

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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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

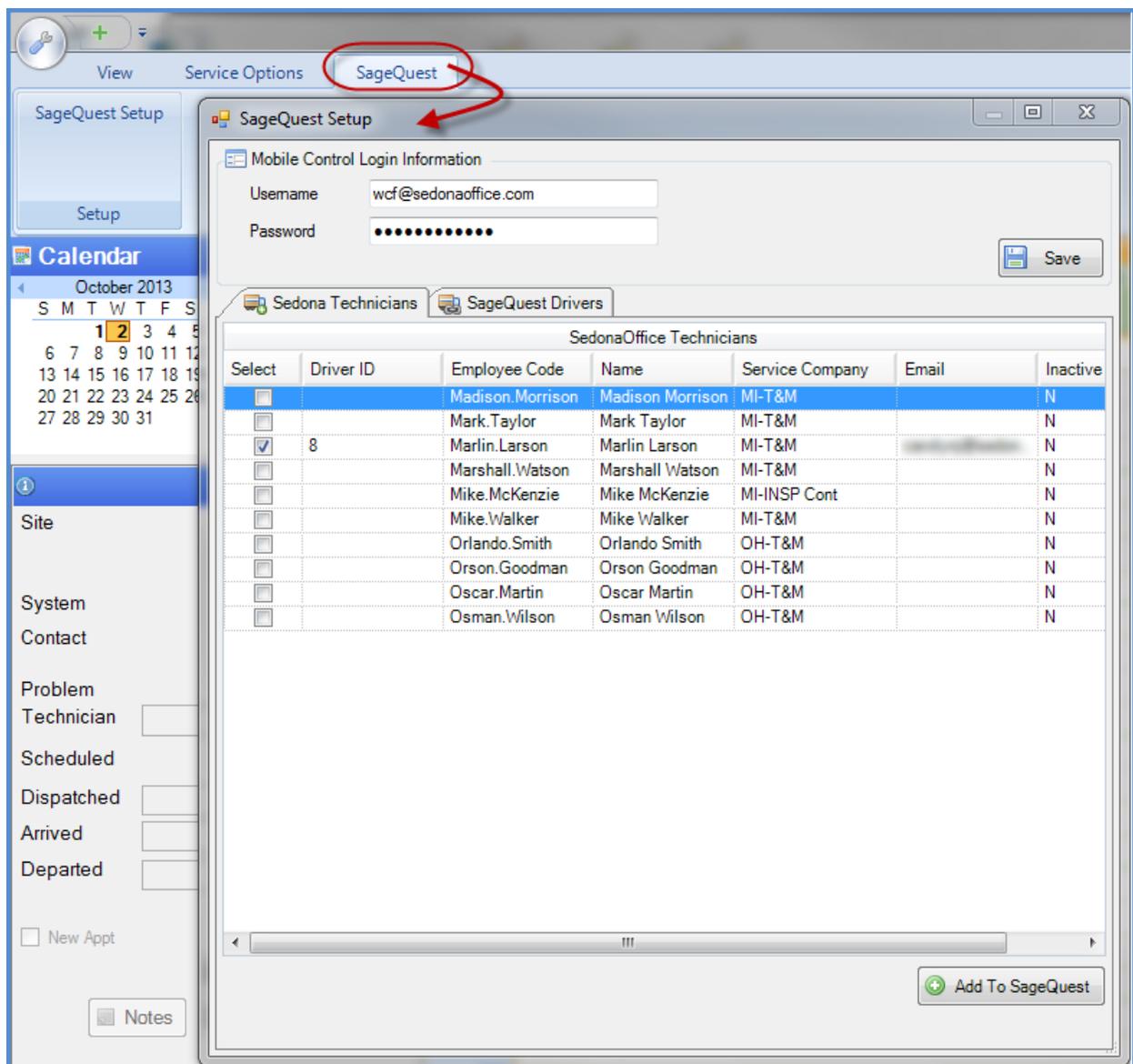
SedonaOffice enables the integration by configuring the server with the appropriate user name and password to access the SageQuest integration server. Without the correct user name and password provided by SageQuest, SedonaOffice cannot communicate with the SageQuest server.

Setup

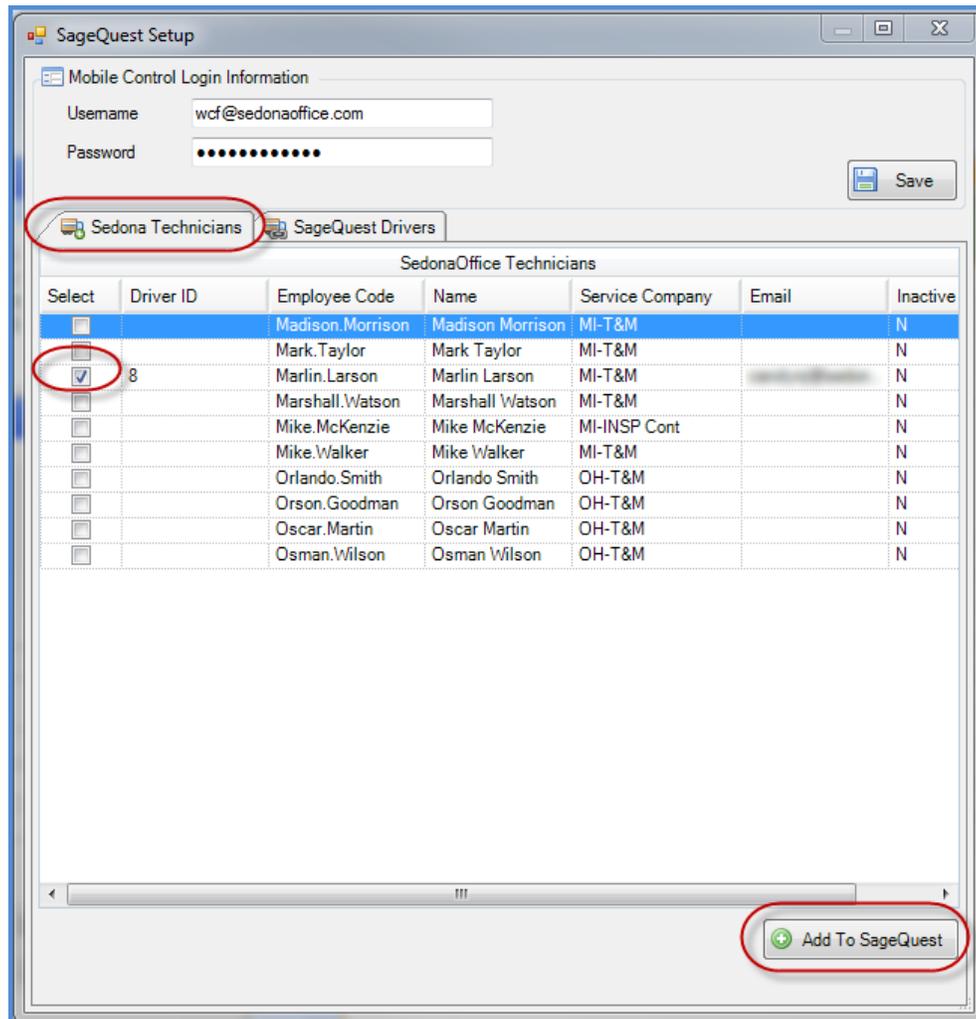
Create SageQuest Drivers

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

1. 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.



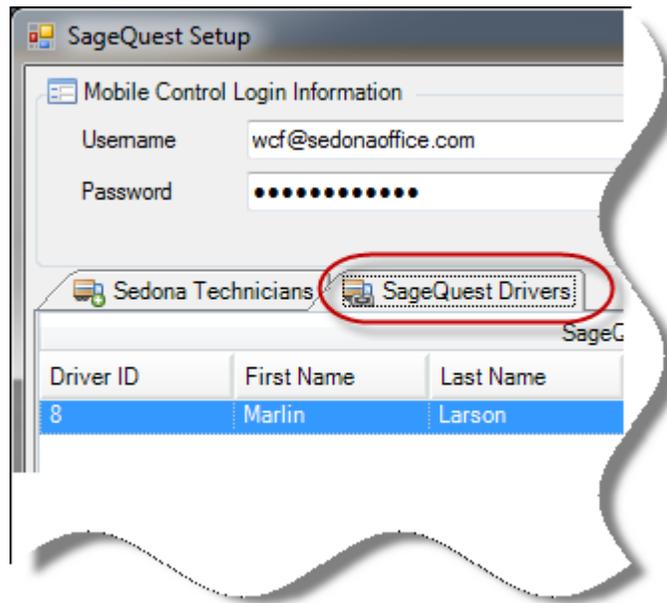
2. Check the boxes in the *Select* column for the desired Technicians, then click on the **Add to SageQuest** button (located at the lower right of the form) to create associated drivers on the **SageQuest Drivers** tab, as shown below:





Note:

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.



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: <http://www.sedonaoffice.com/V5Help/V5Help.html>. For Employees, see SedonaSetup » Operations Setup » Employees. For Technicians, see SedonaSetup » Service Setup » Tecnicians.

Link SedonaOffice Technicians to SageQuest Vehicles

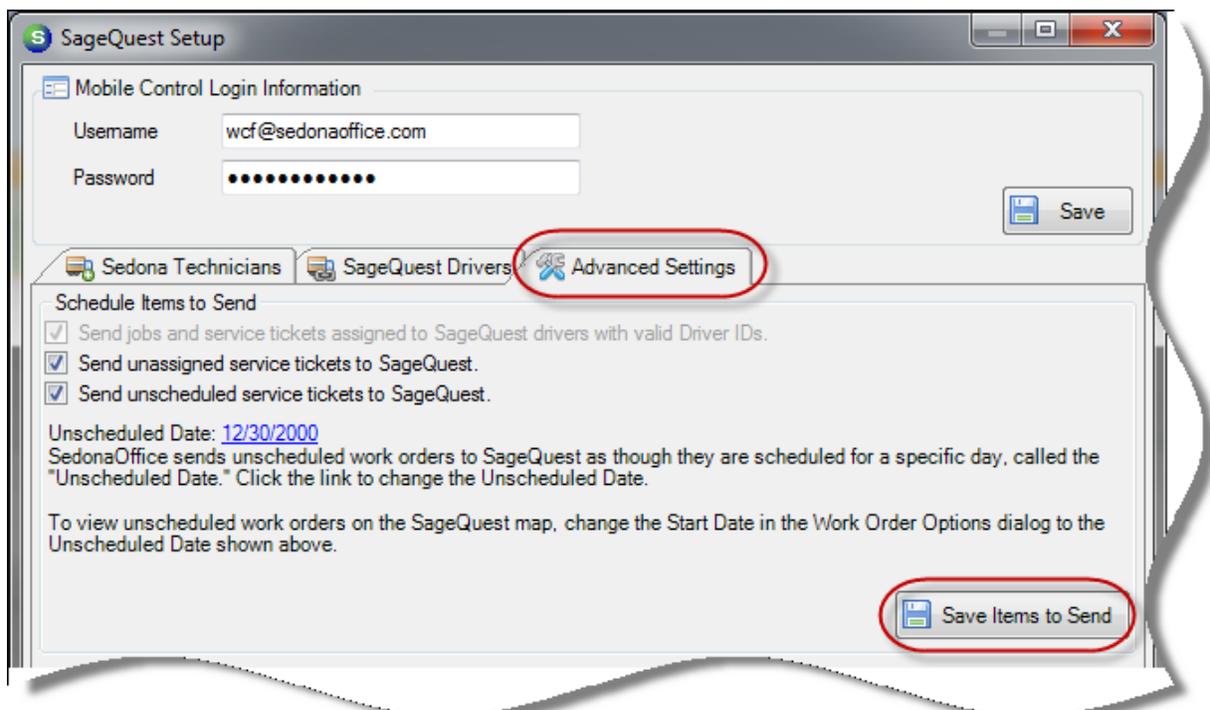
3. The next step is to associate SageQuest Drivers to their Vehicles. You will use the **SageQuest MCO** web app to associate drivers with vehicles equipped with GPS units. Click on the Vehicle Management tab of the MCO application. Enter the name of the Vehicle, the Vehicle Number and in the Driver 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



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.



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.

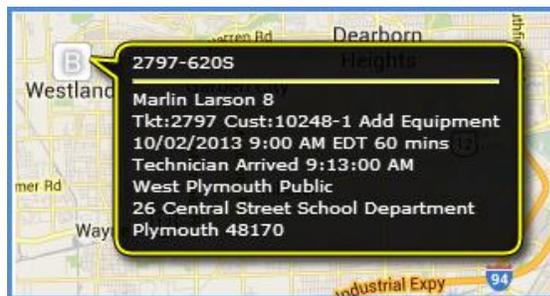
When users schedule tickets in SedonaOffice, the application cancels the associated work orders. By default, SageQuest is configured to display work orders with any status. To hide cancelled work orders, sign into SageQuest’s **MCO** application and configure your **Work Order Status Preferences** (My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

| Work Order Status Preferences | | | | |
|-------------------------------|---|---|-----------------|---|
| Code | Assigned Color | Unassigned Color | Display on Maps | |
| Arrived | <input type="checkbox"/> White | <input type="checkbox"/> White | ✓ |  |
| Cancelled | <input type="checkbox"/> White | <input type="checkbox"/> White | ✗ |  |
| Departed | <input type="checkbox"/> White | <input type="checkbox"/> White | ✓ |  |
| Dispatched | <input checked="" type="checkbox"/> Gold | <input checked="" type="checkbox"/> Gold | ✓ |  |
| Open | <input type="checkbox"/> White | <input type="checkbox"/> White | ✓ |  |
| Resolved | <input checked="" type="checkbox"/> SpringGreen | <input checked="" type="checkbox"/> SpringGreen | ✓ |  |
| Scheduled | <input checked="" type="checkbox"/> Rose | <input checked="" type="checkbox"/> Rose | ✓ |  |
| Unscheduled | <input type="checkbox"/> White | <input type="checkbox"/> White | ✓ |  |

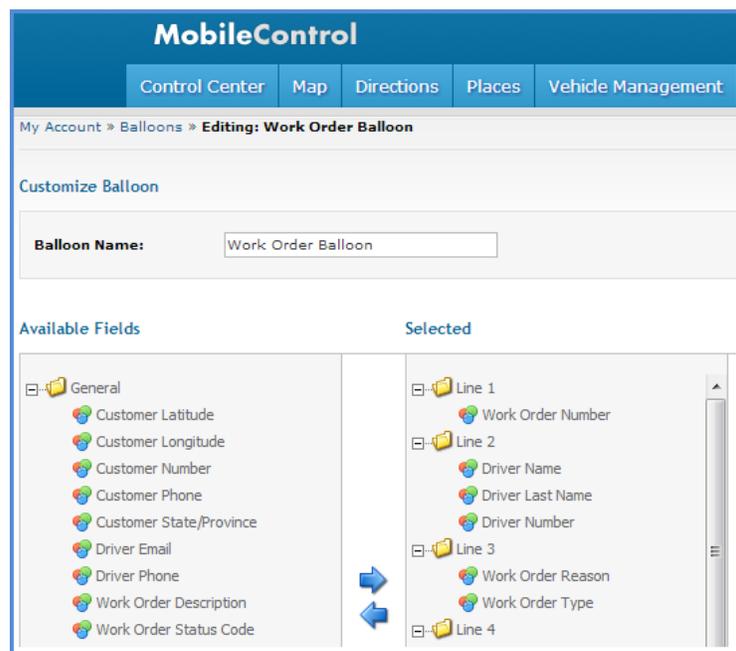
Functionality

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: <http://www.sedonaoffice.com/wp-content/uploads/SedonaService-Basics-V-5.6-Rev-1.pdf>. 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.

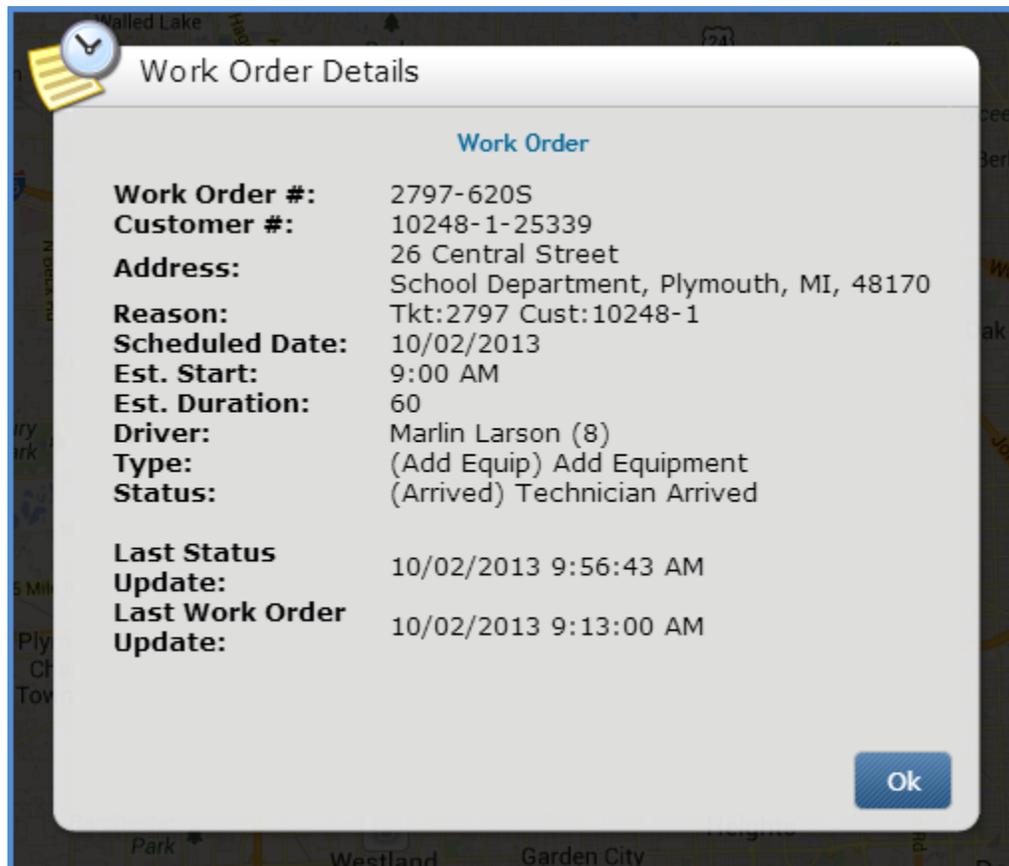


Use the **MCO** application (My Account » Balloons) to customize the data shown in the balloon.



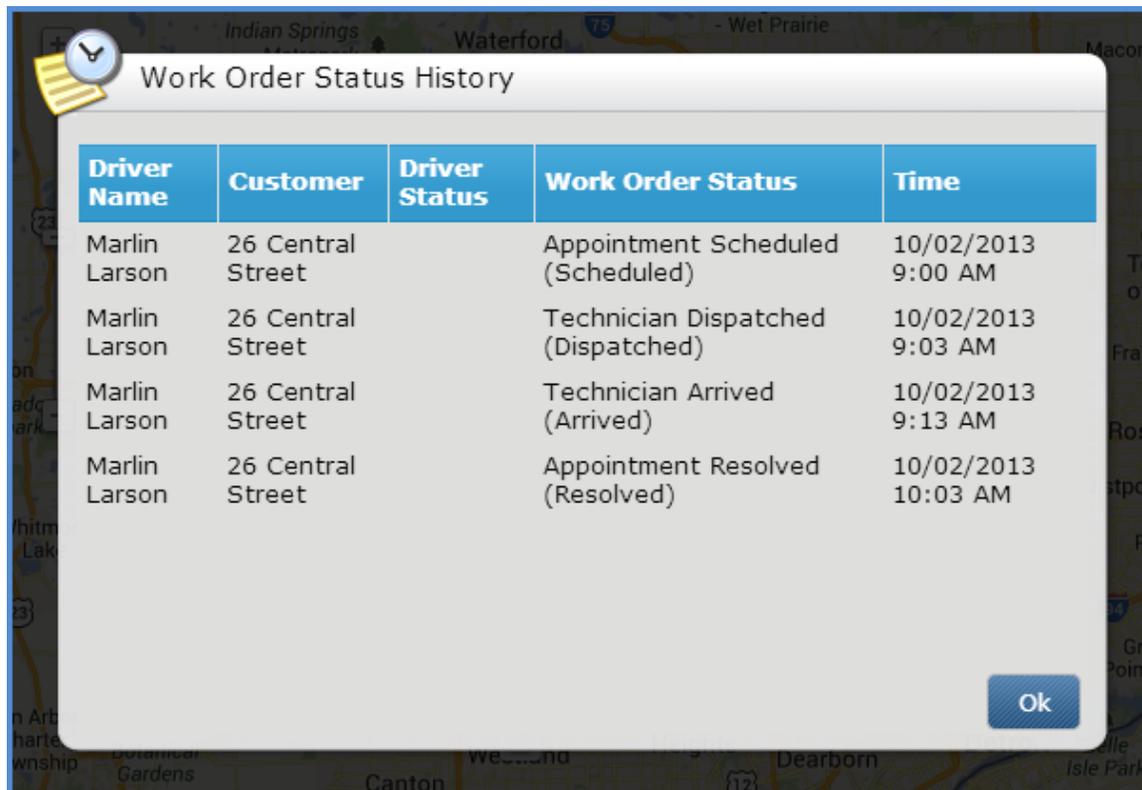
Viewing Work Order Details from SageQuest

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.



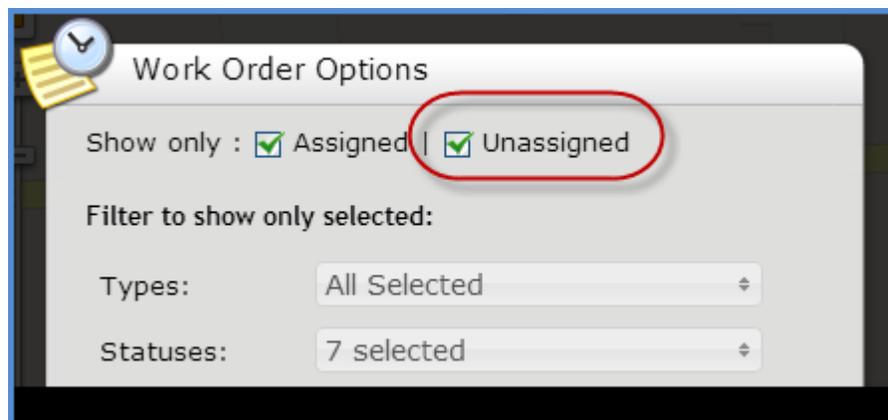
| Driver Name | Customer | Driver Status | Work Order Status | Time |
|---------------|-------------------|---------------|------------------------------------|---------------------|
| Marlin Larson | 26 Central Street | | Appointment Scheduled (Scheduled) | 10/02/2013 9:00 AM |
| Marlin Larson | 26 Central Street | | Technician Dispatched (Dispatched) | 10/02/2013 9:03 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

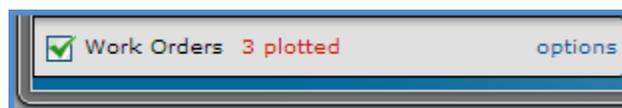
1. On the MCO site, click the **options** link in the lower left-hand corner.



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



3. The map now displays unassigned work orders.



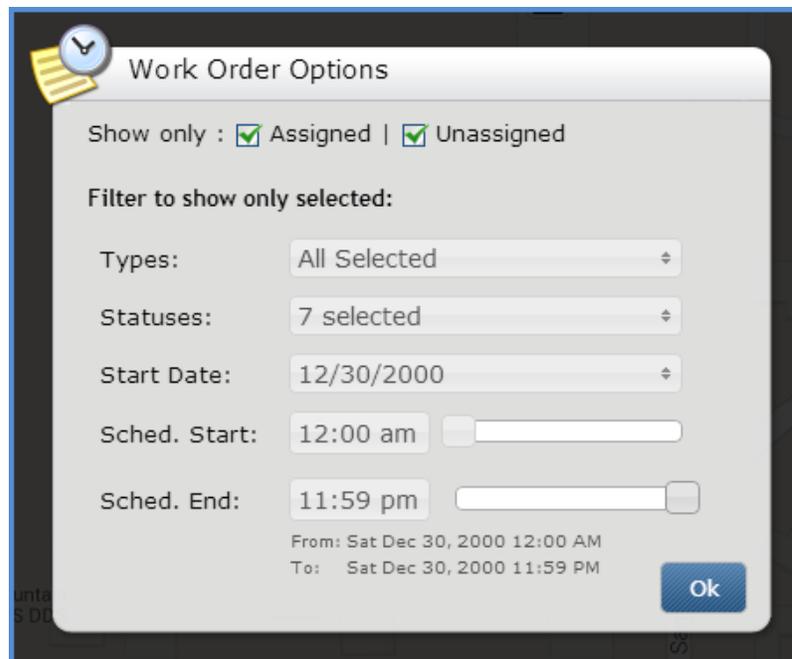
Viewing Unscheduled Work Orders From SageQuest

To view unscheduled work orders from SageQuest,

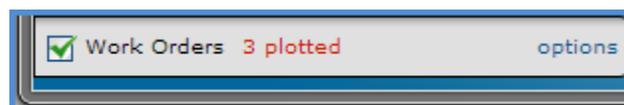
1. On the MCO site, click the **options** link in the lower left-hand corner.



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

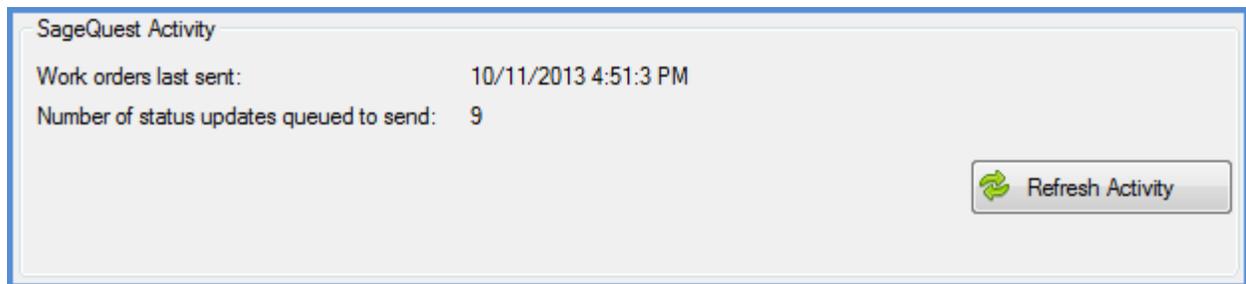


3. The map now displays unscheduled work orders.



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.



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.