

### 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**

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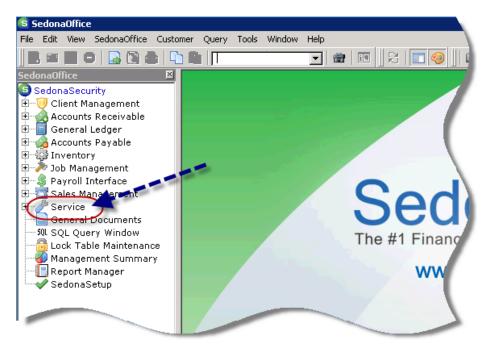
### Setup & Changes

#### **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.

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

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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.

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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.

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

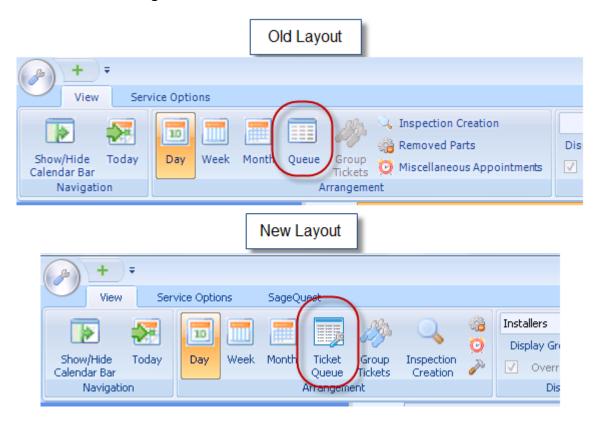
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#### Additions/Changes to the Ribbon

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.

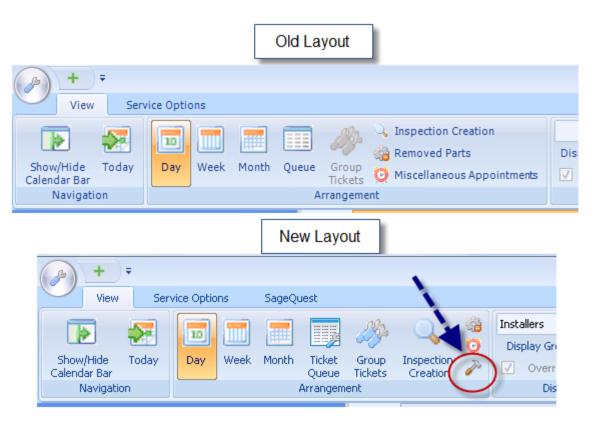




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A new button has been added to the Arrangement group of the ribbon on this button will open your **Open Jobs List**.

icon. Clicking





On the Calendar Options group of the ribbon, the "Double Click to Add" information has

been removed, and a new radio button Providen Appointments.

has been added for creating Job

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## Functionality



### Job Scheduling/Viewing Functionality

#### **Open Job List**

The Open Job List is accessed by clicking on the *science* 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.

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#### 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.

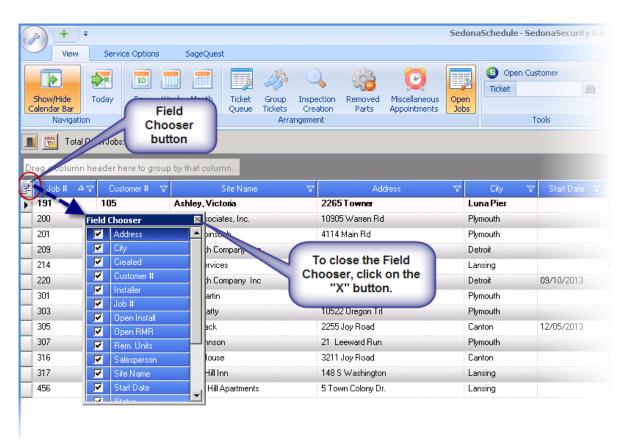
You may toggle back and forth between views by clicking on the buttons above the Job List column names.

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#### **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.



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#### 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.

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<b>191</b> 200 201	<b>105</b> 100	Ashley, Victoria Moss Associates, Inc.	2265 Towner 10905 Warren Rd	Luna Pier Plymouth	♥ Start Date N	(All) (Custom) (Blanks) (NonBlanks) ACC-Com	A Jobcost Parts	
<b>191</b> 200 201 209	105 100 164	Ashley, Victoria Moss Associates, Inc. John Robinsonb	2265 Towner 10905 Warren Rd 4114 Main Rd	Luna Pier Plymouth Plymouth	▼ Start Date 1	(All) (Custom) (Blanks) (NonBlanks) ACC-Com ACC-Res Add On/Upgrade-Res	A Jobcost Parts Parts	
191 200 201 209 214	105 100 164 10003	Ashley, Victoria Moss Associates, Inc. John Robinsonb S.H. Smith Company Inc	2265 Towner 10905 Warren Rd 4114 Main Rd 20 Church Street	Luna Pier Plymouth Plymouth Detroit	✓ Start Date 1 09/10/2013	(All) (Custom) (Blanks) (NonBlanks) ACC-Com ACC-Res	Jobcost     Parts     Parts     Parts     Parts	
191 200 201 209 214 220	105 100 164 10003 5001	Ashley, Victoria Moss Associales, Inc. John Robinsonb S.H. Smith Company Inc Social Services	2265 Towner 10905 Warren Rd 4114 Main Rd 20 Church Street 149 Water Street	Luna Pier Plymouth Plymouth Detroit Lansing		(All) (Custom) (Blanks) ACC-Com ACC-Res Add On/Upgrade-Res OCTV-Com EP	Jobcost     Parts     Parts     Parts     Install Equipment	
191 200 201 209 214 220 301	105 100 164 10003 5001 10003	Ashley, Victoria Moss Associates, Inc. John Robinsonb S.H. Smith Company Inc Social Services S.H. Smith Company Inc	2265 Towner 10905 Waren Rd 4114 Main Rd 20 Church Street 149 Waler Street 20 Church Street	Luna Pier Plymouth Plymouth Detroit Lansing Detroit		All) (Custom) (Blanks) (NonBlanks) ACC-Res Add Dn/Upgrade-Res CCTV-Com EP Profer Todage Comm	▲ Jobcost Parts Parts Parts Parts Install Equipment Progress Invoice	
191 200 201 209 214 220 301 303	105 100 164 10003 5001 10003 9639	Ashley, Victoria Moss Associates, Inc. John Robinsonb S.H. Smith Company Inc Social Services S.H. Smith Company, Inc Lesley Matin	2265 Towner           10905 Waren Rd           4114 Main Rd           20 Church Street           149 Water Street           20 Church Street           20 Church Street           5 Cliffmount Drive	Luna Pier Plymouth Plymouth Detroit Lansing Detroit Plymouth		All) (Custom) (Blanks) (NornBlanks) ACC-Com ACC-Res AdC On/Upgrade-Res CCTV-Com EP Untrusion-Res	Jobcost     Parts     Parts     Parts     Parts     Install Equipment     Progress Invoice     Scheduling	
	105 100 164 10003 5001 10003 9639 183	Ashley, Victoria Moss Associates, Inc. John Robinsonb S.H. Smith Company Inc Social Services S.H. Smith Company Inc Lesley Martin Walsh, Paty	2265 Towner 19905 Waren Rd 4114 Main Rd 20 Church Street 149 Water Street 20 Church Street 5 Clifmount Drive 10522 Oregon Til	Luna Pier Plymouth Plymouth Detroit Lansing Detroit Plymouth Plymouth	09/10/2013	(AI) (Custom) (Blanks) ACC-Com ACC-Res Add Dn/Upgrade-Res CUTY-CneEP Intrusion-Res Intrusion-Res	Jobcost     Parts     Parts     Parts     Parts     Install Equipment     Progress Invoice     Scheduling     Parts	

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.

+ =					Sedona	5chedule - Se	donaSecurity	5.6.197		
View Serv	rice Options	SageQuest								
Show/Hide Calendar Bar Navigation	Day Wee		Group Inspection fickets Creation Arrangement	Removed Appointment		Open Cu: Ticket	stomer 🗱		1	
👔 📆 Total Open Job Irag a column header H	_	by that column.								
Job# A∀ Cu	stomer # 🛛 🗸	Site Name	V	Address	V	City 🗸	Start Date	🗸 Туре	😧 Status 🗸	
214 5001	:	Social Services	1491	Water Street	Lan	sing		Intrusion-Res	Install Equipment	7
301 9639		Lesley Martin	5 Clif	fmount Drive	Plyn	iouth		Intrusion-Res	Scheduling	2.75
303 183	1	Walsh, Patty	1052	2 Oregon Trl	Plyn	iouth		Intrusion-Res	Pats	18.75
100										

### Reference Document SedonaSchedule

#### 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.

<u>} + ₹</u>		5 0 I	Se	dona5chedule-9	SedonaSecurity 5.0	5.197	
View Show/Hide Calendar Bar Navigation			pection Removed Miscellaneous Op eation Parts Appointments Jo	S Open ( Ticket	Customer 📸		
🔳 📆 🛛 Total C	lpen Jobs: 13						
Drag a column l	neader here to grou	n by that column			Type 🖓	7	
≝ Job # △ <	-		7 Address 🖓	City ·	v Start Date ⊽	Туре	⊽ Sta
191	105	Ashley, Victoria	2265 Towner	Luna Pier		CCTV-Res	Jobco
200	100	Moss Associates, Inc.	10905 Warren Rd	Plymouth	$\sim$	CCTV-Com EP	Parts
201	164	John Robinsonb	4114 Main Rd	Plymouth		CCTV-Com EP	Parts
209	10003	S.H. Smith Company Inc	20 Church Street	Detroit		Fire-Com % Parts	Parts
214	5001	Social Services	149 Water Street	Lansing		Intrusion-Res	Install E
220	10003	S.H. Smith Company Inc	20 Church Street	Detroit	09/10/2013	Mont-Hookup-Comm	Progres
301	9639	Lesley Martin	5 Cliffmount Drive	Plymouth		Intrusion-Res	Schedu
303	183	Walsh, Patty	10522 Oregon Tri	Plymouth		Intrusion-Res	Parts
305	185	Upton, Jack	2255 Joy Road	Canton	12/05/2013	Intrusion-Res	Parts
307	27866	Dana Johnson	21 Leeward Run	Plymouth		Add On/Upgrade-Res	Job Cor
316	192	Fischer House	3211 Joy Road	Canton		Fire-Com	Schedu
317	10565	Tollgate Hill Inn	148 S Washington	Lansing		ACC-Res	Jobcos
456	10110	Chestnut Hill Apartments	5 Town Colony Dr.	Lansing		ACC-Com	Jobcos

#### Job List Filter Group on Job Type

	Service Options	SageQues	•								
	5	-		0	863			S Open	Custom	er	
					50			Ticket		66	
Show/Hide alendar Bar	Today Day	Week Month	Ticket Group Oueue Tickets	Inspection Creation	Removed Parts	Miscellaneous Appointments	Open Jobs				
Navigati	n		An	angement					Tools		
🚺 📆 Total	Open Jobs: 13										
	openroops, no			_	_	_	_	_			
Type △											
∄ Job #	△▽ Customer #	V	Site Name	V	an a	Address	$\nabla$				
Type : ACC-Co	om (1 item)										
Type : ACC-Re											
Type : Add Or	/Upgrade-Res (1 item)										
Type : CCTV-0	Com EP (2 items)										
Type : CCTV-F	Res (1 item)										
	m (1 item)										
Type : Fire-Co	A. 10										
Type : Fire-Co Type : Fire-Co	m % Parts (1 item)										
Type : Fire-Co	m % Parts (1 item) n-Res (4 items)							Lansing			
Type : Fire-Co		Social Ser	vices	14	19 Water Stre	et					
Type : Fire-Co Type : Intrusio	n-Res (4 items)	Social Ser Lesley Ma			19 Water Stre Cliffmount Driv			Plymouth			
Type : Fire-Co Type : Intrusio	n-Res (4 items) 5001		rtin	5		ve		Plymouth Plymouth			

#### **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.

Show/Hide alendar Bar Navigation	Foday Day	Week Month Ticket Group Queue Tickets Arran	Inspection Removed Miscellaneou Creation Parts Appointment		88		
	_	up by that column.	_	_			
Job# ∆⊽	-		√ Address				
191	105	Ashley, Victoria	2265 Towner	Luna Pier		CCTV-Res	Jobcost
200	100	Moss Associates, Inc.	10905 Warren Rd	Plymouth		CCTV-Com EP	
201	164	John Robinsonb	4114 Main Rd	Plymouth		CCTV-Com EP	Parts
209	10003	S.H. Smith Company Inc	20 Church Street	Detroit		Fire-Com % Parts	Parts
214	5001	Social Services	149 Water Street	Lansing		Intrusion-Res	
220	10003	S.H. Smith Company Inc	20 Church Street	Detroit 09	/10/2013	Mont-Hookup-Comm	Progress Inv
301	9639	Lesley Martin	5 Cliffmount Drive	Plymouth		Intrusion-Res	
303	183	Walsh, Patty	Tustom Filter				× Parts
305	185	Upton, Jack		- <b>-</b>			Parts
307	27866	Dana Johnson	Filter based on All	<ul> <li>of the following conditions:</li> </ul>			
316	192	Fischer House	Add Any	als	- Plymout	th	- Scheduling
317	10565	Tollgate Hill Inn		Equals	Canton		Jobcost
456	10110	Chestnut Hill Apartments	Delete City = 6	_ yuais			

#### **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.

### Reference Document SedonaSchedule

#### 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:
  - o Job number
  - Job type
  - Current job status
  - Customer number and Customer name
  - o Site name, address and phone number
  - o Job hours information
    - Total Estimated Labor Hours
    - [Total] Hours Used
    - Proposed Hours [what is currently being scheduled]
    - Remaining Labor Units (Estimated minus Completed)

Schedule Job Number 316					_ 🗆 🗵
Job: 316	Customer: 192		Select installers to schedule be	low: Group:	Installers
Type: Fire-Com	Fischer House	Job	Installer	Service Company	Install Company
Status: Scheduling	Int			MI-T&M	SedonaSecurity
			Milton Morris	MI-T&M	SedonaSecurity
Job Hours	Site: Fischer House		Mitchell Malloy	MI-T&M	SedonaSecurity
Estimated Total Hours: 135.00	3211 Joy Road				
Hours Used: 0.00	Canton MI				
Proposed Hours: 0.00	(734) 248-7799				
Hours Remaining: 135.00					
Job Task:	Labor Task:				
	I			Select	
Start Date: 12/10/2013	End Date: 12/11/2	013		Remove	
Start Time: 11:44 PM	End Time: 11:44 PM	N V	Showing: 🔽 Conflicts	Proposed 🗖	Previous Auto Refresh: 🔽
🔽 Exclude Sat 🔽 Exclude Sur	n	Clear	Installer J	ob Number Scheduled	Est Length
	ary 2014 February WTFS SMTV	2014 ► WITES			
24 25 26 27 28 29 30	1 2 3 4	1			
1 2 3 4 5 6 7 5 6 7 8 9 10 11 12 13 14 12 13 14		5 6 7 8			
15 16 17 18 19 20 21 19 20 21	22 23 24 25 16 17 18	19 20 21 22			
22 23 24 25 26 27 28 26 27 28 29 30 31		26 27 28 1 5 6 7 8			
·					
S Go to Job				🖂 Sche	edule 💢 Close



### Reference Document SedonaSchedule

#### Job Scheduling Form (continued)

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

🖻 Schedule Job Number 316				_ 🗆 ×
Job: 316	Customer: 192	Select installers to schedule b	elow: Group:	Installers
Type: Fire-Com	Fischer House	Installer	Service Company	Install Company
Status: Scheduling		Mark Taylor	MI-T&M	SedonaSecurity
		Milton Morris	MI-T&M	SedonaSecurity
Job Hours	Site: Fischer House	Mitchell Malloy	MI-T&M	SedonaSecurity
Estimated Total Hours: 135.00	3211 Joy Road			
Hours Used: 0.00	Canton MI			
Proposed Hours: 0.00	(734) 248-7799			
Hours Remaining: 135.00				
Job Task:	Labor Task:			
			Select	
Schedule				
Start Date: 12/10/2013 Selector	End Date: 12/11/2013		Remove	
Start Time: 11:44 PM 💌	End Time: 11:44 PM	Showing: 🔽 Conflicts	Proposed	Previous 🛛 Auto Refresh: 🔽
		Installer	Job Number Scheduled	Est Length
🔽 Exclude Sat 🔽 Exclude Sur	Clear	Installer	Sob Number Scheduled	Escengui
✓ December 2013 Januar	ry 2014 February 2014 🕨			
SMTWTFS SMT	WTFS SMTWTFS			
24 25 26 27 28 29 30 1 2 3 4 5 6 7 5 6 7	1 2 3 4 1 8 9 10 11 2 3 4 5 6 7 8			
8 9 10 11 12 13 14 12 13 14	15 16 17 18 9 10 11 12 13 14 15			
15 16 17 18 19 20 21 19 20 21 22 23 24 25 26 27 28 26 27 28	22 23 24 25 16 17 18 19 20 21 22 29 30 31 23 24 25 26 27 28 1			
29 30 31	2345678			
U				
O S S S S S S S S S S S S S S S S S S S				
S Go to Job			Sc	hedule 🔀 Close

#### 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:
  - o [Display] Group Selector
  - o Installer Name; related Service Company and Install Company
  - Select button
  - o Remove button

Schedule Job Number 316	5					_ 🗆 🗵
Job: 316	Customer: 19	2	Select installers to sc	hedule below: Gro	up: Installers	-
Type: Fire-Com	Fischer House		Installer	Service Company	Install Company	
Status: Scheduling			Mark Taylor	MI-T&M	SedonaSecurity	
			Milton Morris	MI-T&M	SedonaSecurity	
Job Hours	Site: Fischer	House	Mitchell Malloy	MI-T&M	SedonaSecurity	
Estimated Total Hours:	135.00 3211 Joy Road					
Hours Used:	0.00 Canton MI			Employee		
Proposed Hours:	0.00 (734) 248-7799			Selector		
Hours Remaining	135.00					
Job Task:	Labor Task:	•	1			
				Select		
Start Date: 12/10/2013	End Date:	12/11/2013		Remove		
					_	
Start Time: 11:44 PM 💌	End Time:	11:44 PM 💌	Showing: 🔽	Conflicts 🔽 Proposed	Previous Auto	Refresh: 🔽
🔽 Exclude Sat	🔽 Exclude Sun	Clear	Installer	Job Number Sched	uled Est	Length
December 2013	January 2014	February 2014				
SMTWTFS 24 25 26 27 28 29 3		SMTWTFS 1				
123456;	7 567891011	2345678				
8 9 10 11 12 13 1- 15 16 17 18 19 20 2		9 10 11 12 13 14 15 16 17 18 19 20 21 22				
22 23 24 25 26 27 2		23 24 25 26 27 28 1				
29 30 31		2345678				
1						
O a sul						
S Go to Job					Schedule 😫 Close	*

#### 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:
  - o Conflicts checkbox
  - Proposed checkbox
  - Previous checkbox
  - o Auto Refresh
  - Working scheduling area containing the following columns of information:
    - Installer name
    - Job/Ticket Number
    - Scheduled Date
    - Estimated Length of Appointment (in minutes)

Schedule Job Number 316					
Job: 316	Customer: 192		Select installers to schedule be	low: Group:	Installers
Type: Fire-Com	Fischer House				,
Status: Scheduling			Installer	Service Company	Install Company
			Mark Taylor Milton Morris	MI-T&M MI-T&M	SedonaSecurity SedonaSecurity
	Site: Fischer H		Mitchell Malloy	MI-T&M	SedonaSecurity
Job Hours		ouse	-		
	Conten MI				
	0.00				
Proposed Hours: 0	0.00 (734) 248-7799				
Hours Remaining: 135	5.00				
Job Task:	✓ Labor Task:				
			,		
				Select	
Start Date: 12/10/2013	End Date:	12/11/2013		Remove	
Start Time: 11:44 PM 💌	End Time:	11:44 PM 💌	Showing: 🔽 Conflicts	Proposed	Previous 🛛 Auto Refresh: 🔽
				1	
🔽 Exclude Sat 🔽 E:	xclude Sun	Clear	Installer	lob Number Scheduled	Est Length
◀ December 2013	January 2014	February 2014 🔹 🕨			
		SMTWTFS		Employee	
24 25 26 27 28 29 30 1 2 3 4 5 6 7	1 2 3 4 5 6 7 8 9 10 11	2 3 4 5 6 7 8		Schedule	
8 9 10 11 12 13 14	12 13 14 15 16 17 18	9 10 11 12 13 14 15			
	19 20 21 22 23 24 25 26 27 28 29 30 31	16 17 18 19 20 21 22 23 24 25 26 27 28 1			
29 30 31	20 27 20 20 30 31	2 3 4 5 6 7 8			
					)
I					
G Go to Job				TRI Sc	shedule

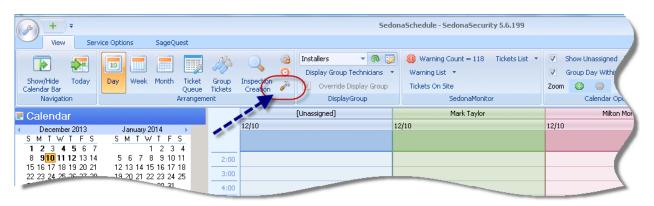
### Reference Document SedonaSchedule

#### 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.

+ =	S Schedule Job Number 316	e 1. et 11		F 107			
View Service Optic				_			
	Job: 316	Customer: 192	Select installers to s	chedule below:	iroup: Installers 💌		
- 🕑 😽 📼	Pe: Fire-Com Natus: Scheduling	Fischer House	Installer	Service Company	Install Company		
Show/Hide Today Day	ptatus: Scheduling		Mark Taylor	MI-T&M	SedonaSecurity		
Calendar Bar Navigation	9		Milton Morris	N/A.	N/A		
			Mitchell Malloy	N/A.	N/A		
🔳 📆 Total Open Jobs: 13 🏅	Job Hours	Site: Fischer House					
Drag a column header here to	Completed: 0.00	3211 Joy Road					
		Canton MI					
Job # △▽ Custriner #	Proposed: 0.00	(734) 248-7799					
191 105	Total: 0.00					5	05/15/2013
200 100	Job Task:	Labor Task:				3	
201 164				Select			
209 10003							
214 5001	Start Date: 12/6/2013	End Date: 12/6/2013		Remove	. [	P	
220 10003	Start Date. Fib and Fib	LIN DOC. FERMININ			·		
301 9639			_		_		
303 183	Start Time: 03:00 PM 💌	End Time: 04:00 PM	Showing: 🔽	Conflicts V Proposed	Previous Auto Refresh:		
305 185					in tea a f		
307 27866	🖉 Exclude Sat 🕅 Exclude	Sun Clear	Installer	Job Number Sched	luled Est Length	P	
316 192 317 10565						5.0	12/04/2013
						-	
456 10110		nuary 2014 February 2014 🕨					
	<u>SMTWTFS</u> <u>SM</u> 24 25 26 27 28 29 30	<u>TWTFS</u> <u>SMTWTFS</u> 1234 1					
	1234567 56	7 8 9 10 11 2 3 4 5 6 7 8					
		14 15 16 17 18 9 10 11 12 13 14 15 21 22 23 24 25 16 17 18 19 20 21 22					
		21 22 23 24 25 16 17 18 19 20 21 22 28 29 30 31 23 24 25 26 27 28 1					
	29 30 31	2345678					



- 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.

Schedule Job Number 316				_ 🗆 ×
Job: 316	Customer: 192	Select installers to schedule be	elow: Group:	Installers
Type: Fire-Com	Fischer House			
Status: Scheduling		Installer	Service Company	Install Company
		Mark Taylor Milton Morris	MI-T&M MI-T&M	SedonaSecurity SedonaSecurity
		Mitchell Malloy	MI-T&M	SedonaSecurity
Job Hours	Site: Fischer House			Codeniacoounty
Estimated Total Hours: 135.00	3211 Joy Road			
Hours Used: 0.00	Canton MI			
Proposed Hours: 0.00	(734) 248-7799			
Hours Remaining: 135.00				
Job Task: Installation	Labor Task: Equipment Install			
			Select	
Start Date: 12/11/2013	End Date: <b>12/11/2013</b>		Remove	
Start Time: 01:00 AM 💌	End Time: 09:00 AM 💌	Showing: 🔽 Conflicts	Proposed	Previous Auto Refresh: 🔽
E S L L S L L S S S L L S		Installer	Job Number Scheduled	Est Length
🔽 Exclude Sat 🔽 Exclude Sun	Clear			
✓ December 2013 Januar	ry 2014 February 2014 🕨			
<u>SMTWTFS</u> SMTV	WTFS SMTWTFS			
24 25 26 27 28 29 30 1 2 3 4 5 6 7 5 6 7	1 2 3 4 1 8 9 10 11 2 3 4 5 6 7 8			
	8 9 10 11 2 3 4 5 6 7 8 15 16 17 18 9 10 11 12 13 14 15			
15 16 17 18 19 20 21 19 20 21	22 23 24 25 16 17 18 19 20 21 22			
22 23 24 25 26 27 28 26 27 28 29 30 31	29 30 31 23 24 25 26 27 28 1 2 3 4 5 6 7 8			
23 30 31	2 3 4 3 0 7 0			
1		1		
S Go to Job			👿 Sc	shedule 😫 Close

- 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.

Schedule Job Number 316	i					_ 🗆 ×
Job: 316		Customer: 192		Select installers to schedule b	elow: Group:	Installers 💌
Type: Fire-Com		Fischer House				
Status: Scheduling				Installer	Service Company	Install Company
				Mark Taylor	MI-T&M	SedonaSecurity
				Milton Morris Mitchell Malloy	MI-T&M MI-T&M	SedonaSecurity SedonaSecurity
Job Hours		Site: Fischer H	ouse	michel maloy	141-1 604	Sedonasecunty
Estimated Total Hours:	135.00	3211 Joy Road				
Hours Used:	0.00	Canton MI				
Proposed Hours:	0.00	(734) 248-7799				
Hours Remaining:	135.00					
Job Task: Installation	•	Labor Task:	Equipment Install			
Interaction					Select	
Start Date: <b>12/30/2013</b>		End Date:	1/3/2014		Remove Remove	411
Statt Date. 12730/2013		End Date.	173/2014		Remove Remove	<u>AII</u>
Start Time: 07:00 PM 💌		End Time:	11:59 PM 💌	Showing: 🔽 Conflicts	E	Previous Auto Refresh: 🔽
		Enu rime.	11.33 FM		Proposed	Previous Auto Refresh: 🔽
Exclude Sat	🔽 Exclude Su		Clear	Installer	Job Number Scheduled	Est Length
		-				
✓ December 2013	lanu	ary 2014 🖌	February 2014			
SMTWTFS			SMTWTFS			
24 25 26 27 28 29 30	0	(1 2 3 )	1			
1 2 3 4 5 6 7 8 9 10 11 12 13 14		8 9 18 11 15 16 17 18	2 3 4 5 6 7 8 9 10 11 12 13 14 15			
15 16 17 18 19 20 2			16 17 18 19 20 21 22			
22 23 24 25 26 27 28	3 26 27 28		23 24 25 26 27 28 1			
29 30 31			2345678			
	-					
						1 1
🗿 Go to Job					🗾 Sch	iedule 💢 Close

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.

Schedule Job Number 316							
Job: 316		Customer: 192		Select installers to schedu	ile below:	Group: MI Techs	•
Type: Fire-Com		Fischer House			-		
Status: Scheduling				Installer	Service Compa		
				Madison Morrison	MI-T&M	SedonaSec	-
				Mark Taylor Marlin Larson	MI-T&M MI-T&M	SedonaSec SedonaSec	
Job Hours		Site: Fischer H	ouse	Marshall Watson	MI-T&M	SedonaSec	
Estimated Total Hours:	135.00	3211 Joy Road		Mike McKenzie	MI-INSP Cont	SedonaSec	-
Hours Used:	0.00	Canton MI		Mike Walker	MI-SVC Cont	SedonaSec	urity
Proposed Hours:	0.00	(734) 248-7799					
1	105.00		· · · · · · · · · · · · · · · · · · ·	1			
Hours Remaining:	135.00			Λ			
Job Task: Installation	•	Labor Task:	Equipment Install 🚽				
1						Select	
						Select	
Start Date: 12/30/2013		End Date:	1/3/2014		Remove	Remove All	
Start Time: 08:00 AM 💌		End Time:	04:00 PM 💌	Showing: 🔽 Con	flicts 🔽 Prop	osed 🔲 Previous	Auto Refresh: 🔽
<b>E F F F F F F F F F F</b>	<b>E F F F F F F F F F F</b>			Installer	Job Number	Scheduled	Est Length
💌 Exclude Sat	Exclude Sur	1	Clear	📀 Mark Taylor 🔪		12/30/2013 8:00:00 AM	480
				📀 Marshall Watson		12/30/2013 8:00:00 AM	480
				🥝 Mark Taylor		12/31/2013 8:00:00 AM	480
<ul> <li>December 2013</li> </ul>		y 2014	February 2014 🔹 🕨	🥝 Marshall Watson		12/31/2013 8:00:00 AM	480
<u>SMTWTFS</u>			<u>SMTWTFS</u>	🕒 Mark Taylor	TCK 2449	1/2/2014 8:00:00 AM	300
24 25 26 27 28 29 30 1 2 3 4 5 6 7		1 2 3 4 8 9 10 11	1 2 3 4 5 6 7 8	📀 Marshall Watson		1/2/2014 8:00:00 AM	480
8 9 10 11 12 13 14		15 16 17 18	9 10 11 12 13 14 15	🥝 Mark Taylor		1/3/2014 8:00:00 AM	480
15 16 17 18 19 20 21		22 23 24 25	16 17 18 19 20 21 22	📀 Marshall Watson		1/3/2014 8:00:00 AM	480
22 23 24 25 26 27 28	3 26 27 28	29 30 31	23 24 25 26 27 28 1				
29 <mark>3031</mark>			2345678				
🜀 Go to Job						🗾 Schedule 🛛 😫	Close



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

Schedule Job Number 316					
Job: 316	Customer: 192	Select installers to schedu	ule below:	Group: MI Techs	•
Type: Fire-Com	Fischer House			,	
Status: Scheduling		Installer	Service Compan		
		Madison Morrison	MI-T&M	SedonaSec	
		Marlin Larson	MI-T&M	SedonaSec	
Job Hours	Site: Fischer House	Mike McKenzie	MI-INSP Cont	SedonaSec	
Estimated Total Hours: 135.00	3211 Joy Road	Mike Walker	MI-SVC Cont	SedonaSec	unty
	Canton MI				
Hours Used: 0.00					
Proposed Hours: 64.00	(734) 248-7799				
Hours Remaining: 71.00					
Job Task: Installation	Labor Task: Equipment Install				
motanation			C.	1	
				elect	
Start Date: 12/30/2013	End Date: 1/3/2014		Remove	Remove All	
Start Time: 08:00 AM 💌	End Time: 04:00 PM 💌	Showing: 🔽 Cor	nflicts 🔽 Propos	ed 🔽 Previous	Auto Refresh: 🔽
Exclude Sat	un Clear	Installer	Job Number	Scheduled	Est Length
		🥝 Mark Taylor		12/30/2013 8:00:00 AM	480
		🥝 Marshall Watson		12/30/2013 8:00:00 AM	480
		🥝 Mark Taylor		12/31/2013 8:00:00 AM	480
	uary 2014 February 2014 F	Marshall Watson		12/31/2013 8:00:00 AM	480
<u>SMTWTFS</u> <u>SMT</u> 24 25 26 27 28 29 30	$\frac{\text{WTFS}}{1234} \qquad \qquad 1$	Mark Taylor		1/2/2014 8:00:00 AM	300
	7 8 9 10 11 2 3 4 5 6 7 8 🌙	Marshall Watson		1/2/2014 8:00:00 AM	480
	4 15 16 17 18 9 10 11 12 13 14 15 🧨	📀 Mark Taylor		1/3/2014 8:00:00 AM	480
	1 22 23 24 25 16 17 18 19 20 21 22	S Marshall Watson		1/3/2014 8:00:00 AM	480
22 23 24 <mark>25</mark> 26 27 28 26 27 2 29 <b>30 31</b>	8 29 30 31 23 24 25 26 27 28 1 2 3 4 5 6 7 8				
23 30 31	2343070				
1		I			
🗿 Go to Job				🗾 Schedule 🛛 😫	Close



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 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.

Schedule Job Number 316					
Job: 316	Customer: 192	Select installers to sched	lule below:	Group: MI Techs	•
Type: Fire-Com	Fischer House				
Status: Scheduling		Installer	Service Company		
		Madison Morrison	MI-T&M	SedonaSecu	
		Marlin Larson	MI-T&M	SedonaSecu	
Job Hours	Site: Fischer House	Mike McKenzie Mike Walker	MI-INSP Cont MI-SVC Cont	SedonaSecu SedonaSecu	
Estimated Total Hours: 135.00	3211 Joy Road	Mike Waiker	MI-SVL Cont	Sedonasecu	inty
Hours Used: 0.00	Canton MI				
Proposed Hours: 64.00	(734) 248-7799				
Hours Remaining: 71.00					
Job Task: Installation	Labor Task: Equipment Install				
			Sele	ect	
Start Date: <b>12/30/2013</b>	End Date: <b>1/3/2014</b>				
Start Date: 12/30/2013	End Date: 1/3/2014		Remove	Remove All	
Start Time: 08:00 AM 💌	End Time: 04:00 PM	Showing: 🔽 Co	nflicts 🔽 Propose	d 🗌 Previous	Auto Refresh: 🔽
🔽 Exclude Sat 🔽 Exclude	e Sun Clear	Installer		icheduled	Est Length
		🕑 Mark Taylor 🚫 Marshall Watson		2/30/2013 8:00:00 AM	480 480
		Marshail Watson		2/30/2013 8:00:00 AM 2/31/2013 8:00:00 AM	480
I December 2013 J	anuary 2014 February 2014	Mark Taylor		2/31/2013 8:00:00 AM	480
	TWTFS SMTWTFS	Mark Taylor		/2/2014 8:00:00 AM	300
24 25 26 27 28 29 30	1 2 3 4 1	Marshall Watson		/2/2014 8:00:00 AM	480
1234567 56		Mark Taylor		/3/2014 8:00:00 AM	480
	3 14 15 16 17 18 9 10 11 12 13 14 15	Marshall Watson		/3/2014 8:00:00 AM	480
	0 21 22 23 24 25 16 17 18 19 20 21 22 7 28 29 30 31 23 24 25 26 27 28 1			0.2011 0.00.00140	100
29 30 31	2 3 4 5 6 7 8				
		1			
S Go to Job				🗟 Schedule 🛛 😫	Close

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.

nstaller	Job Number	Scheduled Date	Start Time	End Time	
📀 Mark Taylor	316	12/30/2013	8:00 AM	4:00 PM	
📀 Marshall Watson	316	12/30/2013	8:00 AM	4:00 PM	
🧿 Mark Taylor	316	12/31/2013	8:00 AM	4:00 PM	
🧔 Marshall Watson	316	12/31/2013	8:00 AM	4:00 PM	
🧕 Mark Taylor	316	1/2/2014	8:00 AM	4:00 PM	
Marshall Watson	316	1/2/2014	8:00 AM	4:00 PM	
🧿 🔊 😽 Taylor	316	1/3/2014	8:00 AM	4:00 PM	



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

(») <u>+</u> =					Sedonas	ichedule - SedonaSec	urity 5.6.200					- 7
View Service C	ptions SageQuest											
		Ma	0 %			Warning Count = 11	8 Tickets List 🔹	Show Unassi				
Show/Hide Today Da		Group	Inspection	Display Group Teo		Warning List 🔹		🔽 Group Day V			<b>6</b> 6	
Calendar Bar	Queue	Tickets	Inspection Creation	Override Disp		Tickets On Site		Zoom 🕥 🤤				
Navigation	Arrangem	ent		DisplayGro		SedonaMo	hitor	Calenc	dar Options		Tools	
🛚 Calendar			12/30	12/31	Mark Taylor 1/1	1/2	1/3	12/30	12/31	Marshall Watson	1/2	1/3
December 2013 SMTWTFS	Januany2014 ▶ SMTWTFS		12/30	12/51	1/1	172	1/5	12/30	12/51	1/1	1/2	115
1234567	1 2 3 4											
8 9 10 11 12 13 14 15 1617 18 19 20 21	5 6 7 8 9 10 11 12 13 14 15 16 17 18	2:00										
22 23 24 25 26 27 28	19 20 21 22 23 24 25	3:00										
29 <mark>3031</mark>	26 27 28 29 30 31	4:00										
		5:00										
		6:00										
٢		7:00		JOB 316 -		TKT 2449 -	100.015	JOB 316 -	JOB 316 -		100.015	JOB 316 -
Site		8:00	JOB 316 - Fire-Com	Fire-Com		Insp-Fire-	JOB 316 - Fire-Com	Fire-Com	Fire-Com		JOB 316 - Fire-Com	Fire-Com
		9:00	(Scheduling) Canton	(Scheduling) Canton		MO (Critical) Livonia	(Scheduling) Canton	(Scheduling) Canton	(Scheduling) Canton		(Scheduling) Canton	(Scheduling) Canton
System		11:00	Fischer House	Fischer House		Livonia High	Fischer House	Fischer House	Fischer House		Fischer House	Fischer House
Contact		12 pm		-		-	-		-			H H
		1:00		-					-			H
Problem Technician		2:00		-					-			H
1		3:00		-					-		-	H
Scheduled	<u>v</u>	4:00		· · · · · ·			· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	/			· · · · · · · · · · · · · · · · · · ·
Dispatched		5:00										
Arrived	¥	6:00										
Departed		7:00										
,		8:00										
New Appt		9:00										
Refreshed: 12/17/2013 7:16:56	Save REdit	10:00										
	heduled (10) 🕕 Detail	11:00										
🌱 Start 🕌 🗾	👝 🔼 Ja										Do 6	7:17 PM



#### 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 Schedule 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.

() + =				Sedon	aSchedule -	SedonaSecurity 5.6.200				- 0
View Service Options SageQue	it									
Calendar Bar 🤅	Ticket Group Queue Tickets	Inspection Creation	V Overrid	P      P	Warning Lit Tickets On		Show Unassigned     Group Day Within Own     Zoom     Calendar Option:	er • Ticke	Open Customer It Tools	80
8	angemeni.	Marlin Lar		Mark Ta	dor	Marshall Watson	Mike McKenzie	Mike W		Madison Morrison
Calendar		mariii i Lar 12/18		12/18	nur	12/18	12/18	12/18	-	2/18
▲         December 2013         January 2014           S         M         T         F         S           1         2         3         4         5         6         7         1         2         3           8         910-11-12         13         14         5         6         7         8         910         11	2:00									
15 16 (713) 19 20 21 12 13 14 15 16 17 18 22 23 23 23 23 25 27 28 19 20 21 22 23 24 25 29 30 31 26 27 28 29 30 31						Double-click or desired Emplo column and time	yee			
						1/				
0	7:00									
Site	8:00	JOB 303 - Intru (Parts) Plymou				$\left( \right)$	) JOB 307 - Add			
	9:00	Walsh, Patty @10		JOB 316 - Fire-C (Scheduling) Ca				JOB 316 - Fire	-Com	
System	10:00	-		Fischer House @3	211 Joy					
Contact	11:00 12 pm	-	-		-					
	12 pm	-	-		-					
Problem Technician	1 2:00	-	-		-					
	3:00	-	-							
,	4:00				j					
Dispatched	5:00									
Arrived	0.00									
Departed										
New Appt	8:00									
🗎 Save 🛛 🖾 Edit	9:00									
Refreshed: 12/18/2013 6:39:26 AM	J									

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.

b #	Customer #	Site Name	Address	City	Created	Start	Туре	Status	Units	Rem Unit	
91	105	Ashley, Victoria	2265 Towner	Luna Pier	05/15/2013		CCTV-Res	Jobcost	16	12.5	
00	100	Moss Associates, Inc.	10905 Warren Rd	Plymouth	06/28/2013		CCTV-Com EP	Parts	30	10.25	
01	164	John Robinsonb	4114 Main Rd	Plymouth	07/02/2013		CCTV-Com EP	Parts	0	0	
)9	10003	S.H. Smith Company	20 Church Street	Detroit	07/25/2013		Fire-Com % Parts	Parts	0	0	
4	5001	Social Services	149 Water Street	Lansing	08/29/2013		Intrusion-Res	Install Equip	7	-2	
20	10003	S.H. Smith Company	20 Church Street	Detroit	09/10/2013	09/10/2013	Mont-Hookup-Comm	Progress Inv	0	0	
)1	9639	Lesley Martin	5 Cliffmount Drive	Plymouth	11/24/2013		Intrusion-Res	Scheduling	2.75	2.75	
)3	183	Walsh, Patty	10522 Oregon Trl	Plymouth	11/26/2013		Intrusion-Res	Parts	18.75	3.75	
5	185	Upton, Jack	2255 Joy Road	Canton	12/03/2013	12/05/2013	Intrusion-Res	Parts	34	24	
7	27866	Dana Johnson	21 Leeward Run	Plymouth	12/03/2013		Add On/Upgrade-Res	Job Complete	0	-3	
6	192	Fischer House	3211 Joy Road	Canton	12/04/2013		Fire-Com	Scheduling	135	135	
7	10565	Tollgate Hill Inn	148 S Washington	Lansing	10/28/2013		ACC-Res	Jobcost	2	-1.0166	
6	10110	Chestnut Hill Apartme	5 Town Colony Dr.	Lansing	10/28/2013		ACC-Com	Jobcost	0	0	



- 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.

Job: 316		Customer: 192 Fischer House		Select installers to schedul	e below:	Group:	MI Techs	Ţ
Type: Fire-Com Status: Scheduling		Fischer House		Installer Madison Morrison Mark Taylor	Service Company MI-T&M MI-T&M		Install Company SedonaSecurity SedonaSecurity	
Job Hours Estimated Total Hours: Hours Used: Proposed Hours: Hours Remaining:	135.00 0.00 1.00 134.00	Site: Fischer He 3211 Joy Road Canton MI (734) 248-7799	puse	Marlin Larson Mike McKenzie Mike Walker	MI-T&M MI-INSP Cont MI-SVC Cont		SedonaSecurity SedonaSecurity SedonaSecurity	
lob Task:	•	Labor Task:	ľ		Sel	ect		
itart Date: <b>12/18/2013</b>		End Date:	12/18/2013		Remove	Remove	All	
itart Time: 08:00 AM 💌	🔽 Exclude Sun	End Time:	09:00 AM	Showing: Conf	Job Number S	ed  Scheduled 2/18/2013	Es	ito Refresh:  ⊽ st Length   60
▲         December 2013           S         M         T         W         T         F           24         25         26         27         28         29           1         2         3         4         5         6           8         9         10         11         12         3           15         16         17         19         20         22         32         24         25         27         29         30         31	30 7 5 6 7 14 12 13 14 1 21 19 20 21 2	/ T F S 2 1 2 3 4 8 9 10 11 5 16 17 18 2 23 24 25	February 2014         Image: Constraint of the second					
3 Go to Job				,			edule 🛙 🗶 Clo	se



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.

Schedule Job Number 316					
Job: 316	Customer: 192	Select installers to schedule	below: Group	MI Techs	•
Type: Fire-Com	Fischer House			,	
Status: Scheduling		Installer	Service Company	Install Company	
		Madison Morrison	MI-T&M	SedonaSecurity	
		Mark Taylor	MI-T&M	SedonaSecurity	
Job Hours	Site: Fischer House	Marlin Larson	MI-T&M	SedonaSecurity	
Estimated Total Hours: 135.00	3211 Joy Road	Mike McKenzie Mike Walker	MI-INSP Cont MI-SVC Cont	SedonaSecurity SedonaSecurity	
	Canton MI	Mike Walker	MI-SVL LONC	SedonaSecurity	
Hours Used: 0.00					
Proposed Hours: 8.00	(734) 248-7799				
Hours Remaining 127.00					
Job Task: Installation 💌	Labor Task: Equipment Install				
		j	Select		
			Select		
Start Date: 12/18/2013	End Date: 12/18/2013		Remove	ve All	
Start Time: 08:00 AM 💌	End Time: 04:00 PM 💌	Showing: 🔽 Conflic	ts 🔽 Proposed I	Previous Auto F	Refresh: 🔽
	,				
🔽 Exclude Sat 🔽 Exclude	Sun Clear	Installer	Job Number Schedule	ed Est Le	ngth
	Clear	🥝 Marshall Watson	12/18/20	13 8:00:00 AM 4	80
	nuary 2014 February 2014 F				
<u>SMTWTFS</u> <u>SM</u> 24 25 26 27 28 29 30	TWTFS SMTWTFS 1234 1				
1234567 56	7 8 9 10 11 2 3 4 5 6 7 8				
8 9 10 11 12 13 14 12 13	14 15 16 17 18 9 10 11 12 13 14 15				
	21 22 23 24 25 16 17 18 19 20 21 22				
22 23 24 <mark>25</mark> 26 27 28 26 27 29 30 31	28 29 30 31 23 24 25 26 27 28 1 2 3 4 5 6 7 8				
29 30 31	2 3 4 5 6 7 8				
J					
			C		1
S Go to Job			( 🗖 🖻	Schedule 🔀 Close	



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

🜀 Create ap	pointments	for Job Numbe	r 316			×
🗹 📶 🛛 ad			ill be saved when you click t you find are in error. You car			
Installer		Job Number	Scheduled Date	Start Time	End Time	
Marshai	l Watson	316	12/18/2013	8:00 AM	4:00 PM	
					Save	🗶 Cancel



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

+ = View Service Options SageQuest				Sedon	aSchedule	- SedonaSecurity 5.6.200				
	<u>A</u>		MI Techs	- 🤉 😼	🕕 Warni	ng Count = 118 Tickets List 🔹	Show Unassigned	O J	Open Custom	ier
🕩 😣 🛄 🗔 🗐	and the second s	- O	Display Gro	up Technicians 🔹	Warning	.ist 🔻	Group Day Within Owner	۰ 🎤	Ticket	<b>66</b>
Show/Hide Today Day Week Month Ticket Calendar Bar Queue	Group Tickets	Inspection Creation	V Overrid	de Display Group	Tickets O	n Site	Zoom 🔕 🥥	0 🖸		
Navigation Arrangem			Disp	layGroup		SedonaMonitor	Calendar Options		Tools	
Calendar		Marlin La	rson	Mark Tay	lor	Marshall Watson	Mike McKenzie		Mike Walker	Madi
December 2013 January 2014 🕨		12/18		12/18		12/18	12/18	12/18		12/18
<u>SMTWTFS</u> <b>123456</b> 7 <b>1234</b>										
8 91011121314 5 6 7 8 9 10 11	2:00									
15 16 17 18 19 20 21 12 13 14 15 16 17 18 22 23 24 25 26 27 28 19 20 21 22 23 24 25	3:00				N					
29 <b>30 31</b> 26 27 28 29 30 31	4:00				1					
	5:00									
	6:00									
D	7:00				- (					
Site	8:00	JOB 303 - Intru				JOB 316 - Fire-Com	JOB 307 - Add			
	9:00	(Parts) Plymou Walsh, Patty @10		JOB 316 - Fire-0		(Scheduling) Canton Fischer House @3211 Joy		JOB 31	6 - Fire-Com	
	10:00			(Scheduling) Ca Fischer House @3						
System	11:00									
Contact	12 pm									
Problem	1:00									
Technician 🚽	2:00									
Scheduled	3:00									
,	4:00									
Dispatched	5:00									
Arrived	6:00									
Departed	7:00									
	8:00									
New Appt	9:00									
Refreshed: 12/18/2013 7:08:05 AM	0									
🔯 Unscheduled (0) 🕕 Detail	11:00									
					-					

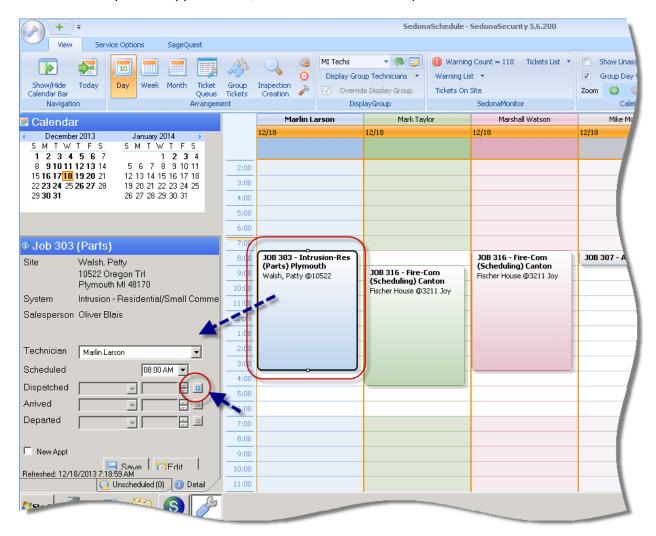
#### Job Appointment Dispatching

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.

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.



### Reference Document SedonaSchedule

#### 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 speece green dispatch button.

+ = View Service	e Options SageQu	Jest				Sedon	aSchedule -	SedonaSecurity 5.6.200	
Show/Hide Today Calendar Bar Navigation	Day Week Month	Ticket Queue Arrangeme	Group Tickets	Q %3 Inspection Creation ≫	Overrie		Warning Liz Warning Liz Tickets On		Zoo
Calendar				Marlin L	arson	Mark Tay	/lor	Marshall Watson	1
December 2013           S         M         T         W         T         F         S           1         2         3         4         5         6         7           8         91011121314         14         151617         18         92021         21           22         23244         25262728         28         29         3031	January 2014 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 23 24 26 27 28 29 30 31	4 11 18	2:00 3:00 4:00 5:00	12/18		12/18		12/18	12/
Job 303 (Parts)     Site Walsh, Pa     10522 Ore     Plymouth     System Intrusion -     Salesperson Oliver Bla     Technician Marlin.Lars     Scheduled	egon Trl MI 48170 Residential/Small ( sis	Comme	6:00 7:00 8:00 9:00 10:00 11:00 12:00 2:00 3:00	JOB 303 - Intra (Parts) Plymou Dispatched @ (00:00:00) Walsh, Patty @1	uth 7:26 AM	JOB 316 - Fire-( (Scheduling) Ca Fischer House @3	anton	JOB 316 - Fire-Com (Scheduling) Canton Fischer House @3211 Joy	
Dispatched 12/18/201 Arrived Departed New Appt	3 107:26 AM		4:00 5:00 6:00 7:00 8:00 9:00 10:00						
		Detail	11:00						

#### 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 <a>[]</a> red dispatch button.

+ = View S	iervice Options	SageQuest				Sedon	aSchedule	- SedonaSecu
Show/Hide Calendar Bar Navigation		Month Ticke Queu Arrang	ie Tickets	Inspection Creation	V Overri	▼ 🐼 🞲 pup Technicians ▼ ide Display Group playGroup	U Warni Warning Tickets O	
Calendar				Marlin L	arson	Mark Tay	/lor	Marsh
December 2013 SMTWTF <b>123456</b>				12/18		12/18		12/18
8 910111213 151617181920 222324252627 293031	21 12 13 14 1	8 9 10 11 15 16 17 18 22 23 24 25 29 30 31	2:00 3:00 4:00					
			5:00					
1052) Plym	h, Patty 2 Oregon Trl outh MI 48170 ion - Residentia	l/Small Comn	9:00 9:00 10:00 11:00 12 pn 1:00	JOB 303 - Intr (Parts) Plymo Arrived @ 8:00 00:00:28) Walsh, Patty @1	uth ) AM (-	JOB 316 - Fire-( (Scheduling) Ca Fischer House @0	anton	JOB 316 - (Schedulin Fischer Hous
Scheduled Dispatched 12/1	n.Larson 08:00 8/2013  07:26 8/2013  08:00		2:00 3:00 4:00 5:00 6:00 7:00					
Refreshert: 12/10/2012	- , Save / ? 2:31:57 AM		9:00 9:00 10:00 11:00					

#### **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.

					Sedon	aSchedule -	SedonaSecurity 5.6.200
View Se	ervice Options SageQ	uest					
		IIII M		MI Techs	👽 🧑 🔻	🕕 Warning	) Count = 118 Tickets List 🔹
		- <u> </u>	ັ 🍼 🖸	Display Gro	oup Technicians 💌	Warning Lis	t 🔻
Show/Hide Today Calendar Bar	Day Week Month	Ticket Group Queue Ticket		🗸 Overri	de Display Group	Tickets On	Site
Navigation		Arrangement		Dis	playGroup		SedonaMonitor
Zalendar				Larson	Mark Ta	ylor	Marshall Watson
December 2013	January 2014	•	12/18		12/18		12/18
SMTWTFS 123456							
8 9101112131	4 5678910	11 2:0	00				
15 16 17 18 19 20 2 22 23 24 25 26 27 2			00				
29 30 31	26 27 28 29 30 31	4:	00				
		50	00				
		6:	00				
Dob 316 (Sch	edulina)	7:1	JOB 303 - In	rusion-Dec			
	er House	8:		outh			JOB 316 - Fire-Com
3211 .	Joy Road	9:	00:07:22)		JOB 316 - Fire-(		(Scheduling) Canton Fischer House @3211 Joy
	n MI 48187	100	00 Walsh, Patty @	010522	<ul> <li>(Scheduling) Ca</li> <li>Fischer House @3</li> </ul>		
System Fire - I	Large Commercial	110	00				
Salesperson Matt M	1iller	12 г	······································				
		19	00				
Technician Mark.	Taylor	- 20					
Scheduled	09:00 AM 🔻	3:	00		-		
		4:	00				
Dispatched		50	00				
Arrived	¥	6:	00				
Departed	× ×		00				
		8:	00				
New Appt	6	90	00				
Refreshed: 12/10/2012 3	Save CBEdit	10:	00				
		Detail 11:0	0			-	



#### 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.

🧟 Job Dispatch	×
Appointment Job Number	Detail 316
Job Type	Fire-Com
Job Status	Scheduling
System	Fire - Large Commercial
Job Task	Installation 💌
Labor Task	Equipment Install
Est Total Labo Est Total Rem	or Units 135.00 aining Labor Units 135.00
	192 Fischer House
	3211 Joy Road Canton MI 48187
ر Scheduled –	
Technician	Mark Taylor 💌
Estimated Len	ngth 480
👸 Dispatch Tim	ies
Scheduled	12/18/2013 🔽 09:00 AM 💌 🛛 💉
Dispatched	12/18/2013 🗨 08:30 AM 🔂 🛒
Arrived	12/18/2013 🔽 09:00 AM 🗄 🖬
Departed	12/18/2013 🔍 04:30 PM 📑 🔟
-	Save Close