SedonaSchedule - Document Overview

SedonaSchedule, previously known as SedonaService, incorporates the scheduling, dispatching and management of Ticket and Job Appointments. All scheduling may now be performed within SedonaSchedule. The Job Schedule Board and the Jobs Appointment Summary will be retired in the near future.

When scheduling Job Appointments, you have the ability to schedule one appointment for one Installer or multiple appointment dates for one or multiple installers, all from the new Job Appointment form. Job Appointments may be dragged to a different Installer on the same day, or may easily be re-scheduled by editing the appointment from the Schedule Board.

Job Appointments may be dispatched directly from the Schedule Board in a “Live Dispatch” mode, or may be dispatched manually by office staff.

A Job Listing is now available to view all open Jobs or Jobs that are not currently scheduled. The Job Listing may be sorted and filtered using the same type of functionality that is employed in the Ticket Queue.

This document is being provided to explain how to use the new features of SedonaSchedule, which is available as of SedonaOffice version 5.6.200.

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Setup & Changes

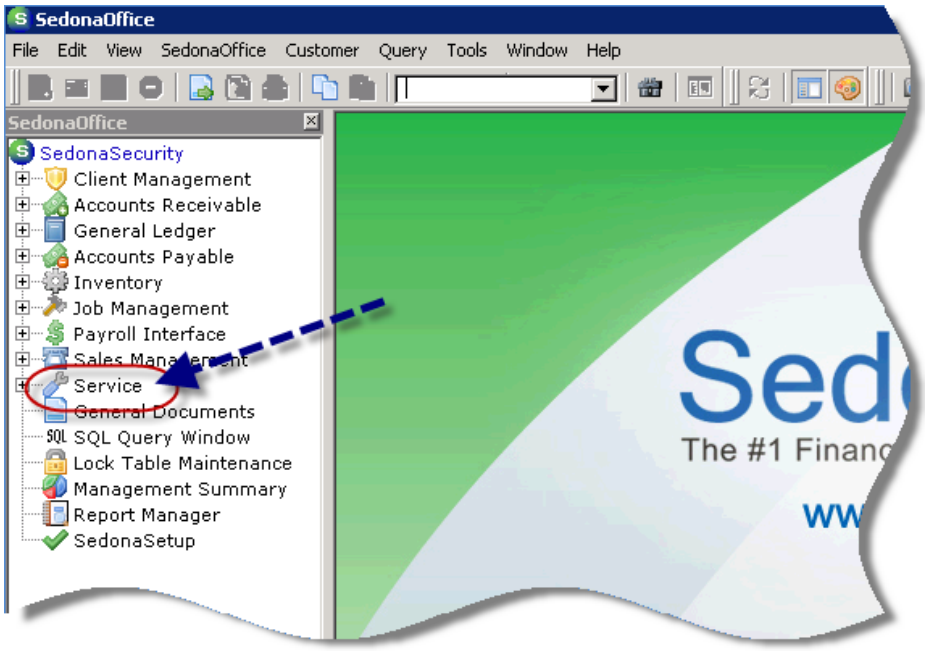
Setup & Changes

Display Group Setup

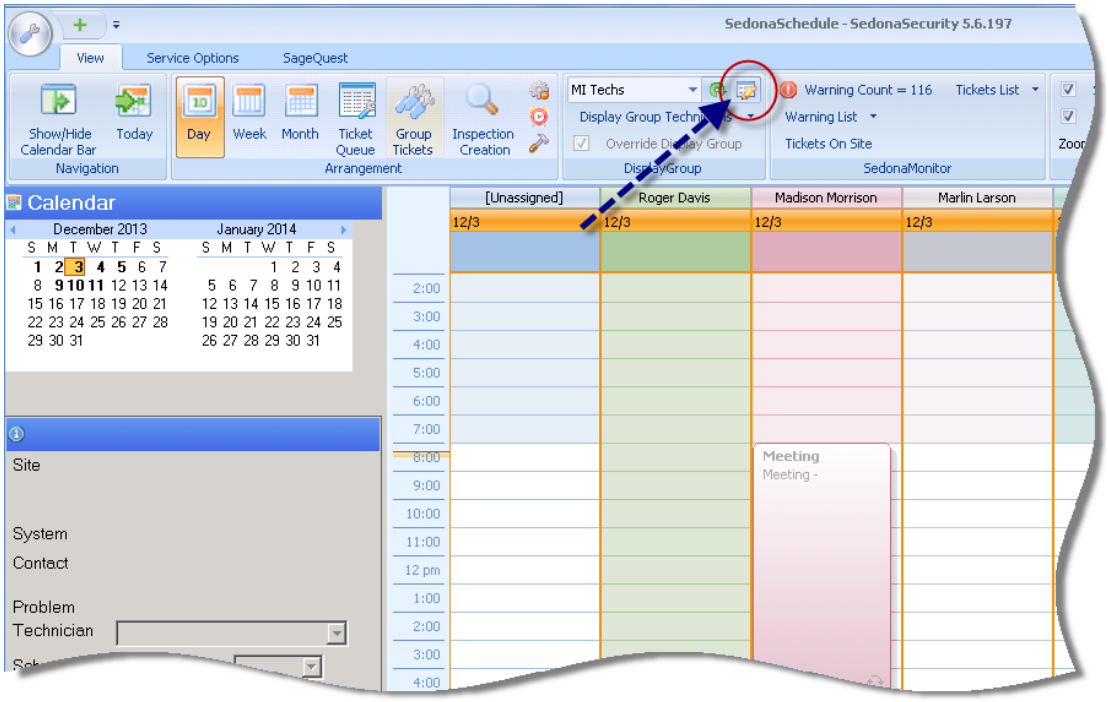
If your company's Installers work exclusively on Jobs, you are using Job Appointments or the Job Schedule Board, and you currently do not have your Installers included in any Display Group on the SedonaSchedule [*formerly SedonaService*] Board, you will need to either create a new Display Group or include your Installers in an existing Display Group.

To create a new *Display Group* for your Installers, follow the steps below and on the following pages.

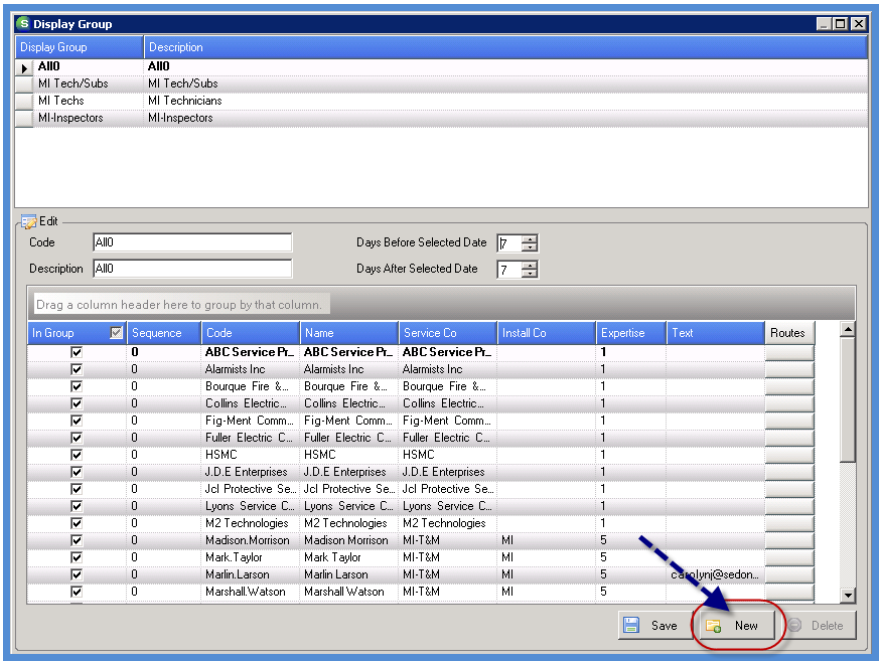
1. Open *Service* from the main SedonaOffice menu.



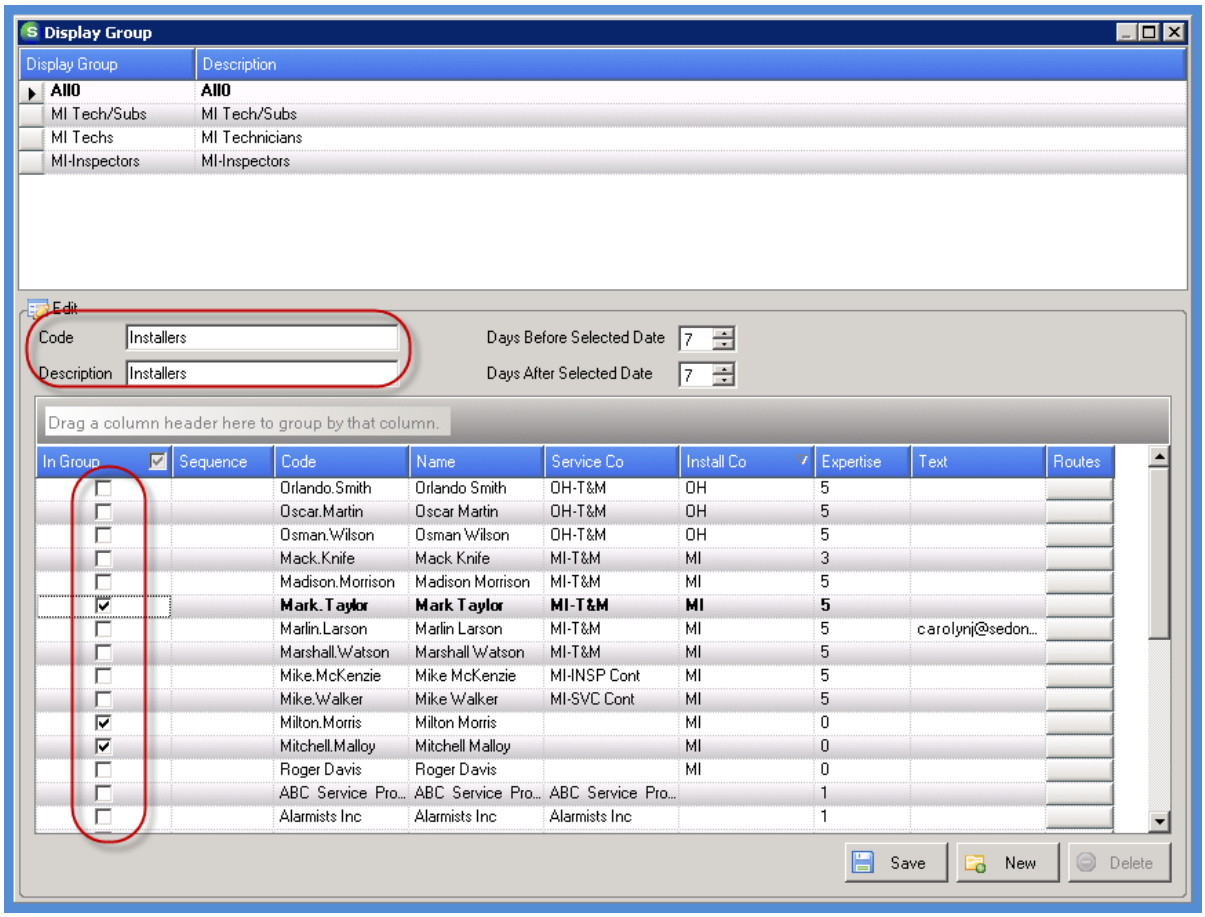
2. *SedonaSchedule* will be displayed. Click on the *Display Group Edit* button on the Ribbon.



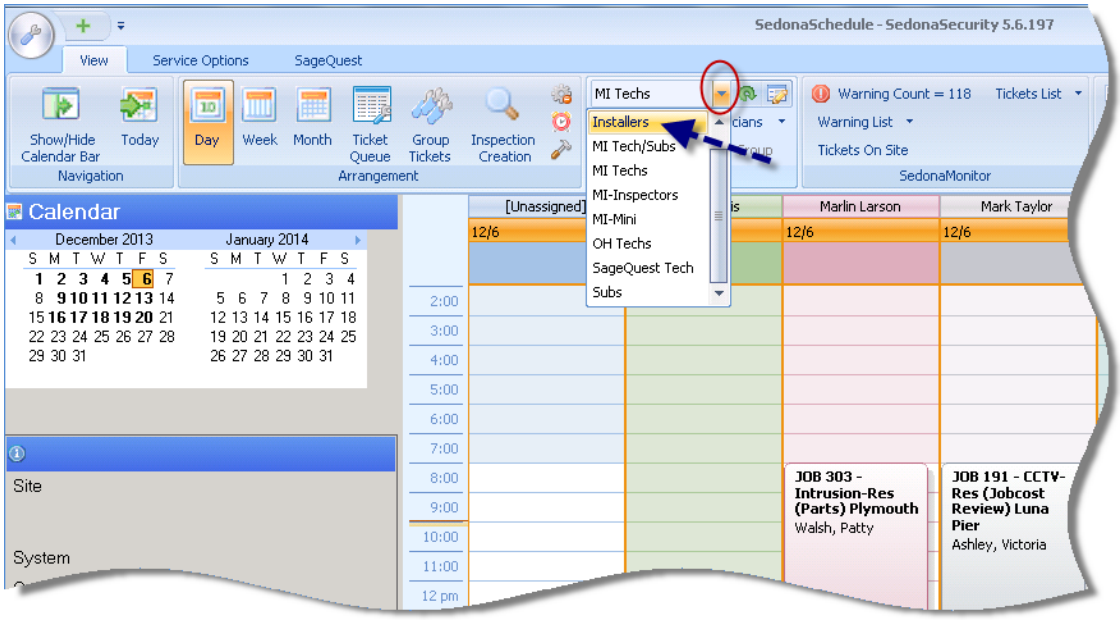
3. The *Display Group* form will be displayed. Click on the *New* button at the lower right of the form.



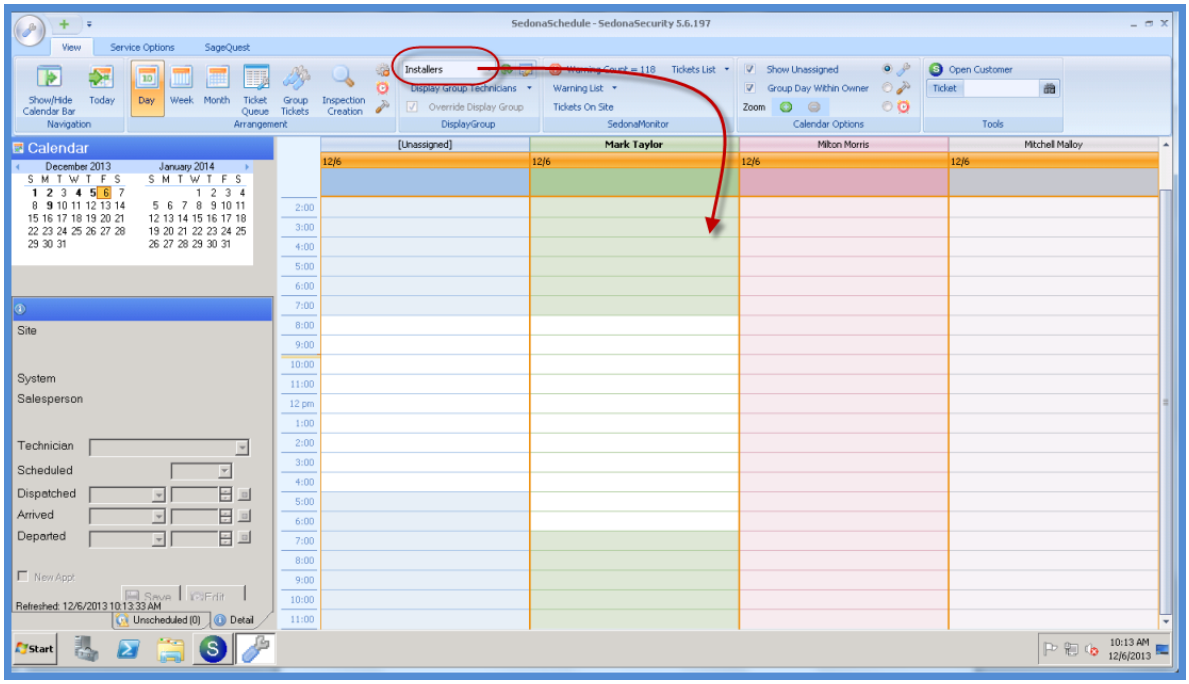
4. In the Code field, enter the name of the new Display Group. In the Technician/Installer name list, check the box to the left of each Installer to be included in the group that will display on the scheduling board. When finished, click the Save button and close out of the Display Group edit.



5. You will be returned to the SedonaSchedule board. Click on the drop-down arrow in the Display Group selection field and select your new Installers Display Group.



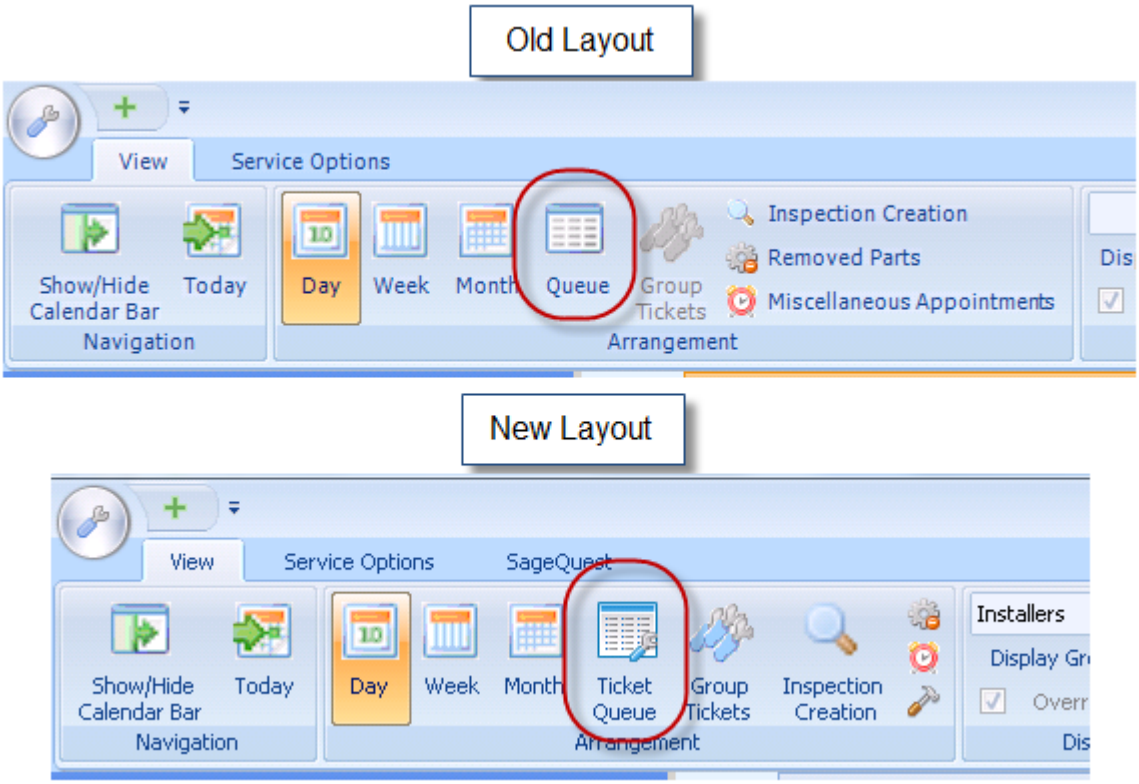
6. The Scheduling board will refresh with the Installer names that were assigned to the Display Group.



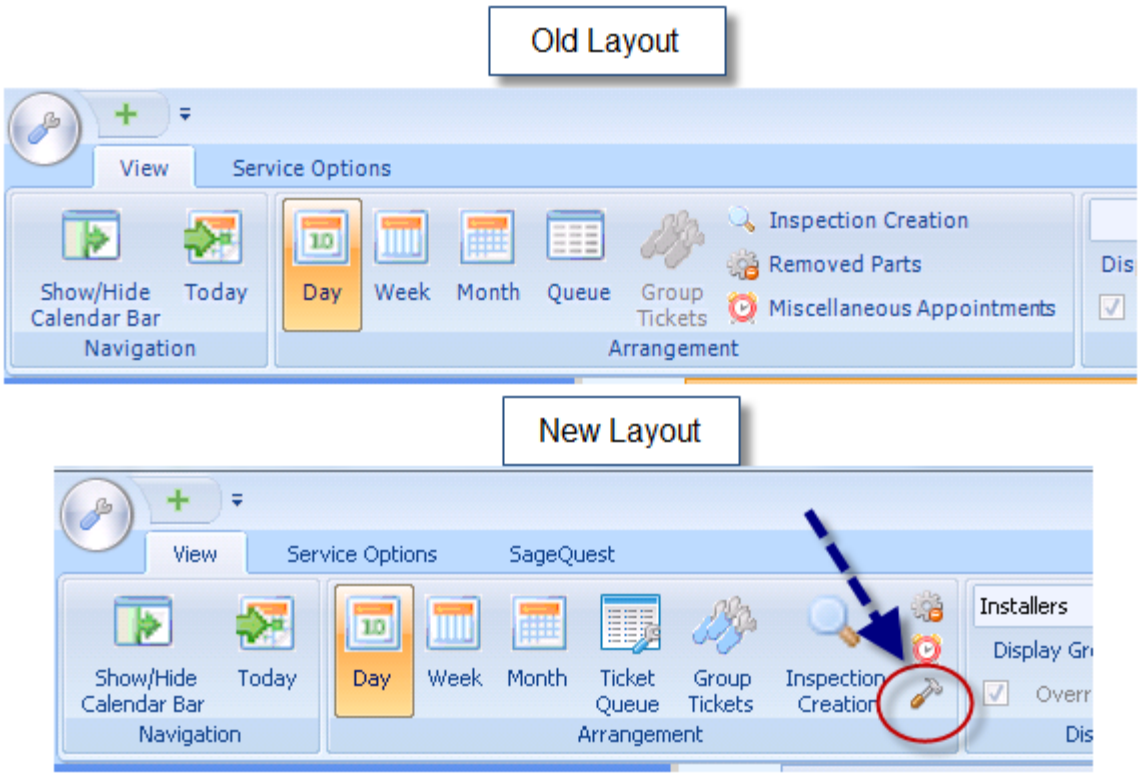
Additions/Changes to the Ribbon

A few changes have been made to the main ribbon to enable the Job Scheduling/Management functions.

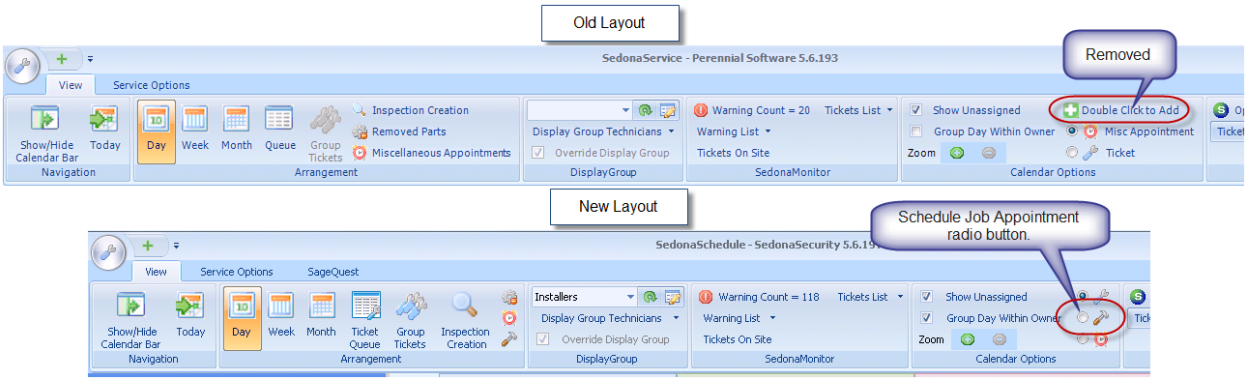
- The button previously named Queue is now labeled **Ticket Queue.** The functionality of this button has not changed.



- A new button has been added to the Arrangement group of the ribbon icon. Clicking on this button will open your **Open Jobs List**.



- On the Calendar Options group of the ribbon, the "Double Click to Add" information has been removed, and a new radio button has been added for creating Job Appointments.



Functionality

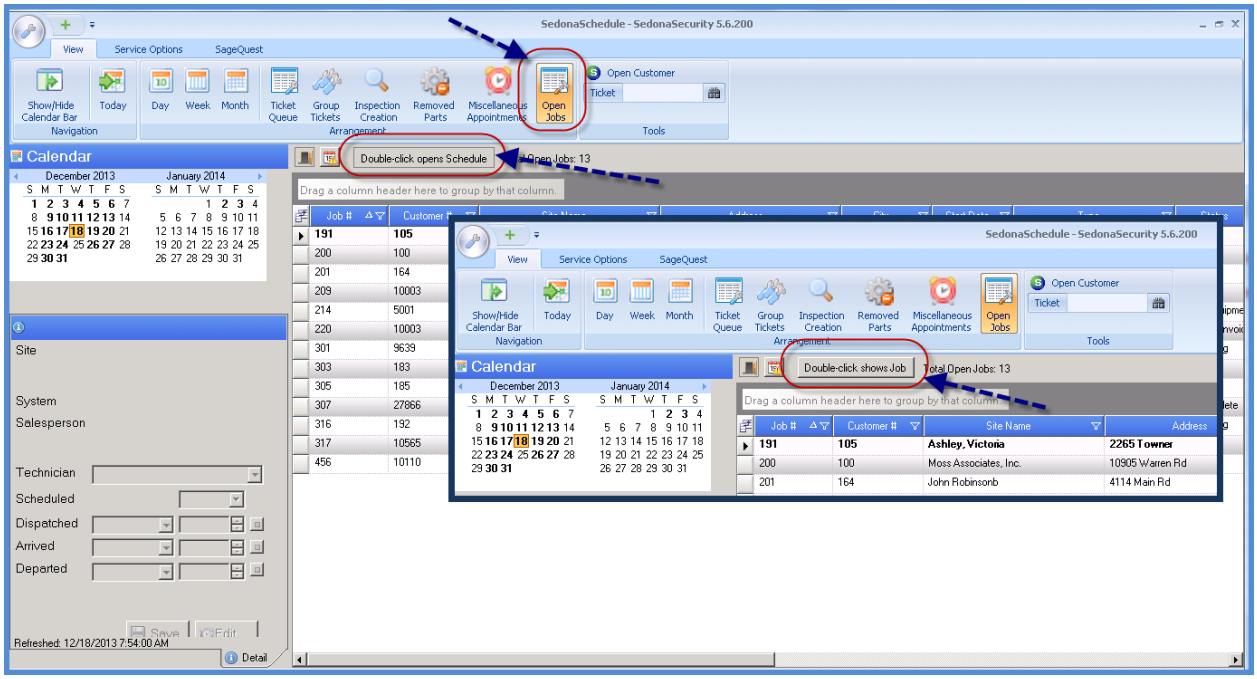
Job Scheduling/Viewing Functionality

Open Job List

The Open Job List is accessed by clicking on the icon located in the Arrangement group of the Ribbon. After clicking on the Hammer icon, the Open Job List will be displayed. On the Ribbon, the Hammer icon will change to a button labeled Open Jobs as shown in the screen shot below. Returning to the Schedule Board will change the Open Jobs button back to the Hammer icon.

Located at the top of the Open Jobs List is a toggle button; clicking on the button will change the functionality when double-clicking on a Job within the list. The toggle button when clicked will display as “Double-click Opens Schedule” or “Double-click Shows Job”.

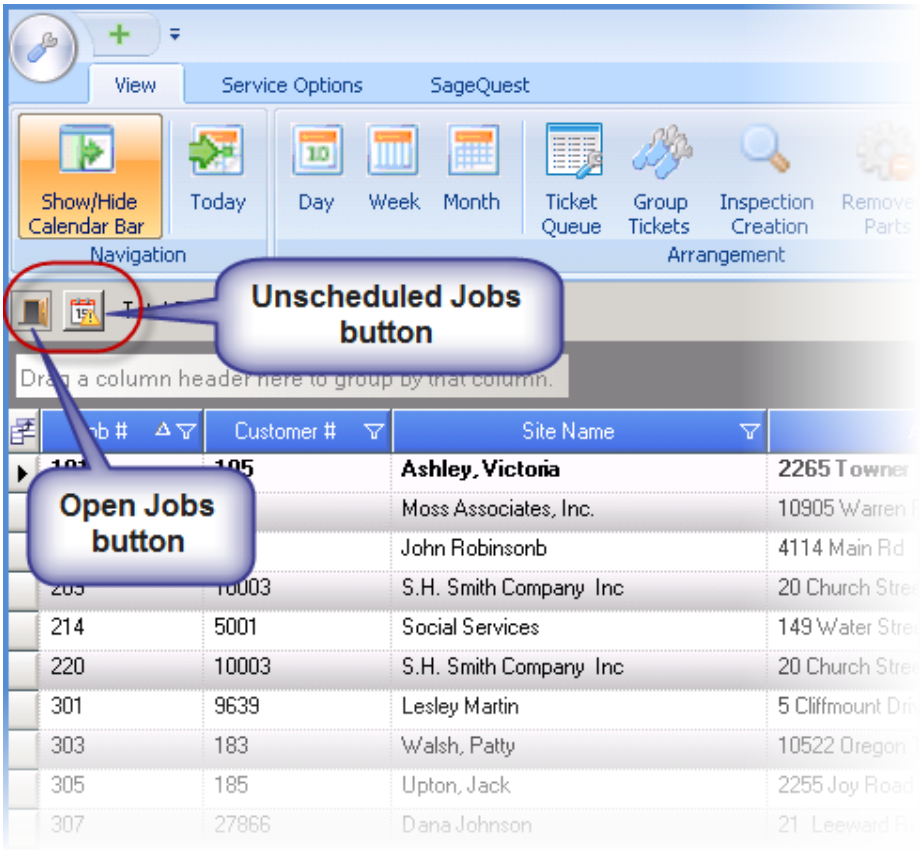
When the Toggle button is set to “Double-click Opens Schedule”, when double-clicking on a Job within the Open Jobs List, the Job Appointment Scheduling form will be displayed. When the Toggle button is set to “Double-click Shows Job”, when double-clicking on a Job within the Open Jobs List, the SedonaOffice icon on your windows task bar will begin to blink; this indicates the Job record has been opened in the main SedonaOffice application. Click on the SedonaOffice icon on the task bar to view the Job record.



Job List Views

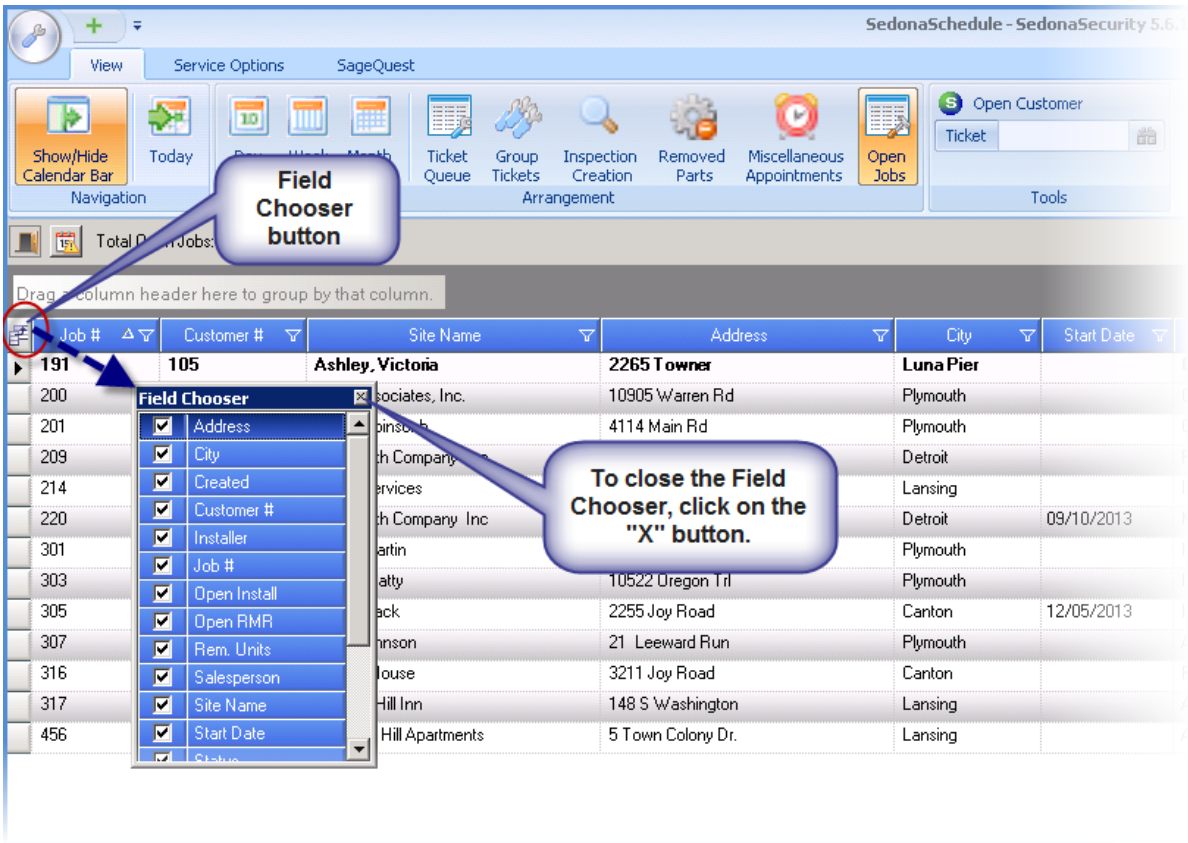
There are two pre-defined views of the Job List; *Open Jobs* and *Unscheduled Jobs*. The Open Jobs view will contain all Jobs that have not been closed in the main SedonaOffice application. The Unscheduled Jobs view will contain any Jobs without any un-dispatched Job Appointments.

You may toggle back and forth between views by clicking on the buttons above the Job List column names.



Job List Configuration

The Job List contains a Field Chooser which allows each User to select which columns are displayed. Columns may also be rearranged by dragging the column header title and dropping at the desired location. Any changes made with the Field Chooser or rearranging columns will be remembered the next time the User logs into the application.



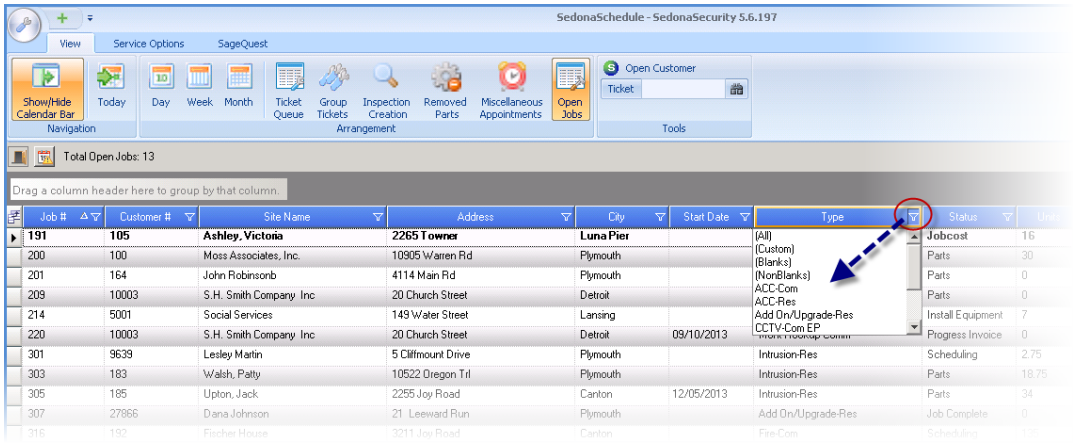
Job List Filters

The Job List may be filtered based on any of the displayed columns within the Job List. There are three ways to use Filters; using *Drop-Down Filters, Filter Groups* or *Custom Filters*. Each filtering option will be described below.

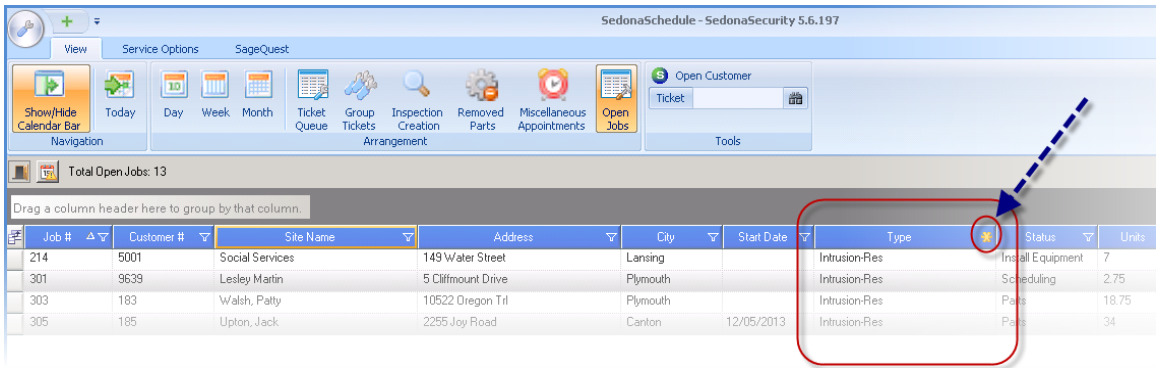
Drop-Down Filters

Within the Job List, in the header of each column is a filter button. Clicking on the filter button will display a list of all the possible values based on all Jobs currently displayed in the list.

For example, you want to view Jobs for one particular Job Type, click on the filter button, and then click on the desired Job Type. The Job List will refresh with the Jobs of the selected Job Type.



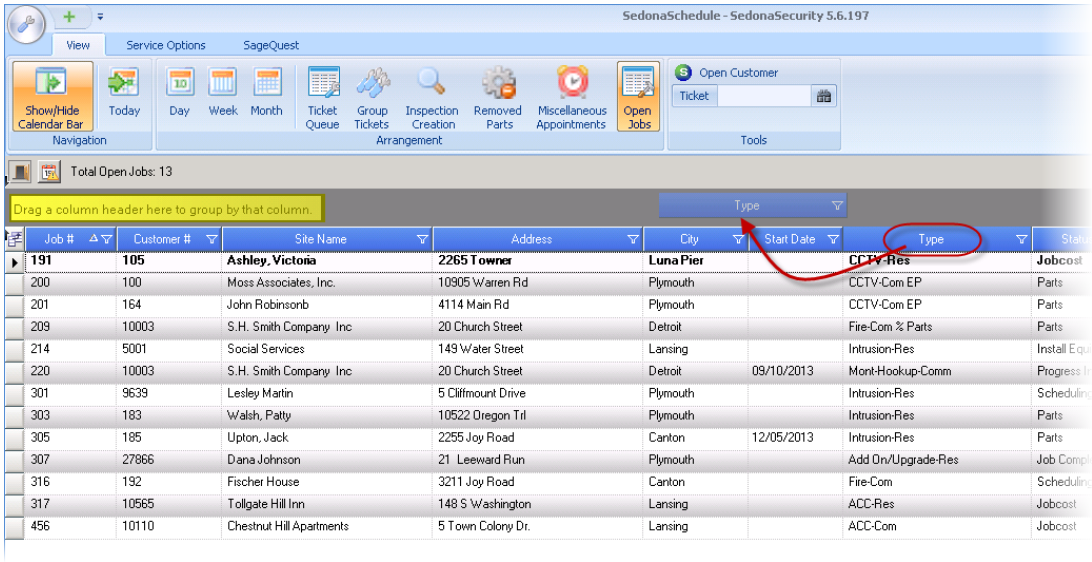
Any column within the Job List that contains a current Filter selection will display a star symbol instead of the Filter cone symbol. To remove a Filter selection, click on the Star symbol and select "All" from the drop-down list.



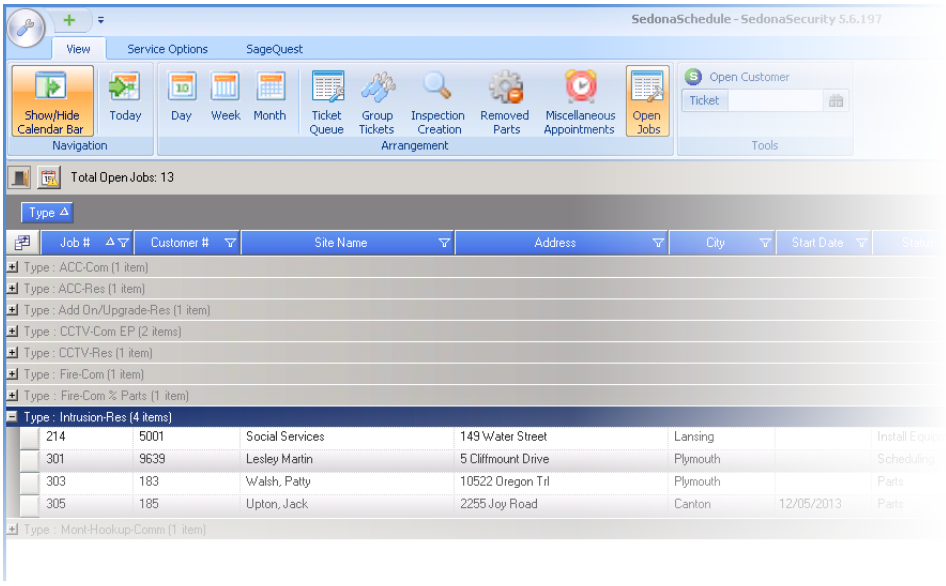
Filter Groups

Within the Job List, you may view the Jobs in *Filter Groups*. When using Filter Groups the view of the Job List changes to a tree structure. After creating a Filter Group, each line displayed within the Job List may be expanded to show the Jobs that belong to that filter group.

To create a Filter Group, drag and drop the desired field to the gray Filter Bar located above the field name areas of the Job List.
To remove a filter and return to the Job List, drag the Filter name displayed in the gray filter bar down into the list of tickets.



Job List Filter Group on Job Type



Custom Filters

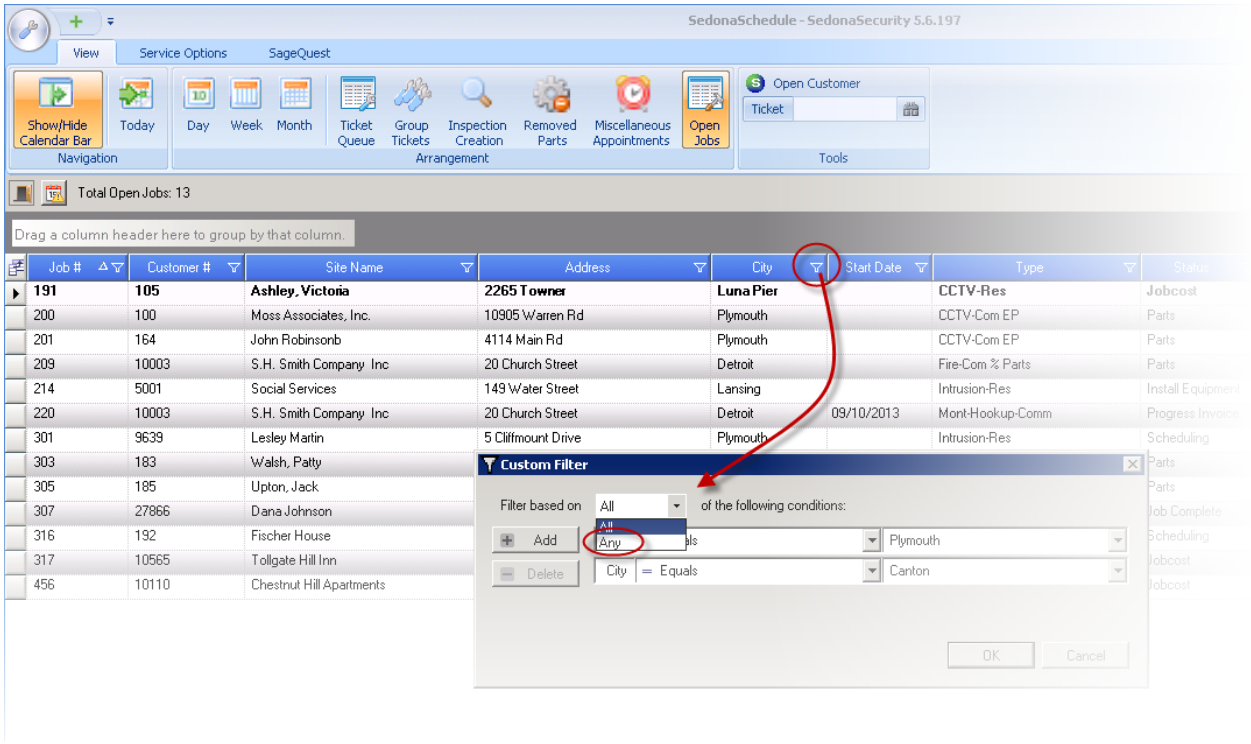
Within the Job List, in the header of each field is a filter button. Within the Filter Drop-Down list is the *Custom* option. The Custom option provides several ways to define what Jobs you wish to be displayed.

When selecting the *Custom*, from the drop-down list within a particular field of the ticket queue, the *Custom Filter* form will be displayed. This form allows the User to select an *Operator* and a *Value* for the application use to determine which Jobs to display in the list.

An *Operator* is a search condition and a *Value* is specifically what you want to see.

Example: The City field in the Job List is selected for a Custom filter. We want to see all Jobs where the site City is Plymouth or Canton. To produce a list of Jobs that meet this requirement, we need to create two rows of conditions and set the *Filter Based On* option to *Any*; which means that the rows of conditions entered can apply to any Job.

For the first condition row, in the Operator field, we selected Equals and in the Value field we selected Plymouth. For the second condition row, in the Operator field, we selected Equals and in the Value field we selected Canton.



Job Appointments

Job Appointments may be created from either the Job List or the Schedule Board. Job Appointments may be created for:

- a single employee on a single day
- a single employee for multiple days
- multiple employees on a single day
- multiple employees on multiple days

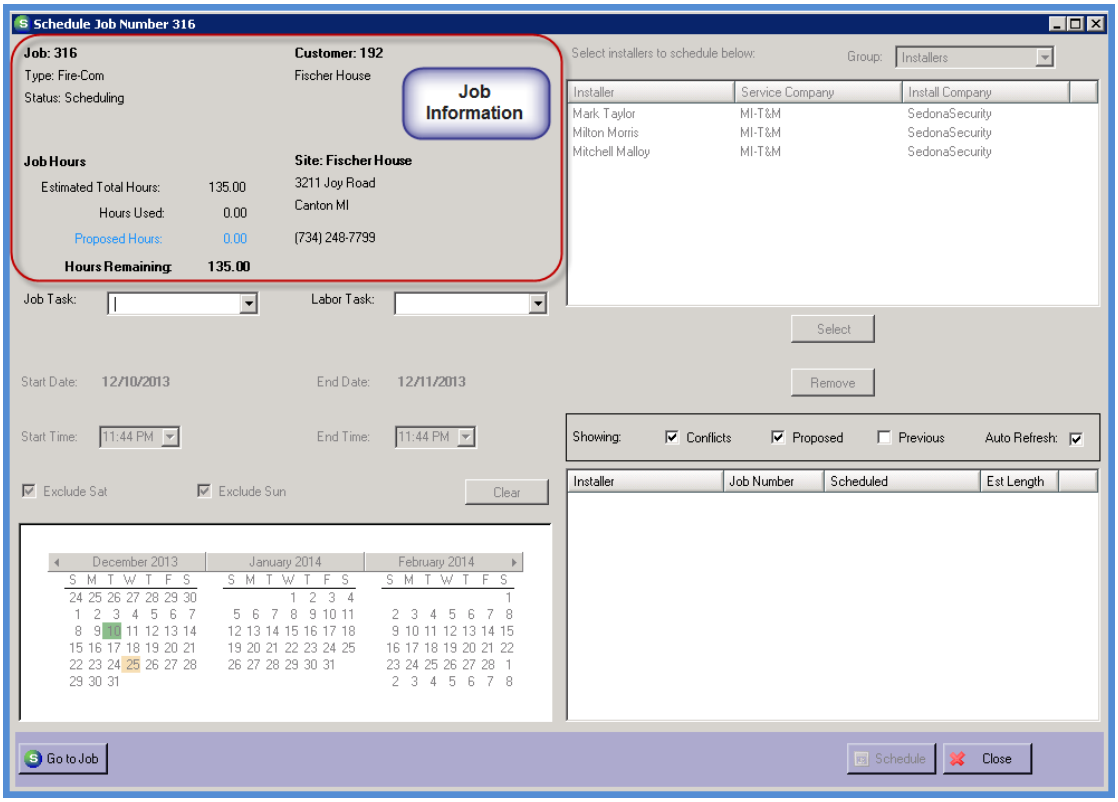
Scheduling a Job Appointment from the Job List or the Schedule Board will be described within this topic heading.

Job Scheduling Form Definitions

Before scheduling a Job Appointment, it is important to understand the layout and functionality of the Job Scheduling form.

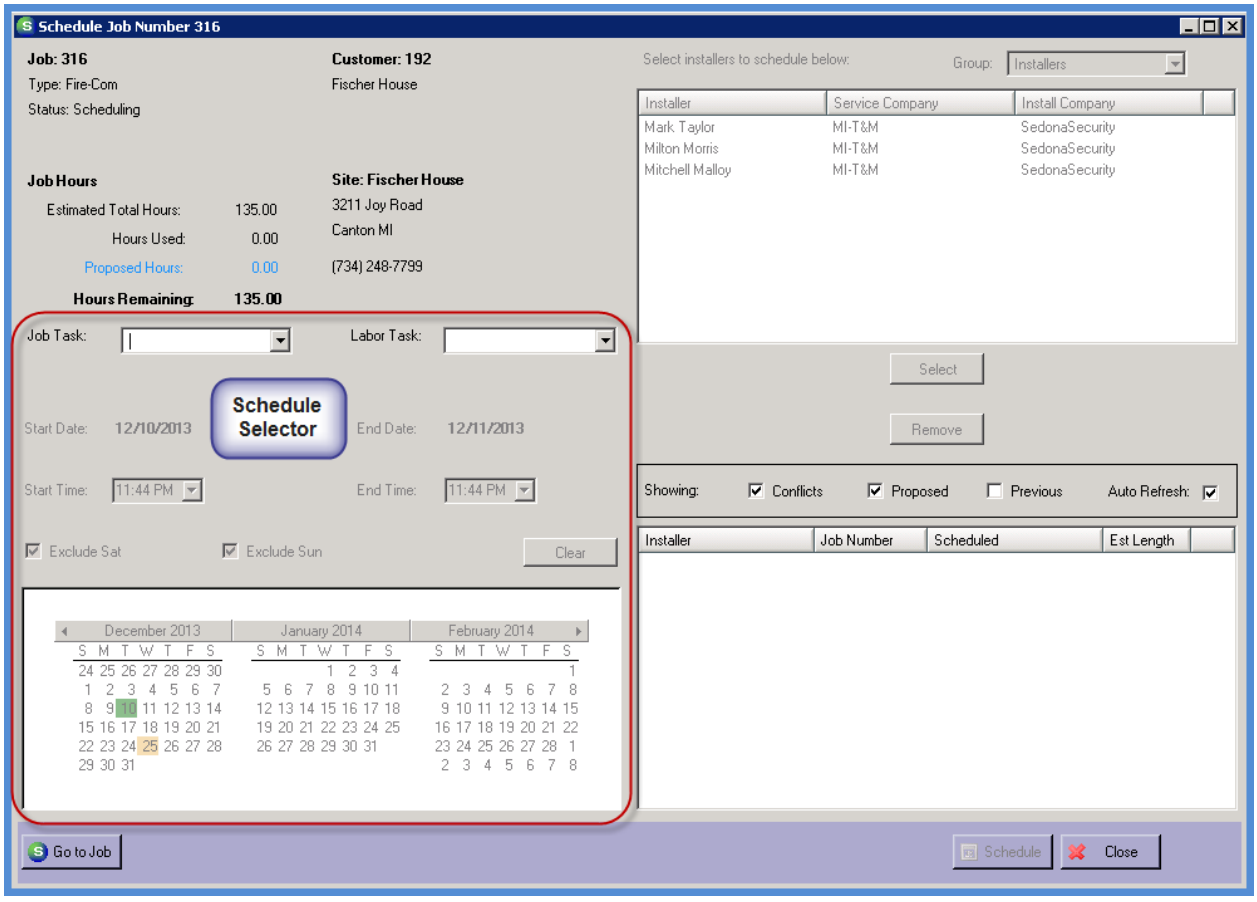
The Job Schedule form is divided into four main areas; each of which is described below and on the following pages.

- **Job Information** – this area will display the following information for the selected Job:
  - Job number
  - Job type
  - Current job status
  - Customer number and Customer name
  - Site name, address and phone number
  - Job hours information
    - Total Estimated Labor Hours
    - [Total] Hours Used
    - Proposed Hours [what is currently being scheduled]
    - Remaining Labor Units (Estimated minus Completed)



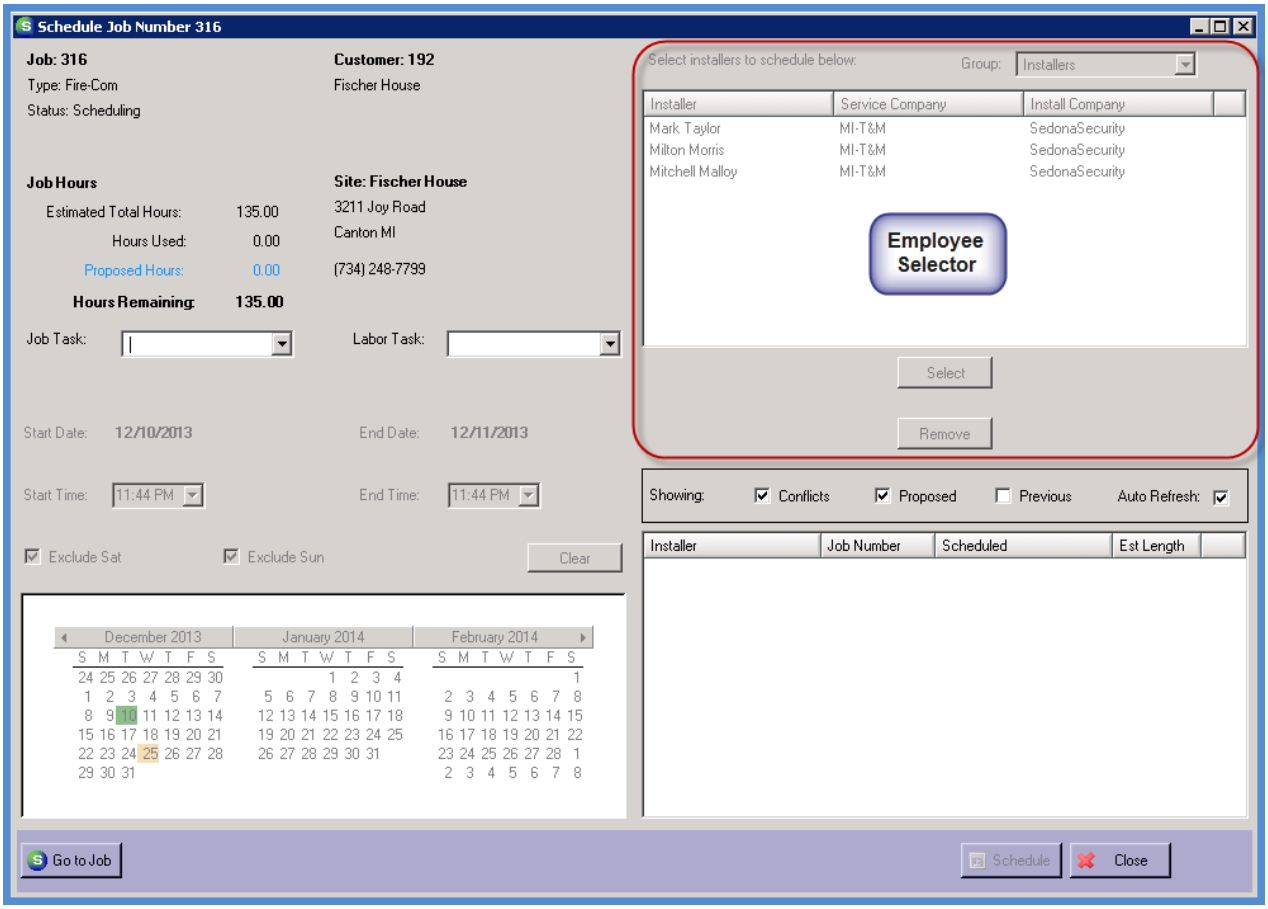
Job Scheduling Form (continued)

- **Schedule Selector** – this area contains the following fields to be used in scheduling Job Appointments:
  - Job Task selector
  - Labor Task selector
  - Start Date & End Date
  - Start Time & End Time
  - Exclude Sat (Saturday) & Exclude Sun (Sunday)
  - Clear button (used to reset and start over)
  - 3-month Calendar view



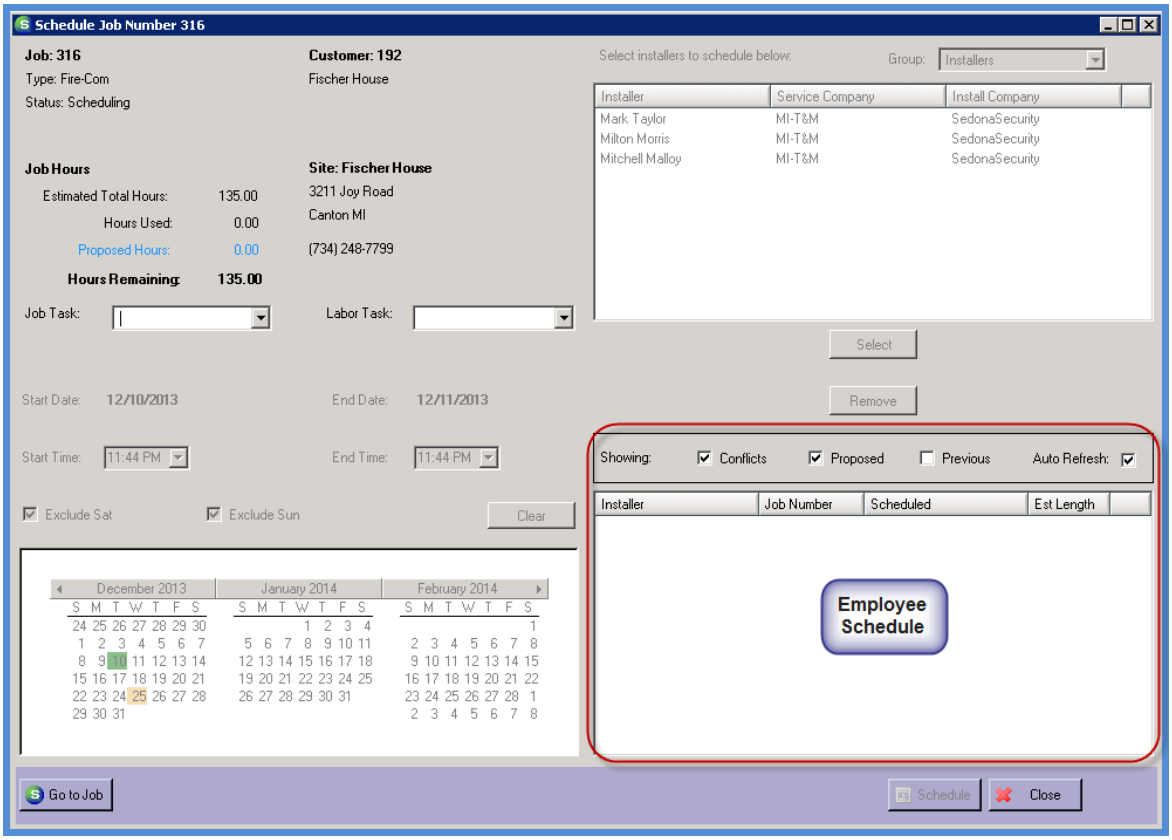
Job Scheduling Form (continued)

- **Employee Selector** – this area will display a list of employees from which to select when scheduling a Job Appointment. The list of names displayed is controlled by the Display Group selected at the top right of this form:
  - [Display] Group Selector
  - Installer Name; related Service Company and Install Company
  - Select button
  - Remove button



Job Scheduling Form (continued)

- **Employee Schedule** – this area is used to build either a single Job Appointment or multiple Job Appointments. The form will display any scheduling conflicts with other Jobs, Tickets or Miscellaneous Appointments. Once all dates, times and employees have been selected, a secondary confirmation form is used to finalize and save the appointment(s) to the Schedule Board. Fields displayed in this area are:
    - Conflicts checkbox
    - Proposed checkbox
    - Previous checkbox
    - Auto Refresh
    - Working scheduling area containing the following columns of information:
        - Installer name
        - Job/Ticket Number
        - Scheduled Date
        - Estimated Length of Appointment (in minutes)

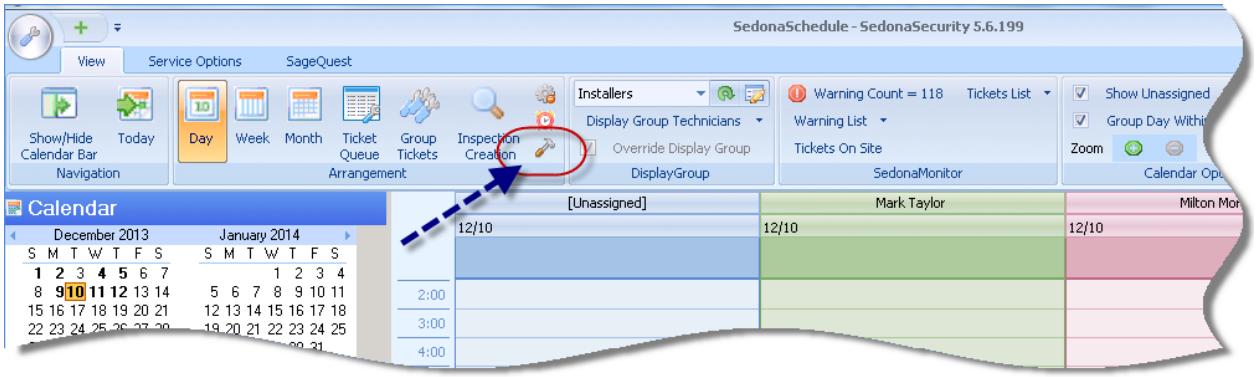


Job Scheduling

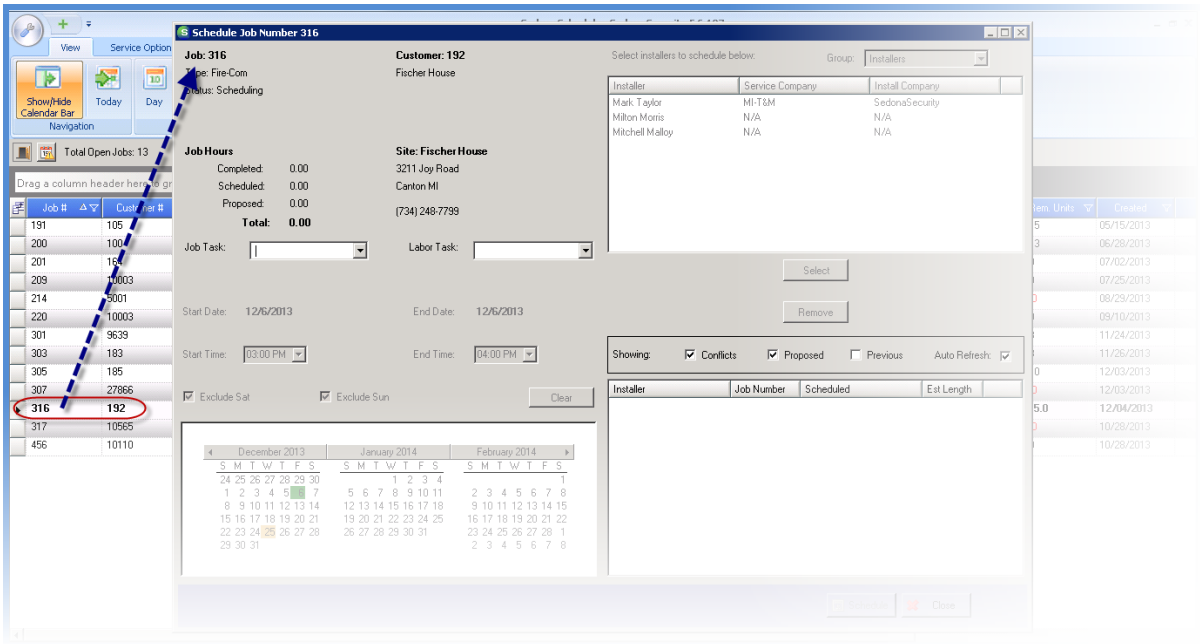
Scheduling a Job from the Job List

To schedule a Job Appointment from the Job List, follow the steps below and on the following pages.

1. From the main Ribbon, click on the Job List icon.



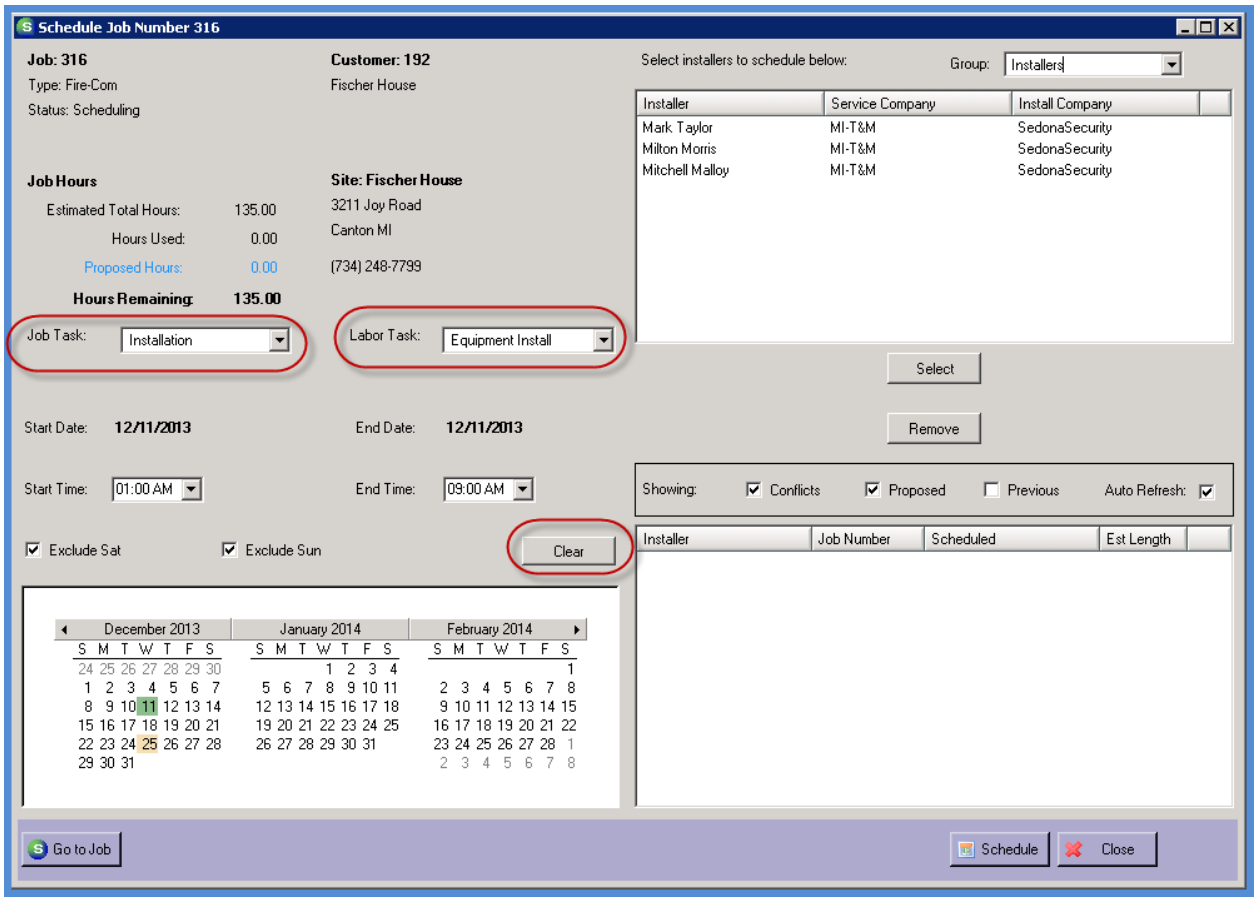
2. The Job List will be displayed. Within the list displayed, double-click on the Job for which an appointment will be scheduled.



Scheduling a Job from the Job List (continued)

3. The Job Schedule form will be displayed. Make the following selections within the *Schedule Selector* area of the Job Schedule form.

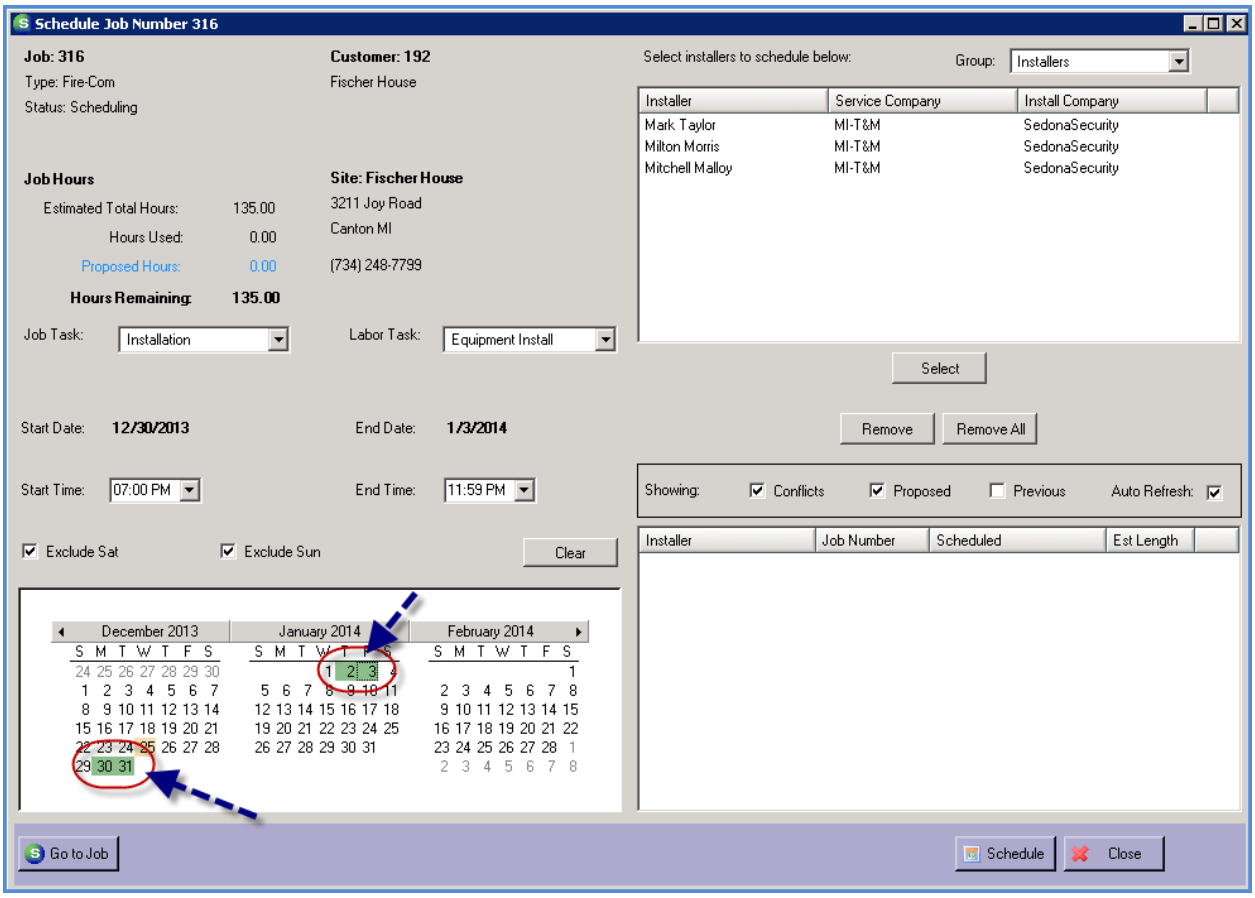
    - Select a Job Task from the drop-down list (required).
    - Select a Labor Task from the drop-down list (optional).
    - Click on the Clear button.



Scheduling a Job from the Job List (continued)

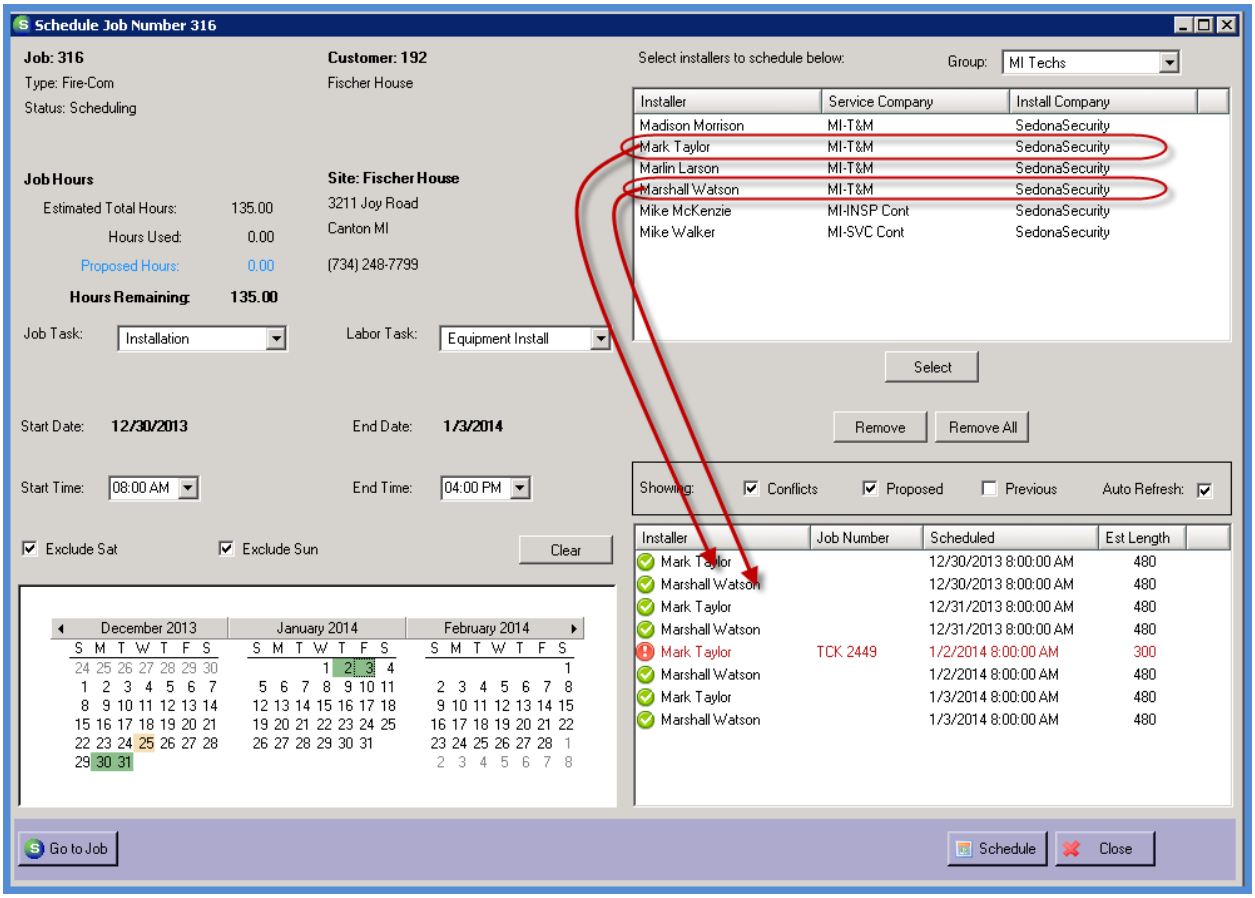
4. ***Select the Appointment Date(s)*** - Next you will select the date or dates on which the Job will be scheduled. Within the *Schedule Selector* area, click on the date on which you wish to schedule the Job Appointment.

    - If more than one day will be scheduled, hold down your mouse to highlight consecutive dates.
    - Click on each date to be included in the scheduled appointments. In the example below, we will be scheduling appointments on 12/30, 12/31, 01/02 and 01/03.



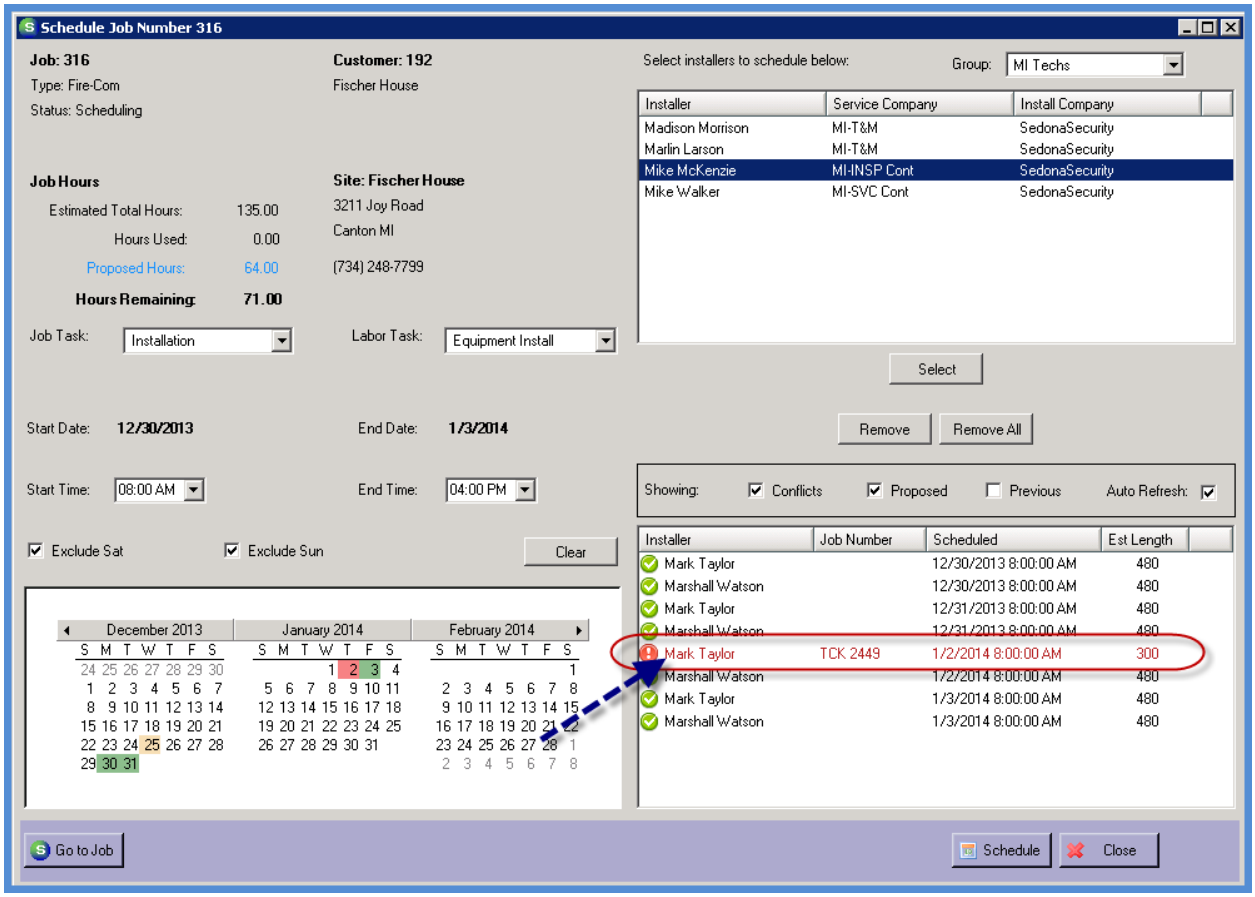
Scheduling a Job from the Job List (continued)

5. ***Select the Installer(s)*** - Next you will select which employee(s) to schedule. Within the *Employee Selector* area, double-click on the Employee for which you wish to schedule the Job Appointment. If more than one Employee will be scheduled for the same dates, double-click on additional Employee names. The selected Employees will appear in the *Employee Schedule* area as they are selected.



Scheduling a Job from the Job List (continued)

If any scheduling conflicts exist, the Employee Name and the Job/Tkt or Miscellaneous Appointment will be displayed with a red font.

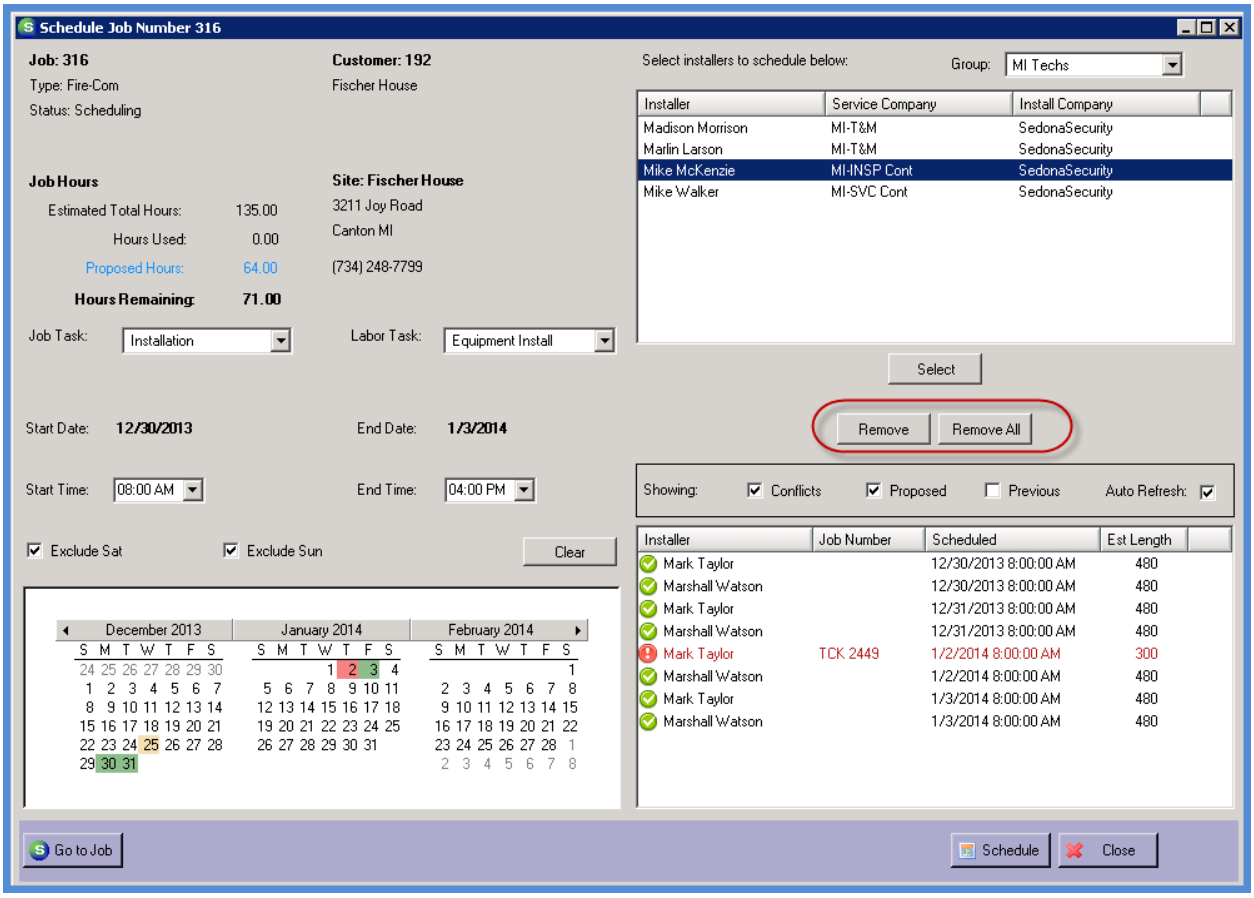


Scheduling a Job from the Job List (continued)

6. If you need to remove an Employee for the Pending appointment(s), click on the Employee Name in the *Employee Schedule* area, and click on the Remove Remove button within the *Employee Selector* area.

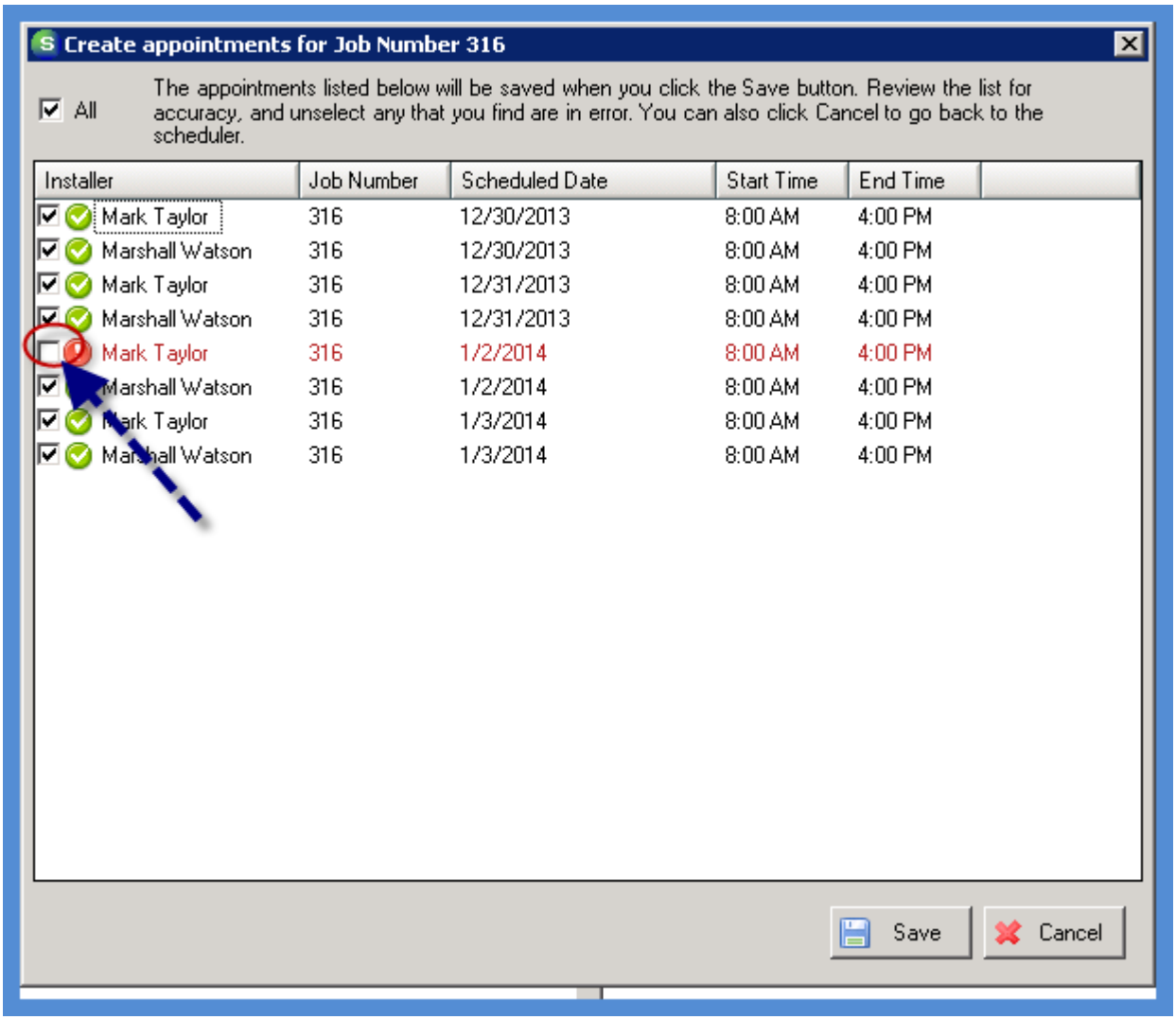
   If you want to start over with the appointment scheduling, click on the Remove All *Remove All* button within the *Employee Selector* area to start over.

   If you are satisfied with the Employees on the dates selected, click on the Schedule *Schedule* button located at the lower right of the form. If there is a scheduling conflict for a particular date, in the next step [Create Appointments form] you will be able to exclude the schedule conflicts.



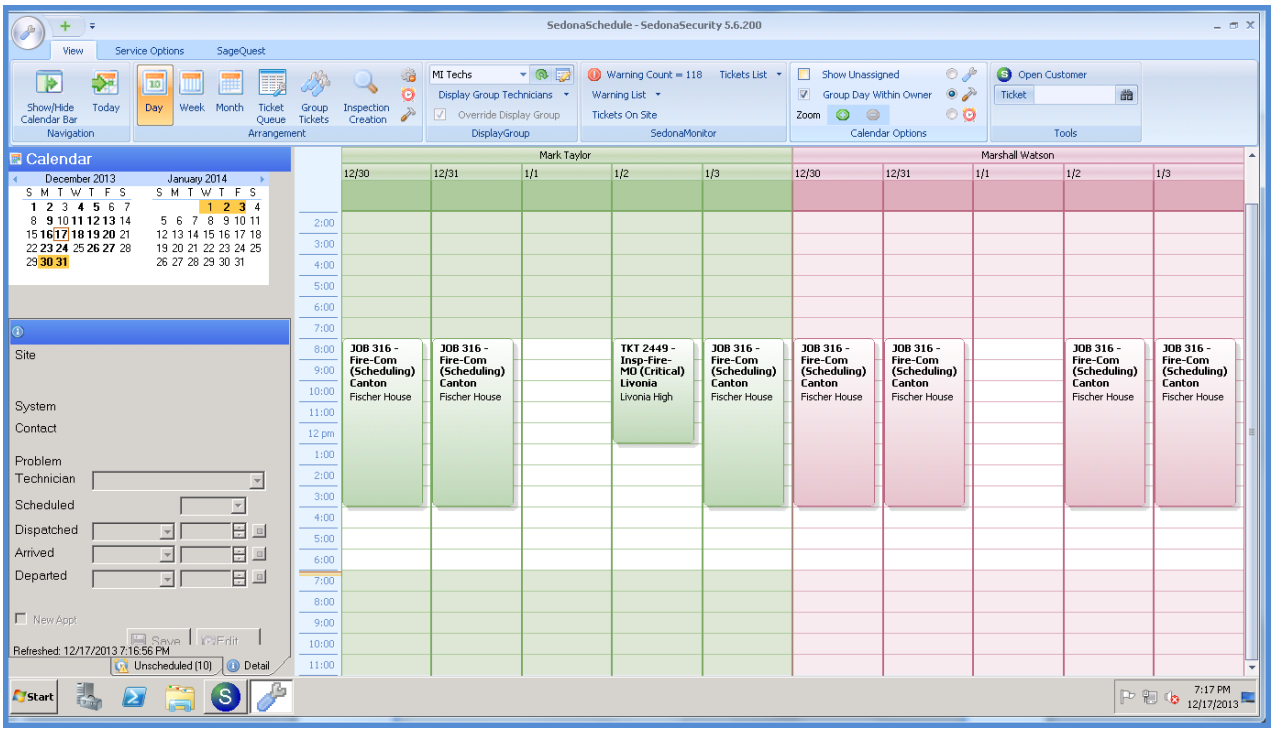
Scheduling a Job from the Job List (continued)

7. The *Create Appointments* form will be displayed. Each employee and date selected in the Job Scheduling form will be listed. If you want to exclude any of the listed pending appointments, un-check the checkbox to the left of each item. When finished, click on the Save button at the lower right of the form to create the Job Appointments.



Scheduling a Job from the Job List (continued)

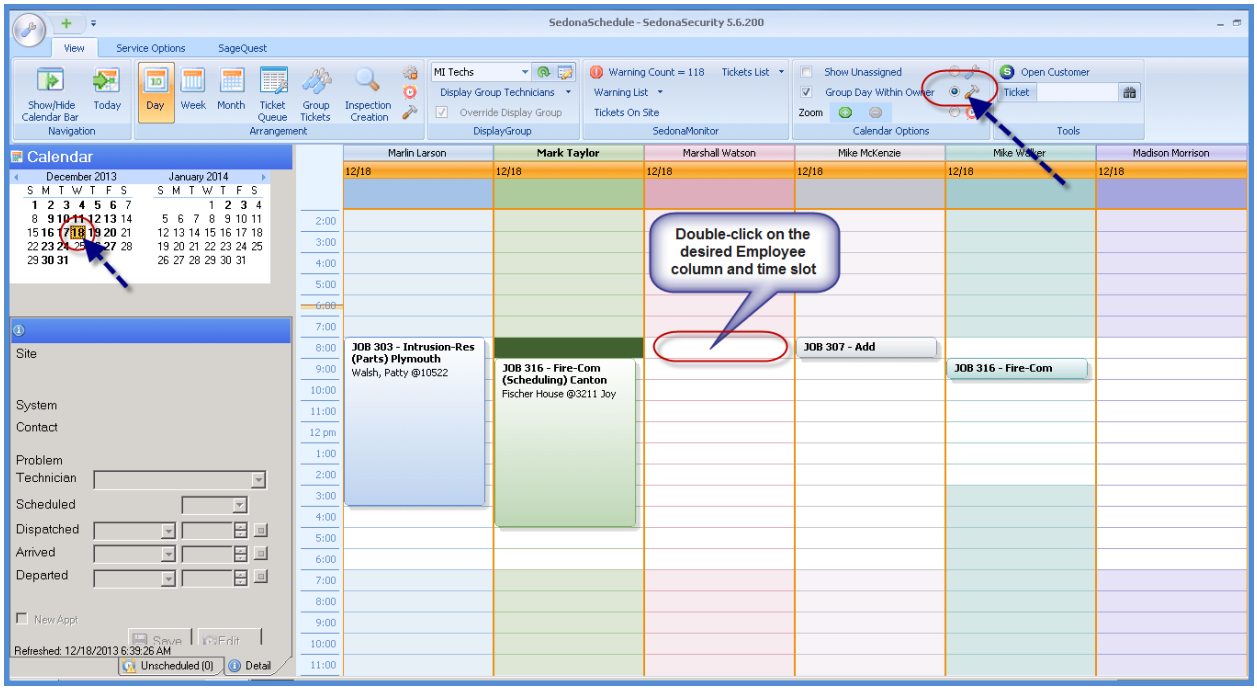
8. You may now view the scheduled Job Appointments on the Schedule Board.



Scheduling a Job from the Schedule Board

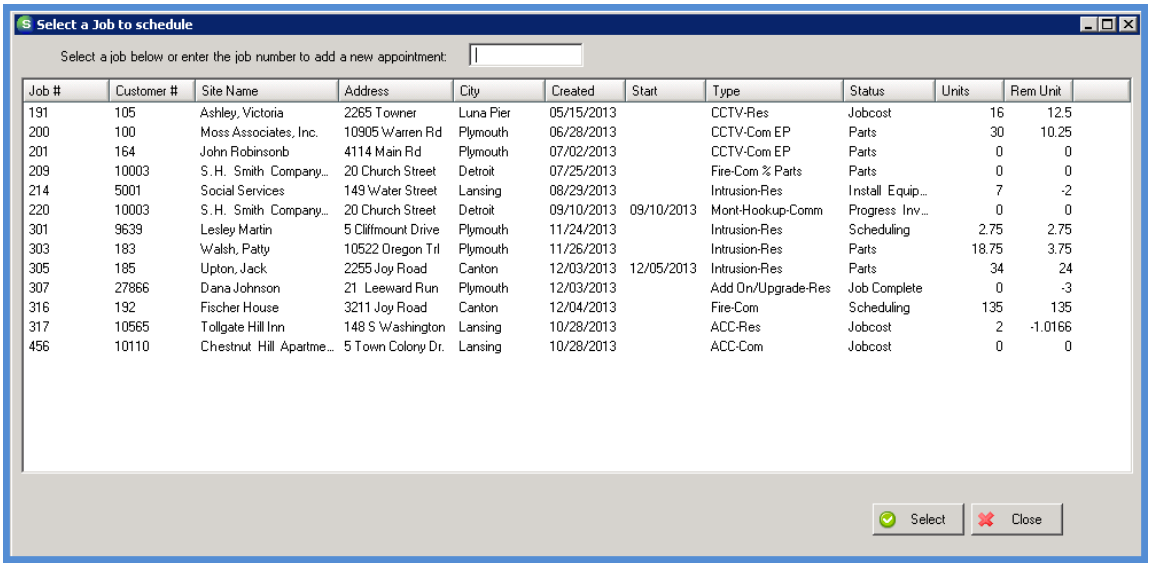
To schedule a single or multiple Job Appointments from the *Schedule Board*, follow the steps below and on the following pages.

1. From the main Ribbon, click on the Job [double-click to add] icon. Within the *Calendar*, click on the date on which the Job Appointment will be scheduled. Within the *Schedule Board* double-click on the desired employee & time slot.



Scheduling a Job from the Schedule Board (continued)

2. The Select a Job to Schedule list will be displayed. You may either type in the Job Number in the field at the top of the list and press the Enter key, or Double-Click on the Job within the list of Jobs displayed.



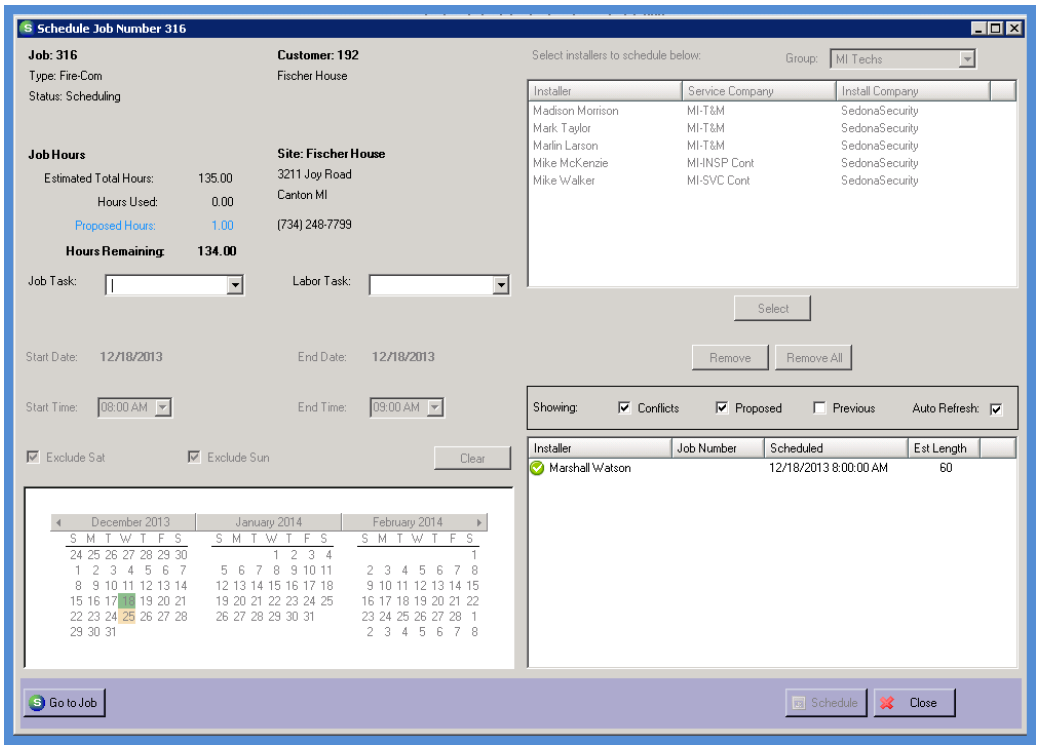
Job #	Customer #	Site Name	Address	City	Created	Start	Type	Status	Units	Rem Unit
191	105	Ashley, Victoria	2265 Towner	Luna Pier	05/15/2013		CCTV-Res	Jobcost	16	12.5
200	100	Moss Associates, Inc.	10905 Warren Rd	Plymouth	06/28/2013		CCTV-Com EP	Parts	30	10.25
201	164	John Robinsonb	4114 Main Rd	Plymouth	07/02/2013		CCTV-Com EP	Parts	0	0
209	10003	S.H. Smith Company...	20 Church Street	Detroit	07/25/2013		Fire-Com % Parts	Parts	0	0
214	5001	Social Services	149 Water Street	Lansing	08/29/2013		Intrusion-Res	Install Equip...	7	-2
220	10003	S.H. Smith Company...	20 Church Street	Detroit	09/10/2013	09/10/2013	Mont-Hookup-Comm	Progress Inv...	0	0
301	9639	Lesley Martin	5 Cliffmount Drive	Plymouth	11/24/2013		Intrusion-Res	Scheduling	2.75	2.75
303	183	Walsh, Patty	10522 Oregon Trl	Plymouth	11/26/2013		Intrusion-Res	Parts	18.75	3.75
305	185	Upton, Jack	2255 Joy Road	Canton	12/03/2013	12/05/2013	Intrusion-Res	Parts	34	24
307	27866	Dana Johnson	21 Leeward Run	Plymouth	12/03/2013		Add On/Upgrade-Res	Job Complete	0	-3
316	192	Fischer House	3211 Joy Road	Canton	12/04/2013		Fire-Com	Scheduling	135	135
317	10565	Tollgate Hill Inn	148 S Washington	Lansing	10/28/2013		ACC-Res	Jobcost	2	-1.0166
456	10110	Chestnut Hill Apartme...	5 Town Colony Dr.	Lansing	10/28/2013		ACC-Com	Jobcost	0	0

Scheduling a Job from the Schedule Board (continued)

3. The *Job Schedule* form will be displayed.

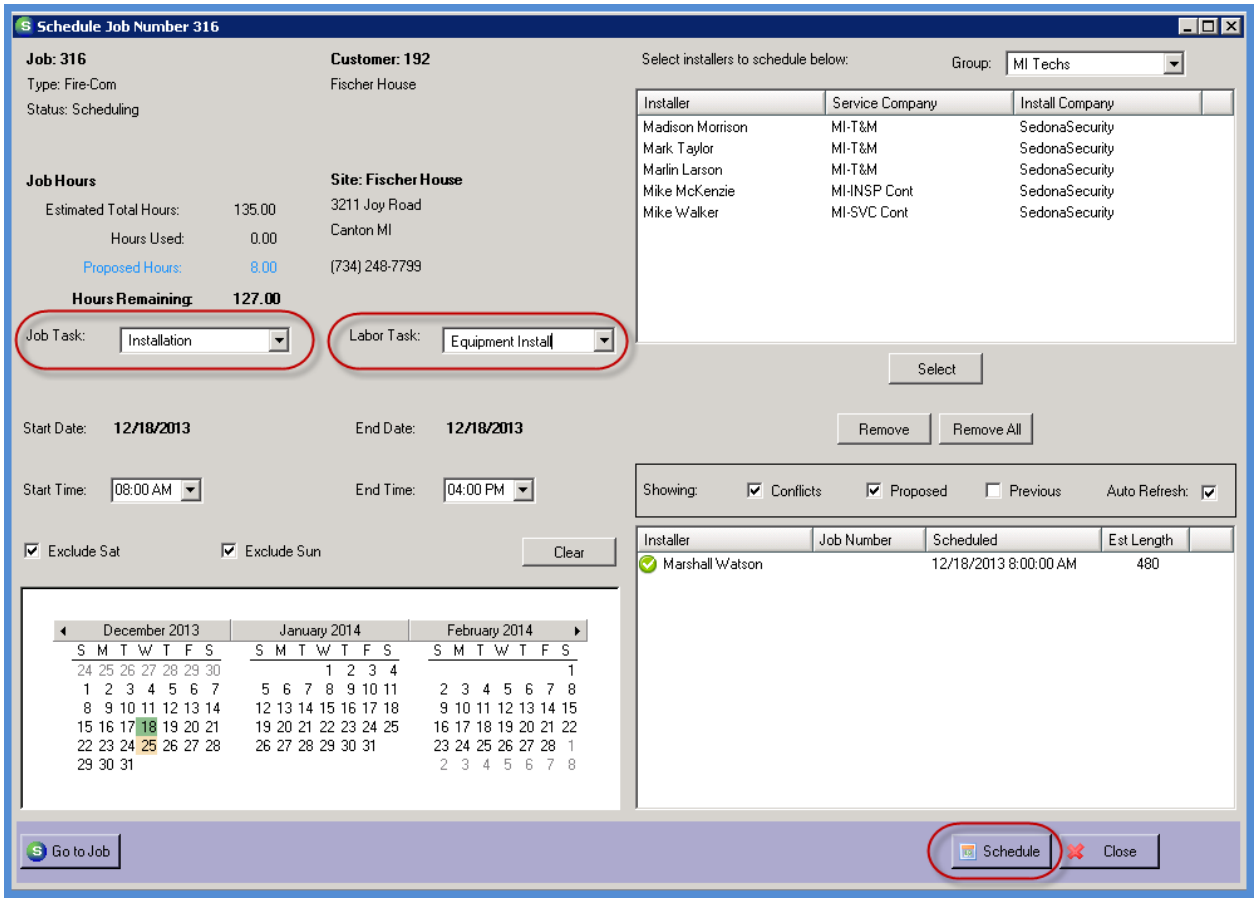
   - If you are scheduling multiple Job Appointments, follow steps 3 through 7 in the *Scheduling a Job from the Job List* topic to complete the scheduling.

   - If you are scheduling a single Job Appointment, follow the remaining steps within this topic.



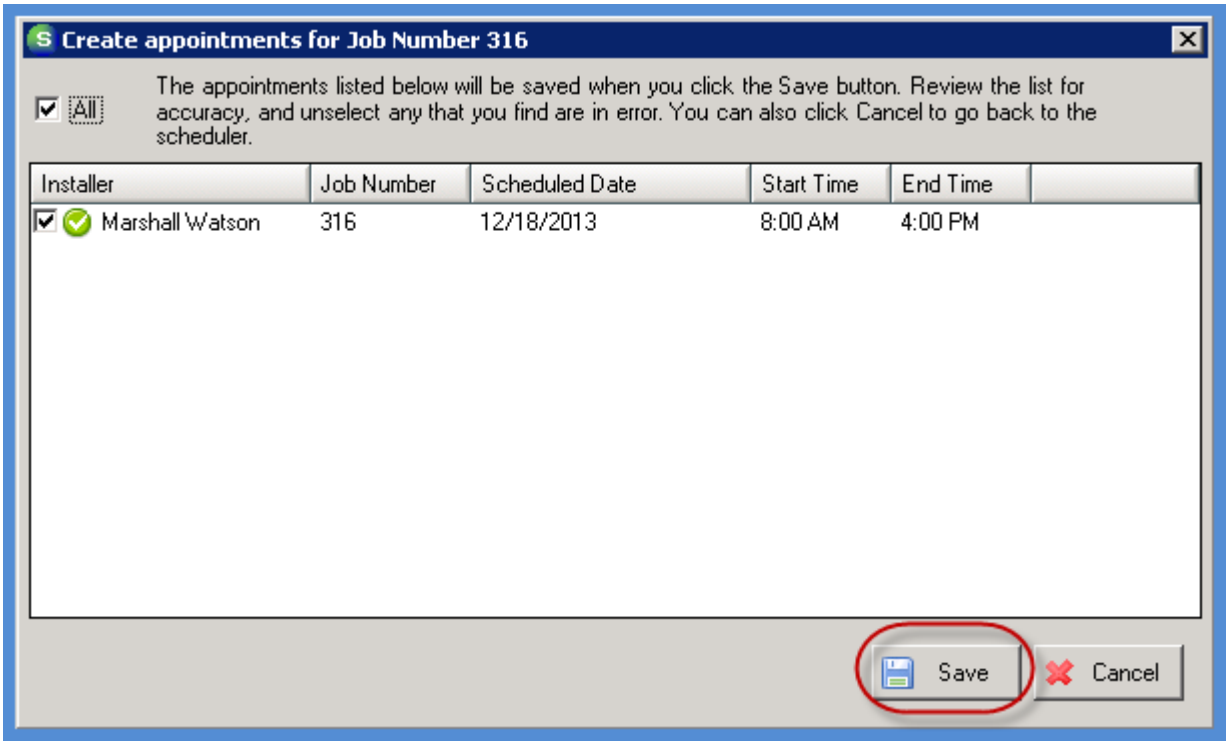
Scheduling a Job from the Schedule Board (continued)

4. Within the *Job Schedule* form, select a *Job Task* (required) and a *Labor Task* (optional), then click on the Schedule button located at the lower right of the form.



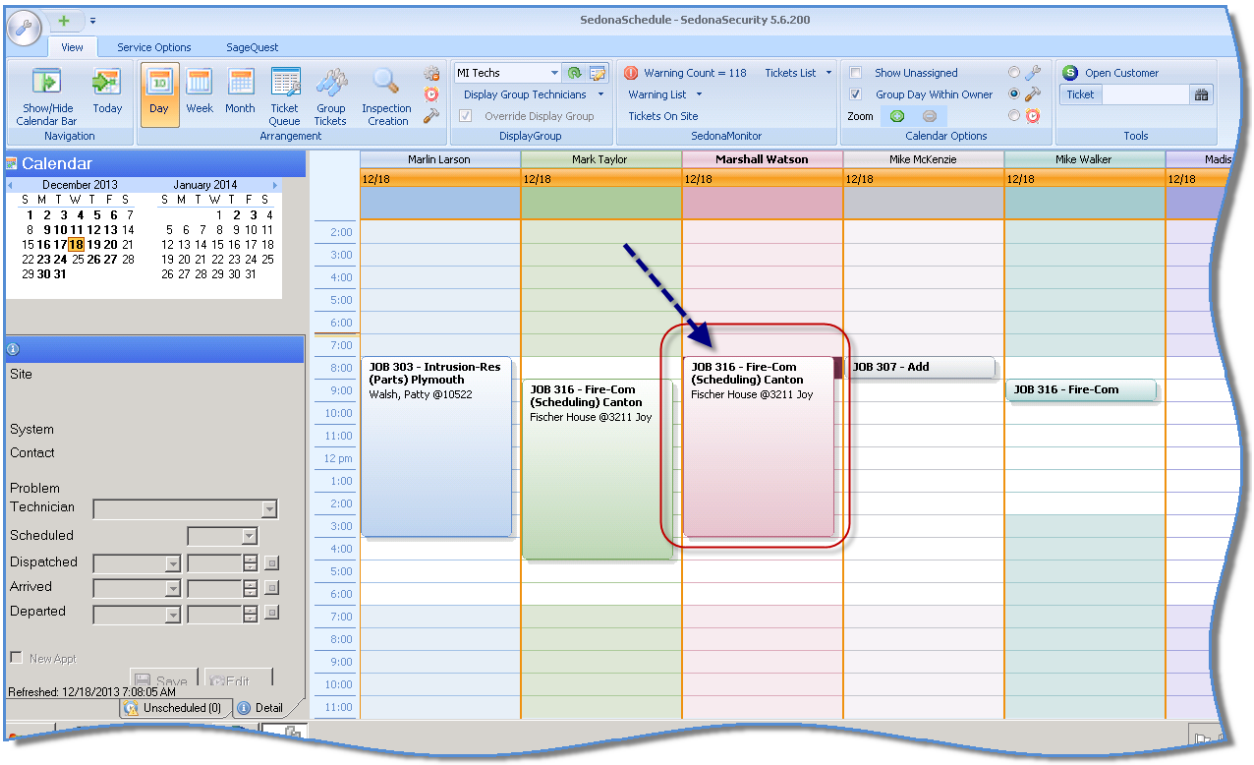
Scheduling a Job from the Schedule Board (continued)

5. The *Create Appointments* form will be displayed. Click on the *Save* button located at the lower right of the form.



Scheduling a Job from the Schedule Board (continued)

6. You may now view the scheduled Job Appointment on the Schedule Board.



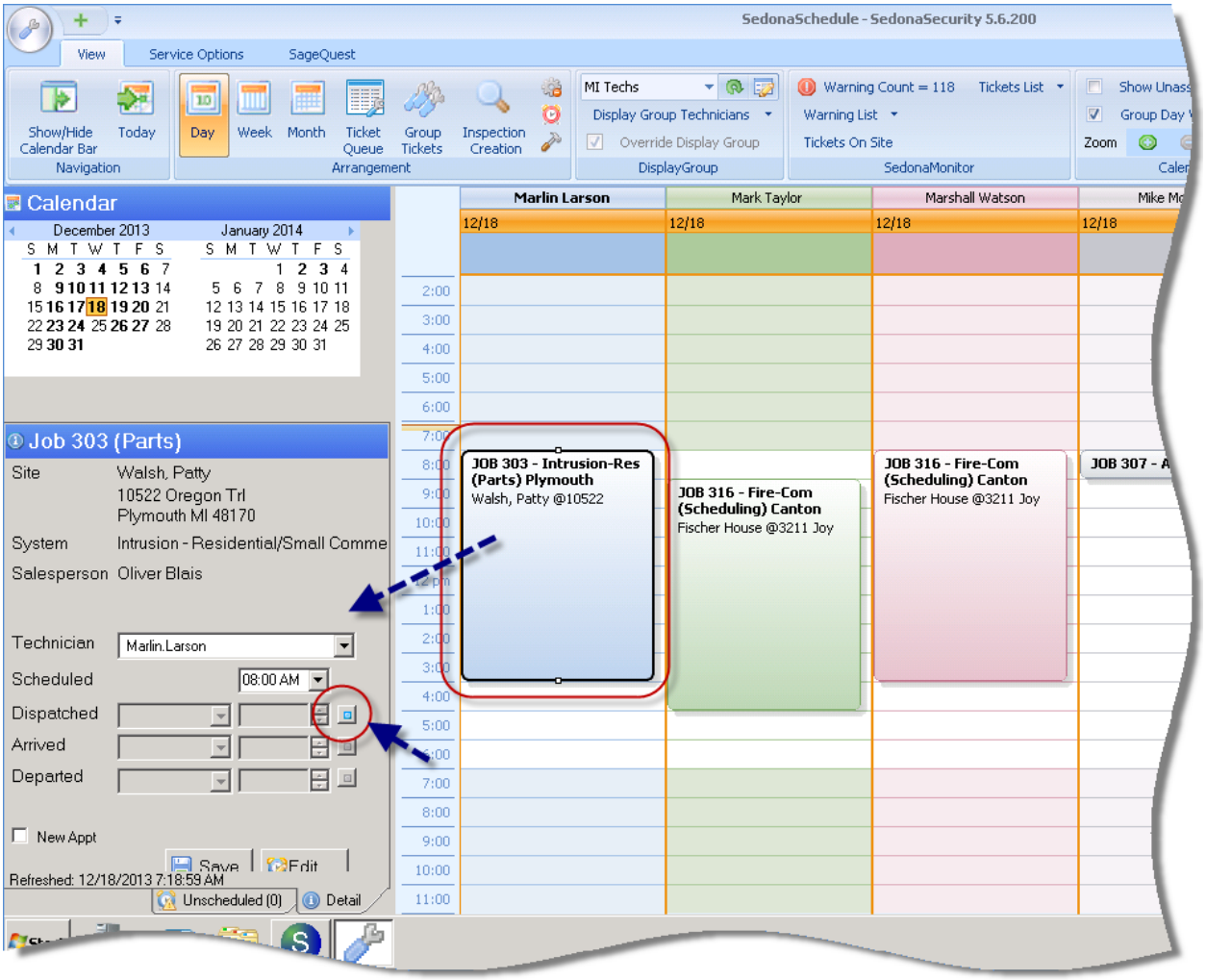
Job Appointment Dispatching

Job Appointments may be Live Dispatched or Dispatch times may be entered manually; both methods will be covered within this topic.

Live Dispatching

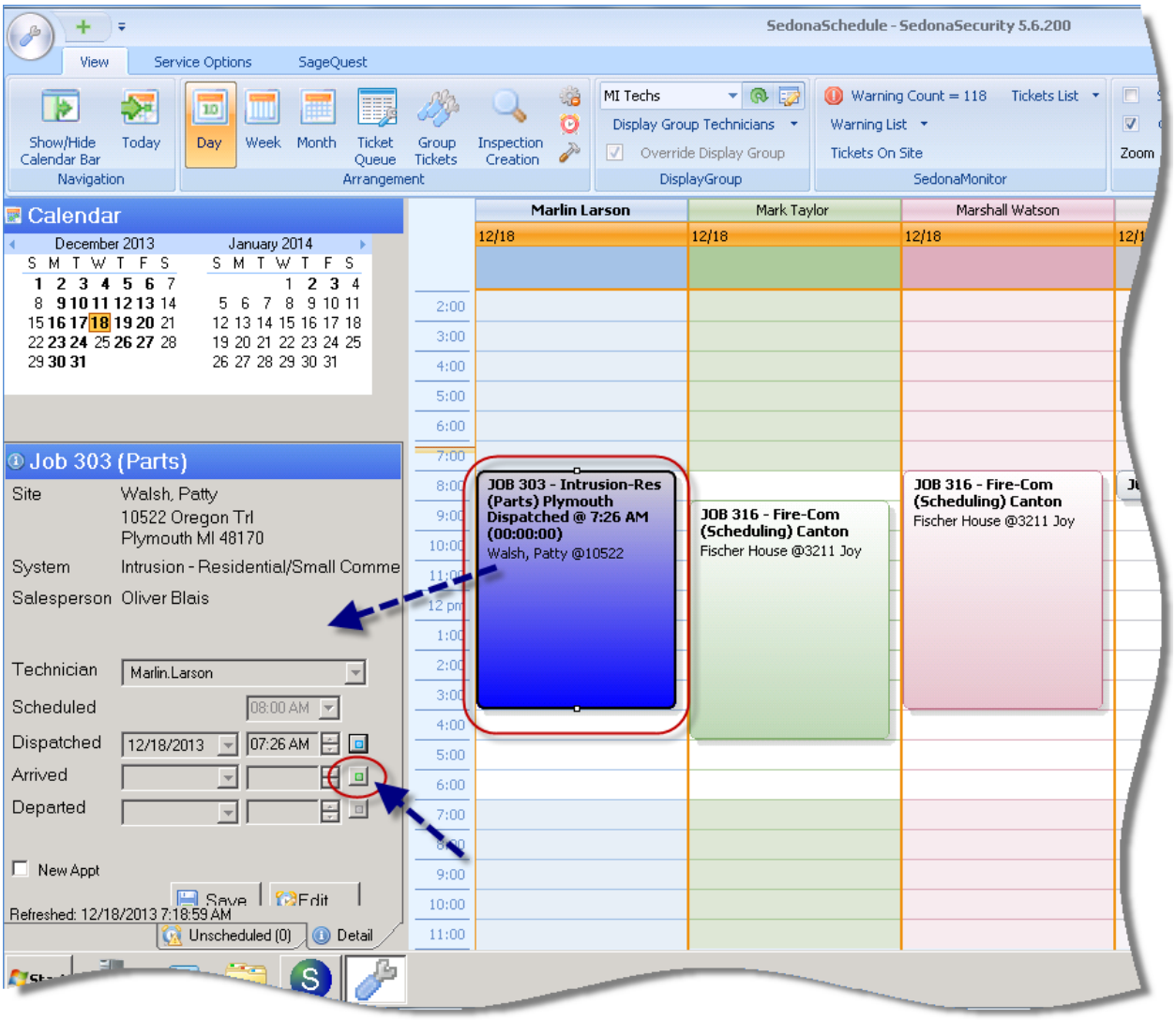
To Live Dispatch a Job Appointment, follow the steps below.

1. From the Schedule Board, click on the Job Appointment to be dispatched. The Job information will be displayed in the Information Viewer to the left. When the employee is on his way to the appointment, click on the blue dispatch button.



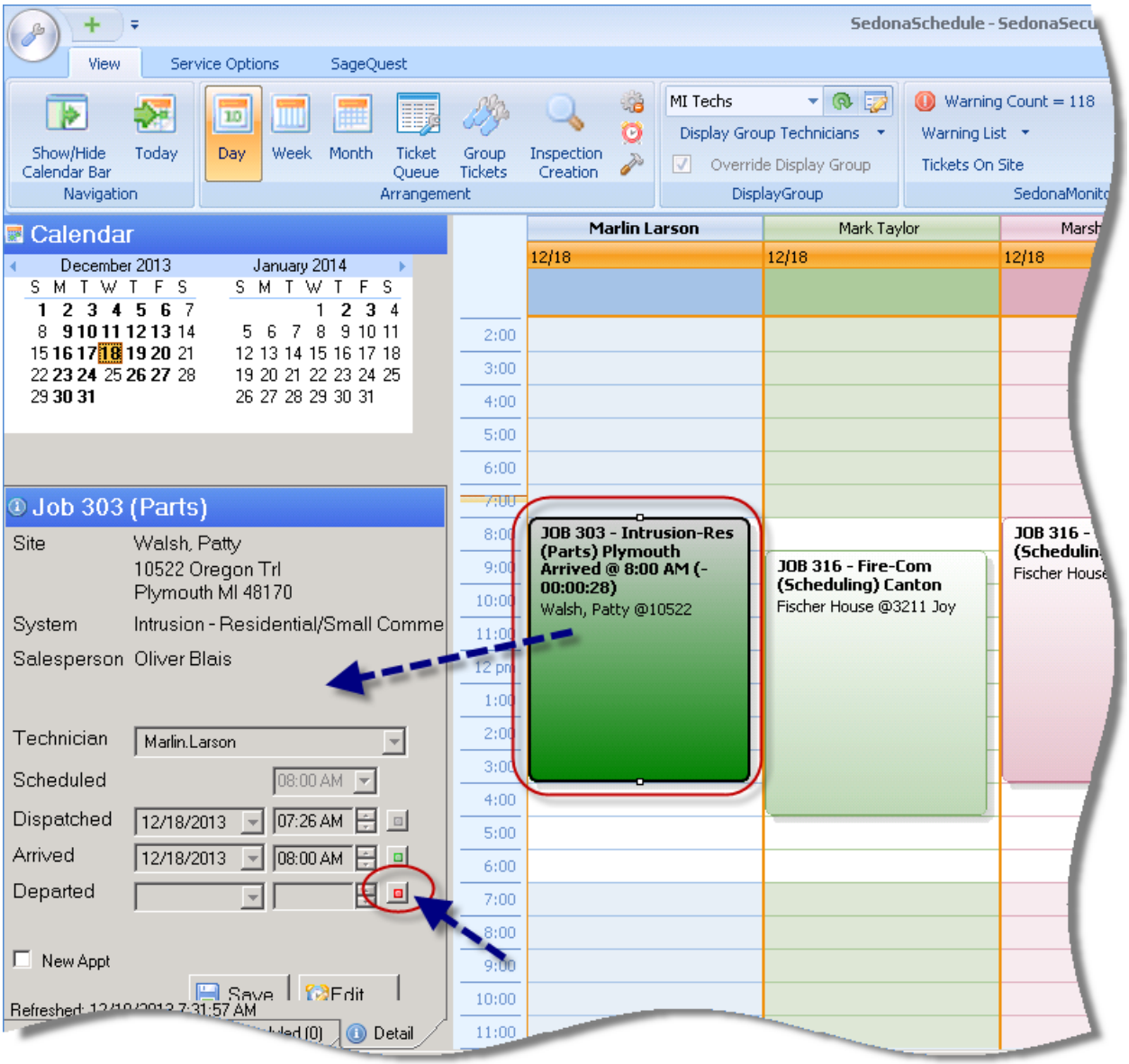
Live Dispatching (continued)

2. Once the employee has arrived at the Job site, from the Schedule Board, click on the Job Appointment to be dispatched and then click on the green dispatch button.



Live Dispatching (continued)

3. Once the employee has completed the Job Appointment, from the Schedule Board, click on the Job Appointment to be dispatched and then click on the red dispatch button.

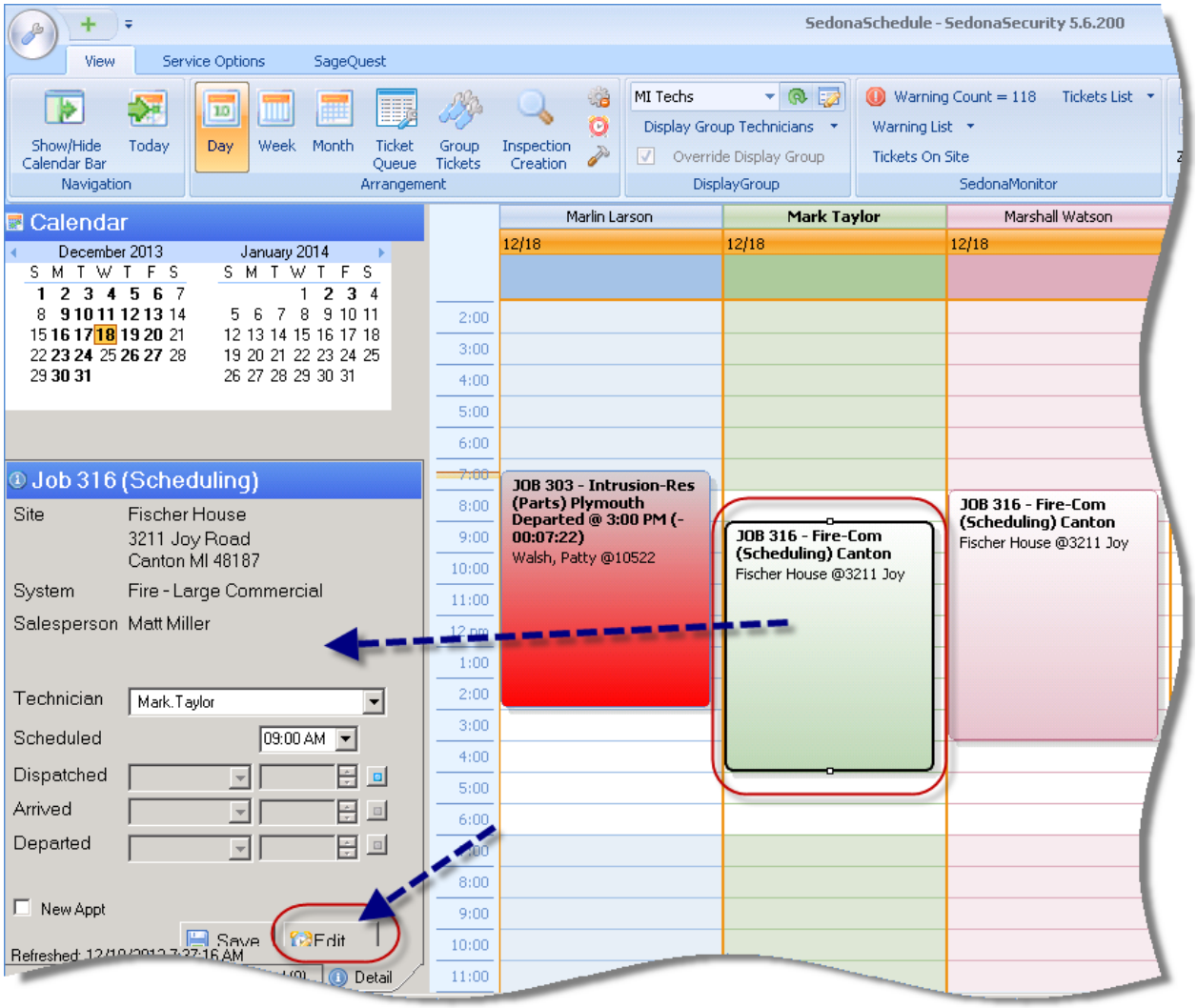


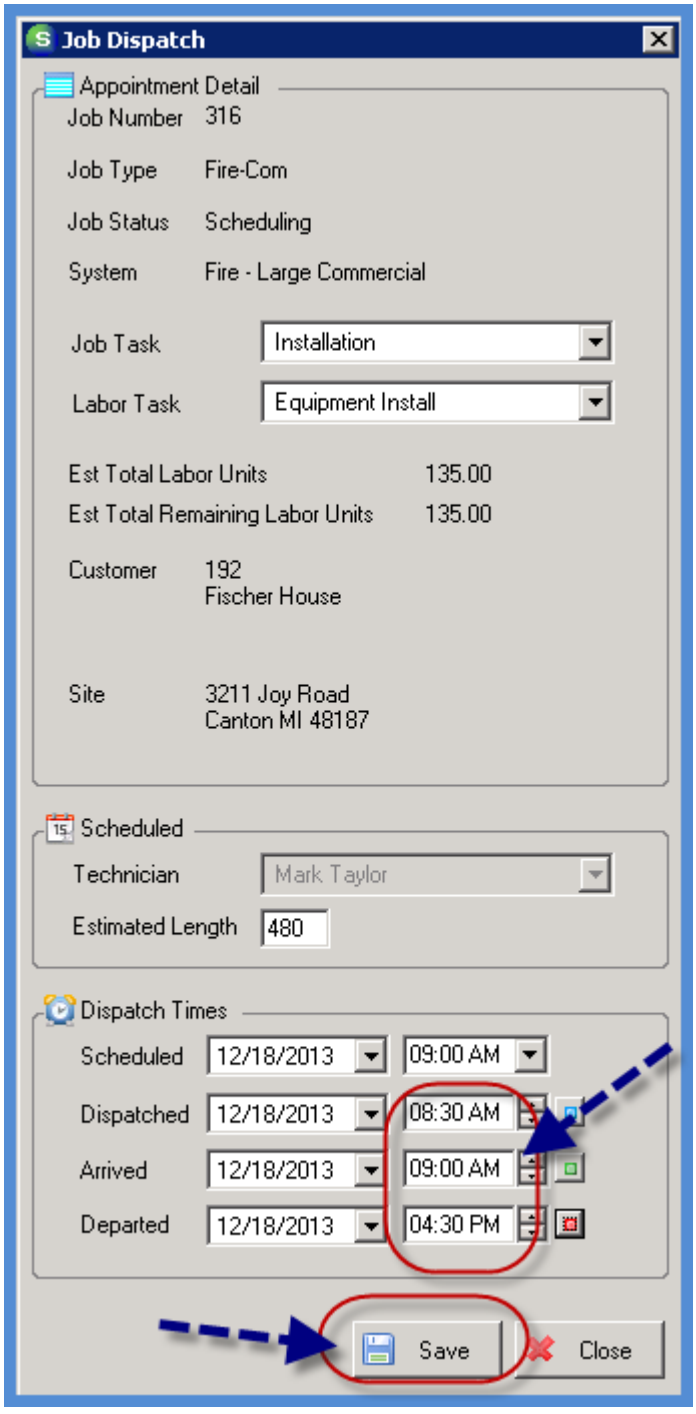
Manual Dispatching

To Manually Dispatch a Job Appointment, follow the steps below.

1. From the Schedule Board, click on the Job Appointment to be dispatched then click on the

Edit button in the Information Viewer area.



Manual Dispatching (continued)

2. The *Job Dispatch* form will be displayed. Type in the Dispatched, Arrived and Departed times, then click on the *Save* button located at the lower right of the form.