



**SedonaOffice Users Conference**  
San Francisco, CA | January 21 – 24, 2018

## **Service Setup 101**

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**PERENNIAL SOFTWARE**

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## **Service Setup 101 Overview**

In this session we will focus on the following Service Setup Tables:

- Problem Codes
- Resolution Codes
- Service Companies
- Service Levels
- Warranty Types
- Service Setup Defaults

We will also review customizing the view of the Ticket Queue. The Ticket Queue is designed to be a central location for viewing and working with Tickets. Each User is able to configure the view of the Ticket Queue to their personal preference for ease in finding the information needed to perform their job.

## Problem Codes


Problem Codes are a required field on Service and Inspection Tickets, and identify why the customer is requesting service. These codes will print on the Ticket, and should be descriptive enough to assist the technician in understanding the reported problem.

There are two types of Problem Codes that you may create; Master Problem Codes and Secondary Problem Codes. The user should check off Is Master for Master Problem Codes and leave this unchecked for Secondary problem codes. Secondary problem codes are optional.

For Master Problem Codes you will indicate the default Estimated Time, Priority and Expertise Level. Any of these fields may be modified on individual tickets.


For companies using SedonaWeb, if the SedonaWeb checkbox is selected for a Master Problem Code, your customer will have access to choose this Problem Code when they create a Ticket through SedonaWeb.

**Problem Codes**

 **Problem Codes**

Problem Code	Description	Priority	Est Time	Expertise	IsMas...	Inactiv
*AC Power Failure	AC Power Failure	Medium	60	3	Y	N
*Add Equipment	Add Equipment	Medium	60	3	Y	N
*Code Changes	Code Changes	Low	60	4	Y	N
*Download	Download	Medium	30	5	Y	N
*Keypad Trouble	Keypad Trouble	Medium	60	3	Y	N
*Low Battery	Low Battery	Medium	60	3	Y	N
*Site Survey	Site Survey	Low	120	4	Y	N
*Zone Trouble	Zone Trouble	Medium	60	3	Y	N
A-Access	Access Control Problem	Medium	60	4	Y	N
C-CCTV	CCTV Problem	Medium	60	3	Y	N
F-Fire	Fire System Problem	Critical	60	3	Y	N
I-Intrusion	Intrusion Sys Problem	Medium	60	3	Y	N
Insp-Access	Inspection - Access Control	Medium	240	5	Y	N
Insp-CCTV	Inspection - CCTV	Medium	240	5	Y	N
Insp-Cellular/Radio	Inspection - Cellular/Radio	Medium	90	3	Y	N
Insp-Fire	Inspection - Fire	Critical	240	5	Y	N
Insp-Intrusion	Inspection - Burg	Medium	240	5	Y	N
Insp-Other	Inspection - Other	Medium	120	5	Y	N
Insp-Sprinkler	Inspection - Sprinkler	High	480	5	Y	N
Insp-Waterflow	Inspection - Waterflow	Medium	120	5	Y	N
NP	Need Parts				N	N
PO	Parts Ordered				N	N

☐ Include Inactive

 **Problem Code Edit**

☐ Inactive

Problem Code:

Description:

Est Time:

Is Master: ☒

SedonaWeb: ☒

Priority:

Expertise Level:

## Resolution Codes

Resolution Codes are used to define how the Service Technician resolved the problem reported on the Ticket. A resolution code is required on each service ticket to be able to invoice the customer and/or close the service ticket. These codes may be setup as a billable or non-billable to the customer. If a customer's system is covered by warranty however you want to invoice for a service call, if you select a resolution code that is non-billable, you will not be able to override the warranty to create an invoice. The Billable flag should be checked on any resolution that could possibly be billable.

Records created that have the billable flag selected will be displayed with a green font color.

If the checkbox "Create Prospect" is selected, a new Prospect record in Sales Management will automatically be created. This is usually used when a Technician up-sells while onsite performing service.

Resolution

Resolutions

Resolution	Description	Billable	Prospect	Inactive
1 Add	Add Equipment	Y	N	N
2 Clean	Clean Equipment	Y	N	N
3 Repair	Repair Equipment	Y	N	N
4 Replace	Replace Equipment	Y	N	N
Arming Billable	Arming Billable	Y	N	N
Arming No Charge	Arming No Charge	N	N	N
Code Changes Billable	Code Changes Billable	Y	N	N
Code Changes No Charge	Code Changes No Charge	N	N	N
Cust Cancel	Customer Cancelled prior to Appt Date	N	N	N
De-Program Panel	De-Program Panel	N	Y	N
Go Back	Go Back Required	N	N	N
Insp Comp.	Inspection Completed	Y	N	N
Insp Decl.	Inspection Declined	Y	N	N
Insp In Progress	Insp In Progress	Y	N	N
Install Complete	Install Complete	Y	N	N
No Show	No Show	Y	N	N
Programming Billable	Programming Billable	Y	N	N
Programming No Charge	Programming No Charge	N	N	N
Resolved In-House	Resolved In-House	Y	N	N
Site Survey	Site Survey Complete	Y	N	N
Void	Void	N	N	N

☐ Include Inactive

Resolution Edit

Resolution Code
De-Program Panel

Description
De-Program Panel

Billable
☐

Create Prospect
☒

Inactive
☐

Apply
New
Delete

## Service Companies

Service Companies are used to identify which company is providing service for an installed system. If your company has multiple Branch offices, you will want to create a Service Company for each Branch office.

If your company uses an outside Vendor for Service Tickets, you should setup a different Service Company and indicate on the Accounts Payable Vendor that the Vendor Type is a Service Provider. This will give the user the ability to indicate on the Service Ticket which Company is servicing that ticket and be able to schedule the Service Company.

If your company will be using tickets for tracking customer service calls, a separate Service Company may be setup, which will help when filtering the Ticket Queue.

### Service Company Tabs:

- **Company Detail** – on this form general information and options for expensing inventory parts is specified.
- **Labor Setup** – on this form, information related to scheduling and expensing of direct labor is specified. The *Appointments* section is used to define the normal business days and hours for the Service Company.

Service Companies

Service Companies

Code	Description	Ticket Form	Inact...	Insp Form	Vendor
CA	SedonaSecurity	Standard	N	N	
HOA	HOA	Standard	N	N	
MI-INSP Cont	SedonaSecurity	Standard	N	N	
MI-INSP T&M	SedonaSecurity	Standard	N	N	
MI-SVC Cont	SedonaSecurity	Standard	N	N	
MI-SVC-Labor WARR	SedonaSecurity	Standard	N	N	
MI-SVC-WARRANTY-WIP	SedonaSecurity	Standard	N	N	
MI-T&M	SedonaSecurity	Standard	N	N	
OH-INSP Cont	SedonaSecurity	Standard	N	N	
OH-INSP R&M	SedonaSecurity	Standard	N	N	
OH-SVC Cont	SedonaSecurity	Standard	N	N	
OH-T&M	SedonaSecurity	Standard	N	N	

☐ Include Inactive ☐ Include Vendors

General ☐ Inactive

Code: MI-T&M Description: SedonaSecurity

Company Detail | Labor Setup

Ticket Form: Standard Category: S-Svc T&M

☐ Does NOT use service ticket form for inspections.

COGS Acct: 520100

☒ Expense Inventory on Service Tickets

☒ When Invoiced

☒ Primary

☒ Secondary

Vendor: Warehouse: Main-MI Email: Service@SedonaSecurity.com

**Critical Message**

Expires On: 9/15/2014

Apply New Delete

Notes

**General** ☐ Inactive

Code:  Description:

Company Detail: **Labor Setup**

**Begin Day From**

Address:

**Appointments**

Start:  Time:   
End:  Time:

**Labor To GL**

Labor Expense Type: ☐ Expense at time of entry  
☒ Expense thru WIP

Labor Expense:   
*COS - Service-Labor T\_M*

Labor Deferred:   
*Deferred Labor - Service*

Labor WIP:   
*WIP - Service Labor*

Override Tech Rate:

Notes



## Service Levels

The Service Level is a required field on each System record. The service level serves as a default for what your company will charge your customer for the service performed on that particular system. These default amounts and rates may be overridden at the time of Service Invoicing.

### General Tab - Data Entry Fields for Service Level

- Costs Included Check Box – if you check off Parts, Labor, and/or Other – the service ticket will not bill out that portion of the charges from the service ticket, as those costs are included. This can be overridden.
- Trip Charge – This is a default charge to appear on the invoice for this service ticket.
- If Bill as Labor is checked off for the Trip Charge, the customer will see two line items for Service Labor on their invoice. If you do not Check off Bill as Labor you can chose an invoice item to display on the invoice for the additional charge, for example Minimum Service Fee. Under Charge put the rate you want to charge.
- Other Charge – This is a second default charge that appears on the invoice, for example a fuel surcharge.
- Labor Calculation – Chose if the billing should start from dispatch or from arrival
- Labor Rates – These are the default Labor Rates that will be billed out for this service ticket after labor has been applied to the service ticket
- Billing – The billing increments you would like to bill for
- After the first \_\_\_\_ minutes – Billing at the Labor Rate above will begin to calculate after the first so many minutes indicated in this field

Notes

### Service Levels

[Service Levels](#)

Service Level	Description	Parts	Labor	Other	Bill As	Trip Ch...	Labor Item	Other Item
INSP-Flat Rate	INSP-Flat Rate	Y	Y	N	SVC Call	\$0.00	SVC Labor	
INSP-Prepaid	INSP-Prepaid	Y	Y	N	SVC Call	\$0.00	SVC Labor	
Job Part LCOM	Job Part LCOM	N	N	N	SVC Call	\$65.00	SVC Labor	
Part GL Test	Part GL Test	N	N	N	SVC Call	\$65.00	SVC Labor	
PP-Access	PP-Access	N	N	N	SVC Call	\$65.00	SVC Labor	
SL No Other	SL No Other	N	N	N	SVC Call	\$40.00	SVC Labor	
SL Yes Other	SL Yes Other	N	N	N	SVC Call	\$40.00	SVC Labor	SVC Misc
SVC Cont-LC	Service Contra...	Y	Y	N	SVC Call	\$0.00	SVC Labor	
SVC Cont-RSC	Service Contra...	Y	Y	N	SVC Call	\$0.00	SVC Labor	
T&M	T&M	N	N	N	SVC Call Fe...	\$60.00	SVC Labor	
T&M Resi-MI	T&M Resi-MI	N	N	N	SVC Call	\$75.00	SVC Labor	
T&M-LC	T&M - Large Com	N	N	N	SVC Call	\$80.00	SVC Labor	
T&M-RSC	T&M-Res/Small...	N	N	N	SVC Call	\$60.00	SVC Labor	SVC Misc
Time and Material	Time and Material	N	N	N	SVC Call	\$65.00	SVC Labor	
WAR/GB-LC	WAR/GB - Larg...	N	N	N	SVC Call	\$0.00	SVC Labor	
WAR/GB-RSC	Warranty/GoB...	N	N	N	SVC Call	\$0.00	SVC Labor	

☐ Include Inactive

[Service Level Edit](#) ☐ Inactive

Service Level:  Description:

**General** | **Parts** | **Inspection**

**General**

Costs Included: ☐ Parts ☐ Labor ☐ Other

Labor Item:

**Trip Charge**

☐ Bill as Labor  Charge:

Other Charge:  Charge:

**Labor Calculation** ☐ From Dispatch ☒ From Arrival

**Labor Rates**

Regular:   
 Overtime:   
 Holiday:

**Billing**

☐ 1 min ☐ 5 min ☐ 10 min  
☒ 15 min ☐ 30 min ☐ 60 min

After the first  minutes.

## Parts Tab – Data Entry Fields for Service Level

- Select a Material COGS account for this service level
- Select a Parts Invoice Item which will determine where the revenue for parts will go, depending on which revenue account and category the Parts Invoice Item is linked to
- Part Pricing Modifier – An Inventory Part can have two Service Part Prices. Select which price you would like this Service Level to use. Additionally, you can have percentage increases on Service Part Price 1 depending if the customer's site is Residential and Commercial.

**Service Level Edit** ☐ Inactive

Service Level: T&M Description: T&M

General **Parts** Inspection

**General**

Material COGS: 520100 COS - Service-Parts

Parts Item Code: SVC Part TX

**Part Pricing**

Use Service Price 1: ☒

Res Price Modifier: 1.0000

Comm Price Modifier: 1.0000

Use Service Price 2: ☐

Apply New Delete

Notes

## Inspection Tab – Data Entry Fields for Service Level

This form is used to specify whether the Service Level must be linked to a recurring line when selected on an Inspection Setup record. If this option is selected, when running cycle invoicing the user can indicate if they want run the cycle for All RMR, Only Inspection Linked RMR, or Only Non-Inspection Linked RMR.

**Service Level Edit** ☐ Inactive

Service Level: T&M Description: T&M

General | Parts | **Inspection**

☐ RMR Link to Customer Recurring is Required

*\*This option is used in Service Inspections to force a link between the inspection and customer RMR.*

Apply New Delete

**New Cycle Invoicing**

**Cycle Bill**

Month: [1] Invoice Date: [ ] \* Used for Tax Calculation

Invoice Group #: 0 Description: [ ]

Include Customers with Bill Day: 28 or Less

☒ All RMR  
☐ Only Inspection Linked RMR  
☐ Only Non-Inspection Linked RMR

Include	Branch	Description	Last Cycle	Posted
<input type="checkbox"/>	Ace Security Systems	Ace Security Systems	11/1/2017	N
<input type="checkbox"/>	Americas Best	Americas Best	2/1/2016	Y
<input type="checkbox"/>	Andrea Security Company	Andrea Security Company	11/1/2015	Y
<input type="checkbox"/>	BELG	Belgium	5/1/2015	Y
<input type="checkbox"/>	Boss Systems	Boss Systems	5/1/2015	Y
<input type="checkbox"/>	Don's Test Branch	Don's Test Branch	1/1/1900	Y

Notes

## Warranty Types

Each System record is assigned a Warranty Type code. This Warranty Type will determine the number of days the system is covered by your company's warranty, and what types of services are included in this warranty. The types of services are divided into three categories; parts, labor and other charges. On Tickets, the application checks to see if the System is covered by the Warranty. If the System is still within the warranty period, charges will be calculated based on the rules of the Warranty. If the System's Warranty has expired, the application will use the billing rules of the Service Level.

At the end of a job, on the Job Closing form, you can indicate the Warranty Start Date. Warranty Start Dates may manually be edited directly on a System record. The System's Warranty will calculate from the Warranty start date until how many days you indicate on the Warranty Type.

Warranty

☐ Warranty

Warranty Code	Description	Parts	Labor	Other	Lab Days	Part Days	Oth Days	Inactive
3 Yr Parts Only	3 Yr Parts Only	Y	N	N	0	1095	0	N
60 Days Labor ...	60 Days Labor Only	N	Y	N	60	0	0	N
90 P&L	90 Days Parts & Labor	Y	Y	N	90	90	0	N
90-P 30-L	90 Days Parts - 30 Days...	Y	Y	N	30	90	0	N
Full Warranty	Full Warranty	Y	Y	Y	365	365	365	N
None	None	N	N	N	0	0	0	N
One Year P & L	One Year Parts and Labor	Y	Y	N	365	365	365	N

☐ Include Inactive

☐ Warranty Edit

**Costs included in this Warranty**

Warranty Code:

Description:

Inactive: ☐

☒ Parts Length - Days:   
☒ Labor Length - Days:   
☐ Other Length - Days:

Notes

## Service Setup Defaults

This setup option consists of three forms, which contain information that will be used as defaults when creating System records, Service Tickets, and defining G/L Accounts for service related expenses.

### Service Setup Defaults - General Tab Fields

- Default Service Company – This will be the default Service Company that will be assigned to each new system record created. The User may override this value when creating the system record.
- Next Ticket # – Enter the starting number that you will have the system automatically assign to service tickets.
- Ticket Printing – There are two options available; you may select one or both options depending on your company preference.
- Note Access Level – Select the security Access Level that will default when entering a new Ticket Note; choices are Level 1 or Level 2.
- Schedule By – Select one of the two radio buttons; Technician Expertise Level or Routes.
- Next Inspection At – This option lets you determine when you want the Next Inspection Date (on the Inspection Setup record) to be advanced. The choices are:
  - When the Ticket is Closed
  - When the Ticket is Created
  - When the Ticket is Scheduled
  - When the Ticket is Resolved
- Warning Message Setup – Enter values that will determine when a warning message will be presented to a User after a certain number of Technician Ticket Appointments have been completed. The warning message is displayed when opening the Customer Explorer record for the Customer.
- Warranty Type – Select the default Warranty Type that will be used on each new system created; this may be overridden.
- Service Level – Select the default Service Level that will be used on each new system created; this may be overridden.
- Invoice Category – Select the default Category Code that will default on Service Tickets. This is typically the Service category; this may be overridden if the User has been granted security permissions to do so.
- Invoice Description – Select the default Invoice Description that will be used on all Service Invoices; this may be overridden by the user creating the invoice.

- **Parts Item Code** – Select the default Item Code that will be used when billing for parts. If an Item Code was entered on the Service Level setup, that Item Code will take precedence over this default.
- **Auto Create Invoice Number** – If a Ticket is billable, if this option is selected, SedonaOffice will automatically generate the invoice number. If this option is not selected, the User will be prompted to type in an invoice number when generating the Ticket invoice.

Prospect Defaults are used when the software automatically creates a new Prospect record as a result of selecting certain “flagged” Resolution Codes on Service Tickets.

- **Lead Source** – Select the desired default Lead Source.
- **Lead Source 2** – Select the desired default Secondary Lead Source (optional).
- **Status** – Select the desired default Sales Status.
- **Sales Department** – Select the desired default Sales Department.

Service Setup

General Setup | GL Setup | GL Accounts for Misc Expense

**General**

Default Service Co. MI-T&M

Next Ticket # 2569

Ticket Printing ☒ Print the System Account on Service Tickets

☒ When Printing Tickets, break out the Trip Charge on the Summary

Note Access Level 2 - Customer Restricted

Schedule By ☒ Technician Expertise Level ☐ Routes

Next Inspection At Ticket Closed

Warning Message Setup

2 or more dispatches within the last 60 days

**Maintenance Contracts**

Warranty Type Full Warranty

Service Level T&M-RSC

**Invoice Defaults**

Invoice Category S-Svc T&M

Invoice Description Service Call

Parts Item Code SVC Part TX

☒ Auto-Create Invoice Number

**Prospect Defaults**

Lead Source Technician

Lead Source 2

Status New

Sales Department Sales

Apply

## Service Setup Defaults – GL Setup Tab Fields

### Labor to GL

If your company will be recording the labor dollars expended on Tickets to the general ledger, two options for expensing labor are available:

- Expense at Time of Entry - if this option is selected, when dispatch times are entered for the Technician Appointment, the labor dollars will be expensed immediately.
- Expense through WIP (Work in Process) - If this option is selected, the labor will post to the Work in Process account specified on this form.
- If the option on this form, Default to Expense Inventory When Invoiced is selected, when the Ticket is invoiced, the amount posted to the WIP account will clear to the Labor expense account specified on this form. The labor dollars recorded to the general ledger will use the Technicians labor rate or the Override rate, if a value was entered on this setup form. Otherwise Labor and Materials will be expensed when the Ticket is closed.
- Labor Expense Account – Select the G/L account that will be used when posting the expense for the service labor.
- Labor Deferred – Select the G/L account that will be used when posting the deferred expense for the service labor. This is the offset account that is used when using WIP or Expensing at the time of entry.
- Labor WIP – Select the G/L account that will be used when posting the service labor into WIP.
- Override Tech Rate – If a value is entered into this field, labor dollars applied to Tickets will use this as the hourly Technician rate. If the value is left at zero, the hourly rate from the Technician setup (Installation tab) will be used.

Notes



## Misc WIP Setup

- WIP Account – If your company is using WIP for Tickets, select the G/L Account number that will be used as the WIP account for miscellaneous expenses for Tickets.

## Inventory Processing

- Use WIP for Service Parts – If this checkbox is selected, you will then select which G/L account to which service part costs will post when parts are issued to a Ticket. If using WIP for service parts, this account will be credited and the Service COGS account will be debited either when the service ticket is invoiced or closed.
- Service COGS – Select the G/L Account number that will be used to record the expense for parts used on Tickets.
  - Default To Expense Inventory – If this option is selected, inventory parts will be expensed at the Service Company level.
  - When Invoiced – If the Expense Inventory on Service Tickets option was selected, by selecting this option, inventory parts will be expensed when the Ticket is invoiced. If this option is not selected, inventory parts will be expensed when the service ticket is closed.

Service Setup

General Setup | **GL Setup** | GL Accounts for Misc Expense

---

☒ Labor To GL

Labor Expense Type: ☒ Expense at time of entry ☐ Expense thru WIP

Labor Expense: 521100 COS - Service-Labor T\_M

Labor Deferred: 258200 Deferred Labor - Service

Labor WIP: 122220 WIP - Service Labor

Override Tech Rate: 0

**Misc WIP Setup**

WIP Account: 122240 WIP - Service Other

**Inventory Processing**

☒ Use WIP for Service Parts

WIP Account: 122210 WIP - Service Parts

Service COGS: 520100 COS - Service-Parts

Default to Expense Inventory on Service Tickets (By Svc Co)

☒ When Invoiced

Apply

## Service Setup Defaults – GL Accounts for Misc Expenses

This optional setup form is used to create a list of available G/L Accounts that may be used for miscellaneous expenses related to Tickets. If any entries are made into this list, when creating a Purchase Order or entering an A/P Bill or Credit on the Expense tab, only these G/L Accounts will be available to the User. Using this option will prevent Users from selecting inappropriate G/L Accounts for Miscellaneous Expenses.

Service Setup

General Setup | GL Setup | **GL Accounts for Misc Expense**

Account Code	Description	Type
520100	COS - Service-Parts	Cost of Goods Sold
520110	COS - Service-Wire & Supplies	Cost of Goods Sold
521115	COS - Service-Travel	Cost of Goods Sold
522110	COS - Service-Subcontractor	Cost of Goods Sold
580113	COS - Freight on Parts	Cost of Goods Sold

Edit

GL Account Code

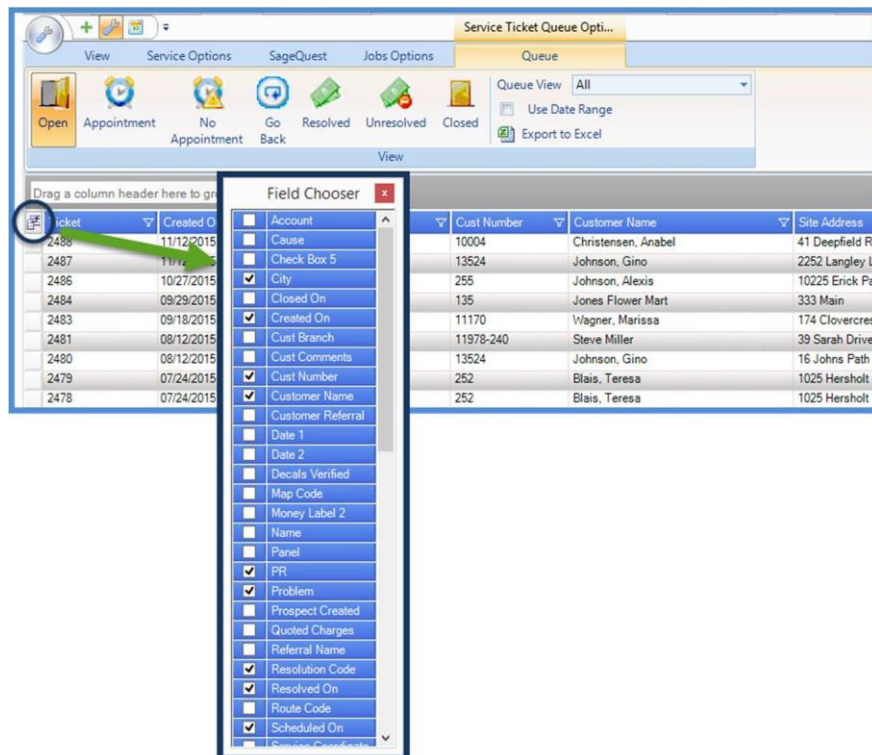
Notes

## Configuring the Ticket Queue

When first accessing the Ticket Queue, all available data columns are displayed. Each User may select which columns they desire to be displayed each time the Ticket Queue is accessed. Once the columns have been selected, the software will remember these settings every time the User logs into SedonaSchedule.

Ticket	Created On	PR	ST	Cust Number	Customer Name	Site Address	City	Problem	Technician	Scheduled On	Resolution	Resolved On
2488	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Plymouth	Camera			N/A	
2487	11/12/2015	Medium	OP	13524	Johnson, Gino	2252 Langley Lane	Novi	Add Equipment			N/A	
2486	10/27/2015	Medium	SC	255	Johnson, Alexis	10225 Erick Pass	Plymouth	Add Equipment	Larry Jackson	11/12/2015 8:00 AM	N/A	
2484	09/29/2015	Medium	SC	135	Jones Flower Mart	333 Main	Plymouth	Insp-Other	Mike McKenzie	11/12/2015 8:00 AM	N/A	
2483	09/18/2015	Medium	GB	11170	Wagner, Marissa	174 Clovercrest	Novi	Can't Set B/A	Marlin Larson	9/18/2015 11:00 AM	N/A	
2481	08/12/2015	Medium	SC	11978-240	Steve Miller	39 Sarah Drive	Plymouth	Can't Set B/A		8/13/2015 11:00 AM	N/A	
2480	08/12/2015	Medium	SC	13524	Johnson, Gino	16 Johns Path	Novi	Low Battery	Marshall Watson	8/14/2015 10:00 AM	N/A	
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt	Plymouth	Low Battery	Orlando Smith	7/24/2015 10:00 AM	N/A	
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth	AC Power Failure	Orson Goodman	7/23/2015 9:00 AM	3 Repair	7/24/2015 3:56 A.
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth	Add Equipment	Jimmy John	7/22/2015 10:00 AM	1 Add	7/24/2015 3:55 A.
2476	07/13/2015	Medium	RS	248	Lynn Jones	1245 Butler	Farmington	Can't Set B/A		7/13/2015 9:00 AM	4 Replace	7/13/2015 8:10 A.
2473	07/07/2015	Medium	RS	10024-6	Hoffman Auto Group	750 Connecticut Blvd	Canton	Prog Fee			N/A	
2472	07/07/2015	Medium	RS	10024-5	Hoffman Auto Group	600 Connecticut Blvd	Canton	Prog Fee			N/A	
2470	07/03/2015	Medium	RS	15405	Hoffman Auto Group	36 Albany Turnpike	Plymouth	Prog Fee			N/A	
2469	07/03/2015	Low	RS	15405	Hoffman Auto Group	36 Albany Turnpike	Plymouth	Code Changes			N/A	
2468	07/03/2015	Medium	RS	195	Whittier Auto Group	8 Main Street	Plymouth	Arming			N/A	
2466	05/27/2015	Medium	SC	46501	Smith, Henry	625 N Main	Canton	Insp-CCTV	Marshall Watson	6/23/2015 3:00 PM	N/A	
2465	05/27/2015	High	SC	31705-4	Plymouth Plantation-Carriage (Fire & Bur.	137 Warren Avenue	Plymouth	Insp-Sprinkler	Mack Miller	11/2/2015 2:00 AM	N/A	
2464	05/27/2015	Critical	SC	31705-24	Plymouth Plantation-Galleria	137 Warren Avenue	Plymouth	Insp-Fire	Mack Miller	11/2/2015 2:00 AM	N/A	
2463	05/27/2015	Medium	RS	31705-1	Plymouth Plantation-Carriage (Fire & Bur	137 Warren Avenue	Plymouth	Insp-Waterflow			4 Replace	8/12/2015 11:50

Clicking on the Field Chooser at the upper left of the Ticket Queue will display a list of all the available columns from which to select.



Once the desired fields have been selected, you may re-arrange the order of the columns by dragging to the desired location.

Ticket	Created On	PR	ST	Cust Number	Customer Name	Site Address	Problem	Technician	Scheduled On	City	Resolution	Resolved
2488	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Camera			Plymouth	N/A	
2487	11/12/2015	Medium	OP	13524	Johnson, Gino	2252 Langley Lane	Add Equipment			Novi	N/A	
2486	10/27/2015	Medium	SC	255	Johnson, Alexis	10225 Erick Pass	Insp-Other	Larry Jackson	11/12/2015 8:00 AM	Plymouth	N/A	
2484	09/29/2015	Medium	SC	135	Jones Flower Mart	333 Main	Can't Set B/A	Mike McKenzie	11/12/2015 8:00 AM	Plymouth	N/A	
2483	09/18/2015	Medium	GB	11170	Wagner, Marissa	174 Clovercrest	Can't Set B/A	Marlin Larson	9/18/2015 11:00 AM	Novi	N/A	
2481	08/12/2015	Medium	SC	11978-240	Steve Miller	39 Sarah Drive	Can't Set B/A		8/13/2015 11:00 AM	Plymouth	N/A	
2480	08/12/2015	Medium	SC	13524	Johnson, Gino	16 Johns Path	Low Battery	Marshall Watson	8/14/2015 10:00 AM	Novi	N/A	
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt	Low Battery	Orlando Smith	7/24/2015 10:00 AM	Plymouth	N/A	
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	AC Power Failure	Orson Goodman	7/23/2015 9:00 AM	Plymouth	3 Repair	7/24/2015
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Add Equipment	Jimmy John	7/22/2015 10:00 AM	Plymouth	1 Add	7/24/2015
2475	07/13/2015	Medium	RS	248	Lynn Jones	1245 Button	Can't Set B/A		7/13/2015 9:00 AM	Farmington	4 Replace	7/13/2015
2473	07/07/2015	Medium	RS	10024-6	Hoffman Auto Group	750 Connecticut Blvd	Prog Fee			Canton	N/A	
2472	07/07/2015	Medium	RS	10024-5	Hoffman Auto Group	600 Connecticut Blvd	Prog Fee			Canton	N/A	
2470	07/07/2015	Medium	RS	15405	Hoffman Auto Group	36 Albany Turnpike	Prog Fee			Plymouth	N/A	
2469	07/07/2015	Low	RS	15405	Hoffman Auto Group	36 Albany Turnpike	Code Changes			Plymouth	N/A	

Column widths may also be adjusted to the User's preference.

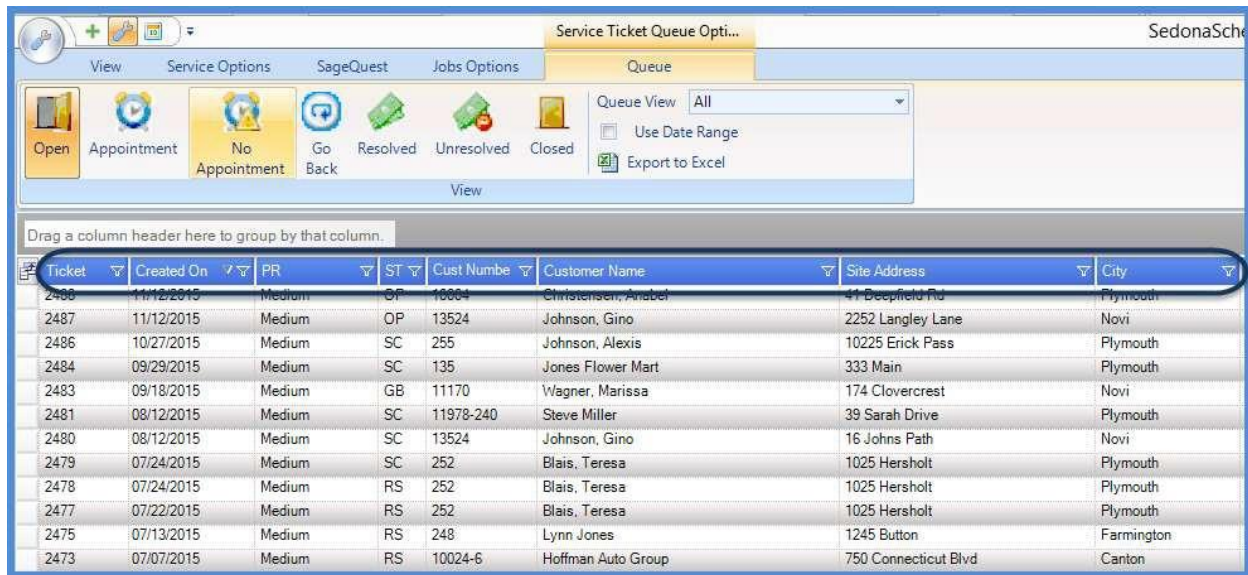
Ticket	Created On	PR	ST	Cust Number	Customer Name	Address	City
2488	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Plymouth
2487	11/12/2015	Medium	OP	13524	Johnson, Gino	2252 Langley Lane	Novi
2486	10/27/2015	Medium	SC	255	Johnson, Alexis	10225 Erick Pass	Plymouth
2484	09/29/2015	Medium	SC	135	Jones Flower Mart	333 Main	Plymouth
2483	09/18/2015	Medium	GB	11170	Wagner, Marissa	174 Clovercrest	Novi
2481	08/12/2015	Medium	SC	11978-240	Steve Miller	39 Sarah Drive	Plymouth
2480	08/12/2015	Medium	SC	13524	Johnson, Gino	16 Johns Path	Novi
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt	Plymouth
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth
2475	07/13/2015	Medium	RS	248	Lynn Jones	1245 Button	Farmington
2473	07/07/2015	Medium	RS	10024-6	Hoffman Auto Group	750 Connecticut Blvd	Canton

## Sorting Filtering & Grouping

The Ticket Queue may sorted and filtered to display the list of Tickets in the fashion desired by the User.

### Sorting

Sorting is accomplished by clicking on the header name of any of the displayed columns within the Ticket Queue.



The screenshot shows the 'Service Ticket Queue Opti...' window. The 'Queue' tab is selected, displaying a list of tickets. The columns are: Ticket, Created On, PR, ST, Cust Number, Customer Name, Site Address, and City. The 'Ticket' column header is circled, indicating it can be clicked to sort the list. The 'Queue View' dropdown is set to 'All'. The 'Use Date Range' checkbox is unchecked. The 'Export to Excel' button is visible. The list of tickets includes details such as Ticket ID, Created On date, Priority (PR), Status (ST), Customer Number, Customer Name, Site Address, and City.


Ticket	Created On	PR	ST	Cust Number	Customer Name	Site Address	City
2486	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Plymouth
2487	11/12/2015	Medium	OP	13524	Johnson, Gino	2252 Langley Lane	Novi
2486	10/27/2015	Medium	SC	255	Johnson, Alexis	10225 Erick Pass	Plymouth
2484	09/29/2015	Medium	SC	135	Jones Flower Mart	333 Main	Plymouth
2483	09/18/2015	Medium	GB	11170	Wagner, Marissa	174 Clovercrest	Novi
2481	08/12/2015	Medium	SC	11978-240	Steve Miller	39 Sarah Drive	Plymouth
2480	08/12/2015	Medium	SC	13524	Johnson, Gino	16 Johns Path	Novi
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt	Plymouth
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth
2475	07/13/2015	Medium	RS	248	Lynn Jones	1245 Button	Farmington
2473	07/07/2015	Medium	RS	10024-6	Hoffman Auto Group	750 Connecticut Blvd	Canton

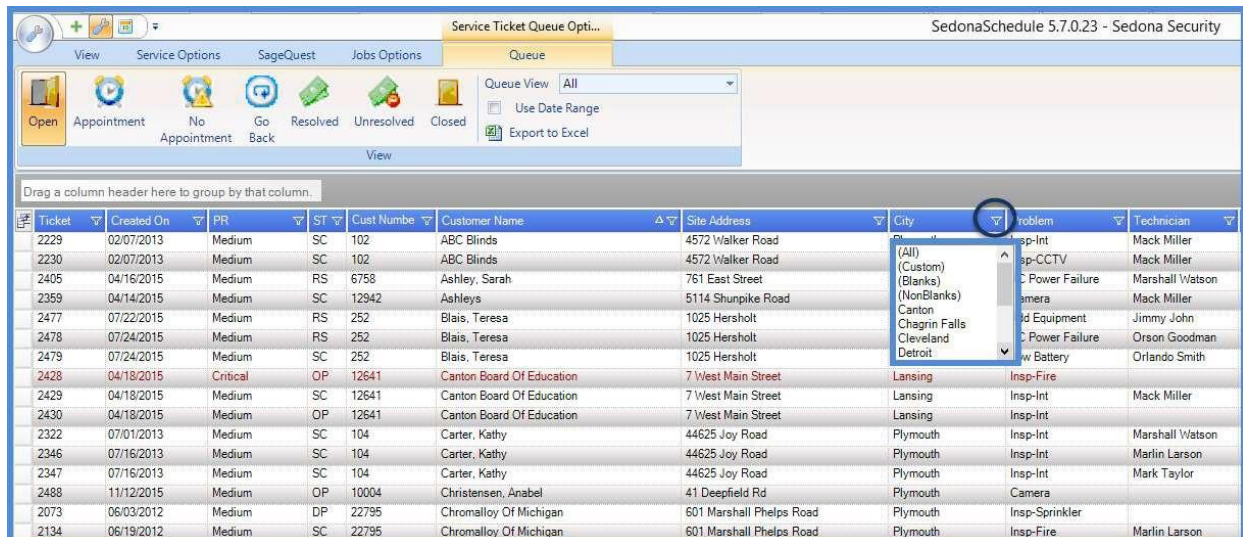


## Filtering

Filtering is used to narrow down the list to just the Tickets you want to work with.

For example, you want to view all of the Tickets where the Site is in a particular city. When clicking on the filter icon in the column header, a list of choices will be listed for all Tickets currently displayed. You may make one choice from the filter drop-down list. If you want to select more than once choice for the field, then you would need to create a custom filter. To remove a filter, click on the Filter button and select ALL at the top of the drop-down list.

When a Filter has been applied to one or more columns, a gold asterisk  will replace the Filter button.

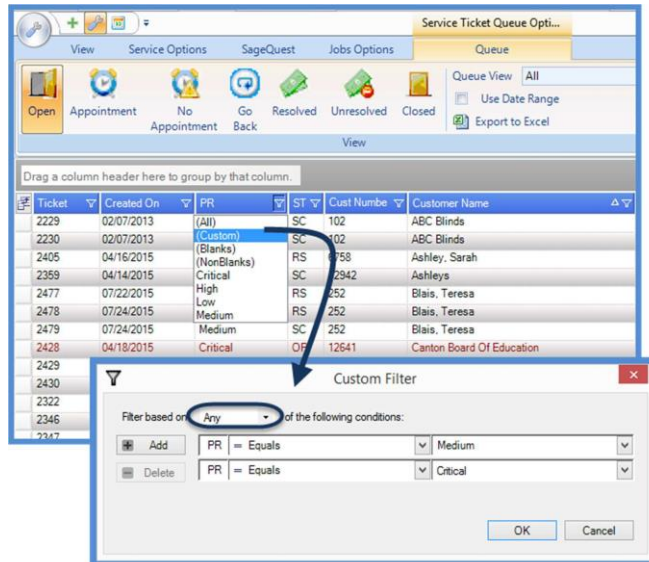


The screenshot shows the 'Service Ticket Queue Opti...' window. The 'Queue View' dropdown is set to 'All'. The 'Filter' button is replaced by a gold asterisk icon. The 'City' column header has a filter icon, and a dropdown menu is open showing a list of cities: (All), (Custom), (Blanks), (Non-Blanks), Canton, Chagrin Falls, Cleveland, and Detroit. The list of tickets is displayed below the header.

Ticket	Created On	PR	ST	Cust Numbe	Customer Name	Site Address	City	Problem	Technician
2229	02/07/2013	Medium	SC	102	ABC Blinds	4572 Walker Road		Insp-Int	Mack Miller
2230	02/07/2013	Medium	SC	102	ABC Blinds	4572 Walker Road		Insp-CCTV	Mack Miller
2405	04/16/2015	Medium	RS	6758	Ashley, Sarah	761 East Street		Power Failure	Marshall Watson
2359	04/14/2015	Medium	SC	12942	Ashleys	5114 Shunpike Road		Camera	Mack Miller
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt		Equipment	Jimmy John
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt		Power Failure	Orson Goodman
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt		Battery	Orlando Smith
2428	04/18/2015	Critical	OP	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Fire	
2429	04/18/2015	Medium	SC	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Int	Mack Miller
2430	04/18/2015	Medium	OP	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Int	
2322	07/01/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Marshall Watson
2346	07/16/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Marlin Larson
2347	07/16/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Mark Taylor
2488	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Plymouth	Camera	
2073	06/03/2012	Medium	DP	22795	Chromalloy Of Michigan	601 Marshall Phelps Road	Plymouth	Insp-Sprinkler	
2134	06/19/2012	Medium	SC	22795	Chromalloy Of Michigan	601 Marshall Phelps Road	Plymouth	Insp-Fire	Marlin Larson

## Custom Filters

Custom Filters help to refine the list of Tickets displayed in the list depending on what you want to view. For example, you want to see all Tickets where the Priority code is set to Critical or Medium



## Grouping

Within the Ticket Queue, you may view the Tickets in Groups. When using Groups, the view of the Ticket Queue changes to a tree structure. After creating a Group, each line displayed within the Ticket Queue may be expanded to show the Tickets that belong to that Group.

To create a Group, drag and drop the desired field to the gray Filter Bar located above the field names area of the Ticket Queue. In the example below, we have grouped the Tickets by the Site city name.

To remove a Group and return to the full Ticket Queue view, drag the Group name displayed in the gray bar down into the list of Tickets.

The screenshot shows the 'Service Ticket Queue Opti...' window. The 'Queue' tab is active, displaying a tree view of tickets grouped by City. The 'City' filter bar is expanded, showing a list of cities with their respective item counts. The 'City : Lansing (5 items)' group is selected, and its contents are displayed in a table below.

Ticket	Created On	PR	ST	Cust Number	Customer Name	Site Address	Problem
2428	04/18/2015	Critical	OP	12641	Canton Board Of Education	7 West Main Street	Insp-Fire
2429	04/18/2015	Medium	SC	12641	Canton Board Of Education	7 West Main Street	Insp-Int
2430	04/18/2015	Medium	OP	12641	Canton Board Of Education	7 West Main Street	Insp-Int
2447	04/20/2015	Medium	RS	13884	The Taft Apartments	414 Chapel Street	Add Equipmen
2449	04/21/2015	Critical	SC	13884	The Taft Apartments	414 Chapel Street	Insp-Fire

Count = 5

Below the table, the following cities are listed in the filter bar:

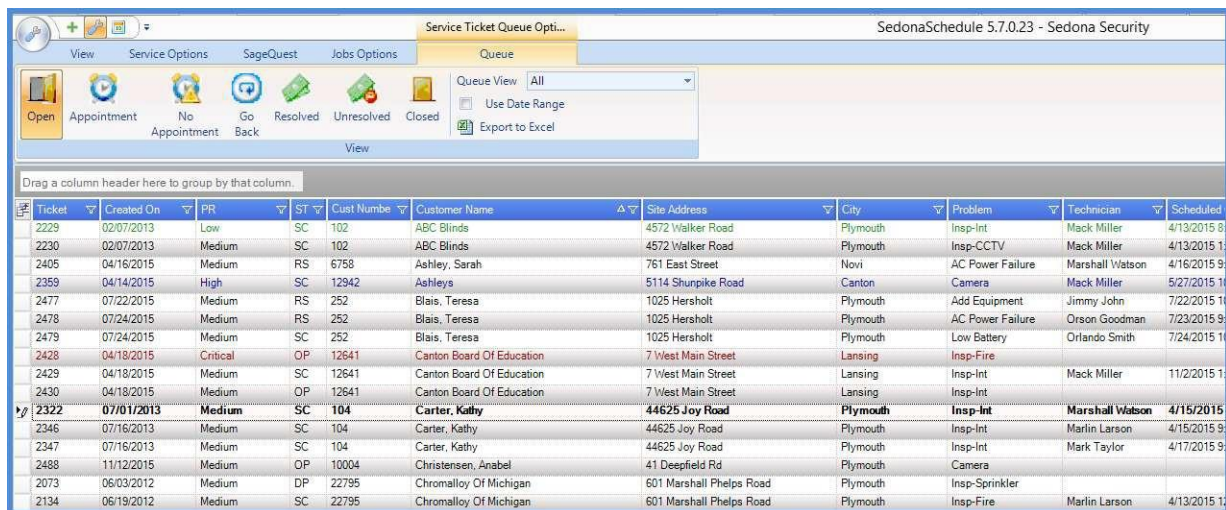
- City : Livonia (4 items)
- City : Novi (7 items)
- City : Plymouth (103 items)



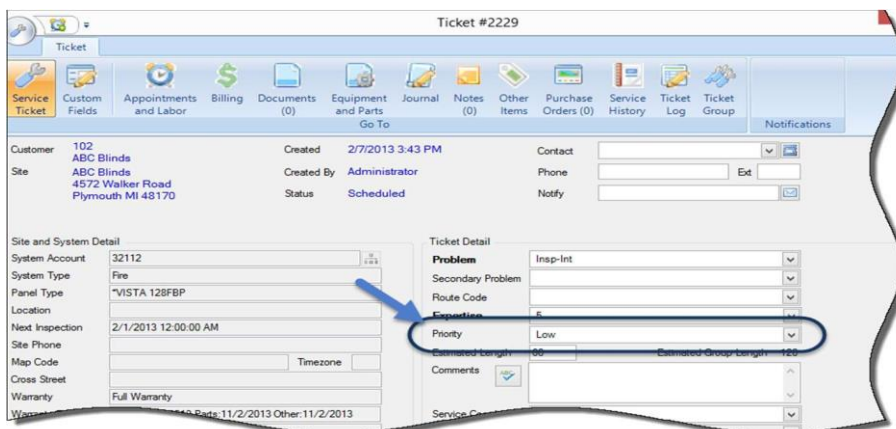
## Ticket Colors

Ticket color display has been coded into the Ticket Queue. The font color of a Ticket displayed in the Ticket Queue depends on the Priority of the Ticket. When a Ticket is initially created, the User must select a Problem Code. In the Problem Code setup table, a default Priority is assigned to that code. The default priority auto-fills into the Ticket, however the User creating the Ticket may choose to either escalate or de-escalate the Ticket Priority. Priority Codes are hard-coded into the software and cannot be added, changed, or deleted. Below are the Priority color codes.

- Low – Green
- Medium - Black
- High - Blue
- Critical – Red



Ticket	Created On	PR	ST	Cust Number	Customer Name	Site Address	City	Problem	Technician	Scheduled
2229	02/07/2013	Low	SC	102	ABC Blinds	4572 Walker Road	Plymouth	Insp-Int	Mack Miller	4/13/2015 8
2230	02/07/2013	Medium	SC	102	ABC Blinds	4572 Walker Road	Plymouth	Insp-CCTV	Mack Miller	4/13/2015 1
2405	04/16/2015	Medium	RS	6758	Ashley, Sarah	761 East Street	Novi	AC Power Failure	Marshall Watson	4/16/2015 9
2359	04/14/2015	High	SC	12942	Ashleys	5114 Shurpike Road	Canton	Camera	Mack Miller	5/27/2015 1
2477	07/22/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth	Add Equipment	Jimmy John	7/22/2015 1
2478	07/24/2015	Medium	RS	252	Blais, Teresa	1025 Hersholt	Plymouth	AC Power Failure	Orson Goodman	7/23/2015 9
2479	07/24/2015	Medium	SC	252	Blais, Teresa	1025 Hersholt	Plymouth	Low Battery	Orlando Smith	7/24/2015 1
2428	04/18/2015	Critical	OP	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Fire		
2429	04/18/2015	Medium	SC	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Int	Mack Miller	11/2/2015 1
2430	04/18/2015	Medium	OP	12641	Canton Board Of Education	7 West Main Street	Lansing	Insp-Int		
2322	07/01/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Marshall Watson	4/15/2015
2346	07/16/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Marlin Larson	4/15/2015 9
2347	07/16/2013	Medium	SC	104	Carter, Kathy	44625 Joy Road	Plymouth	Insp-Int	Mark Taylor	4/17/2015 9
2488	11/12/2015	Medium	OP	10004	Christensen, Anabel	41 Deepfield Rd	Plymouth	Camera		
2073	06/03/2012	Medium	DP	22795	Chromalloy Of Michigan	601 Marshall Phelps Road	Plymouth	Insp-Sprinkler		
2134	06/19/2012	Medium	SC	22795	Chromalloy Of Michigan	601 Marshall Phelps Road	Plymouth	Insp-Fire	Marlin Larson	4/13/2015 1



**Ticket #2229**

Customer: 102 ABC Blinds  
 Site: ABC Blinds  
 4572 Walker Road  
 Plymouth, MI 48170

Created: 2/7/2013 3:43 PM  
 Created By: Administrator  
 Status: Scheduled

Site and System Detail

System Account: 32112  
 System Type: Fire  
 Panel Type: VISTA 128FBP  
 Location: 2/1/2013 12:00:00 AM  
 Next Inspection: 2/1/2013 12:00:00 AM  
 Site Phone: [Empty]  
 Map Code: [Empty]  
 Cross Street: [Empty]  
 Warranty: Full Warranty  
 Warrantor: [Empty]

Ticket Detail

Problem: Insp-Int  
 Secondary Problem: [Empty]  
 Route Code: [Empty]  
 Expiration: [Empty]  
 Priority: Low  
 Estimated Length: 60  
 Estimated Group Length: 120  
 Comments: [Empty]  
 Service Code: [Empty]