# 2017

## 15th Annual

# SOUC

January 22-25, 2017    Marco Island, FL

# Service

**PERENNIAL SOFTWARE**
Makers of SedonaOffice and AlarmBiller

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## Service Overview

This session is designed to communicate concepts and provide a deeper knowledge of some of the advance features available within SedonaSchedule.  The topics that will be covered within this document are:

- Costing Methods
- Costing Setup
- Using WIP
- Document Management
- Service Reporting

## Costing Methods

SedonaOffice offers two methods for recording expenses incurred on Service and Inspection Tickets:

- Expense Immediately
- Use WIP (Work-In-Process)

### Expense Immediately

Using this method, when any expenses are linked to a Ticket, the expense will post to the designated cost of goods sold or expense accounts at the first opportunity. This would include parts, labor, and miscellaneous expenses. Labor will post when a technician appointment is fully dispatched. Parts will post when a ticket is invoiced or when closed if the ticket is non-billable. Miscellaneous expenses will post immediately when a transaction is saved.

### Use WIP (Work-in-Process)

When a company is setup to use WIP, when an expense is incurred that is linked to a Ticket, the amount will post to a balance sheet account. When the ticket is invoiced or closed [depending on whether the ticket is billable], the amounts posted into WIP will move to the designated cost of goods sold or expense accounts.

### Which Costing Method Should You Use?

There is no right or wrong method; each company needs to determine what will work best within their business structure.

Typically, tickets are opened and closed within a short period of time. When this occurs within the same accounting period, revenue and expenses are properly matched, so there would be no need to use WIP.

Situations where tickets remain open for long periods of time or where the ticket is opened in one accounting period and invoiced/closed in a subsequent period is where revenue and expenses will not be matched in one accounting period.

For companies that do not have a large volume of tickets processed in a given month, income and expense matching is probably not a huge issue. In companies with a high volume of ticket processing and many dollars expensed on tickets, using WIP may be the best solution to avoid spikes in expenses and revenue.

# Costing Setup

Depending on which costing method will be used, make certain all the correct options are set properly in SedonaSetup to ensure expenses post as expected.

There are three basic types of expenses that may post to tickets; parts, labor and miscellaneous expenses.  The expensing method for each expense type is maintained in different areas of SedonaSetup.

## Setup for Expensing Immediately

**Parts Setup**

The setting which controls whether parts will be expensed immediately or use WIP is found on the GL Setup tab of the Service Setup Defaults form – **Use WIP for Service Parts**.

Leave this option **un-checked** so that parts will be expensed immediately.
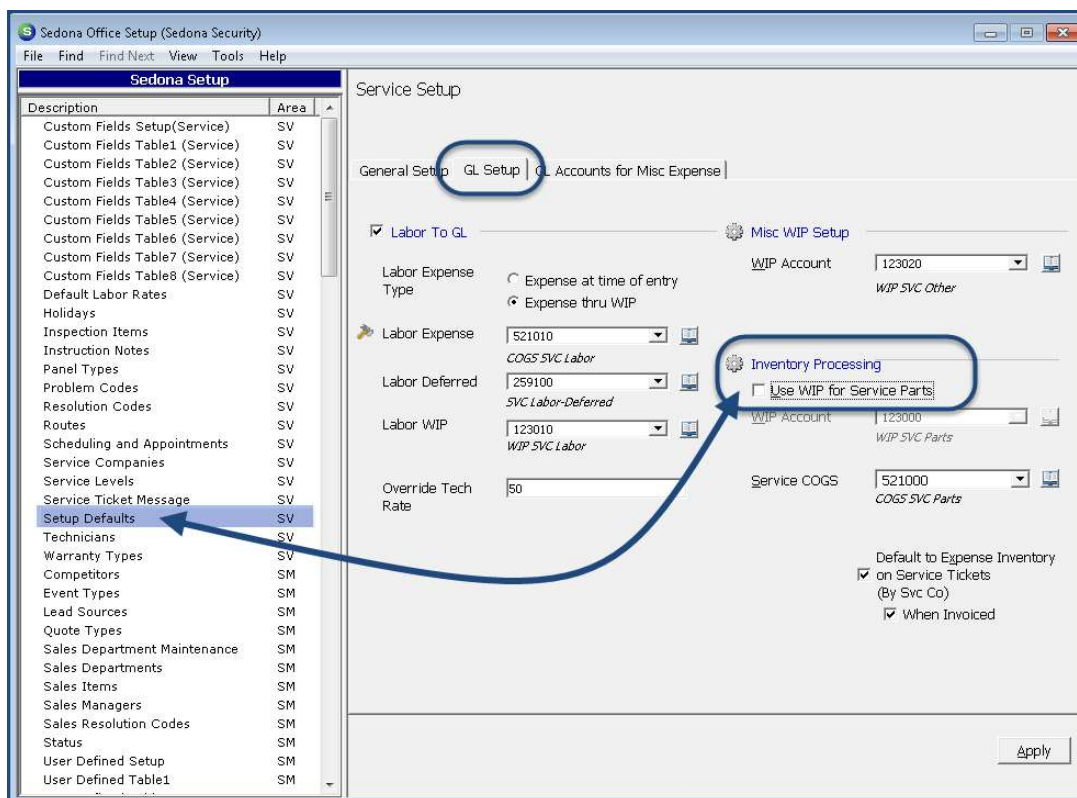


Notes

## Labor Setup

The settings which control whether and how Labor is expensed is found on the Labor Setup tab of the Service Company setup.   If your company is using multiple Service Companies, all of the setups below need to be done on all Service Company setup records.
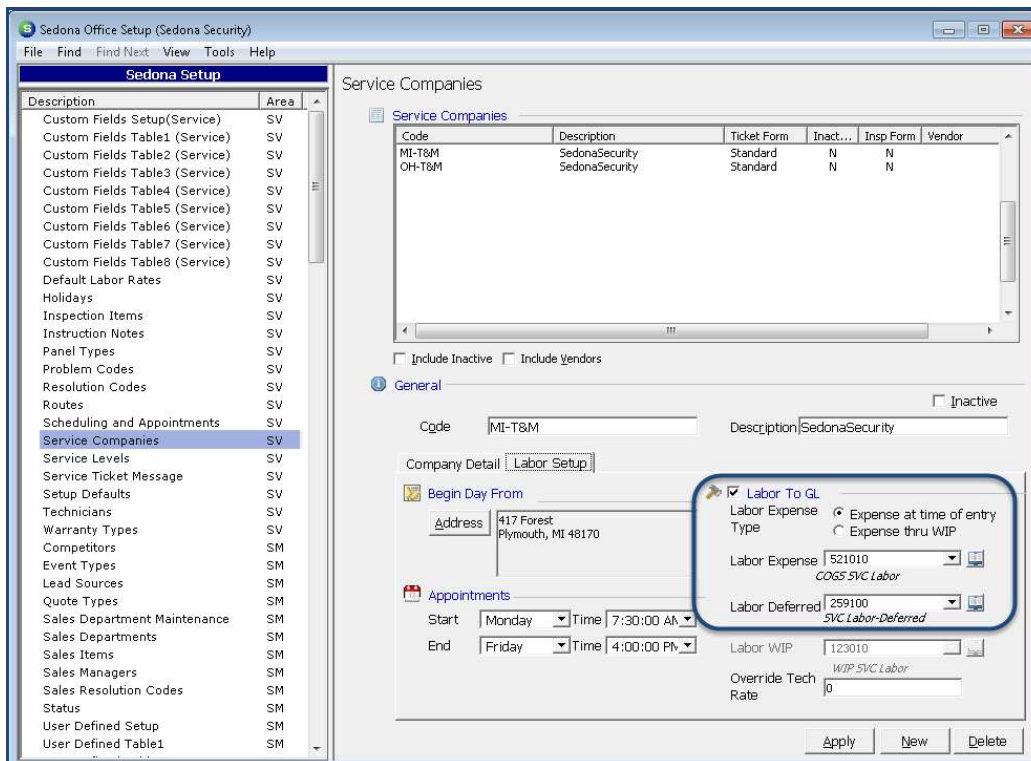
- Labor to GL checkbox
- Expense at time of entry radio button
- Labor Expense [G/L Account] selection
- Labor Deferred [G/L Account] selection

First make certain to check the **Labor to GL** checkbox.

Next select the **Expense at time of entry** radio button.

Next select the **Labor Expense** G/L account that will be used for the cost side of the labor transaction to the general ledger.  This is typically a cost of goods sold type of account.  You should <u>not</u> use the G/L Account normally used when expensing payroll wages.

Next select the **Labor Deferred** G/L account that will be used as the offset to the cost side of the labor transaction to the general ledger.  This is a liability type of account.



Notes

## Miscellaneous Expense Setup

Whether miscellaneous expenses are immediately expensed or use WIP is determined by the Expense Type selected by the user creating the transaction.  If the Expense Type selected by the user is checked to use WIP, then WIP will be used.  The only exception is the Expense Type "O"; when this type is selected, the item will always be expensed immediately.

Make certain the **Use WIP** checkbox is not selected for all of the user defined Expense Types listed below the expense type of TX.

The **Use WIP** setting controls transactions for both Service and Jobs.  If your company is using WIP for miscellaneous expenses for Jobs, but not for Service, then Users should only use the expense type of "O" for all miscellaneous expenses for Service.

Notes

## Setup for using WIP

**Parts Setup**

The setting which controls whether parts will be expensed immediately or use WIP is found on the GL Setup tab of the Service Setup Defaults form – **Use WIP for Service Parts**.

Check this option so that parts will be processed through WIP.  You will also need to select the G/L Account that will be used for WIP Parts.  This is an asset type G/L account.
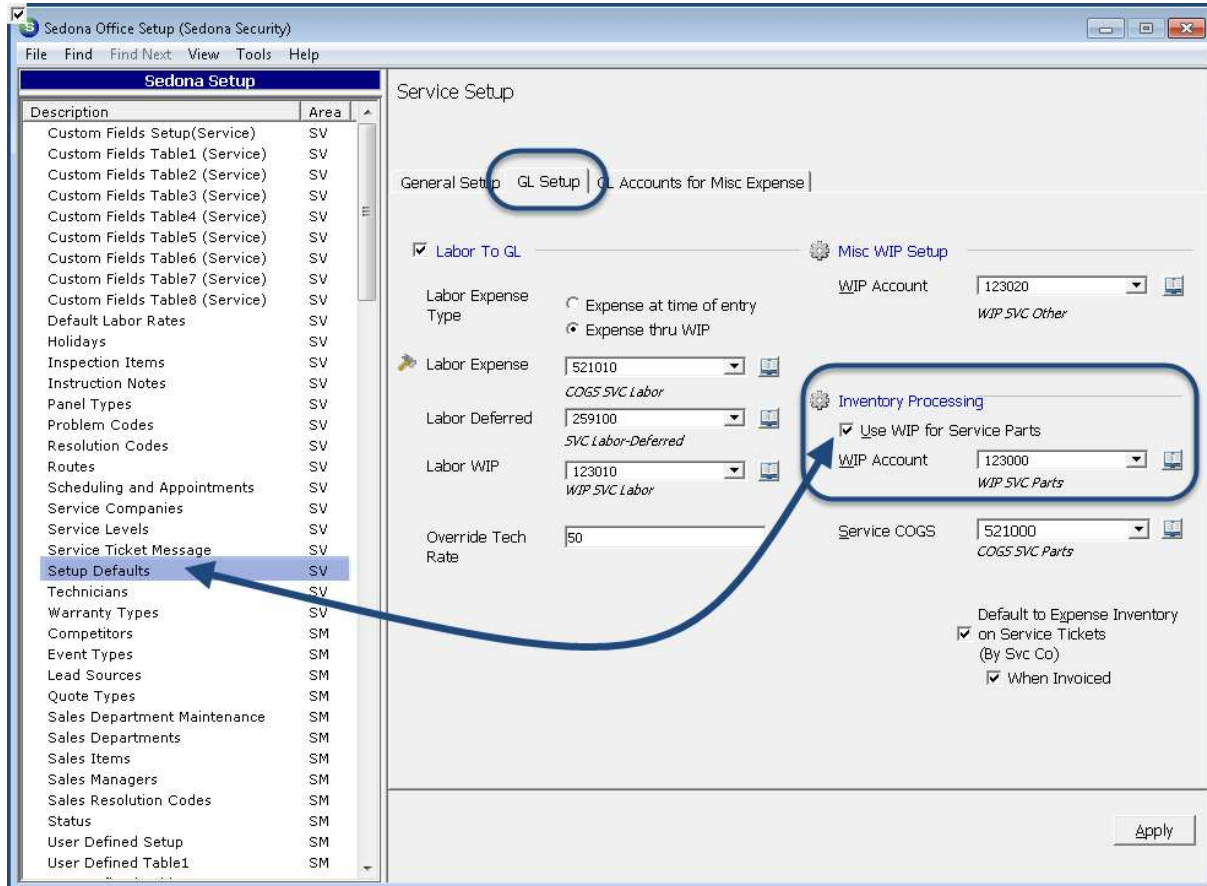


Notes

## Labor Setup

The settings which control whether and how Labor is expensed is found on the Labor Setup tab of the Service Company setup.

- Labor to GL checkbox
- Expense at time of entry radio button
- Labor Expense [G/L Account] selection
- Labor Deferred [G/L Account] selection
- Labor WIP [G/L Account] selection

First make certain to check the **Labor to GL** checkbox.

Next select the **Expense thru WIP** radio button.

Next select the **Labor Expense** G/L account that will be used for the cost side of the labor transaction to the general ledger.  This is typically a cost of goods sold type of account.  You should not use the G/L Account normally used when expensing payroll wages.

Next select the **Labor Deferred** G/L account that will be used as the offset to the cost side of the labor transaction to the general ledger.  This is a liability type of account.

Lastly select the **Labor WIP** G/L account that will be used as the offset to the Labor Deferred account.
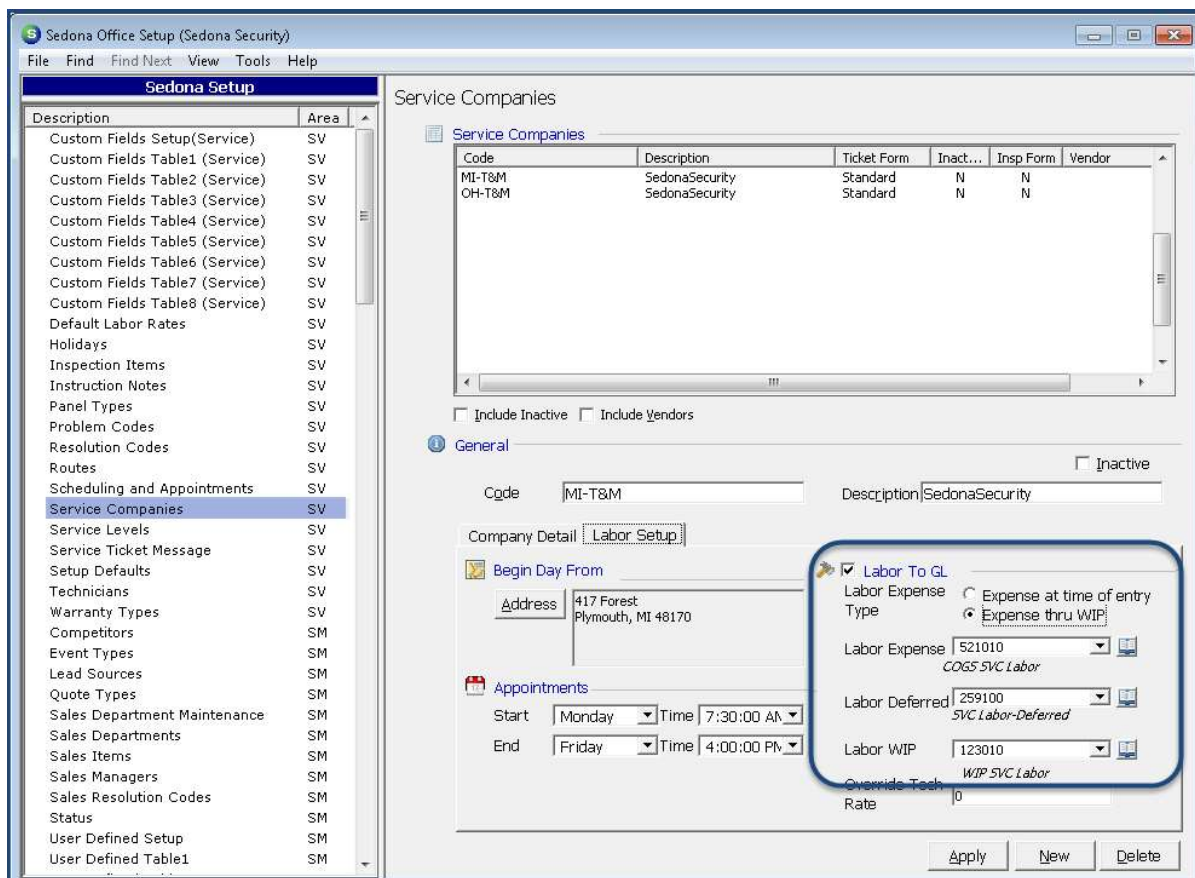
## Miscellaneous Expense Setup

Whether miscellaneous expenses are immediately expensed or use WIP is determined by the Expense Type selected by the user creating the transaction.  If the Expense Type selected by the user is checked to use WIP, then WIP will be used.  The only exception is the Expense Type "O"; when this type is selected, the item will <u>always</u> be expensed immediately.

Make certain the **Use WIP** checkbox is selected for all of the user defined Expense Types listed below the expense type of TX.

The **Use WIP** setting controls transactions for both Service and Jobs.  If your company is not using WIP for miscellaneous expenses for Jobs, but will use WIP for Service, **then you should set up user defined Expense types that will be used exclusively for Service**.

All Miscellaneous Expenses use the same WIP G/L Account number. This account number is setup on the GL Setup tab of the Service Setup Defaults form – **WIP Account**.
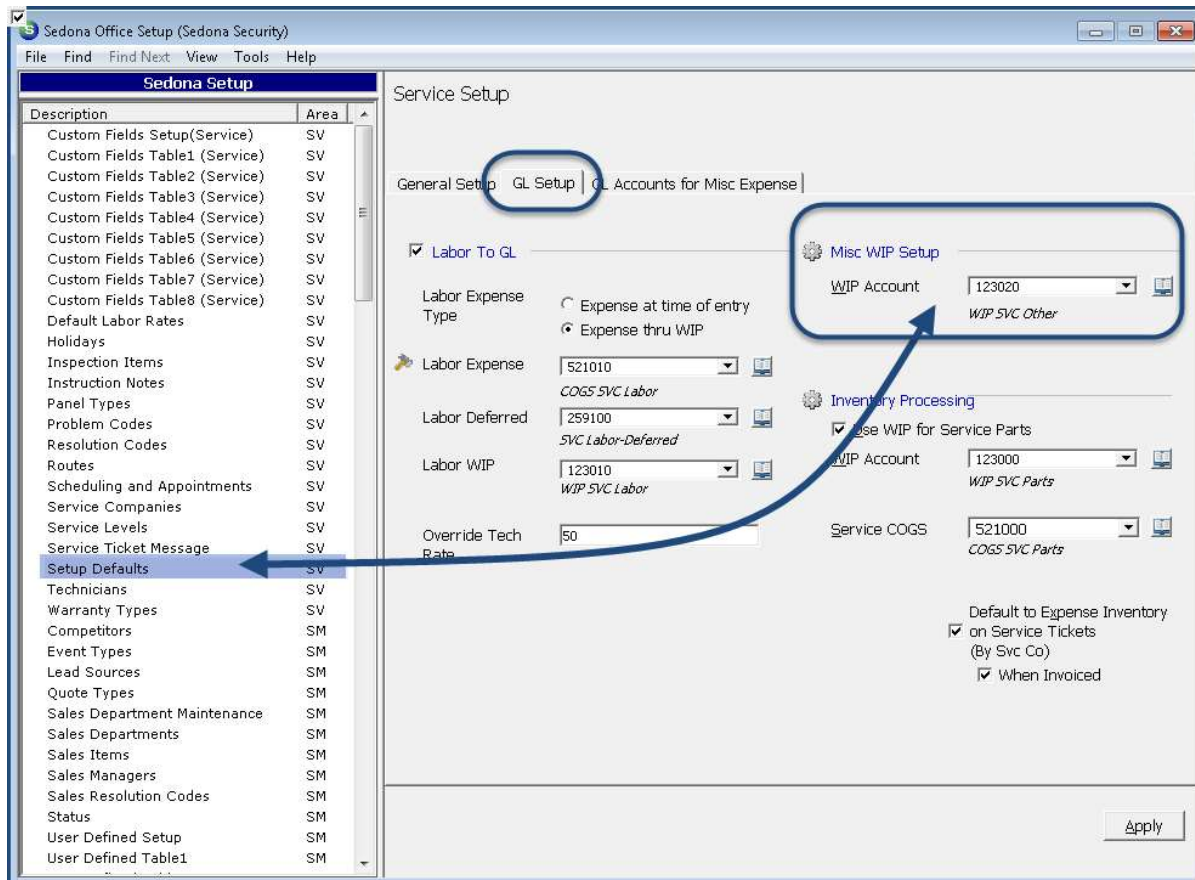


Notes

## Using WIP

When using WIP for Tickets, when a transaction is posted within a Ticket or outside of a Ticket and linking to a Ticket number, expenses will post to an asset account instead of an expense or cost of goods sold account. If a ticket is billable, when the invoice is created within the Ticket, the expenses will move from the WIP accounts and into the appropriate COGS and/or Expense accounts.

We will walk through one ticket to view the various expense related transactions and how they are posted to the ticket as it progresses.

### Part Expenses

Amounts will post to the Parts WIP account when certain actions are performed by a user.

- Issue a Part to the Ticket from an inventory Warehouse
- Put parts on the ticket using the Equipment and Parts form
- Using the FSU, the Technician selects the parts used
- Receive a direct expense purchase order for parts



Notes

## Labor Expenses

Amounts will post to the Labor WIP account when a Technician Appointment is fully dispatched by a Technician using the FSU or by a User in the office manually dispatching the appointment.



| Notes |
|-------|
|       |

## Miscellaneous Expenses

Amounts will post to the Miscellaneous WIP account when certain actions are performed by a user.

- Enter an accounts payable expense bill and link to a ticket number [not linked to a PO receipt]
- Receive a direct expense purchase order linked to a ticket number

In the example below, a bill was entered to reimburse the technician for parking fees.



| Notes |
| --- |
| |

## Recognizing Expenses

In the example below, we have invoiced the Ticket and the amounts previously in WIP have now transferred into the appropriate COGS or Expense Accounts.



| Reg No. | Type | Date | Reference | Acct | Description | Exp Type | Amount |
|---|---|---|---|---|---|---|---|
| | | | 4126 | 120000 | Inventory* | | ($8.94) |
| 806459 | MWIP | 12/26/2016 | 4126 | 123000 | WIP SVC Parts | | $8.94 |
| 806461 | LABOR | 12/26/2016 | Svc Labor:4126 | 123010 | WIP SVC Labor | | $75.00 |
| | | | Svc Labor:4126 | 259100 | SVC Labor-Deferred | | ($75.00) |
| 806462 | BILL | 12/26/2016 | ST4126 | 210100 | Accounts Payable* | | ($8.00) |
| | | | ST4126 | 123020 | WIP SVC Other | | $8.00 |
| 806463 | COGS | 12/26/2016 | 4126 | 123000 | WIP SVC Parts | | ($8.94) |
| | | | 4126 | 521000 | COGS SVC Parts | M | $8.94 |
| 806464 | INV | 12/26/2016 | 393481 | 110110 | Accounts Receivable* | | $240.33 |
| | | | 393481 | 420331 | Revenue - T & M Service | | ($231.82) |
| | SALETAX | 12/26/2016 | 393481 | 250110 | Sales Tax Payable-Michigan | | ($8.51) |
| 806465 | LABOR | 12/26/2016 | 4126 | 123010 | WIP SVC Labor | | ($75.00) |
| | | | 4126 | 521010 | COGS SVC Labor | L | $75.00 |
| 806466 | MWIP | 12/26/2016 | 4126 | 123020 | WIP SVC Other | | ($8.00) |
| | | | 4126 | 520010 | COS - Service-Other | OW | $8.00 |

Customer: 47842 Johnson, Michael Sr.
Site: Johnson, Michael Sr. 14550 Erik Pass Plymouth MI 48170
Created: 12/26/2016 3:46 PM
Created By: Administrator
Status: Resolved
Resolved: 12/26/2016 4:19 PM

Notes

# Document Management

Documents may be attached to Tickets manually by a User in the office or by a Technician in the field using the FSU. The office staff may attach layouts, part repair documents or whatever may be helpful to the technician performing service. Technicians may attach documents to tickets as well such as pictures of site conditions.

For Inspection type tickets only, a new feature recently introduced to SedonaOffice allows you to have one or more documents auto-attached to Inspection Tickets upon creation. These can be fill-in Inspection forms, company checks-lists, etc.

## Setup for Auto-Attaching Documents

The Auto-attach Documents is setup on the Inspection record of a system. Clicking on the Reports tab of an Inspection record will display a listing of documents available to attach to the Inspection record and a list of previously attached documents.

Any template forms or documents that were previously loaded with be displayed for selection to attach to the Inspection record. When a new Inspection Ticket is created, all documents attached to the Inspection Record will automatically be attached to the ticket and are displayed on the Documents tab of the ticket.

Below is an Inspection Ticket where two reports were automatically attached when the ticket was created.

## Loading Document Templates for Inspection Records

To add new documents available for selection on Inspection records, open any Inspection Record, click on the Reports tab then click on the Manage…button.

The Inspection Report Templates form will be displayed.  Click on the New button of this form. The windows file explorer will launch to locate the document you want to attach.  Repeat the same process to attach additional documents.  When finished, click the Apply button.

The list of documents added to the list are now available for selection on any Inspection record.
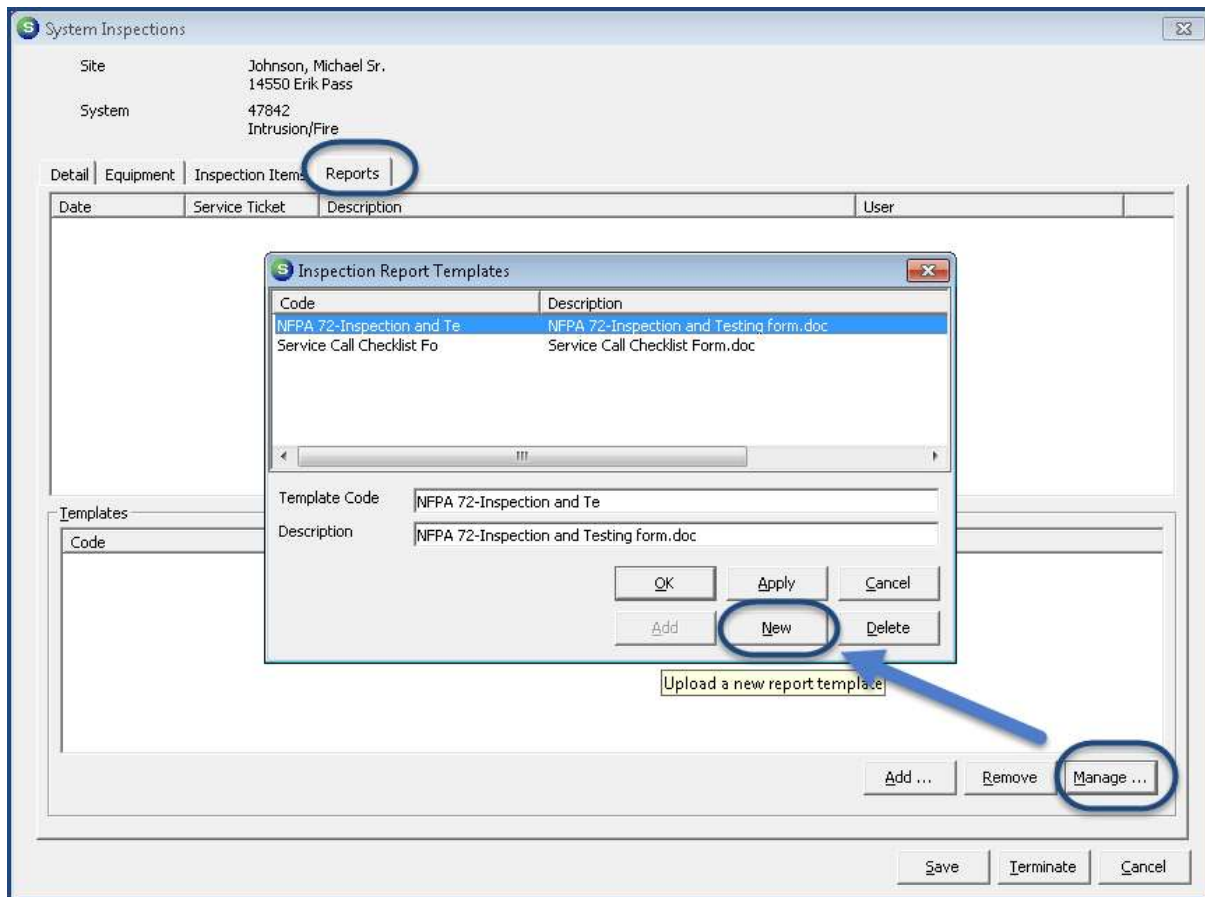
Notes

# Service Reporting

SedonaOffice has several operational and financial type reports available for Tickets.  We will look at a few of the reports available from the Report Manager.  If you cannot find a report that suits your needs, you may use the Customer Query Builder, third-party ODBC compliant applications, or an outside contractor to design reports.

## Open Service Ticket Cost Report

The purpose of this report is to review the profitability of tickets for companies using WIP.  The report provides estimated revenue and expense analysis broken out by Materials, Labor, and Other for tickets open as of a selected date.

Summary View

### Open Service Ticket Cost Report — Sedona Security

**All Open Tickets as of 10/31/2016**

| Ticket Number | Problem Code | Creation Date | Status | Totals Est Income | WIP | PCT | Hours | Materials Est Income | WIP | Labor Est Income | WIP | Other Est Income | WIP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 3465 | Add Equipment | 06/19/2015 | CL | 0.00 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3506 | Add Equipment | 08/10/2015 | CL | 1,015.81 | 0.00 | 100.00% | 0.00 | 1,015.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3547 | Add Equipment | 09/15/2015 | CL | 272.50 | 0.00 | 100.00% | 0.00 | 247.50 | 0.00 | 0.00 | 0.00 | 25.00 | 0.00 |
| 3733 | Add Equipment | 02/11/2016 | CL | 15.81 | 0.00 | 100.00% | 0.00 | 15.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3734 | AC Power Failure | 02/11/2016 | CL | 180.00 | 0.00 | 100.00% | 2.00 | 0.00 | 0.00 | 180.00 | 0.00 | 0.00 | 0.00 |
| 3955 | AC Power Failure | 07/19/2016 | CL | 180.00 | 100.00 | 44.44% | 2.00 | 0.00 | 0.00 | 180.00 | 100.00 | 0.00 | 0.00 |
| **Tickets:** | | 6 | **Grand Total:** | 1,664.12 | 100.00 | 93.99% | 4.00 | 1,279.12 | 0.00 | 360.00 | 100.00 | 25.00 | 0.00 |

Detail View

### Open Service Ticket Cost Report — Sedona Security

**All Open Tickets as of 10/31/2016**

| Ticket Number / Customer Number | Problem Code / Site Name | Creation Date | Status | Totals Est Income / Site Address | WIP | PCT | Hours | Materials Est Income | WIP | Labor Est Income | WIP | Other Est Income | WIP |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **MI - Michigan** | | | | | | | | | | | | | |
| 3734 / 32973 | AC Power Failure / Alexis Beasley | 02/11/2016 | CL | 180.00 — 250 Park Shore Dr, Novi MI, 48375 | 0.00 | 100.00% | 2.00 | 0.00 | 0.00 | 180.00 | 0.00 | 0.00 | 0.00 |
| 3955 / 47737 | AC Power Failure / Bed Bath and Bubbles | 07/19/2016 | CL | 180.00 — 129 Living Way, Canton MI, 48187 | 100.00 | 44.44% | 2.00 | 0.00 | 0.00 | 180.00 | 100.00 | 0.00 | 0.00 |
| 3465 / 16987-194 | Add Equipment / Fred Robinson | 06/19/2015 | CL | 0.00 — 32 Everit Street, Novi MI, 48375 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3547 / 340 | Add Equipment / Ryan Younign | 09/15/2015 | CL | 272.50 — 2438 Forrest Drive, Canton MI, 48187 | 0.00 | 100.00% | 0.00 | 247.50 | 0.00 | 0.00 | 0.00 | 25.00 | 0.00 |
| 3733 / 127 | Add Equipment / Ted Carter Assoc | 02/11/2016 | CL | 15.81 — 1234 Fourth Ave, Plymouth MI, 48170 | 0.00 | 100.00% | 0.00 | 15.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **MI** | **Tickets:** 5 **Total:** | | | 648.31 | 100.00 | 84.58% | 4.00 | 263.31 | 0.00 | 360.00 | 100.00 | 25.00 | 0.00 |
| **OH - Ohio** | | | | | | | | | | | | | |
| 3506 / 25744 | Add Equipment / Dana Jones | 08/10/2015 | CL | 1,015.81 — 49 Grey Terrace, Cleveland OH, 44110 | 0.00 | 100.00% | 0.00 | 1,015.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **OH** | **Tickets:** 1 **Total:** | | | 1,015.81 | 0.00 | 100.00% | 0.00 | 1,015.81 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | **Tickets:** 6 **Grand Total:** | | | 1,664.12 | 100.00 | 93.99% | 4.00 | 1,279.12 | 0.00 | 360.00 | 100.00 | 25.00 | 0.00 |

## Closed Service Ticket Cost Report

The purpose of this report is to review the profitability of closed.  The report provides the actual revenue and expense analysis broken out by Materials, Labor, and Other for tickets closed during a selected period of time.

Summary View

**Closed Service Ticket Report**                                          **Sedona Security**

December 2016

| Resolution Code | | | Totals Invoiced | Expenses | PCT | Hours | Materials Invoiced | Expenses | Labor Invoiced | Expenses | Other Invoiced | Expenses |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **MI - Michigan** | | | | | | | | | | | | |
| **Billable** | | | | | | | | | | | | |
| 2 Clean | Tickets: | 1 | 272.50 | 110.00 | 59.63% | 0.00 | 247.50 | 110.00 | 0.00 | 0.00 | 25.00 | 0.00 |
| 3 Repair | Tickets: | 1 | 295.00 | 40.00 | 86.44% | 2.00 | 0.00 | 0.00 | 180.00 | 40.00 | 115.00 | 0.00 |
| Service Completed | Tickets: | 3 | 410.00 | 100.00 | 75.61% | 2.00 | 0.00 | 0.00 | 180.00 | 100.00 | 230.00 | 0.00 |
| **MI** | Billable Tickets: | 5 | 977.50 | 250.00 | 74.42% | 4.00 | 247.50 | 110.00 | 360.00 | 140.00 | 370.00 | 0.00 |
| | NonBillable Tickets: | 0 | 0.00 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Total Tickets: | 5 | 977.50 | 250.00 | 74.42% | 4.00 | 247.50 | 110.00 | 360.00 | 140.00 | 370.00 | 0.00 |
| **OH - Ohio** | | | | | | | | | | | | |
| **Billable** | | | | | | | | | | | | |
| 4 Replace | Tickets: | 1 | 0.00 | 75.00 | 0.00% | 1.50 | 0.00 | 0.00 | 0.00 | 75.00 | 0.00 | 0.00 |
| **OH** | Billable Tickets: | 1 | 0.00 | 75.00 | 0.00% | 1.50 | 0.00 | 0.00 | 0.00 | 75.00 | 0.00 | 0.00 |
| | NonBillable Tickets: | 0 | 0.00 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Total Tickets: | 1 | 0.00 | 75.00 | 0.00% | 1.50 | 0.00 | 0.00 | 0.00 | 75.00 | 0.00 | 0.00 |
| **Grand Total:** | Billable Tickets: | 6 | 977.50 | 325.00 | 66.75% | 5.50 | 247.50 | 110.00 | 360.00 | 215.00 | 370.00 | 0.00 |
| | NonBillable Tickets: | 0 | 0.00 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Total Tickets: | 6 | 977.50 | 325.00 | 66.75% | 5.50 | 247.50 | 110.00 | 360.00 | 215.00 | 370.00 | 0.00 |

Detail View

**Closed Service Ticket Report**                                          **Sedona Security**

December 2016

| Ticket Number Customer Number | Problem Code | Creation Dt Site Name | Closed Dt | Res Code | Totals Invoiced Site Address | Expenses | PCT | Hours | Materials Invoiced | Expenses | Labor Invoiced | Expenses | Other Invoiced | Expenses |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **MI - Michigan** | | | | | | | | | | | | | | |
| **Billable** | | | | | | | | | | | | | | |
| 3465 16987-194 | Add Equipment | 06/19/2015 Fred Robinson | 12/29/2016 | Service Co | 115.00 32 Everit Street, Novi MI, 48375 | 0.00 | 100.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 115.00 | 0.00 |
| 3547 340 | Add Equipment | 09/15/2016 Ryan Younign | 12/29/2016 | 2 Clean | 272.50 2438 Forrest Drive, Canton MI, 48187 | 110.00 | 59.63% | 0.00 | 247.50 | 110.00 | 0.00 | 0.00 | 25.00 | 0.00 |
| 3733 127 | Add Equipment | 02/11/2016 Ted Carter Assoc | 12/29/2016 | Service Co | 0.00 1234 Fourth Ave, Plymouth MI, 48170 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 3734 32973 | AC Power Failure | 02/11/2016 Alexis Beasley | 12/29/2016 | 3 Repair | 295.00 250 Park Shore Dr, Novi MI, 48375 | 40.00 | 86.44% | 2.00 | 0.00 | 0.00 | 180.00 | 40.00 | 115.00 | 0.00 |
| 3955 47737 | AC Power Failure | 07/19/2016 Bed Bath and Bubbles | 12/30/2016 | Service Co | 295.00 129 Living Way, Canton MI, 48187 | 100.00 | 66.10% | 2.00 | 0.00 | 0.00 | 180.00 | 100.00 | 115.00 | 0.00 |
| **Billable** | | | Total Tickets: | 5 | 977.50 | 250.00 | 74.42% | 4.00 | 247.50 | 110.00 | 360.00 | 140.00 | 370.00 | 0.00 |
| **MI** | | | Billable Tickets: | 5 | 977.50 | 250.00 | 74.42% | 4.00 | 247.50 | 110.00 | 360.00 | 140.00 | 370.00 | 0.00 |
| | | | NonBillable Tickets: | 0 | 0.00 | 0.00 | 0.00% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | | | Total Tickets: | 5 | 977.50 | 250.00 | 74.42% | 4.00 | 247.50 | 110.00 | 360.00 | 140.00 | 370.00 | 0.00 |

## Service Sales History

This report is designed to print the entire service history for a single customer. As with all SedonaOffice reports, this may be exported to excel for further manipulation. This is a custom designed report for one particular SedonaOffice customer, however it is available to be used by all SO customers.

### Service Sales History Report — Sedona Security

**Site**
9450 — Desire Waldroup, 51 Hartford Turnpike, Novi, MI 48375

**Customer**
2768 — Waldroup, Desire, 51 Hartford Turnpike, Novi, MI 48375

| Invoice Date | Tech 1 | Tech 2 | System | Invoice | Qty | Item Code | Description | Ticket Number | Price | Ext Price |
|---|---|---|---|---|---|---|---|---|---|---|
| 07/11/2016 | | | Intrusion | 393865 | 1 | SVC Call | Minimum Service Call Charge | 3104 | 115.00 | 115.00 |
| 07/11/2016 | Mark.Taylo | | Intrusion | 393862 | 1.5 | SVC Labor | Service Labor | 3071 | 120.00 | 180.00 |
| 07/11/2016 | Mark.Taylo | | Intrusion | 393862 | 1 | 0L-404024VLB | SENTRONIC HOLDER/CLOSER 24V L | 3071 | 450.00 | 450.00 |
| 07/11/2016 | Mark.Taylo | | Intrusion | 393862 | 1 | SVC Call | Minimum Service Call Charge | 3071 | 115.00 | 115.00 |
| 07/11/2016 | Mark.Taylo | | Intrusion | 393862 | 1 | 12 | 12 Volt Battery | 3071 | 21.15 | 21.15 |
| 08/06/2015 | Madison.Mo | | Intrusion | 278993 | 4 | 1508AQN5 | 24 VOLT DOOR HOLD BACK W/MOUN | 2466 | 117.60 | 470.40 |
| 08/06/2015 | Madison.Mo | | Intrusion | 278993 | 1 | SVC Call | Minimum Service Call Charge | 2466 | 115.00 | 115.00 |
| 08/06/2015 | Madison.Mo | | Intrusion | 278993 | 0.75 | SVC Labor | Service Labor | 2466 | 120.00 | 90.00 |

## Daily Service Snapshot

The Daily Service Snapshot Report is a custom report designed to print counts of tickets as of a selected date. The report will display the total amount invoiced, the count of tickets completed and resolved on the as of date selected. Included are counts of open Service Tickets, Service Tickets where a Technician has been assigned, open Inspection Tickets, Inspection Tickets where a Technician has been assigned, and Tickets marked as Go Back.

### Daily Service Snapshot — Sedona Security

By Branch
12/30/2016

| Branch | Total Invoiced | Completed | Open Service | Tech Assigned | Open Inspections | Tech Assigned | Resolved Tickets | Go back Tickets |
|---|---|---|---|---|---|---|---|---|
| MI | 2,921.80 | 189 | 0 | 0 | 13 | 0 | 0 | 0 |
| OH | 600.00 | 77 | 0 | 0 | 1 | 0 | 0 | 0 |
| | 3,521.80 | 266 | 0 | 0 | 14 | 0 | 0 | 0 |

## Technician Performance

The Technician Performance Report is a custom report designed to print information for tickets where Technician appointments have been dispatched within the Accounting Period range or Date range selected.  The report will display: the number of hours invoiced, the Labor amounts invoiced, the Part amounts invoiced, and Other charges invoiced.  If an asterisk is displayed next to a Ticket Number, this indicates more than one Technician was dispatched on the Ticket.

**Technician Performance**                                                                       **Sedona Security**

All Active Branches
All Active Service Companies

June 2016

| Ticket | Appointment | Hours | Labor | Parts | Other | Total | Site | Account# |
|--------|-------------|-------|-------|-------|-------|-------|------|----------|
| **Madison.Morrison** | | | | | | | | |
| 3899 | 6/17/2016 | 5.00 | 400.00 | 0.00 | 178.00 | 578.00 | Livonia High School | SR6183 |
| **Mark.Taylor** | | | | | | | | |
| 3657 | 6/16/2016 | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 | Kroger | 47666 |
| **Mike.Walker** | | | | | | | | |
| 3171 | 6/9/2016 | 1.50 | 120.00 | 40.00 | 120.00 | 280.00 | Pamela Price | 221 |
| 3891 | 6/14/2016 | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 | Lake Marie Elementary School | SR6369C |
| | | 2.5 | 120.00 | 40.00 | 120.00 | 280.00 | | |
| **Milton.Morris** | | | | | | | | |
| 3897 | 6/16/2016 | 5.00 | 0.00 | 0.00 | 0.00 | 0.00 | Lake Marie Elementary School | SR6369D |
| **Mitchell.Malloy** | | | | | | | | |
| 3893 | 6/16/2016 | 5.00 | 0.00 | 0.00 | 0.00 | 0.00 | Alejandra Banks | A70030 |
| 3900 | 6/13/2016 | 2.00 | 0.00 | 0.00 | 0.00 | 0.00 | Meeka Foundation | 879 |
| | | 7.0 | 0.00 | 0.00 | 0.00 | 0.00 | | |
| **Orlando.Smith** | | | | | | | | |
| 3902 | 6/14/2016 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | Bed Bath and Bubbles | 47701 |
| **Oscar.Martin** | | | | | | | | |
| 2667 | 6/9/2016 | 0.00 | 0.00 | 99.65 | 0.00 | 99.65 | Cory Hawkins | T09-198 |
| **Osman.Wilson** | | | | | | | | |
| 3883 | 6/10/2016 | 1.00 | 30.00 | 0.00 | 175.00 | 205.00 | Bill Seiden | K12847 |
| | | 21.5 | 550.00 | 139.65 | 473.00 | 1,162.65 | | |
| | | 21.5 | 550.00 | 139.65 | 473.00 | 1,162.65 | | |

## Labor Hours

This report is listed under the Job Management reports section of the Report Manager, and contains options to print labor hours and dollars for Jobs, Tickets or both for a selected period of time.

**Labor Hours** — **Sedona Security**

4/1/2016 to 6/30/2016

| Work Date | UserCode | Created Date | Units | TechRate | Amount | Ticket # | Ticket Type | Problem | Site Name |
|---|---|---|---|---|---|---|---|---|---|
| **MI - Michigan** | | | | | | | | | |
| **Madison.Morrison** | | | | | | | | | |
| 06/17/2016 | Administrator | 06/17/2016 | 5.50 | 20.00 | 110.00 | 3899 | I | INSP-Fire-QT | Livonia High School |
| | | **Madison.Morrison** | **5.50** | | **110.00** | | | | |
| **Mark.Taylor** | | | | | | | | | |
| 04/07/2016 | Administrator | 04/07/2016 | 1.05 | 50.00 | 52.50 | 3942 | S | Code Changes | Nancy Ann |
| 04/13/2016 | Administrator | 04/13/2016 | 1.00 | 50.00 | 50.00 | 3807 | S | Zone Trouble | Surelock Homes |
| 04/20/2016 | Administrator | 04/20/2016 | 1.00 | 50.00 | 50.00 | 3754 | S | Insp-Int | Smith and Sons |
| 04/28/2016 | Administrator | 04/28/2016 | 2.00 | 50.00 | 100.00 | 3817 | S | AC Power Failure | Surelock Homes |
| 05/05/2016 | Administrator | 05/05/2016 | 1.00 | 50.00 | 50.00 | 3632 | I | Insp-Fire-MO | Mellissa Robinson |
| 06/16/2016 | Administrator | 06/16/2016 | 1.00 | 50.00 | 50.00 | 3657 | I | Insp-Fire-AN | Kroger |
| | | **Mark.Taylor** | **7.05** | | **352.50** | | | | |
| **Mike.Walker** | | | | | | | | | |
| 04/28/2016 | Administrator | 04/28/2016 | 1.00 | 60.00 | 60.00 | 3811 | S | AC Power Failure | Hoffman Auto Group |
| 06/09/2016 | Administrator | 06/09/2016 | 1.50 | 60.00 | 90.00 | 3171 | S | AC Power Failure | Pamela Price |
| | | **Mike.Walker** | **2.50** | | **150.00** | | | | |
| **Milton.Morris** | | | | | | | | | |
| 05/03/2016 | Administrator | 05/03/2016 | 2.68 | 21.00 | 56.35 | 3825 | I | AC Power Failure | Lady Admiral Meeka Kila-Bubbles Lu |
| | | **Milton.Morris** | **2.68** | | **56.35** | | | | |
| **Mitchell.Malloy** | | | | | | | | | |
| 05/03/2016 | Administrator | 05/03/2016 | 3.00 | 46.00 | 144.00 | 3826 | I | AC Power Failure | Lady Admiral Meeka Kila-Bubbles Lu |
| 05/24/2016 | Administrator | 05/24/2016 | 1.00 | 46.00 | 46.00 | 3836 | I | Code Changes | Robert E Lee |
| 06/13/2016 | Administrator | 06/14/2016 | 2.00 | 46.00 | 96.00 | 3900 | I | Insp-Fire-AN | Meeka Foundation |
| | | **Mitchell.Malloy** | **6.00** | | **286.00** | | | | |
| | | **MI - Michigan** | **23.73** | | **954.85** | | | | |