

SedonaService Setup & Configuration Version 5.6

Last Revised: March 30, 2011



About this Document

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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.



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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.





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.

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

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Fran Jack JoeM Mich Mich		Devon Richards	MI South Insp		4		
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	haelJohnson		1.11.00	MI South	4		
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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.

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	SamCarlson	Sam Carlson	MI South Insp		5		
$\gamma \cup$	Bailey Barr	Bailey Barr	MI South	MI South	5		
	BillHunt	Bill Hunt	MI South	MI South	5		
	BradDalton	Brad Dalton	MI South	MI South	4		
	JoeMarina	Joe Marina	MI South	MI South	5		
	MichaelBaxter	Michael Baxter	MI South	MI South	4		
	MichaelJohnson	Michael Johnson	MI South	MI South	5		
	MiltonSmith	Milton Smith	MI South	MI South	4		
	PhillipJones	Phillip Jones	MI South	MI South	3		
	RichardFoster	Richard Foster	MI South	MI South	4		
	SteveWilson	Steve Wilson	MI South	MI South	3		
Γ	WalterHarris	Walter Harris	MI North Insp		5		
	AnthonyArruda	Anthony Arruda	MI North	MI North	4		
	EdPhillips	Ed Phillips	MI North	MI North	5		
					\sim		



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.

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	1234567	9.00	

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

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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.

)e		
Appointment Type	Description	Inactive	
Holiday	Holiday	N	
Lunch	Lunch	N	
Meeting	Meeting	N	
Misc	Miscellaneous	N	
Other	Other	N	
Sick	Sick Time	N	
Vacation	Vacation	N	
Show Inactive			
Edit Code			Inactive
Edit)	Inactive

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

Options
Warehouse Crechnician Parts Warehouse
April 2011 S M T / T F S

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.





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.

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0			-	_				1



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.

A +) ₹	s	ervice Tid	cket Queue Opi	tions					Sedona	Office - CJM Secu	irity 1.0.0.14		
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ricket ⊽	Created Un 10/21/2010			Schedule 7 10/21/2010_		7 Name ♥ Polly's Pies		State Na ∨ Michigan	Sta ∨ MI	Zip/Postal Coc 48170	I ♥ Sve Co ▲♥ MI-South	Technicia ∀ BarneyBar_	Proble Code Cl	
₹ Ticket 🗸	Created On	V PR V		Schedule 🗸				State Na 🔽		Zip/Postal Cod				V Sub F
1078	10/11/2009	Medium		10/11/2009	9086-01	Eliott Stabler	Plymouth	Michigan	MI	48170	MI-South	Edgar Eden	Keypad	
712	01/04/2010	Medium		3/12/2010 9:		Taylor, Ja	Plymouth	Michigan	MI	48170	MI-South	Egor Earle	Can't Se	
7150	10/21/2910	Medium	SC	10/21/2010	16851	Simply San	Bad Axe	Michigan	М	48413	MI-South	Barney Barb	Add Equ	
7102 🔪	11/02/2009	Medium	RS	11/2/2009 9:	3611	Cuddy, Lisa	Plymouth	Michigan	М	48170	MI-South	Edgar Eden	Keypad	T
		Field Ch Butto)										

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.

Field (Chooser 🛛 🛛	
	Account	System Account (System)
	City	City (Site)
	Created On	Ticket Creation Date
	Map Code	Map Code (Site)
	Name	Site Name
	PR	Priority (Ticket)
	Problem	Problem Code (Ticket)
	Route Code	Route Code (System)
	Scheduled	Last Scheduled Appointment Date
	Service LvI	Service Level (Ticket)
	ST	Ticket Status
	State	State Abbreviation (Site)
	State Name	State Long Name (Site)
	Sub Problem	Secondary Problem Code (Ticket)
	Svc Co	Service Company
	Technician	Last Scheduled Technician
	Ticket	Ticket Number
	X Street	Cross Street (Site)
U	Zip/Postal Code	Zip/Postal Code (Site)



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.

8) +	Ŧ		Service Ticket Que	ue Options	
Vie	w Servi	ce Options	Queue	e	
Show/Hide Calendar Bar		Day Wee	k Month Qu		ctions F
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- HONOL					♥ Scheduled
7149	10/21/		Low	SC	
		2010			
7149	10/21/	2010 2009	Low	SC	10/21/201
7149 7078	10/21/ 10/11/2	2010 2009 2010	Lo w Medium	SC SC	10/21/20 1 10/11/200



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.

() + =	Service Ticket	Queue Opti	ons					Sedo	naOffic	e - CJM	1 Securit	y 1.0.0	.14	1
View Serv	ice Options Qi	ueue												
Show/Hide Today Calendar Bar	Day Week Month Qu	Jeue Ø		Group Teo verride Disp	ilay Grou	-	Warnin	rning Co ng List : On Site	•		:kets List) Open cket	Customer
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20 21 22 23 24 25 26 27 28 29 30 31	17 18 19 20 21 22 23 24 25 26 27 28 29 30	7121	01/ M	SC . SC	3/12/		Tayl Poll_		Mich		48170 48170		Egor	
27 28 23 30 31	1 2 3 4 5 6 7			SC	10/2			Fy_ Bad			48413		Barn	
1		1		1										
Site					_	-		-						- 1
			-							-			_	-

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.

Show/Hide Calend Bar Navigation Day Week Month Queue Inspections Removed Parts Macellaneous Appontments Dopply Group Warning Los March 201 Tools Calendar Navigation Arrangement DisplayGroup DisplayGroup SedonaMonitor Tools S M T W T F S 77 28 1 2 3 4 5 5 7 8 9 13 14 15 16 17 18 19 02 12 22 324 25 28 7 28 29 30 11 S M T W T F S 1702 Toles DisplayGroup Elog Stoles Provide Scheduled X Account Name City S X Zp/P X Svc Co X Technician Y Provide 21 22 23 24 25 28 T 18 19 20 21 22 Total 11 12 13 14 15 16 17 18 19 10 21 22/2309 M R S 11/2/2009 900 AM Total 11/2/2009 900 AM Total 11/2/2009 900 AM Total 11/0/2009 M R SedonaMonitor Elog Stable Plymouth Mi 48170 Mi-South Edga Eden Keg 20 21 22 23 24 25 28 T 19 19 20 21 22/20 10 11/2/2009 M R S 10/21/2/2010 90 AM 1224 Taylor, James Plymouth Mi 48170 Mi-South Edga Eden Keg 27 28 29 30 11 24 25 28 27 28 29 30 12 7 149 10/22/2010 Lo SC 10/21/2010 11:00 AM 1252 Polys Price Plymouth Mi 48170				0 8	6 6	MI-South	🔻 🖗 😺	🕕 Warning Cou	nt = 13	Tickets On S	ite 🕒	Open Custo	mer	
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		1234567	7150	10/21/2010	M SC	10/21/2010 2:00 PM	16851	Simply Sandwich	Bad Axe	MI	48413	MI-South	Barney Barber	Add Equ



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 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.

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View	Service Options	Qu	eue										
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			🗤	9	Display	Group Technicians	-	Warning List		Tickets List 🔹	Ticket	1	
Show/Hide Calendar Bar	Today Day V	Veek Month	Queue Inspections Removed Parts	Miscellaneous Appointments	V Ov	erride Display Group							
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7121	01/04/2010	M_ RS	3/12/2011 9:00 AM	1224	T aylor,	Plymouth	М	48170	MI-South	Bailey Barr Barney Barber	Can't Set B/A		Time an Bi
7126	03/15/2010	M SC	3/22/2011 9:00 AM	CCTV	T aylor,	Plymouth	М	48170	CA-Sou	Ben Bainbridge	Inspection		T&M R C
7136	06/02/2010	M SC	3/21/2011 12:00 PM	3796	Ashley,	Santa Ana	CA	92706	CA-Sou	Cain Cabe	Zone Trouble		Time an B
7141	08/31/2010	M. SC	3/23/2011 3:00 PM	10055-BA	DeMars	Dana Point	CA	92629	CA-Sou	Edgar Eden Egor Earle	Keypad Trouble		Time an U
7149	10/21/2010	L SC	3/21/2011 11:00 AM	1452	Polly's_	Plymouth	MI	48170	MI-Sou_	Balph Phillips	Code Changes		T&M In_
7155	10/26/2010	M. RS	3/24/2011 9:00 AM	2167	Jenny B.	Holtville	CA	92250	CA-Sou	Ben Bainbridge	Low Battery		T&M Int
7156	10/28/2010	M. RS	3/21/2011 10:00 AM	3333	Michael	Plymouth	MI	48170	CA-Sou	Bailey Barr	AC Power Failure		T&M Int
7157	10/29/2010	M. OP		9020	WORL	Los Angeles	CA	90021	WPB	Barney Barber	AC Power Failure		T&M Int
7164	01/12/2011	M_ OP	3/24/2011 9:00 AM	3621	Ashley,	Huntington Bea	CA	92647	CA-Sou	Bailey Barr	Keypad Trouble		T&M Int., B2
7168	03/24/2011	M_ OP	3/24/2011 1:00 PM	9138	Ashley,	Huntington Bea	CA	92649	CA-Sou	Bailey Barr	Keypad Trouble		Time an
7169	03/26/2011	M RS	3/25/2011 8:00 AM	9005-001	Johnso	Auburn Hills	MI	48170	MI-South	Barney Barber	Keypad Trouble		T&M Int
7171	03/26/2011	M_ SC	3/29/2011 9:00 AM	9641	Miller,	Plymouth	MI	48170	MI-South	Edgar Eden	Add Equipment		Time an
7172	03/26/2011	M. OP		10000-1	Sweet	Plymouth	М	48170	MI-South		Low Battery		Time an
7173	03/27/2011	M_ OP		9127-002	Bonjour	Plymouth	М	48170	MI-South		Low Battery		Time an F2
7174	03/27/2011	M_ IP	3/25/2011 9:00 AM	3611	Cuddy,	Plymouth	М	48170	MI-South	Cain Cabe	Keypad Trouble		Time an
7176	03/27/2011	M. OP		3333	Michael	Plymouth	М	48170	MI-South		Add Equipment		T&M Int
7177	03/27/2011	M_ OP		9076	Matthe	Plymouth	MI	48170	MI-South		Zone Trouble		Time an

Queue filtered on one Technician

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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.

B) +	Ŧ		Ser	vice Ticke	et Queue C	Options					Sedo	naServic	e - CJM	Security 1	1.0.0.16		
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7078		/2009		M SC		3/2011 8:00 AM		9086-01		Plymouth	MI	481			Edgar Eden	Keypad Trouble	
7121	01/04	1/2010	I	M RS	3/12	2/2011 9:00 AM		1224	T aylor,	Plymouth	MI	481	170	MI-South	Egor Earle	Can't Set B/A	
7126	03/15	5/2010	ł	M SC	3/22	2/2011 9:00 AM		CCTV	T aylor,	Plymouth	MI	481	170	CA-Sou	Cain Cabe	Inspection	
7136	06/02	2/2010	I	M SC	3/2	1/2011 12:00 PI	м	3796	Ashley,	Santa Ana	CA	927	706	CA-Sou	Cain Cabe	Zone Trouble	
7141	08/31	/2010	١	M SC	3/23	3/2011 3:00 PM		10055-BA	DeMars	Dana Point	CA	926	529	CA-Sou	Ralph Phillips	Keypad Trouble	
7149	10/2	1/2010	i i	L SC	3/2	1/2011 11:00/	AM	1452	Polly's_	Plymouth	MI	48	170	MI-Sou_	Barney Barber	Code Changes	
7155	10/26	5/2010	٢	M RS	3/24	4/2011 9:00 AM		2167	Jenny B.	Holtville	CA	922	250	CA-Sou	Ben Bainbridge	Low Battery	1
7156	10/28	3/2010	I	M RS	3/2	1/2011 10:00 Al	м	3333	Michael	Plymouth	MI	481	170	CA-Sou	Bailey Barr	AC Power Failure	•
7157	10/29	9/2010	١	M OP				9020	WORL	Los Angeles	CA	900	021	WPB	Barney Barber	AC Power Failure	
7164			,	U OP	3/24	4/2011 9:00 AM		3621	Ashley,	Hussi	-	-		CA-Sou	Bailey Barr	Keypad Trouble	
							L	9130								Keypad Trouble	_

Queue Filter Group by Technician

A) +	Ŧ		Service T	icket Queue O	ptions				١
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Ticket 7126 7174 Co	△ ▽ Cre. 03/1 03/2 punt = 2	15/2010 27/2011	3	/22/2011 9:00			Me	SC	CCTV



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.

B	+ :	;	Service Ticke	t Queue	Options				Sedon	naService -	CJM Securi	ity 1.0.0.16					- 7
	View	Service Options	(Queue													
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					<u> </u>		Display	Group Technician	s *	Warning Lis	st 🖛	Tickets L	ist 🔹 [Ticket	88		
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7	164	01/12/2011	M M	e OP	3/24/2011 9:0	0 AM	3621	Ashley,	Hunting	gton Beach	CA	92647	CA-South	Keypad Trouble		T&M Intr	B2
7	168	03/24/2011	M	e OP	3/24/2011 1:0	0 PM	9138	Ashley,	Hunting	gton Beach	CA	92649	CA-South	Keypad Trouble		Time an	
	C	ount = 3															
(±) echr	nician : B	ount = 3 arney Barber (3 items)															
		en Bainbridge (1 item)															
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土 Techr	nician : E	dgar Eden (2 items)															
土 Techr	nician : Eg	gor Earle (1 item)															
土 Techr	nician : R	alph Phillips (1 item)															



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.





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.

s Customer Search											_ 🗆 X
🞢 Search Criteria 🛛 —											
C Customer #	O System	Account					Branch Selection	r			
Name	🔿 Job Nur	mber	Select 🔽	Branch	Description	Inactive					-
C Address	O Service	Ticket	V	CA	California	N					
C Telephone	O Invoice	#	<u>২</u>	CHI CLT	CHI CLT	N N					-4
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_							1				
System Level		(johnson)						(
Show Cancelled											
-		Customer					Bill To				
Number	Name	Customer Type	Branch	Status	Bi	II Address 1	Bill Address 2	Bill Address 3	Site Name	Site Number	Site.
10059	Johnson, Micha		CA	AR		25 Lake Road			Johnson, Micha_	1	325
10059	Johnson, Michael	Residential	CA	AR		25 Lake Road			Johnson, Michael	1	325 (
9005	Johnson, Amanda		PA	AR		522 Wheaton			Johnson, Amanda		4522
9028	Subway Sandwi		CA	AR		3362 Magnolia			Subway Sandwi		1336
9041	Carolyn Johnson	Residential	CA	ANR	26	672 Hans Lane			Carolyn Johnson	1	2672
•											Þ
									0	Select 😫	Close

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 #	C System	Account				
	Name	🔿 Job Nur	mber	Select 🔽	Branch	Descri	ption
	Address	C Service	Ticket		CA	Califo	rnia
,	C Telephone	C Invoice	#		CHI	CHI	
	Bill Contact	C Credit #		ম	CLT FL	CLT FL	
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	🗌 Show Cancelled						
-			Customer				
Ŧ	Nymber	Name	Customer Type	Branch	S	tatus	Bill Add
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	10059	Johnson, Michael	Residential	CA	A	R	325 La
	9005	Johnson, Amanda	Residential	PA	A	R	4522
	9028	Subway Sandwi	Restaurant	CA	A	R	133
	9041	Carolyn Johnson	Residential	CA	A	NR	267



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.

Field (Thooser 🛛 🛛 🛛
	Bill Address 1
	Bill Address 2
	Bill Address 3
	Branch
	Customer Type
	Name
	Number
	Site Address 1
	Site Address 2
	Site Address 3
	Site City
	Site Name
	Site Number
	Status
	System Account
	System Code



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.

_	tomer Search Search Criteria —												
	Customer #	C System	Account					Branch S	election				
	Name	C Job Nu		Select		Description							-
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	Show Cancelled	1		ponnson									<u> </u>
7			Customer	6				Site	S	ite			
	Number	Name	Customer Type			s S	site Number		Site Address	Site Address 2	Site Address 3	Site City	Bil
	9041	Carolyn Johnson	Residential	CA	ANR	1		Carolyn Johnson	2672 Hens Lane			Riverside	26
	9005 10059	Johnson, Amanda		¢∆ CA	AR	1		Johnson, Amanda Johnson Micha_				Auburn Hills Loma Linda	45 32
	10059	Johnson, Michael		CA	AB	1		Johnson, Michael				Loma Linda	32
	9028	Subway Sandwi		CA	AR	1		Subway Sandwi				Riverside	13
		10000											



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.

Customer #	C System Account					Branch Selection					
Name	O Job Number	Select 🖌	Branch	Description	Inactive						
Address	C Service Ticket	V	CA	California	N						
Telephone	C Invoice #		CHI	CHI	N						
		V	CLT	CLT	N						
Bill Contact	C Credit #	V	FL	FL	N						
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Site Name Johnson, Michael Johnson, Amanda	325 Lake Road 325 Lake Road	Loma Linda Loma Linda	System Account 8797 10059	System Code Intrusion Cell Back-up	10059 10059	Name Johnson, Micha_ Johnson, Michael	Customer Type Residential Residential Residential	CA CA	AR AR	325 Lake Road 325 Lake Road	1
Show Cancelled Site Name Johnson, Michael Johnson, Michael Johnson, Amanda Subway Sandwiches Carolyn Johnson	325 Lake Road 325 Lake Road 4522 Wheaton	Loma Linda Loma Linda Auburn Hills	System Account 8797 10059 9005-001	System Code Intrusion Cell Back-up Intrusion	10059 10059 9005	Name Johnson, Micha_ Johnson, Michael Johnson, Amanda	Customer Type Residential Residential Residential	CA CA PA	AR AR AR	325 Lake Road 325 Lake Road 4522 Wheaton	Bi
Site Name Johnson, Michael Johnson, Michael Johnson, Amanda Subway Sandwiches	325 Lake Road 325 Lake Road 4522 Wheaton 13362 Magnolia	Loma Linda Loma Linda Auburn Hills Riverside	System Account 8797 10059 9005-001 365-3691	System Code Intrusion Cell Back-up Intrusion Intrusion	10059 10059 9005 9028	Name Johnson, Micha_ Johnson, Michael Johnson, Amanda Subway Sandwi	Customer Type Residential Residential Residential Restaurant	CA CA PA CA	AR AR AR AR	325 Lake Road 325 Lake Road 4522 Wheaton 13362 Magnolia	

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.

Select I// Branch Description Inactive I// CA California N I// CH California N I// CLT Clt N I// PL FL N I// Sis I// Sis N	Dustomer # © System Account Name C Johnane C Address Service Ticket V CA CHI CHI CHI CHI Name C Debracition No Bil Contact C Deditti V Debrack V Site Contact C breek # V System Code Number System Code Site Adress System Code Number System Code Site Adress System Code Number System Code Site Adress System Code Number Number Dinson, Michael 325 Lake Road Johnson, Michael 325 Lake Road <th>ustomer Search</th> <th></th> <th>_</th>	ustomer Search												_
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	Subway Sandwiches 13362 Magnolia Riverside 365-3691 Intrusion 9028 Subway Sandwi Restaurant CA AR 13362 Magnolia			Loma Linc			Cell Back-up	10059			CA	AR		
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