appointments • Clock-out & Clock-in • Copy/Paste Appointments 	99 - 101 102 - 104 105