Document Overview

SageQuest, a business partner of SedonaOffice, a total fleet management solution provides GPS-based vehicle tracking, routing, and reporting to help businesses nationwide more effectively manage their mobile workforce. Using real-time tracking, reporting and alerts, SedonaOffice customers quickly improve their fleet profitability by reducing costs, creating more revenue per day and improving overall customer satisfaction.

This document is being provided to explain how configure and maintain your integration with SedonaOffice version 5.6.193 and SageQuest.



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Reference Document SageQuest QuickStart

Requirements

- 1. SedonaOffice must initialize SageQuest integration at the server.
- 2. Users must use SedonaService to create SageQuest drivers for the appropriate service technicians (techs).
- 3. A user must use the SageQuest MobileControl web application (MCO) to associate drivers with vehicles.
- 4. A user must use SedonaService to assign appointments to the appropriate Service Technician.

Initialize SageQuest

SedonaOffice enables the integration by configuring the server with the appropriate user name and password to access the SageQuest integration server. Without the correct user name and password provided by SageQuest, SedonaOffice cannot communicate with the SageQuest server.

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Setup

Create SageQuest Drivers

To setup your SageQuest Technician, follow the steps below and on the following pages.

 In SedonaService, click on the *SageQuest Setup* option to select each SedonaOffice Service Technician whose appointments will be sent to SageQuest and plotted on the MCO map.

+ = View Service Options SageQuest								
SageQuest Setup	SageOr	lest Setun				_	- 0 X	
	E Mobile Control Login Information							
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Setup	Passw	ord •••••	•••••					
Calendar	Save Save							
October 2013	Sedona Technicians AsaceQuest Drivers							
1 2 3 4 5			C.	donaOffice Technic				
6 7 8 9 10 11 12	Calant	Driver ID		Name	Concine Comment	[Freed	Institut	
13 14 15 16 17 18 19	Select	Driver ID	Employee Code	Name	Service Company	Email	inactive	
20 21 22 23 24 25 26			Madison.Morrison	Madison Morrison			N	
27 20 23 30 31		0	Mark, Laroon	Mark Laylor			N	
		•	Marehall Watson	Marehall Wateon			N	
0			Mike McKenzie	Mike MeKenzie	MLINSP Cont		N	
01			Mike Workenzie	Mike Workenzie	MITRM		N	
Site			Odaada Serith	Orlando Smith			N N	
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			Oncor Martin	Orson Goodman			N	
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						💿 Add T	o SageQuest	
Notes								
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 Check the boxes in the *Select* column for the desired Technicians, then click on *the Add to SageQuest* button (located at the lower right of the form) to create associated drivers on the SageQuest Drivers tab, as shown below:

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rassw	ora	•••••					Same Same
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🖉 🔜 Sec	dona Tech	nicians) 🛃 SageQuest Drive	rs			
			Se	donaOffice Technic	ans		
Select	Driver	D	Employee Code	Name	Service Company	Email	Inactive
		-	Madison Morrison	Madison Morrison	MI-T&M		N
			Mark Taylor	Mark Taylor	MI-T&M		N
	8		Marlin Larson	Marlin Larson	MI-T&M		N
			Marshall.Watson	Marshall Watson	MI-T&M		N
			Mike.McKenzie	Mike McKenzie	MI-INSP Cont		N
			Mike.Walker	Mike Walker	MI-T&M		N
			Orlando.Smith	Orlando Smith	OH-T&M		N
			Orson.Goodman	Orson Goodman	OH-T&M		N
			Oscar.Martin	Oscar Martin	OH-T&M		N
			Osman.Wilson	Osman Wilson	OH-T&M		N
•						Ada	d To SageQuest

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SedonaOffice sends appointments to SageQuest for each driver it creates on the **SageQuest Drivers** tab. If you create a driver from the MCO web app, SedonaOffice will not send appointments for that driver. If a driver was setup from the MCO web app, the driver must be deleted using the MCO web app.

Į	🖶 SageQuest Setu	ip		$\left[\right]$
ſ	- Mobile Control	Login Information		
l	Usemame	wcf@sedonaoffice	e.com	
l	Password	•••••		r .
	Sedona Tec	hnicians Sage	eQuest Drivers	
ł	Driver ID	First Name	Last Name	
	8	Marlin	Larson	
				5

If the Sedona Technicians tab does not contain an entry for the driver you intend to create, create the Technician in SedonaSetup. This will require creating an Employee record be created first, and create/link the Technician record to the Employee record. For instructions on how to create Employees and Technicians, please refer to the SedonaOffice online documentation for help: <u>http://www.sedonaoffice.com/V5Help/V5Help.html</u>. For Employees, see SedonaSetup » Operations Setup » Employees. For Technicians, see SedonaSetup » Service Setup » Tecnicians.

Link SedonaOffice Technicians to SageQuest Vehicles

3. The next step is to associate SageQuest Drivers to their Vehicles. You will use the SageQuest MCO web app to associate drivers with vehicles equipped with GPS units. Click on the Vehicle Management tab of the MCO application. Enter the name of the Vehicle, the Vehicle Number and in the Driver field, click on the drop-down arrow to select the Driver name (SedonaOffice Technician name). Repeat this process for each Vehicle.

Once the Setup is complete, you will be able to view assigned appointments in SedonaOffice in the MCO application

	MobileControl					0		
	Control	Center	Мар	Directions	Pla	aces	Vehicle I	Management
/ehicle Manage	ement » Vi	ew All Vel	nicles » P	ortable 2		C		
/ehicle Inform	ation							(
Vehicle Name:	1	Portable	2				$\mathbf{)}$	vī
Vehicle Numbe	er:							Ye
Odometer (ca	lculated):	Initial:	0.00	Curre	ent:	0.00		Ma
Hours Of Use:	0	Initial:	0.00	Curre	ent:	0.00		Mc
Balloon:		(none)				-		E)
							(00m)	

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Configure Schedule Items to Send to SageQuest

While sending service ticket and job dispatches scheduled to a SageQuest driver is sufficient for most users, SedonaOffice allows users to send unassigned and unscheduled service tickets to SageQuest. On the **Advanced Settings** tab, check the appropriate checkbox and press the **Save** *Items to Send* button to configure SedonaOffice to send either item to SageQuest.

SageQuest Setu	up 🔚 🖃 🗮 🍋	N				
Mobile Control I	Login Information	1				
Usemame	wcf@sedonaoffice.com					
Password	Save	/				
Sedona Tech Schedule Items to	chnicians SageQuest Drivers Advanced Settings					
Send jobs and s	service tickets assigned to SageQuest drivers with valid Driver IDs. ed service tickets to SageQuest.	\				
Unscheduled Date: 12/30/2000 SedonaOffice sends unscheduled work orders to SageQuest as though they are scheduled for a specific day, called the "Unscheduled Date." Click the link to change the Unscheduled Date.						
To view unscheduled work orders on the SageQuest map, change the Start Date in the Work Order Options dialog to the Unscheduled Date shown above.						
	Save Items to Send					
		2				

SedonaOffice sends unscheduled service tickets as though they are scheduled for a specific day, called the "Unscheduled Date". In practice, this date should never change.

When users schedule tickets in SedonaOffice, the application cancels the associated work orders. By default, SageQuest is configured to display work orders with any status. To hide cancelled work orders, sign into SageQuest's **MCO** application and configure your **Work Order Status Preferences** (My Account » Work Order Preferences) to hide cancelled work orders.

Work Order Status Prefere	nces			
Code	Assigned Color	Unassigned Color	Display on Maps	
Arrived	White	White	×	
Cancelled	White	White	×	2
Departed	White	White	~	2
Dispatched	Gold	Gold	~	2
Open	White	White	×	2
Resolved	SpringGreen	SpringGreen	×	2
Scheduled	Rose	Rose	×	2
Unscheduled	White	White	~	2

Reference Document SageQuest QuickStart

Functionality

Creating Technician Appointments in SedonaOffice

Use SedonaService to assign appointments to any service technician mapped to a SageQuest driver. For instructions on how to create Technician appointments, please refer to the SedonaOffice online documentation for help: <u>http://www.sedonaoffice.com/wp-</u> <u>content/uploads/SedonaService-Basics-V-5.6-Rev-1.pdf</u>. Once the Technician appointment has been saved, in the background, SedonaOffice sends appointment information and status changes to SageQuest, which plots each appointment on the map in the MCO web app.



Use the MCO application (My Account » Balloons) to customize the data shown in the balloon.

MobileContro			bl		
	Control Center	Мар	Directions	Places	Vehicle Management
My Account » I	Balloons » Editing: W	ork Ord	er Balloon		
Customize Bal	loon				
Balloon Nan	Work	Order Bal	loon		
Available Fields			Select	ed	
⊡ f i General			€	Line 1	•
🚱 Cust	🚱 Customer Latitude			🌚 Work Oi	rder Number
🚱 Cust	😵 Customer Longitude			Line 2	
🐶 Cust	😵 Customer Number			Priver I	iame ast Name
Cust Cust	tomer State/Province		Driver Last Name		
🚱 Driv	er Email			Line 3	Ξ
🌚 Driv	er Phone			🌚 Work Oi	rder Reason
🌚 Wor	k Order Description		4	🌚 Work Or	rder Type
🌚 Wor	k Order Status Code		▼ ⊡…∅	Line 4	

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Viewing Work Order Details from SageQuest

To view the information sent from SageQuest to SedonaOffice, right-click an appointment on the **MCO** map and select **View full details**.





Viewing Work Order Status History from SageQuest

Right-click an appointment and select **Work order status history** ... to show status changes sent from SedonaOffice to SageQuest.

Marlin Larson26 Central StreetAppointment Scheduled (Scheduled)10/02/2013 9:00 AMMarlin Larson26 Central StreetTechnician Dispatched (Dispatched)10/02/2013 9:03 AMMarlin Larson26 Central StreetTechnician Arrived (Arrived)10/02/2013 9:03 AMMarlin Larson26 Central StreetTechnician Arrived (Arrived)10/02/2013 9:13 AMMarlin Larson26 Central StreetTechnician Arrived (Arrived)10/02/2013 9:13 AMMarlin Larson26 Central StreetAppointment Resolved (Resolved)10/02/2013 10:03 AM	Driver Name	Customer	Driver Status	Work Order Status	Time
Marlin Larson26 Central StreetTechnician Dispatched (Dispatched)10/02/2013 9:03 AMMarlin Larson26 Central StreetTechnician Arrived 	1arlin .arson	26 Central Street		Appointment Scheduled (Scheduled)	10/02/2013 9:00 AM
Marlin26 CentralTechnician Arrived10/02/2013LarsonStreet(Arrived)9:13 AMMarlin26 CentralAppointment Resolved10/02/2013LarsonStreet(Resolved)10:03 AM	Marlin Larson	26 Central Street		Technician Dispatched (Dispatched)	10/02/2013 9:03 AM
Marlin 26 Central Appointment Resolved 10/02/2013 Larson Street (Resolved) 10:03 AM	Marlin Larson	26 Central Street		Technician Arrived (Arrived)	10/02/2013 9:13 AM
	Marlin Larson	26 Central Street		Appointment Resolved (Resolved)	10/02/2013 10:03 AM



Viewing Unassigned Work Orders from SageQuest

1. On the MCO site, click the **options** link in the lower left-hand corner.



2. Check the **Unassigned** check box and press the **Ok** button.

Work Order Show only : 🗹 A Filter to show only	Options Assigned I I Unassigned y selected:	
Types:	All Selected	\$
Statuses:	7 selected	\$

3. The map now displays unassigned work orders.





Viewing Unscheduled Work Orders From SageQuest

To view unscheduled work orders from SageQuest,

1. On the MCO site, click the **options** link in the lower left-hand corner.



2. Set the Start Date to the "Unscheduled Date" and check the "Unassigned" checkbox. Then press the **Ok** button.

Work Orde	r Options	
Show only : 🗹	Assigned 🗹 Unassigned	
Filter to show on	y selected:	
Types:	All Selected	\$
Statuses:	7 selected	+
Start Date:	12/30/2000	+
Sched. Start:	12:00 am	
Sched. End:	11:59 pm	
unta S DD	From: Sat Dec 30, 2000 12:00 AM To: Sat Dec 30, 2000 11:59 PM	Ok

3. The map now displays unscheduled work orders.



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Verifying SageQuest Activity

By default, SedonaOffice sends job and service activity to SageQuest once every five minutes. To verify when this process last ran and how many status are queued to be sent, open the service module's **SageQuest Setup** dialog and select the **Advanced Settings** tab. The SageQuest Activity section shows when this process last ran and how many status changes are queued to be sent to SageQuest.

ſ	SageQuest Activity		
	Work orders last sent:	10/11/2013 4:51:3 PM	
	Number of status updates queued to send:	9	
			Refresh Activity

Troubleshooting

Appointments Do Not Appear on the MCO Map

In SedonaService, click on the **SageQuest Setup** tab to verify SedonaOffice can connect to SageQuest. The dialog shows a message such as "A communication error occurred getting information from SageQuest" or "Unable to connect to SageQuest" if SedonaOffice cannot access the SageQuest integration server.

If the **SageQuest Setup** dialog does not show an error message, verify the **Sedona Technicians** tab shows checkmarks next to the appropriate Driver IDs *and* the **SageQuest Drivers** tab shows Driver IDs next to all drivers. If the **SageQuest Drivers** tab has duplicate driver records or drivers without Driver IDs, this often results from creating drivers in the MCO web app rather than using SedonaOffice to create drivers. SedonaOffice will not send appointments to SageQuest if the driver (Technician) was not created in SedonaOffice first.