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Service Management 101

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PERENNIAL SOFTWARE

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Service Management 101 Overview

The Service Module is comprised of two main areas, the Schedule Board and Ticket Queue. In this session, we will review the Schedule Board ribbon. The Schedule Board is used to create and manage Technician Appointments.

There are many options and features within the Schedule Board, which will be covered during this session, including:

- Creating Tickets
- Scheduling Technician Appointments
- Adjusting Appointments
- Deleting Appointments
- Generating Inspection Tickets

We will also cover creating invoices from Service Tickets.

Schedule Board Features & Options

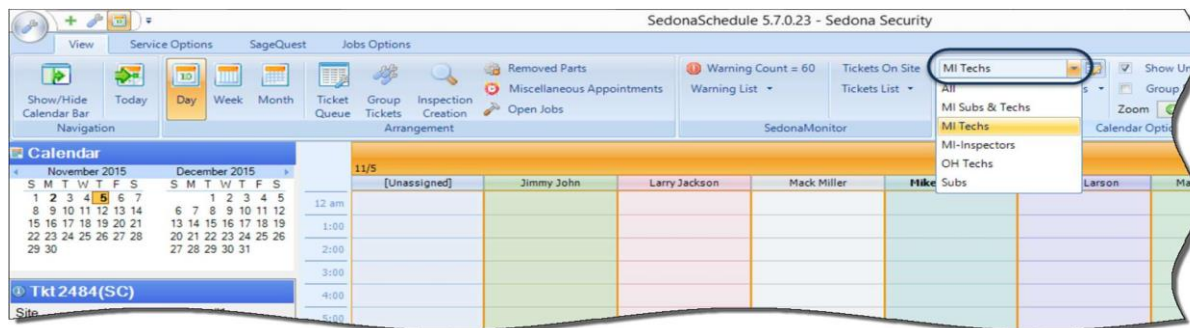
The Schedule Board consists of several components - a Ribbon at the top, the Calendar/Detail Viewer shown on the left and the Display area on the right where you view Scheduled Appointments. Information that is displayed within the Display area is controlled by which option the User clicks on the Ribbon.

The screenshot displays the SedonaSchedule 5.7.50.11548 - Sedona Security interface. The top ribbon includes tabs for View, Service Options, Fleetmatics, and Jobs Options. Below the ribbon, the navigation bar contains icons for Show/Hide Calendar Bar, Today, Week, Month, Inspection Creation, Open Jobs, and Arrangement. The main interface is divided into three sections: a Calendar on the left, a Detail Viewer in the middle, and a Display area on the right. The Calendar shows a weekly view for November and December 2017. The Detail Viewer shows a list of tickets for Tkt 3425(SC) with details like Site, System, Contact, Problem, and Technician. The Display area shows a grid of tickets for various technicians, including Mark Taylor, David Jones, Mitchell Malloy, and Mike Walker. The grid displays tickets such as TKT 3115 - Mountain, TKT 3137 - Mountain, TKT 3152 - Insp-Int (Medium) Canton, TKT 3706 - Add Equipment, TKT 3153 - Insp-Fire (Critical), TKT 3390 - Add Equipment, TKT 3425 - Add Equipment, TKT 3319 - Insp-Fire-HO, TKT 3402 - Insp-Int (Medium), TKT 3727 - Add Equipment, and TKT 3771 - AC Power Failure.

Notes

Display Group

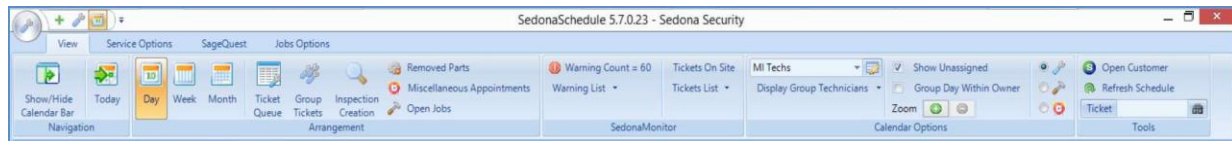
A Display Group is a grouping of one or more Technicians. Within the Schedule Board, you are able to choose to view a single Display Group or all Technicians within the Company. A Technician may be associated with one or multiple Display Groups. Your company creates the Display Groups to which your Users 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

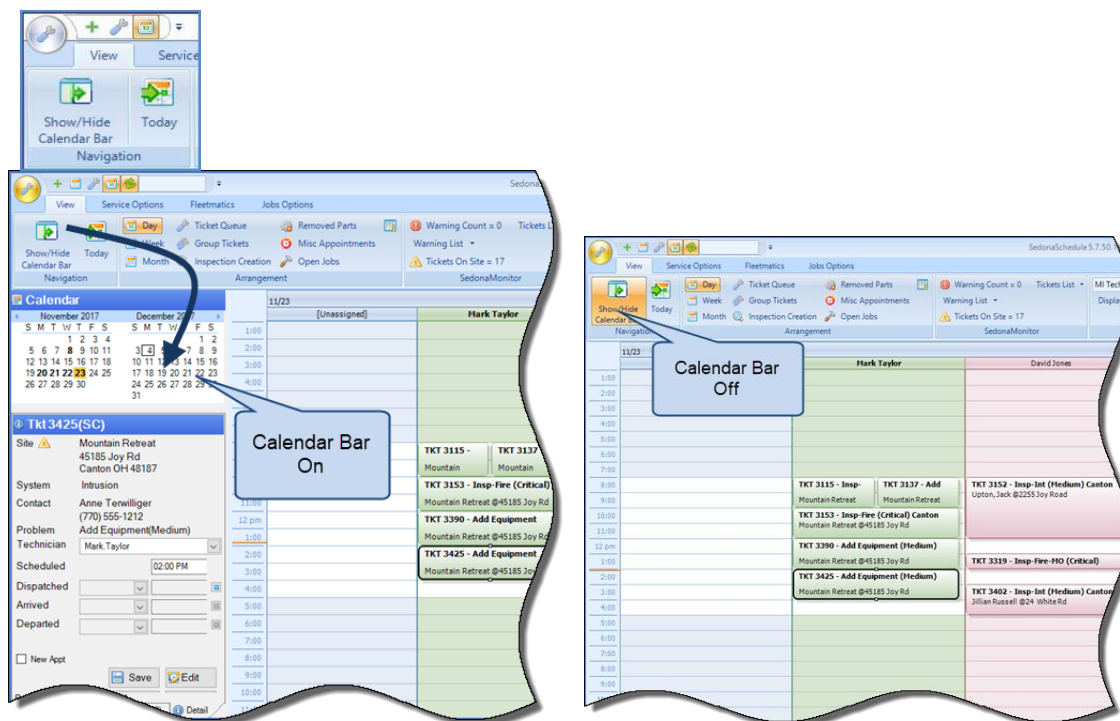
The Ribbon, which is comprised of multiple Ribbon Groups, displays and controls the options for navigating to various functions within SedonaSchedule.



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.



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.

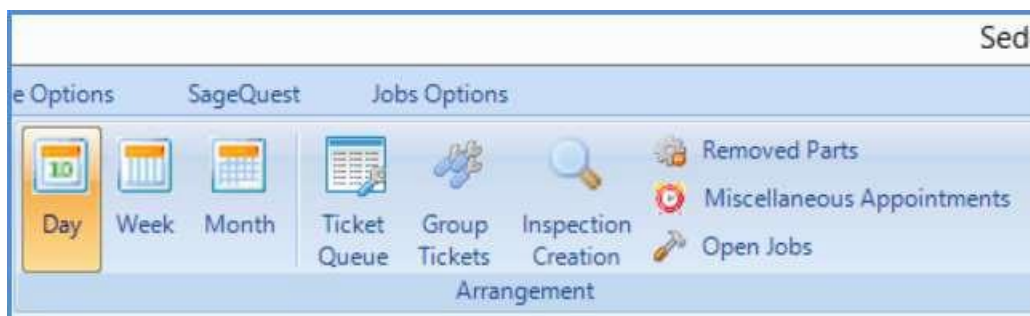
Group Tickets - selecting this option will display the list of Group Tickets. This feature is not installed unless your company requests activation.

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.



Sedona Monitor 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 a number is 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.

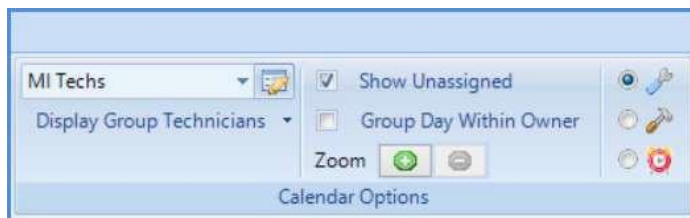
Zoom Buttons - Controls the time slot view within the Schedule Board.

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.

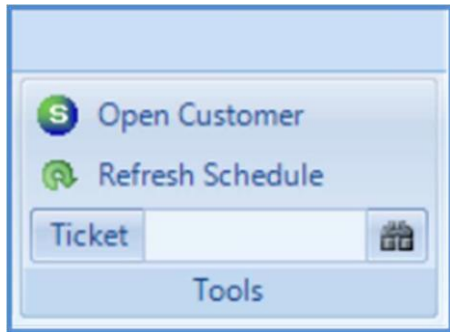
Hammer - When selected, double-clicking on a time slot within the Schedule Board will open the list of open Jobs from which to select for scheduling an Appointment.

Clock - When selected, double-clicking on a time slot within the Schedule Board will open the Miscellaneous Appointment scheduling form.



Tools Ribbon Group

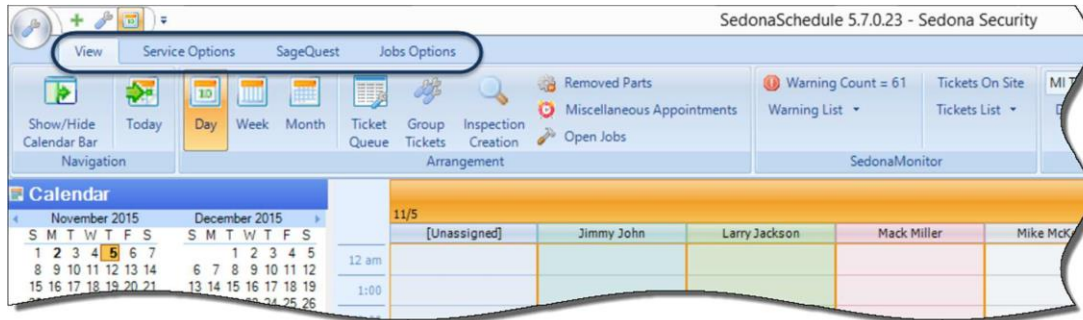
This Ribbon Group contains options to quickly locate a Ticket and to open a customer record when highlighting a particular ticket from the Ticket Queue.



Notes

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.



The Calendar Viewer

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.

SedonaSchedule 5.7.0.23

View Service Options SageQuest Jobs Options

Show/Hide Calendar Bar Today Day Week Month Ticket Queue Group Tickets Inspection Creation Arrangement Removed Parts Miscellaneous Appointments Open Jobs Warning Count = 0 Warning List Tick Tick

Calendar

November 2015 December 2015

S M T W T F S S M T W T F S

1 2 3 4 5 6 7 1 2 3 4 5

8 9 10 11 12 13 14 6 7 8 9 10 11 12

15 16 17 18 19 20 21 13 14 15 16 17 18 19

22 23 24 25 26 27 28 20 21 22 23 24 25 26

29 30 27 28 29 30 31

Tkt 2486(SC)

Site Johnson, Alexis
10225 Erick Pass
Plymouth MI 48170

System 255-01 Intrusion

Salesperson

Problem Add Equipment(Medium)

Technician Larry Jackson

Scheduled 08:00 AM

Dispatched

Arrived

Departed

☐ New Appt

Save Edit

Notes Map Email

Refreshed: 11/12/2015 4:21:11 AM

Unscheduled (0) Detail

11/12

[Unassigned] Larry Jackson Mark Taylor Jimmy Jc

12 am

2:00

3:00

4:00

5:00

6:00

7:00

8:00

9:00

10:00

11:00

12 pm

1:00

2:00

3:00

4:00

5:00

6:00

7:00

8:00

9:00

10:00

11:00

TKT 2486 - Add Equipment (Medium) Plymouth Johnson, Alexis

JOB 1118 - R-Intrusion (Parts) Plymouth Johnson, Alexis
Memo: Must wear booties while working in home.

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.

The screenshot displays the SedonaSchedule 5.7.50.11548 - Sedona Security application. The interface includes a top menu bar with 'View', 'Service Options', 'Fleetmatics', and 'Jobs Options'. Below this is a toolbar with various icons for navigation and management. The main area shows a calendar for November and December 2017. A pop-up window for 'Tkt 3425(SC)' is open, displaying details for a 'Mountain Retreat' appointment at 45185 Joy Rd, Canton OH 48187. The appointment is scheduled for 02:00 PM on 12/4/2017, with technician Mark Taylor. The pop-up includes fields for 'Site', 'System', 'Contact', 'Problem', 'Technician', 'Scheduled', 'Dispatched', 'Arrived', and 'Departed'. At the bottom of the pop-up are 'Save' and 'Edit' buttons. The background calendar shows a grid of appointments for various technicians, including Mark Taylor, David Jones, Mitchell Malloy, and Mike Walker. A blue arrow points to the 'Detail' tab at the bottom of the pop-up window.

Unscheduled Tab

The Unscheduled tabs displays Tickets that do not have an appointment scheduled. Tickets may be dragged and dropped directly onto the schedule board to create an appointment.

The screenshot shows the SedonaSchedule 5.7.50.11548 - Sedona Security interface. The top menu bar includes View, Service Options, Fleetmatics, and Jobs Options. The left sidebar contains a calendar view for November and December 2017, and a list of tickets. A blue arrow points to the 'Unscheduled (120)' tab. The main area displays a schedule board with columns for technicians: (Unassigned), Mark Taylor, David Jones, Mitchell Malloy, and Mike Walker. Tickets are listed in the board cells, such as TKT 3115 - Mountain, TKT 3137 - Mountain, TKT 3152 - Insp-Int (Medium) Canton, TKT 3706 - Add Equipment, TKT 3153 - Insp-Fire (Critical), TKT 3390 - Add Equipment, TKT 3319 - Insp-Fire-HO, TKT 3425 - Add Equipment, TKT 3402 - Insp-Int (Medium), TKT 3727 - Add Equipment, and TKT 3771 - AC Power Failure.

Notes

Creating a Service Ticket

There are three ways to create a new service ticket:

1. Service Tickets may be initiated when working in SedonaSchedule. Above the main ribbon, click on the green plus sign and find the customer for which you would like to create a ticket.
2. In SedonaOffice in the customer view you can right click on *Service* and click *New Service Ticket*, please make sure you chose the correct system.
3. Creating a New Service Ticket and Scheduling a Technician Appointment in one process may be initiated when working in SedonaSchedule. From the Calendar Options Ribbon Group click on the Wrench icon. From the Schedule Board click the date on the Calendar for when the Appointment will be scheduled. Determine which Technician and Time Slot will be scheduled, then double-click on that time slot. The Customer Search form will be displayed; locate the customer/site/system record for the new ticket using the various options on the search form. Once located, double-click on the correct row.

The New Ticket form will be displayed. Fill in the fields according to your company's policy and procedures. When finished, click the **Save** button located at the lower right of the form.

The screenshot shows the 'New Ticket' form in SedonaOffice. The form is divided into several sections:

- Customer Information:** Customer 13884, The Taft Apartments, 414 Chapel Street, Lansing MI 48901-. Created 4/18/2015 9:06:09 AM, Created By Administrator, Status Open.
- Site and System Detail:** System Account Z50681, System Type Fire, Panel Type RAD-2071, Location 11903, Next Inspection 4/1/2016 12:00:00 AM, Site Phone (517) 782-9157, Map Code 7966, Cross Street 11903, Warranty One Year P & L, Warranty End Expired, Memo 7966, Comments, Notes.
- Ticket Detail:** Problem, Secondary Problem, Route Code, Expertise 1, Priority, Estimated Length 0, Comments, Service Coordinator, Technician, PO #, Category S-SVC Con, Resolution.
- Service Company and Level:** Service Company Mi-SVC Cont, Service Level SVC Cont-LC.
- Payment Information:** Use Payment Information On File (None, Bank (0), Credit Card (0)).

A **Save** button is located at the bottom right of the form.

Scheduling A Technician Appointment

The third way of creating a ticket from above also schedules a technician. The other two ways to schedule a technician are as follows:

When inside of a ticket, click on the Clock icon at the upper left of the Ticket. The schedule board will open where you may select the date, time slot and technician you would like to schedule. A question will appear asking if you want to schedule the technician/date/timeslot you chose if that is correct click on yes.

Ticket #3687

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Journal Notes (1) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Customer: 10062 Bicon Electronics Co
Site: Bicon Electronics Co
50 Barlow St.
Main Plant
Canton MI 48188
Eastern Time

Created: 1/7/2016 9:05 AM
Created By: Administrator
Status: Open

Contact: [Dropdown]
Phone: (411) 556-3215
Notify: [Dropdown]

Site and System Detail

System Account: V41370
System Type: Intrusion
Panel Type: UNKNOWN
Location: 8074
Next Inspection: [Dropdown]
Site Phone: (734) 824-5125
Map Code: 25264 Timezone: ET
Cross Street: 8074
Warranty: One Year P & L
Warranty End: Labor: 8/31/2018 Parts: 8/31/2018 Other: 8/31/2018
Memo: 25264
Comments: [Text Area]
Notes: [Text Area]
Secondary Account: [Text Area]
Keys: [Text Area]
Service Company: MI
Service Level: SVC Cont-Com
CMS Account Number: [Text Area]

Ticket Detail

Problem: Can't Set B/A
Secondary Problem: [Dropdown]
Route Code: 001
Expertise: 3
Priority: Medium
Estimated Length: 60
Comments: keypad keeps beeping
Service Coordinator: [Dropdown]
Technician: Madison Morrison
PO #: 5564
Category: SVC T&M
Resolution: [Dropdown]

Use Payment Information On File

☒ None
☐ Bank (0)
☐ Credit Card (0)

Notes

From the unscheduled list, the user can select the ticket they would like to schedule a technician for, and drag and drop the ticket onto the schedule board underneath the day, time and technician they would like to schedule.

The screenshot displays the SedonaSchedule 5.7.50.11548 application. On the left, a calendar for November and December 2017 is shown. Below the calendar is a list of unscheduled tickets. A blue arrow points from a ticket in this list to a slot in the schedule board. The schedule board is a grid with columns for technicians: (Unassigned), Mark Taylor, David Jones, Mitchell Malloy, and Mike Walker. The tickets listed include:

- TKT 3115 - Mountain
- TKT 3137 - Mountain
- TKT 3152 - Insp-Int (Medium) Canton Upton, Jack @2255 Joy Road
- TKT 3706 - Add Equipment Larsen St John & Johnson @1
- TKT 3153 - Insp-Fire (Critical) Mountain Retreat @45185 Joy Rd
- TKT 3390 - Add Equipment Mountain Retreat @45185 Joy Rd
- TKT 3425 - Add Equipment Mountain Retreat @45185 Joy Rd
- TKT 3319 - Insp-Fire-HO
- TKT 3402 - Insp-Int (Medium) Jillian Russell @24 White Rd
- TKT 3727 - Add Equipment Jackson-Hewitt 2429 @75 Martin
- TKT 3771 - AC Power Failure

Notes

Managing Appointments

Adjusting Appointments

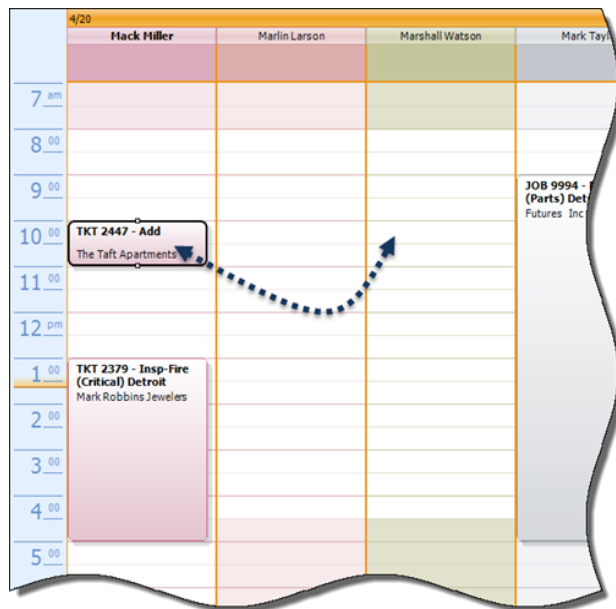
If an appointment needs to be adjusted, there are a few methods available to accomplish this. Depending if you are currently working within the Schedule Board or within a Ticket, the process is different and may have fewer or more steps involved.

Drag and Drop Adjusting Appointments

If a Technician Appointment is being re-scheduled for the same day or a different day, either with the same Technician or a different Technician, the easiest method is using the drag and drop method on the Schedule Board.

From the Schedule Board, click on the Appointment to be re-scheduled, hold the left mouse button down then drag the Appointment to the desired Technician column and time slot, then release the mouse. The Appointment is now moved to the new Technician/time-slot.

If the appointment needs to be rescheduled for another date, hold your control key down to select both dates from the calendar viewer, when both dates are displayed in the Display view, drag and drop the appointment from one day to the other.



Notes

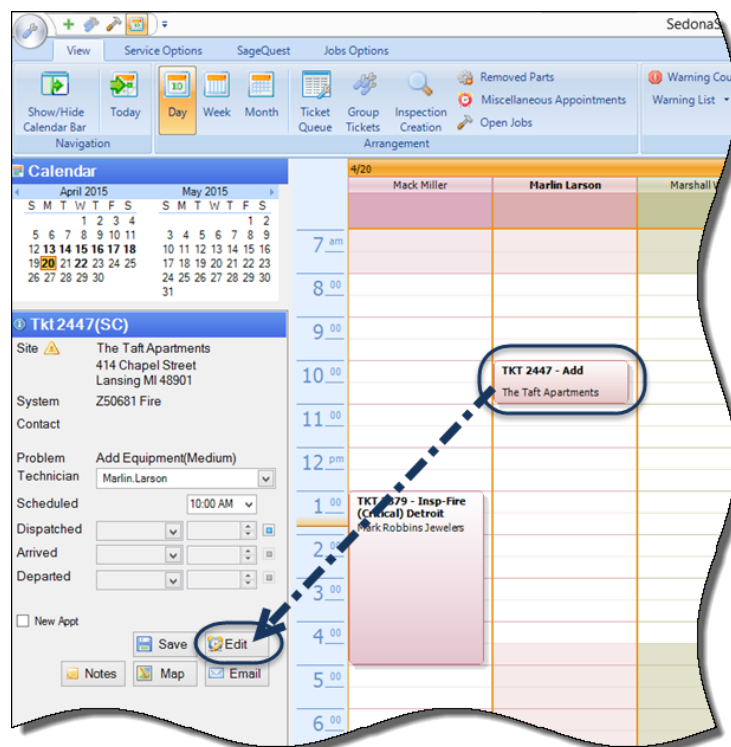
Adjust an Appointment from the Dispatch Form

This re-scheduling method is performed from the Schedule Board, and would be used if you are re-scheduling for a different date, time, and/or a different Technician.

From the Schedule Board, click once on the Appointment to be adjusted. Next click on the *Edit* button within the Ticket Detail Viewer.

The Ticket Dispatch form will be displayed. You may change the Technician by clicking on the drop-down arrow [in the Technician field] and selecting another name from the list. You may change the Appointment Date, by clicking the drop-down arrow in the Scheduled field and select a new date on the Calendar. You may also change the appointment time by clicking the drop-down arrow in the Time field and selecting a choice from the list.

Click the *Save* button when finished. The Appointment will now be moved to the Technician/Date/Time selected.



Notes

Adjust an Appointment from the Ticket

This re-scheduling method is easy to use if you are already working in the Ticket. With the Ticket open, click on the Appointments and Labor button from the ribbon. In the lower tier, double-click on the appointment to be re-scheduled. The Ticket Dispatch form will be displayed. You may change the Technician by clicking on the drop-down arrow [in the Technician field] and selecting another name from the list. You may change the Appointment Date, by clicking the drop-down arrow in the Scheduled field and select a new date on the Calendar. You may also change the appointment time by clicking the drop-down arrow in the Time field and selecting a choice from the list. Click the Save button when finished. The Appointment will now be moved to the Technician/Date/Time selected.

The screenshot displays the 'Ticket #2447' window. The 'Dispatch' ribbon is active, showing various toolbars. The main area contains customer information (13884 The Taft Apartments, 414 Chapel Street, Lansing MI 48901) and a table of appointments. A callout bubble points to the 'Appointment' column in the table, stating 'Double-click on the Appointment to be Re-scheduled'.

Name	Appointment	Dispatched	Arrived	Departed
Marlin Larson	4/20/2015 10:00 AM			

The 'Ticket Dispatch' form is open, showing the following details:

- Appointment Detail:** Ticket 2447, Site The Taft Apartments, 414 Chapel Street, Lansing MI 48901, Contact Add Equipment, Problem One Year P & L, Warranty T&M-LC.
- Scheduled:** Technician Marlin Larson, Estimated Length 60, Firm Appointment ☐.
- Dispatch Times:** Scheduled 4/20/2015 10:00 AM, Dispatched, Arrived, Departed.
- Appointment Resolution:** Resolution, Notes, Resolves Ticket ☐, Needs Go Back ☐.

Buttons at the bottom: Schedule, Save, Close.

Delete an Appointment

If an appointment needs to be deleted, there are two methods available to accomplish this. Depending if you are currently working within the Schedule Board or within a Ticket, the process is different and may have fewer or more steps involved.

1. To delete an Appointment from the Schedule Board, click once on the appointment to be deleted, then press the Delete key on your keyboard. You will receive a confirmation message asking if you want to delete the appointment, click Yes button to confirm.
2. To delete an Appointment while working in the Ticket, click on the Appointments and Labor button from the ribbon. In the lower tier of the form, click once on the Appointment to be deleted, press the delete key on your keyboard. You will receive a confirmation message asking if you want to delete the appointment, click Yes button to confirm.

If there are no other scheduled appointments for the Ticket, the Ticket will appear in the Unscheduled list.

Notes

Inspection Tickets Generation

The Inspection Ticket generation program within SedonaSchedule creates tickets in bulk based upon the information contained in the System Inspection Setup records that are attached to a System record. Inspection Tickets and Vendor Inspection Tickets are generated at the same time. If an Inspection Record is setup with a Service Company that is a Service Provider (subcontractor), the ticket will be created as a Vendor Inspection ticket.

Inspection Tickets are typically generated once a month for Inspections due in the next month to allow time to plan for the needed resources. Usually one staff member is responsible for generating all of the Inspection Tickets for the company. For companies operating under multiple physical Branch locations, you may place this responsibility with each Branch office. When selecting which Inspection Tickets to create, you may filter on a particular Service Company. If you have created unique Service Companies for each Branch office, and the Inspection Records are linked to the appropriate Branch Service Company, then generating Inspection Tickets at the Branch level may be done in separate batches.

Notes

Inspection Creation Filter Options

Below is a list of the Filter Options; you may select one or many options depending on which Inspection Tickets you wish to display in the Inspections List. The only required field is the Due As Of date.

Due As Of - From the Calendar icon, select the date through which you want to see a list of up-coming inspections.

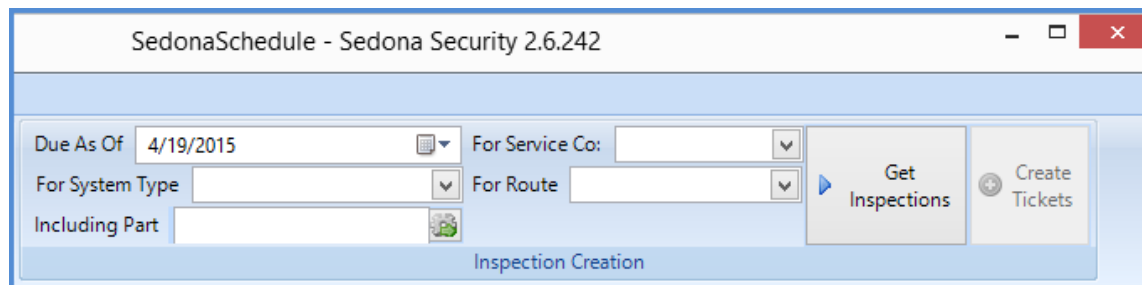
For System Type - If you want to generate Inspection Tickets for one specific System Type, then make a selection from the drop-down list; otherwise all System Types will be considered in the program selection process. If no selection is made in this field, all System Types will be considered.

Including Part - If you have created a list of equipment to inspect on your Inspection records setup, you may filter on a particular part number found in the Inspection records setup. For example, you may want to inspect all systems where a particular panel is contained in the Inspection Equipment list.

For Service Co - You may select a single Service Company or all Service Companies will be considered if no selection is made.

For Route - If your company is using Route Codes, you may select one particular Route or all Routes will be considered if no selection is made.

Once the desired options have been selected, click the *Get Inspections* button.



The screenshot shows a software window titled "SedonaSchedule - Sedona Security 2.6.242". Inside the window, there is a section for "Inspection Creation" with several filter options: "Due As Of" (set to 4/19/2015 with a calendar icon), "For Service Co:" (a dropdown menu), "For System Type" (a dropdown menu), "For Route" (a dropdown menu), and "Including Part" (a text field with a magnifying glass icon). To the right of these fields are two buttons: "Get Inspections" and "Create Tickets".

Notes

After clicking on the *Get Inspections* button, a list of all Inspection Records meeting the criteria entered will be listed below the ribbon. You may review the list, then select either all of the records by checking the box at the top of the list in the Select column, or check the box to the left of individual Inspection Records, or check the select all, then de-select any records where you do not want to generate an Inspection Ticket at this time. If any Inspection Records are not checked, the next time you return to this form to generate Inspection Tickets, these records will appear in the list.

Once all the desired Inspections are checked, click on the Create Tickets button on the ribbon. Once the ticket creation process has finished, the newly created Inspection Tickets will appear in the Ticket Queue for processing.

Account	Service Co.	System	Site	Address	Date	Route Code
<input checked="" type="checkbox"/> 31705-403	MI-INSP Cont	Fire	Plymouth Plantation-C-	137 Warren Avenue	06/01/2015	N/A
<input checked="" type="checkbox"/> 252423	MI-INSP T&M	Fire	Carnton Board Of Educa-	7 West Main Street	07/01/2015	N/A
<input checked="" type="checkbox"/> 252423	MI-INSP T&M	Fire	Carnton Board Of Educa-	7 West Main Street	07/01/2015	N/A
<input checked="" type="checkbox"/> L2423	MI-INSP T&M	Intrusion	Carnton Board Of Educa-	7 West Main Street	07/01/2015	N/A
<input checked="" type="checkbox"/> Z50647	MI-INSP T&M	Fire	Webster St Apartments	63-65 Webster Street	07/01/2015	N/A
<input checked="" type="checkbox"/> 8495	MI-T&M	Intrusion	Jones Jewelers #1	2 Main Street	07/01/2015	N/A

Notes

Create an Invoice from a Service Ticket

Once a Ticket has been Resolved, it is ready to be reviewed and prepared for invoicing. The Billing form of the Ticket displays a summary of all the billable charges accumulated on the Ticket; this is also the form where the Invoice is created. These charges originate from any combination of three forms on the Ticket:

- Labor Charges – viewable and editable from the *Appointments and Labor* form
- Part Charges - viewable and editable from the *Equipment and Parts* form
- Other Charges - viewable and editable from the *Other Items* form

When you are reviewing different elements of the Ticket, it may seem you are jumping around a bit. The buttons on the Ribbon are arranged in alphabetical order, not in the order you would assume actions would occur.

Ticket #2446

Customer: 39975 Hill, Carolyn
Site: Carolyn Hill, 72 Blevins Dr, Salem MI 48175
Created: 4/20/2015 4:52:58 AM
Created By: Administrator
Status: Resolved

Contact: [Dropdown]
Phone: [Text] Ext: [Text]
Notify: [Text] [Email Icon]

Billing Overrides

- ☐ Override Warranty
- ☐ Override Service Level

Invoice

☐ Third Party Bill To

Contact: [Dropdown]
Invoice Date: 4/21/2015 [Dropdown]
☒ Add Resolution Note to Invoice
☒ Close Ticket After Invoicing
Create Invoice

Ticket Charges

	Cost	Tax
Total Parts	142.23	11.38
Total Labor	240.00	19.20
Total Other	70.00	5.60
Sub Total	452.23	36.18
Total		\$488.41

Bill to Cycle
Next Cycle Date: (N/A)

Save

Review Before Invoicing - Notes

If a note is flagged as the Resolution note and you are printing resolution notes on your customer invoices, then make certain the text is acceptable to print on an invoice. You can copy and paste the resolution note into a new note and flag as the new resolution note; or you may re-type the note entirely. Resolution notes are limited to 256 characters due to space limitations on Invoice Printing Forms.

Ticket #2446

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Journal **Notes (1)** Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Customer 39975 Hill, Carolyn
Site Carolyn Hill
72 Blevins Dr
Salem MI 48175

Created 4/20/2015 4:52:56 AM
Created By Administrator
Status Resolved

Contact [dropdown]
Phone [text] Ext [text]
Notify [checkbox]

Notes	Level	Resolution	Entered	By	Edited	Edited By
Found motion hanging from the wall with wire...	1 - No Restriction	<input checked="" type="checkbox"/>	4/21/2015 7:59 PM	Administrator	4/21/2015 8:01 PM	Administrator

Found motion hanging from the wall with wires exposed. Replaced motion in hallway with truck stock. Ms Hill admits that the damaged was done by her son. Tested with CS; all ok.

Access Level 1 - No Restriction ☒ Resolution Note

List Instructions New Save

Notes

Review Before Invoicing - Equipment and Parts

The Equipment and Parts form shows one Part was used; verify the quantity and pricing is correct. If a Part was replaced, in the upper tier, a part line should be displayed with a red font indicating another staff member has performed the part replacement.

Ticket #2446

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) **Equipment and Parts** Journal Notes (1) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group Critical Messages (1) COGS Account: 520100 Notifications

Customer 39975 Hill, Carolyn
Site Carolyn Hill
72 Blevins Dr
Salem MI 48175

Created 4/20/2015 4:52:56 AM
Created By Administrator
Status Resolved

Contact [v]
Phone [v] Ext [v]
Notify [v]

Customer Equipment Detail					Installed			Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Date	Remove
PC1832NK	DSC 1832 CONTRO...	1	entry closet		05/01/2001	Other	J 129		✖
BD2312	12V 22.3AH BATTER...	1	panel		05/01/2001	Other	J 129		✖
DSCBV300	BRAVO 300 MOTION	1	zone 2	01	05/01/2001	Other	J 129		✖
DSCBV300	BRAVO 300 MOTION	1	zone 3		05/01/2001	Other	J 129		✖
DSCWS4945	WIRELESS DOOR/...	1	entry door	01	05/01/2001	Other	J 129		✖
DSCWS4945	WIRELESS DOOR/...	1	garage side door		05/01/2001	Other	J 129		✖
DSCWT4911B	WIRELESS OUTDO...	1			05/01/2001	Other	J 129		✖
PK5516	16 ZONE LED KEYP...	1	foyer		05/01/2001	Other	J 129		✖
BOSDS150I	DS150 EXIT MOTION	1			07/27/2012	Service	2198	04/21/2015	✖
5853	Wireless Glassbreak	2			07/27/2012	Service	2135		✖

Service Ticket Parts										
Stock	Technician	Part	Description	Location	Qty	Unit Price	Total Price	Tax	Costing	Serial
▶	✓ Larry Jackson	BOSDS150I	DS150 EXIT MOTION		1	142.2300	142.23	11.38	Standard	

New Save

Notes

Review Before Invoicing - Appointments and Labor Form

The Appointments and Labor form is divided into two tiers; the upper tier displays the calculated number of billable hours and rates along with a possible Service Fee also known as a Trip Charge. The total amounts should agree with amount shown in the Labor charges area of the Billing form.

To modify the number of billable hours, the *Manual Labor* checkbox can be checked off and you can adjust the Hours and Rates to be billed. User permissions are required to be able to manually override billable labor charges.

The amount displayed in the Service Fee area will appear as part of the "Other" charges amount on the Billing form.

Ticket #2446

Service Ticket | Customer Fields | **Appointments and Labor** | Billing | Documents (0) | Equipment and Parts | Journal | Notes (1) | Other Items | Purchase Orders (0) | Service History | Ticket Log | Ticket Group

Go To

Critical Messages (1)

Notifications

Customer: 39975 Hill, Carolyn
Site: Carolyn Hill, 72 Blevins Dr, Salem MI 48175
Created: 4/20/2015 4:52:56 AM
Created By: Administrator
Status: Resolved
Contact: [Dropdown]
Phone: [Text] Ext: [Text]
Notify: [Text] [Email Icon]

Labor

☐ Manual Labor

	Hours	Rate	Amounts	
Regular	4.0	60.00	Total Labor	240.00
Overtime	0.0	90.00	Tax	19.20
Holiday	0.0	120.00	Total Amount	\$259.20

☒ Service Fee Amount: 60.00

[Save]

Name	Appointment	Dispatched	Arrived	Departed	Firm	Est Len	Act Len	Billable Len
Larry Jackson	4/20/2015 10:00 AM	4/20/2015 9:45 AM	4/20/2015 10:00 AM	4/20/2015 11:45 AM	<input type="checkbox"/>	360	120	120
Larry Jackson	4/20/2015 12:15 PM	4/20/2015 12:15 PM	4/20/2015 12:15 PM	4/20/2015 2:15 PM	<input type="checkbox"/>	240	120	120

Notes

Review Before Invoicing - Other Items Form

The Other Items form may be used to add additional charges for miscellaneous items or services for which you want to invoice to the customer. Items such as miscellaneous hardware, wire, etc. are typical Items you may want to include on the Invoice. When adding a line item, you are selecting from the Invoice Item list and not inventory parts. If you want to invoice for such things as hardware or wire, you would select an Item code such as Service Parts, and then modify the description to be more specific. The Description field will print on the Invoice; the Item Code will not.

A charge line may be defaulted into the Ticket when it is created based upon the Service Level setup for the Ticket. In the example below, the Fuel Surcharge was a default Item from the Service Level. You may add as many rows of charges to this form as necessary.

Ticket #2446

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Journal Notes (1) **Other Items** Purchase Orders (0) Service History Ticket Log Ticket Group Critical Messages (1)

Go To

Customer 39975 Hill, Carolyn
Site Carolyn Hill
72 Blevins Dr
Salem MI 48175

Created 4/20/2015 4:52:56 AM
Created By Administrator
Status Resolved

Contact
Phone
Ext
Notify

Item Code	Description	Qty	Unit Price	Total Price	Tax
Fuel Surcharge	Fuel Surcharge	1	10.00	10.00	0.00

+ New Save

Notes

Billing Form - Create the Invoice

On the lower left of the Billing form, you have a few options before clicking the Create Invoice button:

Contact Name - You have the option of selecting a Contact Name from the drop-down list (if any) which would be the Attention To on the invoice - this is optional.

Invoice Date - The Invoice date will default to today's date; this may be modified if necessary, as long as the date entered is in an open accounting period.

Add Resolution Note to Invoice - If you want to include the Resolution Note in the Invoice Memo field, select this option.

Close Ticket After Invoicing - If this option is selected, once the *Create Invoice* button is clicked, the invoice will post and you will be returned to the Ticket Queue to work on the next Ticket.

Click the *Create Invoice* button. Once the Invoice has posted, the Create Invoice button will change to *View Invoice*. Click on the View Invoice button.

Ticket #2446

Service Ticket Custom Fields Appointments and Labor **Billing** Documents (0) Equipment and Parts Journal Notes (1) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group Critical Messages (1) Notifications

Go To

Customer 39975 Hill, Carolyn
Site Carolyn Hill
72 Blevins Dr
Salem MI 48175
Created 4/20/2015 4:52:56 AM
Created By Administrator
Status Resolved
Contact [Dropdown]
Phone [Text] Ext [Text]
Notify [Text] [Email Icon]

Billing Overrides
☐ Override Warranty
☐ Override Service Level

Invoice
☐ Third Party Bill To

Contact [Dropdown] [Image]
Invoice Date 4/21/2015 [Dropdown]
☒ Add Resolution Note to Invoice
☐ Close Ticket After Invoicing
Create Invoice [Image]

Ticket Charges

	Cost	Tax
Total Parts	142.23	11.38
Total Labor	240.00	19.20
Total Other	70.00	4.80
Sub Total	452.23	35.38
Total		\$487.61

Bill to Cycle
Next Cycle Date (N/A)

Save [Image]

Notes