

How to Setup and Use Routes in Sedona Office

Last Modified on 08/10/2026 10:04 am EDT

Routes are used in scheduling Service and Inspection Tickets.

A Route typically defines a geographical area for use in scheduling Technicians.

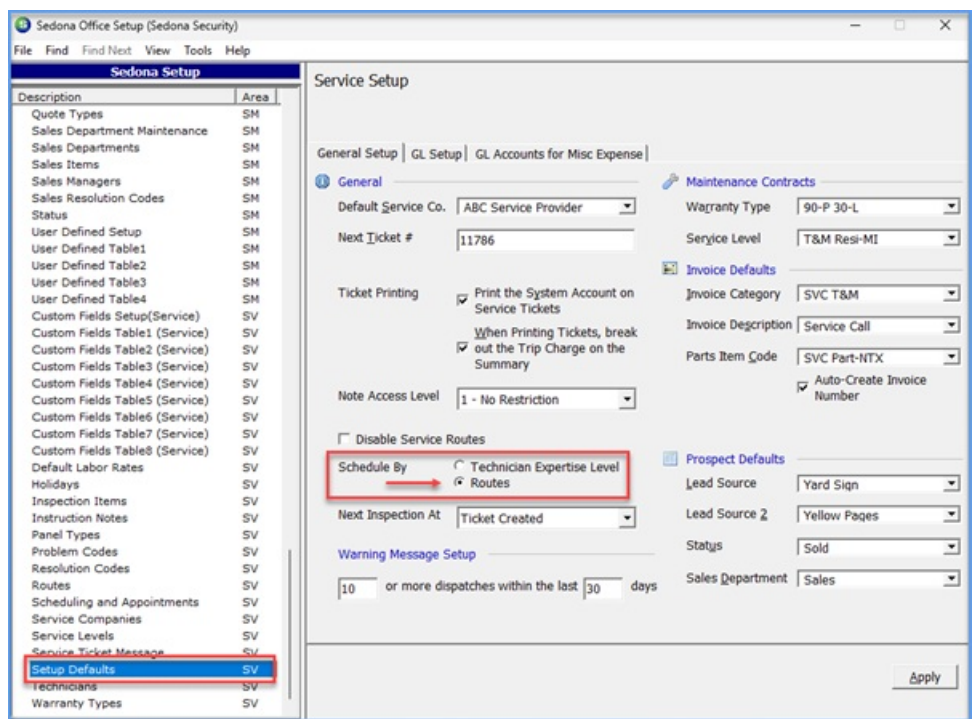
The route assigned to the System or Inspection Record will default into Inspection and Service Tickets when created. The default Route may be overridden on the Service or Inspection Ticket.

The Route scheduling feature provides the ability to schedule by Route instead of the normal method of scheduling by technicians within a Service Company.

SedonaSetup

Setup Defaults (Service)

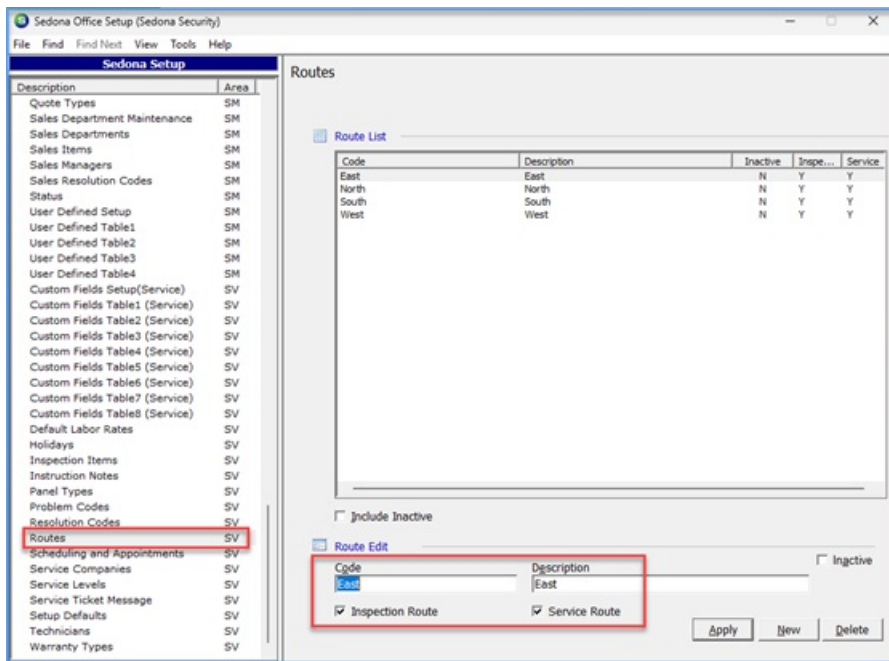
Schedule By – Selecting this option will enable the Routes feature in Sedona Office.



Routes (Service)

After enabling Routes, add the routes that will be used to schedule tickets.

For each route, specify whether it will be used for Inspection Tickets, Service Tickets, or both. .



Geographical Tables

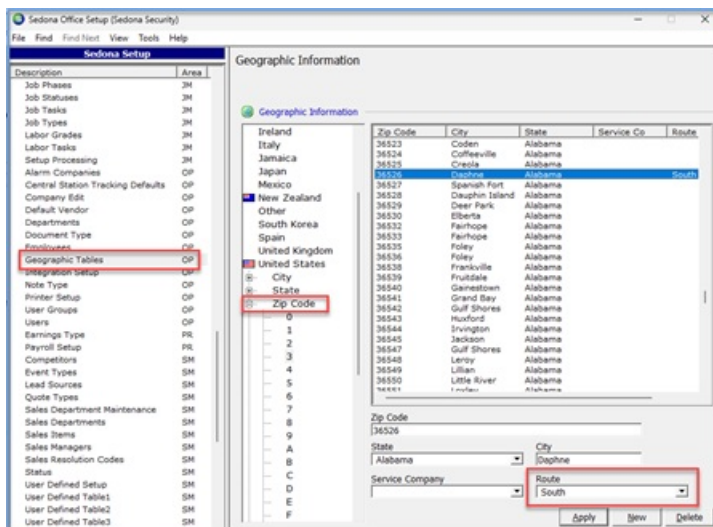
To automatically assign Zip Codes to a Route at the system level, navigate to Geographic Tables.

Select United States – Zip Code.

Enter the starting number of the Zip Code or Zip Code range you want to assign to a route.

Select the appropriate Route from the Route drop-down list.

Click Apply to save the assignment.

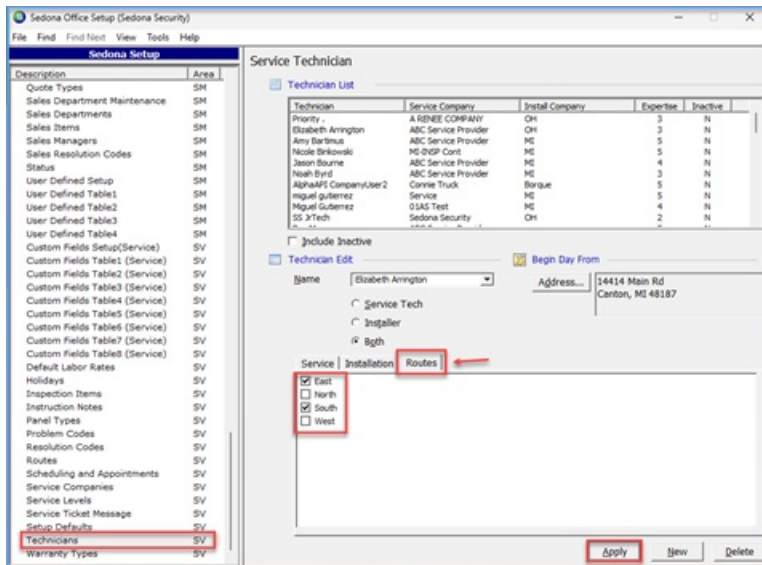


Technicians (Service)

Navigate to **Technicians** and select the technician you want to configure.

Open the **Routes** tab.

Assign the technician to at least one **Route**, or multiple routes if applicable.



Sedona Office

Customer Account – Systems

Once Routes have been enabled, users can select the appropriate Route for each system.

For existing systems, the Route must be assigned manually.

For new systems, the Route is automatically assigned based on the Zip Code configured for the site.

50832 50832-2 Fire System

Customer: 50832 Kathleen Kelly - Beach House Address: 234 Sunflower Lane Daphne, AL 36526

System Custom Fields Recurring Equipment Inspections Transmitters Notes & Comments

System Information

System Account: 50832-2
System Type: Fire
Panel Type:
Location:
Memg:
Monitored By / CS Integration: <Not integrated>

Service Information

Warranty: 90-P 30-L
Warranty Start:
Service Level: T&M Resi-MI
Primary Service Co: ABC Service Provider
Alt Service Co 1:
Alt Service Co 2:
Require PO:
Route Code: South
Critical Message:
Expires On:

Contract Information

Contract Form: 3 Year
Contract Number:
Contract Date:
Contract Length: 0 Renewal Months: 0
OK to Rate Increase After:
Cycle P.O.:
Cycle PO Expires:

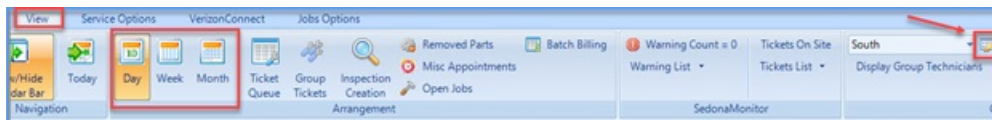
U/D Info ☐ Inactive Save Close

Sedona Scheduler – Display Groups

Open the Sedona Scheduler.

Select the View tab, then choose Day, Week, or Month view.

Select Edit Display Groups to configure display groups that correspond to the defined routes.

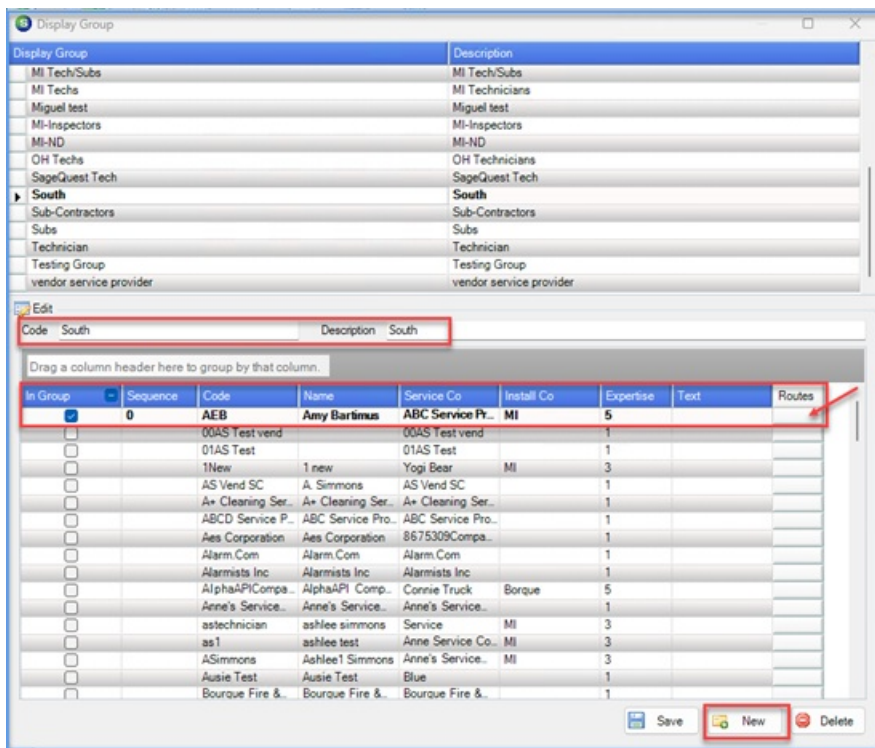


In the Display Groups window, select New.

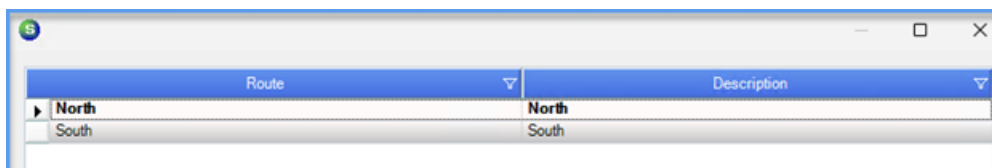
Enter the Route name in the Code field and provide a Description.

In the lower section of the window, select the technicians to include in the route.

Click Save to create the display group.



To view the route assignments for a technician, select the Route button located to the far right of the technician's name. The assigned route or routes will be displayed.



Service Tickets

When a Service Ticket is created, the Route assigned to the system is automatically populated on the ticket.

If necessary, the route can be manually changed from within the Service Ticket.

Ticket #11786

Customer: 50832 Kathleen Kelly
Site: Kathleen Kelly - Beach House
 234 Sunflower Lane
 Daphne, AL 36526
 Central Time

Created: 7/20/2026 4:59 PM
Created By: AEB
Status: Open

Site and System Detail:
 System Account: 50832-2
 System Type: Fire
 Panel Type:
 Location:
 Next Inspection: 7/1/2026
 Site Phone:
 Map Code:
 Cross Street:
 Warranty: 90-P 30-L
 Warranty End: Expired
 Memo:
 Comments:
 Notes:

Ticket Detail:
Problem: Add Equipment
Secondary Problem:
Route Code: South
Expertise: 3
Priority: Medium
Estimated Length: 120
Comments:
Service Coordinator:
Technician:
PO #:
Category: SVC Cont
Resolution:

Service Information:
Service Company: ABC Service Provider
Service Level: T&M Resp-M
CS System Link:

Use Payment Information On File:
☒ None
☐ Bank (1)
☐ Credit Card (1)

Save

When scheduling an appointment for a Service Ticket, select the appropriate Display Group to view the technicians assigned to that route on the Schedule Board. Then, schedule the appointment with the appropriate technician.

Schedule Ticket # 11783

View:
 July 2026 August 2026
 S M T W T F S S M T W T F S
 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5

Display Group: South
Select: Code Name Service Co
☒ AEB Amy Bartimus ABC Service Provider

Schedule Board:
 7/2026
 [Unassigned] Amy Bartimus
 8 am
 5:00

Inspection Records

Routes can also be used for Inspection Tickets created through the Inspection Module and linked to Customer Inspection Records.

For both existing and new Inspection Records, the appropriate Route must be selected manually from the Route drop-down list.

Inspection Tickets

When generating Inspection Tickets, you can select the Route for which the tickets will be created by using the For Which Route option.

When an Inspection Ticket is created, the Route assigned to the Inspection Record is automatically populated on the ticket.

If necessary, the route can be manually changed from within the Inspection Ticket.

When scheduling an appointment for an Inspection Ticket, select the appropriate Display Group to view the technicians assigned to that route on the Schedule Board. Then, schedule the appointment with the appropriate technician, just as you would for a Service Ticket.

