

Inspections Overview and Topics

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The Inspection Ticket generation program within SedonaSchedule creates tickets in bulk based upon the information contained in the Inspection Setup records that are attached to a Customer's System record within the Customer Explorer. It is important to understand how to setup and maintain Inspection information as it will have a direct effect on what information will be used to create the Inspection Tickets. The Inspection Record setup is covered until the topic [Setup an Inspection Record](#).

Types of Inspection Tickets

There are two types of Inspection Tickets, regular Inspection Tickets - the work is performed by your company, and Vendor Inspection Tickets where the work is performed by a Service Provider (subcontractor). When setting up an Inspection record, the default Service Company is selected on the setup form. If the Service Company selected is a Service Provider, when Inspection Tickets are generated, the Ticket will be created as a Vendor Inspection Ticket, otherwise the Ticket will be created as a regular Inspection Ticket.

Linking an Inspection to a Recurring Line

Inspection Records may be linked to a Recurring Line on a customer's account. Setting up an Inspection record in this manner will allow you to Cycle Invoice your customer after the Inspection Ticket has been completed. Linking an Inspection Record to Recurring Line does not require you to Cycle Invoice your customers for inspection services after work is performed; it is just an option. You may cycle invoice your customers when desired.

Linking an Inspection Record to a Recurring Line is a good check & balance. When setting up the Inspection Record and attempting to link to a Recurring Line, if a recurring line has not yet been setup for the Inspection services, you would have nothing to link to the Inspection record. Linking ensures that if you should be billing for Inspections through cycle invoicing, the recurring lines have been setup.

To be able to Link a Recurring Line to an Inspection Record, you must have at least one Service Level created and flagged for this purpose. This will be discussed further on the following pages covering Inspection Record setup.

Service Level Setup

If an Inspection Record will be linked to a Recurring Line, you must first have at least one Service Level created for this purpose. After filling in the data entry fields on the General and Parts tabs, navigate to the Inspection Tab and check the box labeled RMR Link to Customer Recurring is Required.

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Pre-Negotiated Inspection Rate

When setting up an Inspection Record you have the option of entering a flat amount that will be invoiced to the customer once the Inspection has been completed. You would select the Invoice Item code to be used and the amount on the setup form. When Inspection Tickets are generated, this amount will automatically be populated onto a line on the Other Items form of the ticket.

Click on the links below for articles related to Inspections.

[Setup an Inspection Record](#)

[RMR Linked Inspections](#)

Generate Inspection Tickets