SedonaSchedule - Ticket Design

Last Modified on 01/11/2023 3:30 pm EST

The Ticket is comprised of a Ribbon at the top of the form and an informational/data entry section below. As buttons on the Ribbon are clicked, the form will be displayed for the option button selected. There are some buttons when clicked, will display Menu Tabs for additional functions. Each button on the Ticket Ribbon will be described below.

Notifications

Typically the first data entry form displayed is the Service Ticket form, however, if any “Critical Messages” have been setup for the Customer, the System or the default Service Company associated with the System, the Notifications form will first be displayed. Once the messages have been read, click on the Service Ticket button on the Ribbon in the header area of the Ticket to proceed.

Service Ticket form

The Service Ticket form is divided into three major areas:

- The Header area contains Customer/Site Information, Ticket Creation Information and Customer Contact Information.
- The left side of the Service Ticket form is mainly display-only information related to the System. The Service Company and the Service Level fields located at the lower left side of the form automatically fill with the values setup on the System record. Both of these fields may be overridden if necessary.
- The right side of the form is where most of the data entry is performed. The Problem Code is a required field. If the System record for the ticket has been flagged to require a Purchase Order Number, then this field will also be required to be able to save the Ticket.

Custom Fields

Once the Service Ticket form has been saved, the next form to open will be the Custom Fields form. Custom Fields are used to track additional information related to the Ticket. Your company decides how to use these fields, and creates the field labels displayed on this form. If the Custom Fields form is not displayed, either the User has not been granted permission to this form or your company is not using this form. If any of the field labels on this form have a bold font, this indicates the field is required. The application will not allow the user to leave this form without filling in the required field(s).

Appointments & Labor

The Appointments and Labor form is a two tier form; the upper tier displays the calculated billable labor information while the lower tier lists all Technician Appointment along with dispatch information. Double-clicking on a Appointment in the lower tier will open the Dispatch form to enter dispatch times, select a Ticket Resolution Code and enter Ticket Notes.

This form contains access to a Menu Tab labeled Dispatch. From the Dispatch Menu Tab, you are able to schedule a new appointment, edit an existing appointment or dispatch a technician.

Billing

The Billing form is used to view billable charges, create an Invoice for the Ticket, and optionally close the Ticket. The Ticket Charges displayed on the right side of the form are totals from other data entry/processing forms within the Ticket. The Parts charges are a total of all inventory Parts listed in the lower tier of the Equipment and Parts form. The Labor charges is the total amount calculated on the Appointments & Labor form. Other charges are derived from one or two sources; if a Trip Charge is being billed and treated as a fee and not a part of technician labor, this amount is found on the Appointments and Labor form. Additional charges may be manually added to the "Other" form. The total Other amount displayed on the Billing form is the total of the trip charge (if any) and all charges listed on the Other form.

Documents

The Documents form is used to add documents to the Ticket or to view previously attached documents. Documents may be scanned in or you may attach a previously saved document to the Ticket. If the Documents button is not displayed on the Ribbon, this indicates your company has not subscribed to SedonaDocs; this is an add-on feature. If your company has subscribed to SedonaDocs but the Documents button is dimmed-out, this indicates the User has not been granted permissions to this form.

Each document attached to the Ticket contains a security access level; this is selected by the User when attaching the document.

- Level 1 - No Restriction: Users with access to level 1 documents may be able to open these documents. If your company is using SedonaWeb (product which allows your customers access to their account via the web), customer's will be able to view all level 1 documents.
- Level 2 - Customer Restricted: Users with access to level 2 documents will be able to open all level 1 and 2 documents. Customer's logging in with SedonaWeb will not be able to see level 2 documents.
- Level 3 - Management Level: Users with access to level 3 documents will be able to open all level 1, 2 and 3 documents.   These are the most restricted documents for management and executive staff.

Equipment and Parts

The Equipment and Parts form is divided into two tiers; the upper tier will display existing equipment installed for the system and the lower tier is where parts used by a Technician on the Ticket are added. This form is also used to perform Part Replacements if the Technician is replacing an existing part in the equipment list. As Parts are added to the lower ties, default pricing will be defaulted but may be modified by the User if necessary. By default, Parts Inventory is deducted from the Warehouse associated with the Technician scheduled to the Ticket. The warehouse may be overridden by the User. Once a Ticket has been closed, any parts used on the Ticket will update the System Equipment

List as long as the Part setup is flagged to update the equipment list.

Journal

The Journal form displays any transactions recorded to the general ledger that are associated with the Ticket. This includes both income and expense transactions. A Menu Tab labeled Journal, is displayed above the ticket ribbon when accessing this form.

Journal Menu Tab

Clicking the Journal Menu Tab will display the View ribbon. Three options are available; Detail, Summary,and Parts Reconcile. Depending on which option is selected will change the view of the information displayed in the Journal form.

Journal Detail

Selecting this option will list both the debit and credit side of every financial transaction associated with the Ticket.

Journal Summary

Selecting this option will list each unique G/L Account Number and total amounts posted to the account for transactions associated with the Ticket.

Parts Reconcile

The Parts reconcile option lists the Parts used on the Ticket and indicates whether the part has been issued to the ticket. If your company is using WIP for Parts, as soon as a Part is added to the Ticket, Inventory will be relieved (credited) and your Parts WIP account will be debited. When the Ticket is Invoiced or Closed, the WIP account clears to your Parts COGS account.

For Parts that were ordered on a Purchase Order and have been received [direct expense], the Issued Quantity on the Parts Reconcile list will be updated with the received quantity. For Parts that will be issued from the Technician's Warehouse, the part Issue transaction will occur [depending on your company settings in SedonaSetup] when the invoice is created or when the Ticket is closed.

Notes

Notes may be added to a ticket at any time; even for closed tickets. The Notes form is divided into two tiers; previously saved notes display in the upper tier and the lower tier is used to enter new notes. Each Note saved to the Ticket contains a security access level; this is selected by the User. Each Note entered may be up to 1,024 characters in length. The Resolution Note may be printed on the customer invoice.

- Level 1 - No Restriction: Users with access to level 1 are able to view these Notes. If your company is using SedonaWeb (product which allows your customers access to their account via the web), customer's will be able to view all level 1 Notes.
- Level 2 - Customer Restricted: Users with access to level 2 Notes will be able to view all level 1 and 2 Notes. Customer's logging in with SedonaWeb will not be able to see level 2 Notes.
- Level 3 - Management Level: Users with access to level 3 will be able to view all level 1, 2 and 3 Notes. These are the most restricted Notes typically reserved for management and executive staff.

Other Items

The Other Items form, is used to select Invoice Items for charges to be billed (beyond the automatically calculated Parts and Labor charges) to the customer. Items such as miscellaneous hardware, fuel surcharges, programming fees, etc. are examples of items added to the Other Items form. You may enter as many line items as needed; each line will print on the customer's invoice. The text displayed in the Description field of the line item will print on the customer's invoice (the Item Code will not print).

Charges may automatically appear on the Other Items form if an Item Code was setup on the default Service Level for the Ticket. These Items may be modified or deleted.

The total off all charges on this form will appear on the Billing form.

To delete a row in the list of Items, highlight the entire row, then press the delete key on your keyboard.

Purchase Orders

When first clicking the Purchase Order button, if any Purchase Orders had previously been created, they will be listed. Above the Ribbon a new Menu Tab labeled Purchase Order will be displayed. When clicking on the Purchase Order Menu Tab, a new Ribbon will be displayed showing one button; Create Purchase Order. If the Ticket is a Vendor Type ticket there will also be another button labeled Order Service From Vendor.

Purchase Orders may be created directly from a Ticket for Parts need for the service call or inspection. If the Ticket is a Vendor Type ticket, you are also able to create a Purchase Order for the Service Provider through the Ticket as well.

To be able to create a Purchase Order for Parts within the Ticket, at least one Part Number added to Service Ticket Parts section (lower tier of the Equipment and Parts form) must have the Stock checkbox de-selected. This indicates the Part needs to be ordered.

For Vendor Tickets and Vendor Inspection Tickets, an additional button is displayed on the Purchase Orders Menu Tab - Order Service from Vendor. When clicking this button, the Purchase Order will auto-fill with the Vendor information linked to the Service Provider Service Company listed on the Service Ticket form (first data entry form).

Service History

The Service History form displays any other tickets for the site of the current ticket; both open and closed. Double-clicking on a ticket displayed in the list will open that ticket for viewing.

Ticket Log

The Ticket Log form displays a history of changes made to the Ticket. The majority of users actions taken on a Ticket are recorded to the Log along with the User Name and a date/time-stamp. This listing is helpful when trying to figure out who did what to the Ticket and when. Information on this form may not be removed.

Group Tickets

Group Tickets is an advanced feature and typically used for inspection type tickets. If this button is not present on the ribbon, this indicates your company as not activated this feature. For more information on the functionality of Group Tickets, click on the link.