

Arrangement Ribbon Group

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The **Arrangement Ribbon Group** contains several options as listed below. Each of these options will be detailed below.

- Day, Week, Month - selecting one of these options controls the period of time that is displayed in the Schedule Board.
- Ticket Queue - selecting this option will display the Ticket Queue.
- Group Tickets - selecting this option will display the list of Group Tickets. This feature is not installed unless your company requests activation.
- Inspection Creation - Clicking this button will open options for viewing a list of upcoming or past due inspections. New Inspection Tickets are also generated from this option section.
- Removed Parts - Selecting this option displays a list of parts that were replaced on tickets. By highlighting a single date or date range on the Calendar will display a list of all parts replaced within the selected date range.
- Miscellaneous Appointments - Selecting this option will display a Menu Tab for Miscellaneous Appointments. Selecting this Menu Tab will display a new Ribbon with options for managing, creating, editing and purging Miscellaneous Appointments. Miscellaneous appointments are used to block out time on the Schedule Board where a Technician is not available to be scheduled.
- Open Jobs (List) - Clicking this button will display the list of Open Jobs. Job Appointments are created from the Open Jobs List.

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Day, Week, Month

Selecting one of these options within the Arrangement Ribbon Group controls the period of time that is displayed in the Schedule Board.

Day View - When clicking on a date within the Calendar, the Schedule Board will display the schedule for that date.

When using the Day View, you are able to click on multiple consecutive or non-consecutive dates within the Calendar to be displayed in the Schedule Board.

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Week View - When clicking on a date within the Calendar, then clicking the Week view button, the Schedule Board will display the schedule for all days within the week of the date selected.

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Month View - When clicking on a date within the Calendar, then clicking the Month view button, the Schedule Board will display the schedule for all days within the month of the date selected.

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Ticket Queue

When selecting this button from the Arrangement Ribbon Group, the list of Tickets shown in the display area will be the last view configured by the User i.e., special filters or ticket types.

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Queue Menu Tab – When viewing the Ticket Queue, a new Menu Tab labeled Queue will be displayed above the Arrangement Ribbon Group. Clicking this Menu Tab will display the Queue View Ribbon. This ribbon has several options that control which tickets are displayed within the Ticket Queue. There is a drop-down option, Queue View, to select which types of Tickets are to be display in the Ticket Queue; one of the four Ticket Types or All Tickets. Each of the options on the Queue View Ribbon Group will be described below.

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Queue View Ribbon Group

Open Button

Clicking on the Open button will display a list of all open Tickets for the Ticket Type selected from the Queue View drop-down list.

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Appointment Button

Clicking on the Appointment button will display a list of all open Tickets where there is at least one Appointment scheduled (dispatched or un-dispatched) for the Ticket Type selected from the Queue View drop-down list.

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No Appointment Button

Clicking on the No Appointment button will display a list of all open Tickets where no Appointments exist for the Ticket Type selected from the Queue View drop-down list.

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Go Back Button

Clicking on the Go Back button will display a list of all open Tickets that were marked as a Go Back (when entering the Technician dispatch times) for the Ticket Type selected from the Queue View drop-down list. These are Tickets that require a return visit and need to be re-scheduled.

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Resolved Button

Clicking the Resolved button will display a list of all open Tickets where a Resolution Code has been saved to the Ticket. For the person invoicing Tickets, this will display a list of all tickets ready to be invoiced, or closed if the ticket is non-billable.

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Unresolved Button

Clicking the Unresolved button will display a list of all open Tickets where a Technician Appointment was completely Dispatched but no Resolution Code was saved to the Ticket.

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Closed Button

Clicking the Closed button will display a list of all Tickets that have been Closed. This goes back to the beginning of time in SedonaOffice. Typically you would select Closed Tickets within a date range. To accomplish this, on the Calendar, highlight a date range, then check the Use Date Range checkbox found on this same View Ribbon Group. Only Tickets that were Closed during the date range will be displayed in the Ticket Queue.

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Use Date Range Checkbox

This option may be used in combination with any of the five ticket status buttons; Open, Appointment, No Appointment, Go Back, Resolved, Unresolved, and Closed. When checking this option, then highlighting a date range on the Calendar, then clicking one of the ticket status buttons, only Tickets that fall within the date range for the particular status will be displayed in the Ticket Queue.

For example: Select 04/13/2022 on the Calendar, check the Use Date Range checkbox, then click on the Appointment button. This will produce a list of all open Tickets that have an appointment date scheduled for 04/13/2022.

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Export to Excel Button

Clicking the Export to Excel button will open the Windows File Explorer for you to enter a file name and location to save the exported Ticket List. Only the Tickets that are currently being viewed in the Ticket Queue will be exported. The ability to use this function is controlled by User Group Security. If the User has not been granted this permission, this button will be dimmed-out.

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Group Tickets

Clicking the Group Tickets button will display a list of all the currently open Group Tickets. Group Tickets is an advanced feature used by companies that perform several Inspections at the same location and need to schedule and invoice for the group of tickets on one Invoice. This feature is only activated when requested. For more information on [Group Tickets](#), please click on the link.

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Inspection Creation

Clicking the Inspections button will Display a new Ribbon Group: Inspection Creation. This Ribbon Group is used for viewing a list of upcoming or past due inspections. New Inspection Tickets are also generated (in bulk) from this option section.

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Removed Parts

Selecting this option allows you to view a list of parts that were replaced on tickets. By highlighting a single date or date range on the Calendar, then clicking the Removed Parts button, will display a list of all parts replaced within the date(s) selected.

This feature provides your company with a list of parts to obtain from Technicians which were removed during a service call so that they may be returned to the Vendor for credit or repair if applicable.

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Miscellaneous Appointments

Miscellaneous appointments are used to block out time on the Schedule Board where a Technician is not available to be scheduled for Service or Inspection Tickets.

Selecting this option and highlighting one day or a date range on the Calendar, will show a list off all scheduled Miscellaneous Appointments in the Display Area.

Also, when clicking on the Miscellaneous Appointments button, a new Menu Tab labeled Miscellaneous Appointments, will be displayed above the Arrangement Ribbon Group. Selecting this Menu Tab will display a new Ribbon with options for managing, creating, editing and purging Miscellaneous Appointments.

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Open Jobs

Clicking on the Open Jobs button will refresh the Display Area with a list of Open Jobs.

Job Appointments may be created from this list by double-clicking on the Job row within the Display Area. **Click on the link to view this topic: [Scheduling a Job Appointment](#).**

The Open Jobs List may be sorted, filtered and grouped into a list suitable for your viewing. Click on the link more information on functionality for the [Open Jobs List](#).

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