SedonaOffice

The #1 Financial Software for Security Companies

SedonaService

Setup & Configuration

Version 5.6

Last Revised:

March 30, 2011

About this Document

This Reference Document is for use by SedonaOffice customers only. This document is not meant to serve as an operating or setup manual, its purpose is to overview the content contained within, and to be used for reference purposes only.

SedonaOffice reserves the right to modify the SedonaOffice product described in this document at any time and without notice. Information contained in this document is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted. In no event shall SedonaOffice be held liable for any incidental, indirect, special, or consequential damages arising from or related to this guide or the information contained herein. The information contained in this document is the property of SedonaOffice.

This document may be updated periodically, be sure to check our website at www.sedonaoffice.com for the most current version. Copyright 2008, 2009, 2010, 2011.

Overview

This document is being provided to explain the setup and configuration of SedonaService which includes the setup of Display Groups, Appointment Types and configuring the Ticket Queue and Customer Search form.

Table of Contents

SedonaService Module Overview

The Service Module which is being introduced with SedonaOffice Version 5.6 has been completely redesigned; this document will explain the basic functionality of how to create, schedule and manage tickets in SedonaService.

The new Service Module is activated within SedonaSetup. Access to this new module is controlled by a new User Group security option. Once permission is granted, when a User logs into SedonaOffice, the Main Menu Tree will only display the options of Service and Print Service Tickets. Clicking on the Service menu option launches the new Service Module. If a User has been granted permission to the new Service Module, they may only work in the new Service Module; the legacy Service Module will no longer be accessible.

The new Service Module incorporates the Schedule Board, Technician Dispatching, Ticket Queues, Inspection Ticket Generation, Technician Dispatching, and new Ticket creation into one application.

A new feature of the new Service Module is Display Groups. Display groups are groupings of Technicians. When viewing the SedonaService Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

The new SedonaService Schedule Board has been designed to be able to view appointments for one day, a week or a month at a time. Multiple tickets may now be assigned to the same Technician for the same timeslot on the same day.

Another new feature of the new Service Module is *Miscellaneous Appointments*; this new feature replaces the Technician Absence option that was available in the legacy Service module.

A new option, the *Unassigned Technician* is also available. This will allow you to schedule an appointment to the "Unassigned Technician" then drag to the appropriate Technician at a later time.

   The right-click option is not used in SedonaService. This new module was designed so that all options and functions are viewable and selectable from the Ribbon or a Context menu.

Setup & Configuration

There are two setup tables and two areas available for User defined configuration. The setup tables are Display Groups and Appointment Types. Both setup tables are discussed under the title of Setup within this document.

The User defined configuration is optional; the two areas available for configuration are the Ticket Queue and Customer Search. Configuration settings are saved for each User. Once a User has configured the Queue and/or the Customer Search, these settings will be remembered the next time the User logs into SedonaService. Both user configuration areas are covered under the title of Configuration within this document.

Setup

Display Group Setup

To be able to best manage the new SedonaService Schedule Board, you must first set up Display Groups. A Display Group consists of a list of selected Technicians which you want to display in the Schedule Board as a group.   When viewing the SedonaService Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

Your Display Groups may be designed in any logical fashion to make viewing, scheduling and dispatching as easy as possible.

If you do not setup Display Groups, the default display group ALL will be the only choice available; this default group contains all Technicians for the company. If your company does not need to create additional Display Groups, you may edit the default ALL display group to sequence your Technicians in the order you desire the names to be displayed in the SedonaService Schedule Board.

To setup a new display group, you must first launch the SedonaService module from the main Sedona Office application. On the main menu, click on the Service menu option. In a few seconds the SedonaService application will be displayed.
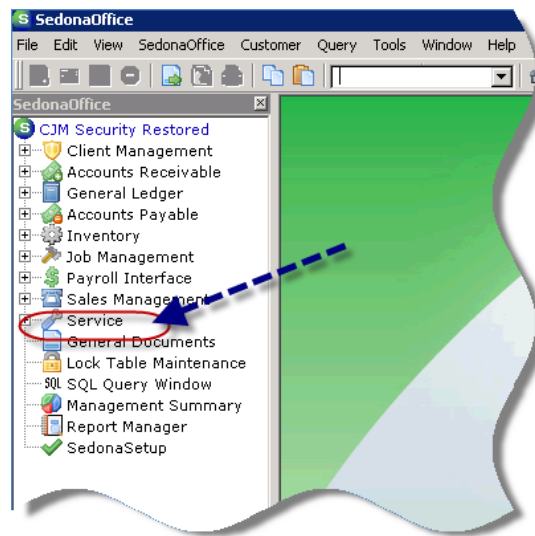
Display Group Setup (continued)

Once the SedonaService application is open, in the display area, the Schedule Board will list the Unassigned Technician and any Service Providers for your company.

To create new Display Groups, click on the *Display Group Edit* button.
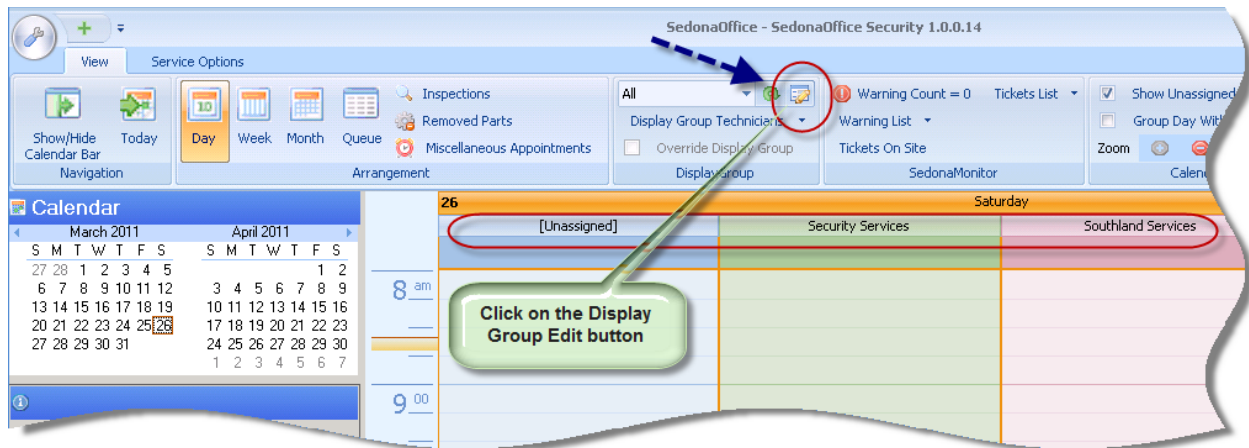
Display Group Setup (continued)

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

Display Group Setup (continued)

Enter a *Code* and *Description* for the Display Group. In the list of Technicians, check the box to the left of each Technician that will be included in the group. In the Sequence column you may entered the numbered order in which the Technicians will display in the SedonaService Schedule Board.

If Sequence numbers are not entered, Technicians will be displayed alphabetically by last name then first name. When finished selecting Technicians and entering sequence numbers, press the *Save* button located at the lower right of the form.

Continue setting up additional Display Groups by pressing the *New* button and repeating the process.

When finished creating the Display Groups, click on the "X" in the upper right corner of the Display Group form to exit Display Group setup.

Display Group Setup (continued)

Click on the Display Group drop-down arrow to view the list of all your Display Groups. Select the Display Group you wish to view in the Schedule Board.
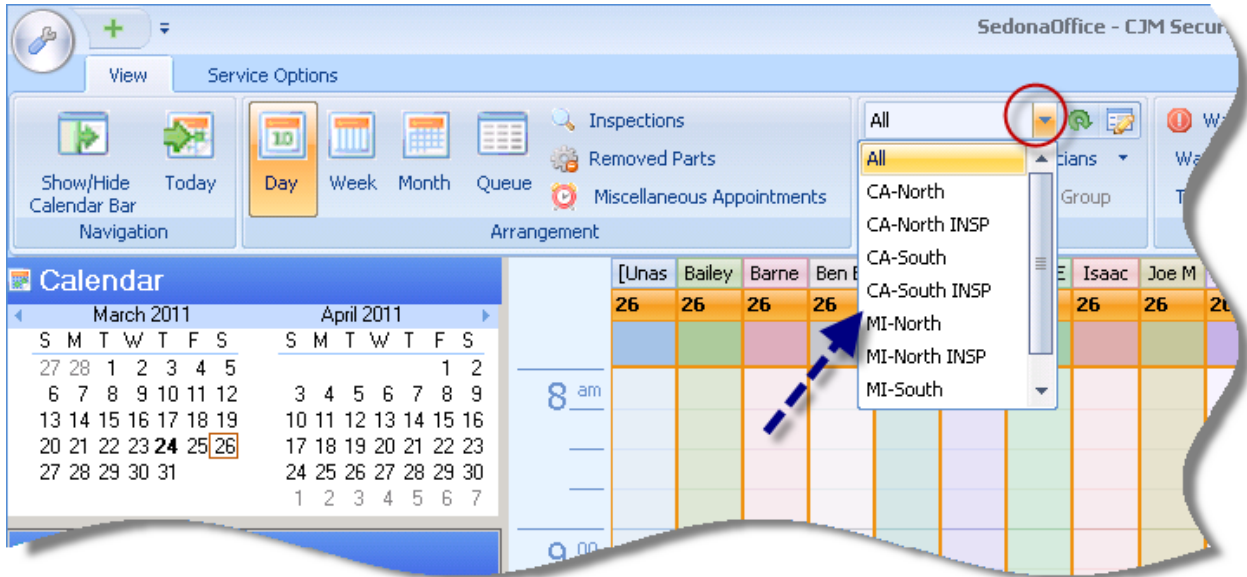

The Schedule Board will display the Technicians that are members of the selected Display Group.
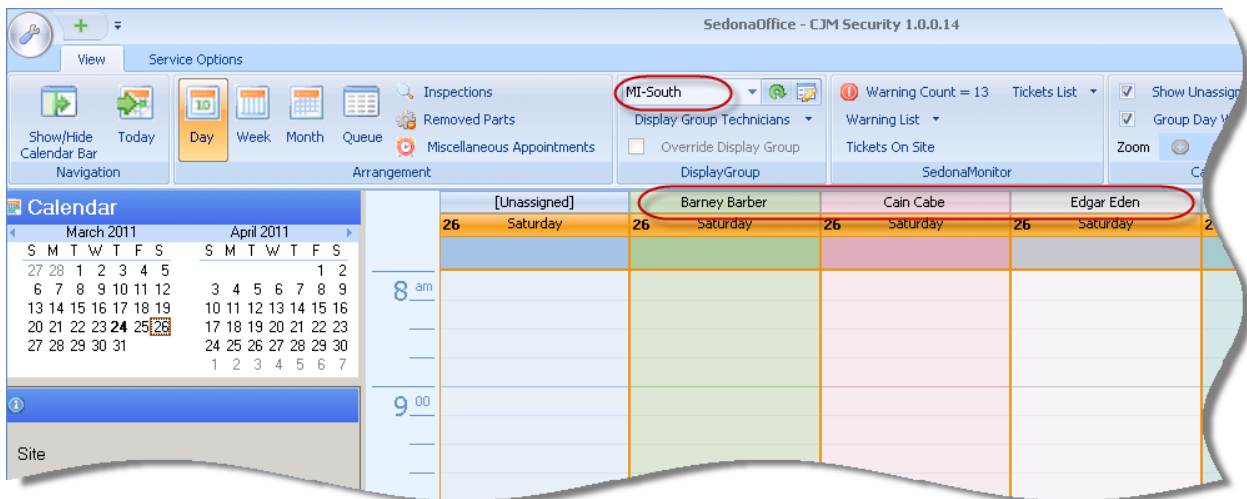
Appointment Type Setup

Miscellaneous appointments are used primarily to indicate a Technician is not available to schedule for a Service or Inspection ticket. When scheduling a Miscellaneous Appointment, an *Appointment Type* must be selected by the User.   SedonaService is delivered with seven default Appointment Types; Holiday, Lunch, Meeting, Misc, Other, Sick and Vacation. These default appointment types may not be modified or deleted. You may create as many additional Appointment Types as needed by your company.

To create new Appointment Types, click on the *Service Options* tab located at the upper left of SedonaService. Two new Ribbon Groups will be displayed. On the Service Setup Tables Ribbon Group, click on the *Appointment Types* button.
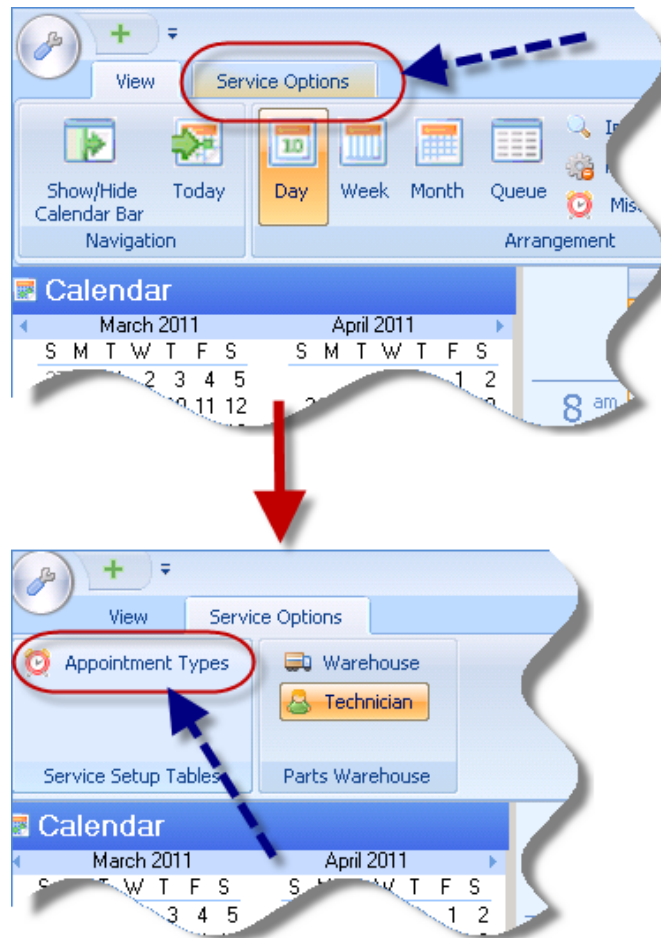
Appointment Type Setup (continued)

The *Appointment Type* setup form will be displayed. To create a new Appointment Type, click the *New* button located at the lower right of the form. Enter a *Code* and *Description*, then click *Save*. The *Description* field will automatically populate with the value entered in the *Code* field; you may change the Description if desired.

You may add as many appointment types as desired.

When finished, to return to the SedonaService Schedule Board, click on the View tab.
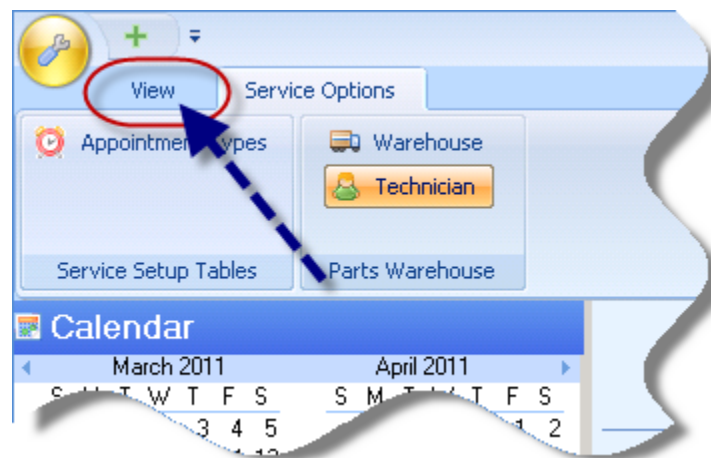
Configuration

Queue Configuration

A great new feature of SedonaService allows each User to organize the Ticket Queue according to their specific preference. When a User logs into the SedonaService application, whatever configuration settings were selected, will be remember the next time the User logs into the application.

Queue Configuration Options

- Fields to be displayed in the Queue

- Arrangement of fields in the Queue

To configure the Queue, follow the steps below and on the following pages.

To open the Ticket Queue, click on the *Queue* button located within the Arrangement ribbon group.
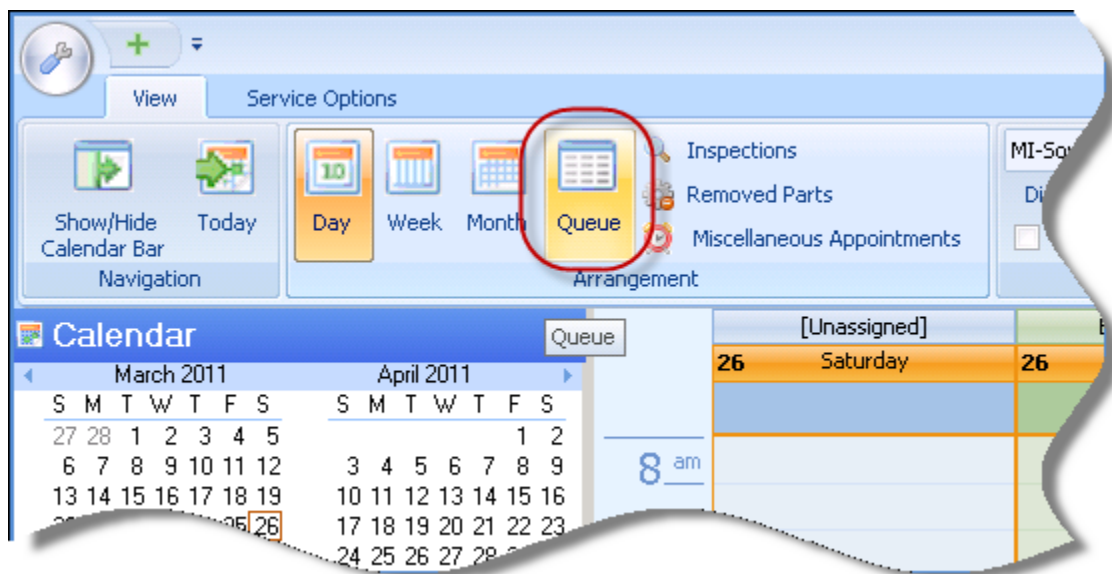
Queue Configuration (continued)

The Queue will be displayed. There are many columns available within the Queue; to make it easier to configure the Queue, click on the Show/Hide Calendar Bar.
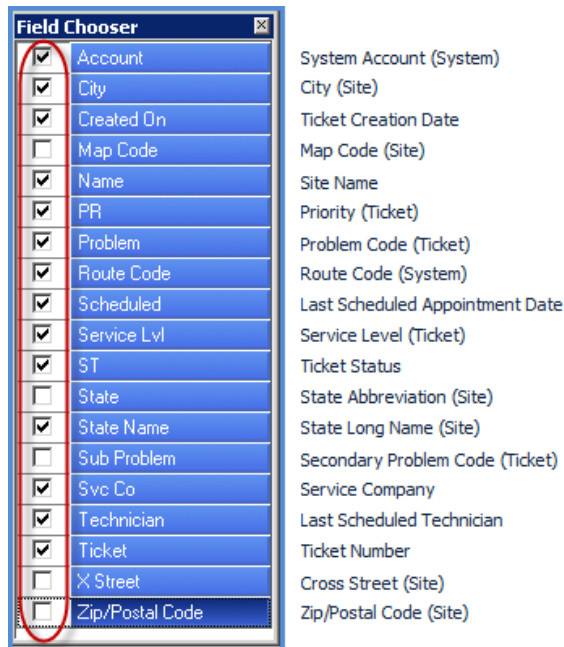
Queue Configuration (continued)

Configuring Queue Fields

To select which Fields to display in the Queue, click on the Field Chooser button located in the upper left corner of the Queue.
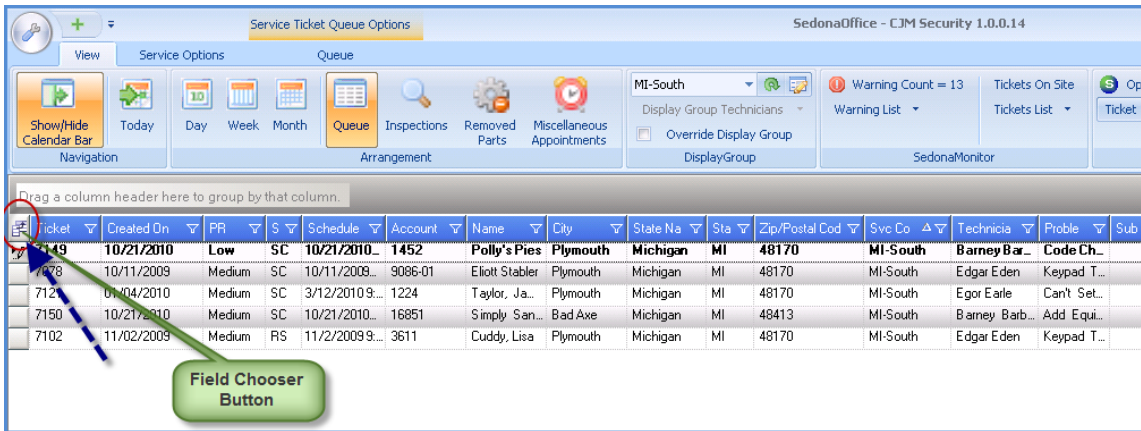
The Field Chooser list will be displayed. This is a listing of all the available fields from which the User may select. All fields are checked on by default; if certain fields are not needed for viewing while in the Queue, un-check the box to the left of the fields not to be displayed. When finished, click the "X" in the upper right corner of the Field Chooser to exit.
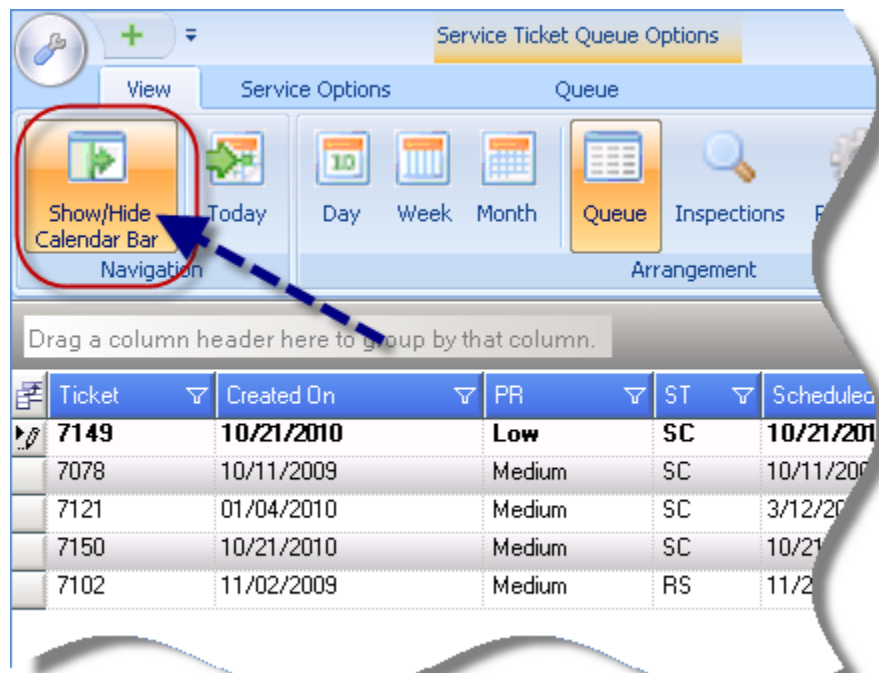
Queue Configuration (continued)

Configuring Queue Field Arrangement

Once the desired Queue Fields have been selected, you may now rearrange the fields and width of the fields to your preference.

Prior to configuring the arrangement of fields, turn the Calendar Bar back on, since this will normally be present when working within the Queue. This way you will see how the Queue will look as you make changes to the Queue Field Arrangement.
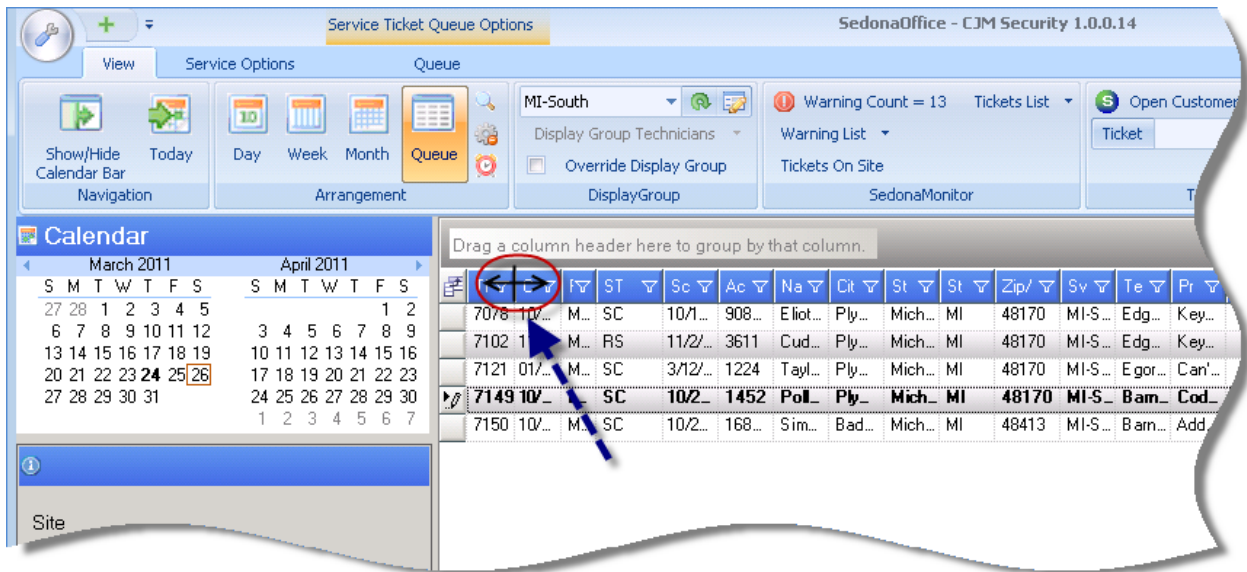
Press the Show/Hide Calendar Bar button from the Navigation ribbon group at the upper left of the SedonaService application.
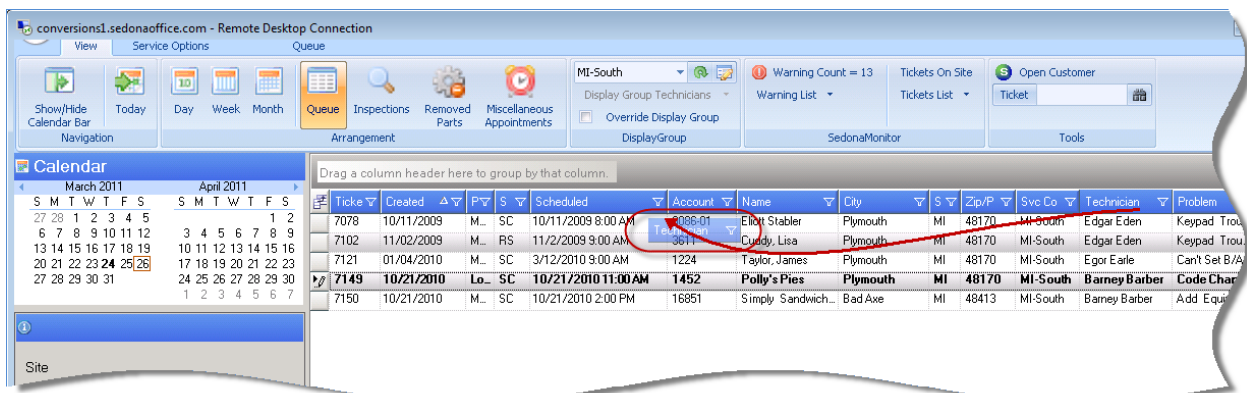
Queue Configuration (continued)

Adjusting Field Width

To make a field wider or narrower, position your mouse to the right of the field to change, hold down the left mouse button and drag the field header to the desired width.


Rearrange Fields

You may move fields into any preferred order. Hold down the left button of the mouse while positioned on one of the field headers, and then drag the field to the desired location. Release the mouse when you reach the preferred location.

Queue Configuration (continued)

Once the Queue is setup to your preference, exit SedonaService to save your settings. Return to SedonaService, click on the Queue button on the Ribbon; the Queue will be displayed with your configuration preferences.
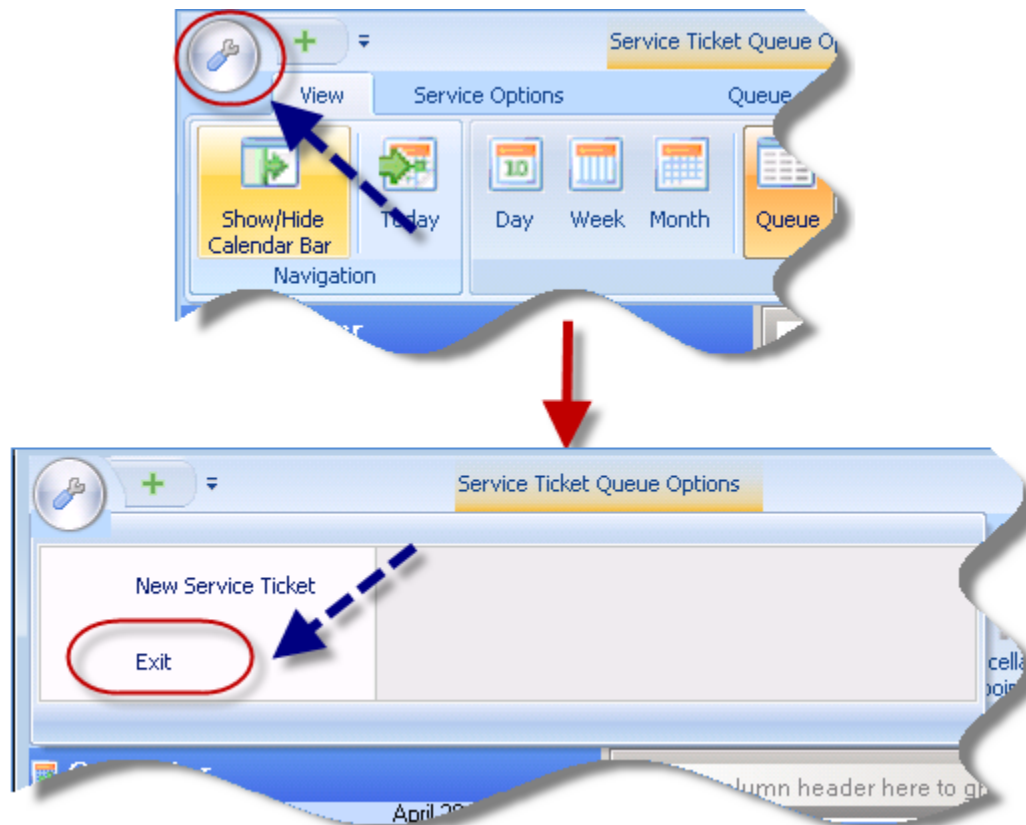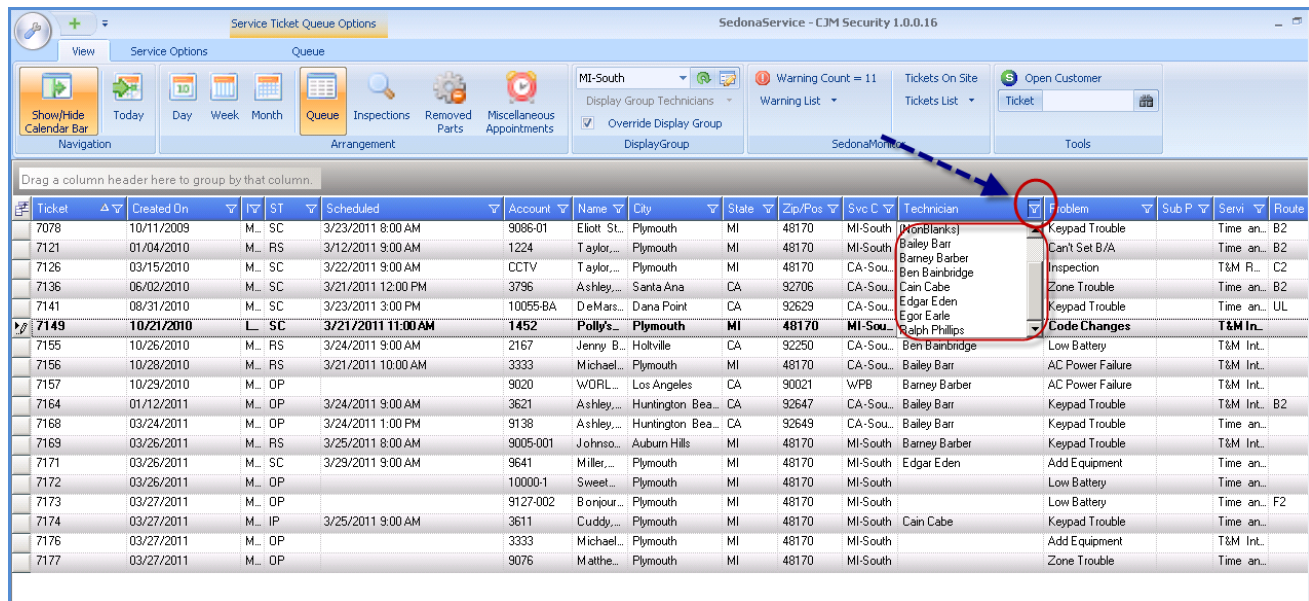
Queue Configuration (continued)

Queue Filters

A new feature of SedonaService allows each User to filter a Ticket Queue based on any of the available fields within the Queue. There are three ways to use Filters within the Queue; using *Drop-Down Filters, Filter Groups* or *Custom Filters*. Each filtering option will be described below.

Drop-Down Filters

Within a Queue, in the header of each field is a filter button. Clicking on the filter button will display a list of all the possible values based on all tickets currently displayed in the Queue.

For example, you want to view the tickets for one particular Technician, click on the filter button, and then click on the desired Technician's name. The Queue will refresh with the tickets of the selected Technician.
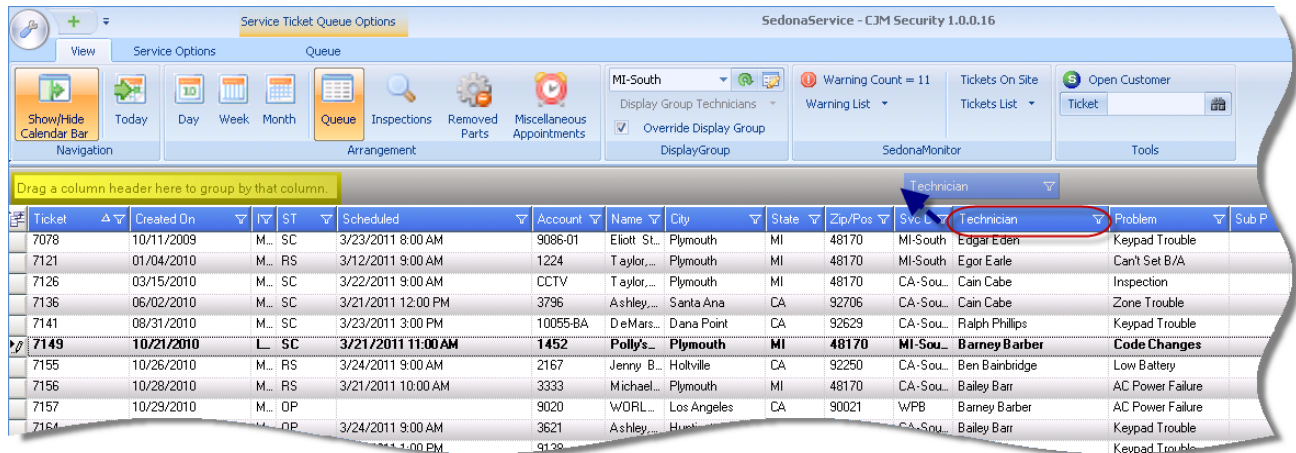

Queue filtered on one Technician
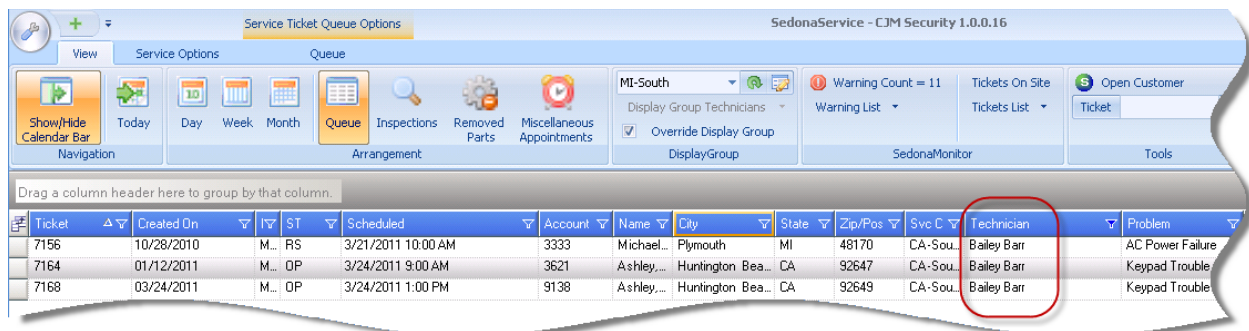
Queue Configuration (continued)

Filter Groups

Within a Queue, you may view the tickets in *Filter Groups*. When using Groups the view of the Ticket Queue changes to a tree structure. After creating a Filter Group, each line displayed within the Ticket Queue may be expanded to show the tickets 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 names areas of the ticket queue.

Queue Filter Group by Technician
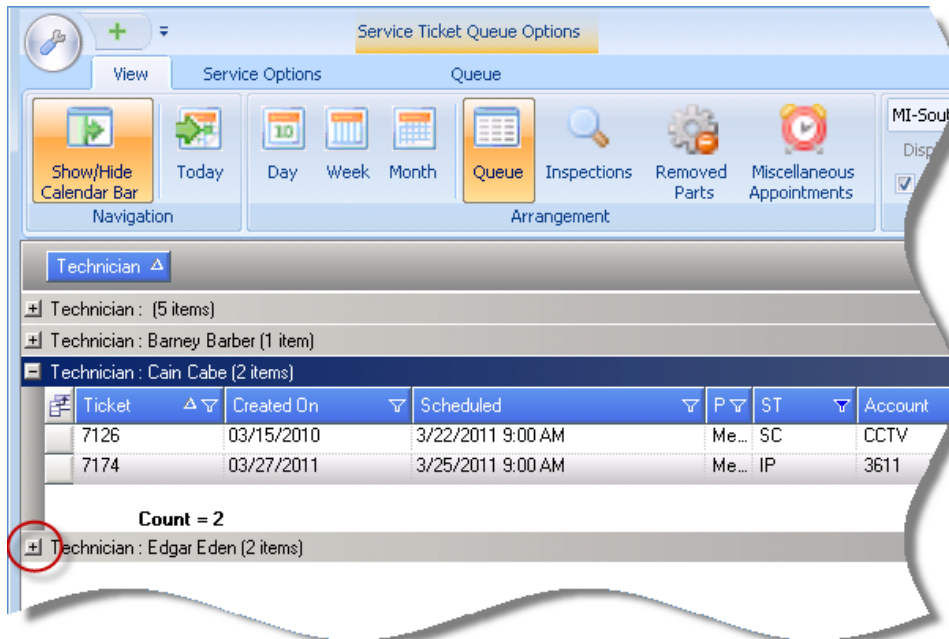
Queue Configuration (continued)

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

Queue Configuration (continued)

Custom Filters

Within a Queue, 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 tickets you wish to display in the Queue.

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 tickets to display in the queue.

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

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

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.
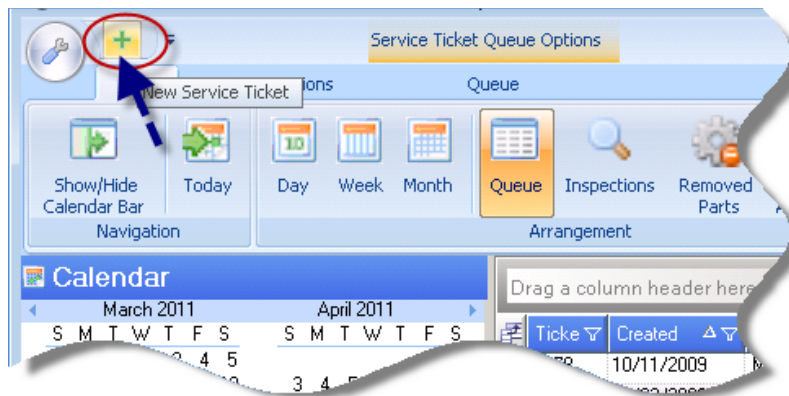
Customer Search Configuration

A great new feature of SedonaService allows each User to organize the Customer Search form according to their specific preferences. When a User logs into the SedonaService application, whatever configuration settings were selected, will be remember the next time the User logs into the application.

Customer Search Configuration Options

- Fields to be displayed in the Customer Search results
- Arrangement of fields in the Customer Search results

To configure the Customer Search form, follow the steps below and on the following pages.

Click on the New Service Ticket button located at the upper left of the SedonaService application.
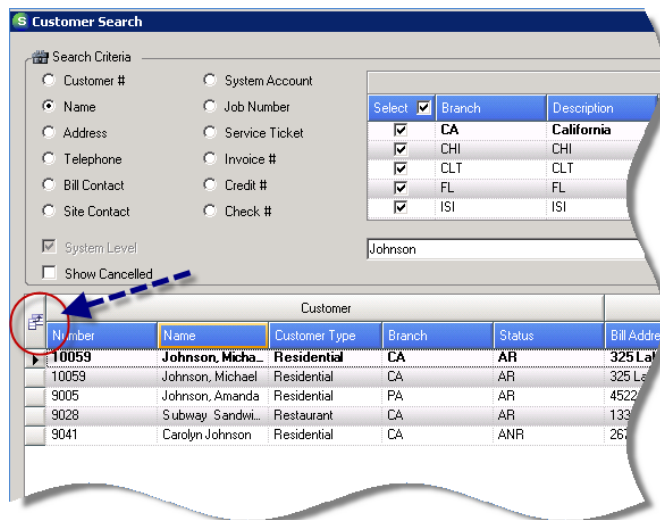
Customer Search Configuration (continued)

You must first perform a Customer Search to display the fields within the results area. Select a Search Criteria option, then enter a search value in the search text box, then press the green search arrow.
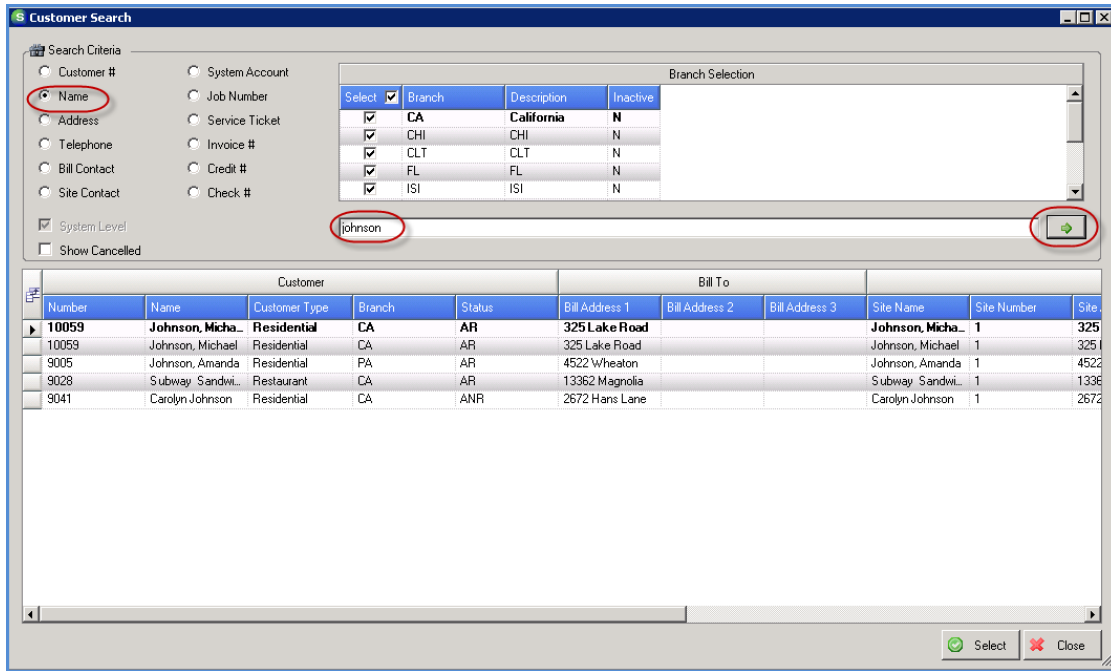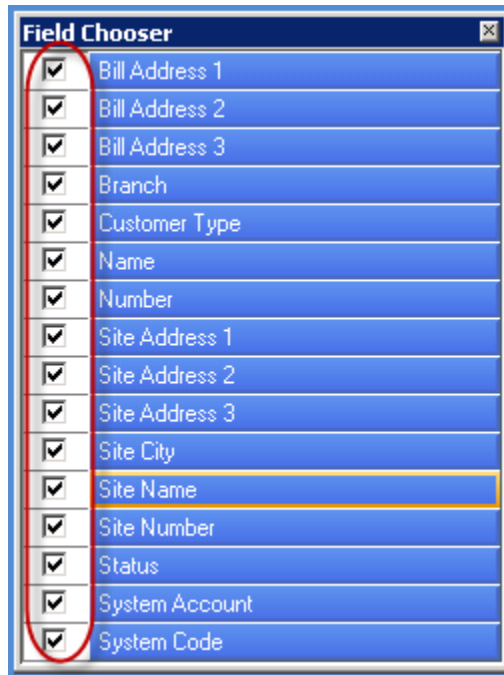
Configuring Customer Search Fields

To select which Fields to display in the Customer Search results, click on the Field Chooser button located in the upper left corner of the Customer Search results area.

Customer Search Configuration (continued)

The Field Chooser list will be displayed. This is a listing of all the available fields from which the User may select. All fields are checked on by default; if certain fields are not needed, un-check the box to the left of the fields not to be displayed. When finished, click the "X" in the upper right corner of the Field Chooser to exit.
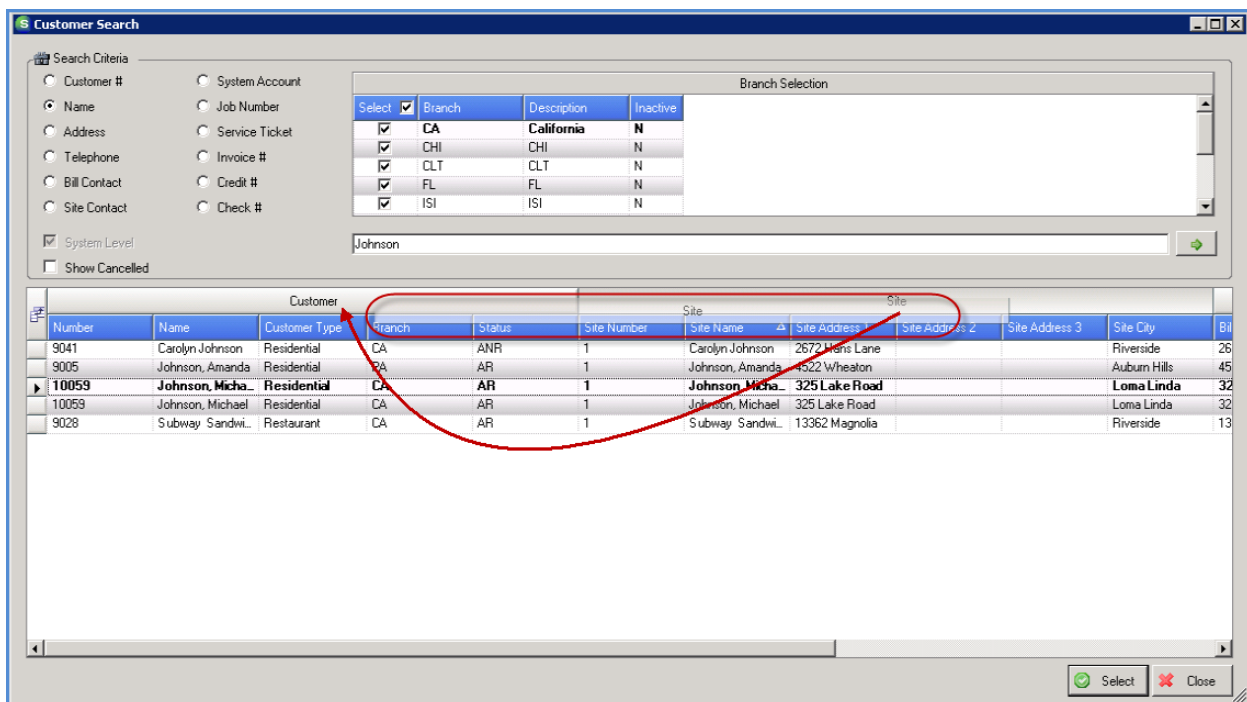
Customer Search Configuration (continued)

Configuring Customer Search Field Arrangement

Once the desired Fields have been selected, you may now rearrange the fields and width of the fields to your preference. You may drag individual fields or an entire group to the preferred location.

Hold down the left button of the mouse while positioned on one of the field headers, and then drag the field or field group to the desired location. Release the mouse when you reach the preferred location.

Customer Search Configuration (continued)

Adjusting Field Width

To make a field wider or narrower, position your mouse to the right of the field to change, hold down the left mouse button and drag the field header to the desired width.
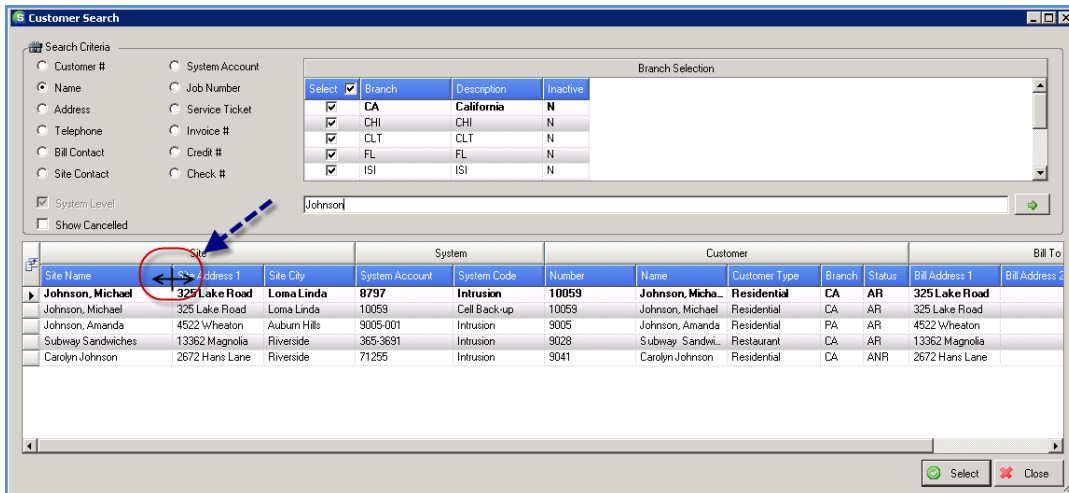
Once all configuration settings have been completed, exit out of the Customer Search to save your preferences. Click on the "X" in the upper right corner of the Customer Search form to exit.