

Group Tickets Setup

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If you will be linking your Inspection records to a Recurring Line, then you will have to setup at least one Service Level that requires linking.

Service Level Setup

The Service Level setup is maintained within the SedonaSetup application. A tab labeled Inspection is used linking a Service Level to an Inspection Record setup. If the checkbox [RMR Link to Customer Recurring is Required] is selected on this form, then any Inspection created selecting this Service Level will require the User to link a recurring line to the Inspection.

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System Inspection Setup

New Inspections are setup from the Customer Explorer within a System record. Fields are present within the System Inspection Setup form to accommodate the use of Group Tickets and the ability to link an Inspection to a Recurring Item. If you will be linking the Inspection to a Recurring Item, you must first setup the Recurring Line(s) on the Customer's System.

Creating a New System Inspection Record

From a Customer Explorer record, expand the Customer Tree to the System where the Inspection will be created. Highlight the customer tree option Inspections, right-click and select the option New Inspection.

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On the System Inspections setup form, fields on the right have been delegated for the use of the Group Ticket functionality.

The three fields, Group Number, High Frequency Bypass, and Exclude from High Frequency Check are used by the Inspection Ticket generation program to determine when and how to create Group Tickets.

The High Frequency Bypass field is selected if there are multiple inspections that have different frequencies but may be due in the same month and you only want to generate a ticket for the least frequent inspection.

For example, an Annual, Semi-Annual and Quarterly inspection are all due on April 1st. The software would create the ticket for the Annual Inspection, and advance the next inspection date for the Quarterly to July 1st, and advance the Semi-Annual inspection next date to October 1st.

Using the scenario in the previous paragraph, if the Exclude from High Frequency Check field is selected, then the software would create a group ticket for all three inspections.

If a Group Number greater than zero is assigned to the Inspection record, it will be considered as a part of a group ticket. Group Numbers may be between 1 and 9.

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