

# SedonaSchedule - Application Options

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There are function buttons and menu tabs located above the Ribbon within SedonaSchedule. Each of these are described below.

- **SedonaSchedule Icon** – Clicking on the SedonaSchedule icon will open a menu with two options; New Service Ticket and Exit. Selecting the New Service Ticket option will open the Customer Search form to locate the customer for which a Service Ticket will be created. Selecting the Exit option will close SedonaSchedule. The main SedonaOffice application will still be running after exiting SedonaSchedule.

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- **Plus Symbol** – This option is used to create a new Service Ticket. Clicking on the Plus Symbol will open the Customer Search form to locate the customer for which a Service Ticket will be created.

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- **Ribbon Control** – Selecting this option displays a drop-down menu with two options; Show Below the Ribbon and Minimize the Ribbon.

- Show Below the Ribbon - When selecting this option, the Plus Symbol (create new service ticket) and Ribbon Control options □ will be displayed below the Ribbon.
- Minimize the Ribbon – Selecting this option will remove the Ribbon from display. If you want to re-display the Ribbon, click on the Ribbon Control option and de-select the Minimize the Ribbon option.

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**Service Options Menu Tab** – Selecting this Menu Tab will display a new Ribbon with four Ribbon Groups; Service Setup Tables, Parts Warehouse, Auto Refresh and Map Type. Each of these Ribbon Groups will be described below and on the following pages.

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**Service Setup Tables Ribbon Group** – There is one option available within this ribbon group, Appointment Types. Appointment Types are used when creating a Miscellaneous Appointment for a Technician; this defines the purpose of the Miscellaneous Appointment. You may add additional Appointment Types to this setup table.

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**Parts Warehouse Ribbon Group** – There are two options available within this ribbon group, Warehouse and Technician. These options control which warehouse parts used on a ticket will be removed. If the Technician option is selected, parts will always be relieved from the Warehouse linked to the Technician on the Ticket. If the Warehouse option is selected, the User may then choose to relieve parts inventory from either the Technician warehouse or any other warehouse.

If the Warehouse option is selected, when adding a part to the Ticket, if a Technician appointment was scheduled for the Ticket, the warehouse will default to that of the Technician; however the User may override this and select a different warehouse if desired.

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**Auto Refresh Ribbon Group** – There are two options available within this Ribbon Group; Auto Refresh On and Auto

Refresh Off. This controls how often the Schedule Board will be refreshed. When the Auto Refresh is set to On, anytime an appointment is added, changed or deleted the Schedule Board will automatically refresh. For companies with a very high level of activity, this may be burdensome for a constant refresh; in situations such as this the Auto Refresh would be set to Off. The Schedule Board may be manually refreshed at any time by clicking on the Refresh Schedule button located on the Tools Ribbon Group within the View Menu Tab.

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**Map Type Ribbon Group** – This option is used to select the default web mapping program that will be used when mapping out a Technician's schedule for the day. Choices are Google, Bing, Yahoo and Rand McNally.

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**Fleetmatics (formerly known as SageQuest) Menu Tab** – Selecting this Menu Tab will display the Setup Ribbon Group. The only option of this Ribbon Group is the Fleetmatics Setup button. Fleetmatics is SedonaOffice's business partner which provides GPS tracking services. Fleetmatics was recently acquired by Fleetmatics; all references to Fleetmatics will be updated to Fleetmatics in a future release of SedonaOffice/SedonaSchedule. This GPS Tracking option is an add-on module to SedonaOffice.

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**Job Options Menu Tab** – Selecting this Menu Tab will display the Info Options Ribbon Group. The only option of this Ribbon Group is the Include Memo button. When this button is turned on (will display as illuminated when turned on), when viewing a Job Appointment on the Schedule Board, if any text was typed into the Note field on the Job Work Order form, that text will be displayed within the appointment information.

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### **View Menu Tab (Main Ribbon)**

The View Menu Tab contains five Ribbon Groups which control much of the functionality of SedonaSchedule. These Ribbon Groups are: Navigation, Arrangement, SedonaMonitor, Calendar Options, and Tools. Click on the link below for definitions for each Ribbon Group.

[Ribbon Groups](#)

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