

Equipment not Transferring from Job to Customer in SedonaOffice

12/29/2023 12:45 pm EST

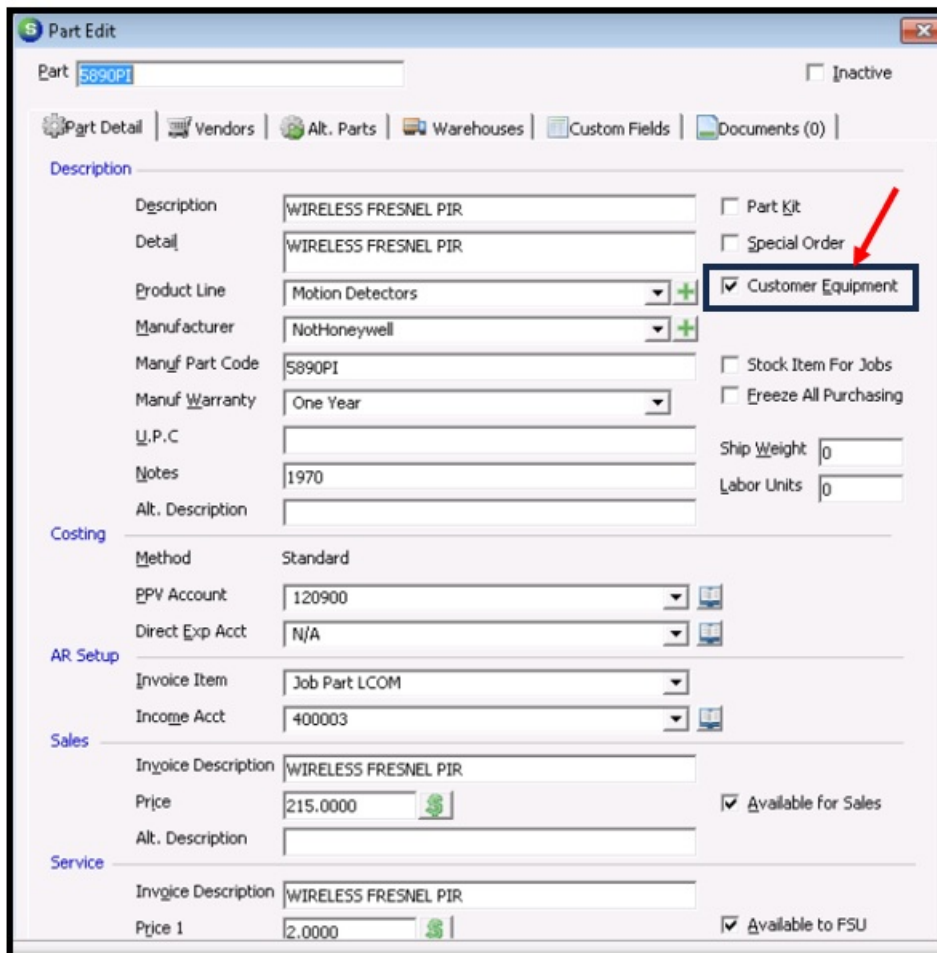
Description of Issue:

Customers may submit a case stating, I closed my customer's Job, but the equipment on the Job did not transfer to the customer's account.

Fixes:

The customer must make sure the following steps in Sedona are being followed to make sure equipment does get transferred after a job is closed.

#1 - The part(s) must be set up as a part designated to be Customer Equipment, and a checkbox must be active for the part to be part of the customer equipment.



The screenshot shows the 'Part Edit' window in Sedona Office. The 'Part' field is set to '5890PI'. The 'Description' section includes fields for Description, Detail, Product Line (Motion Detectors), Manufacturer (NotHoneywell), Manuf Part Code (5890PI), Manuf Warranty (One Year), U.P.C., Notes (1970), and Alt. Description. On the right side, there are several checkboxes: 'Part Kit' (unchecked), 'Special Order' (unchecked), 'Customer Equipment' (checked), 'Stock Item For Jobs' (unchecked), and 'Freeze All Purchasing' (unchecked). The 'Costing' section shows Method (Standard), EPV Account (120900), and Direct Exp Acct (N/A). The 'AR Setup' section shows Invoice Item (Job Part LCOM) and Income Acct (400003). The 'Sales' section shows Invoice Description (WIRELESS FRESNEL PIR), Price (215.0000), and 'Available for Sales' (checked). The 'Service' section shows Invoice Description (WIRELESS FRESNEL PIR), Price 1 (2.0000), and 'Available to FSU' (checked). A red arrow points to the 'Customer Equipment' checkbox, which is highlighted with a blue box.

#2 - Once you close the job a pop-up box will appear – Load Equipment.

- A date must be entered installed/removed on-site
- The parts going to the customer account must have a checkmark next to the box
- You must click on Close at the bottom of the pop-up screen, you cannot just X out of the screen

Job - 5116-9 (Elizabeth Arrington Beach House)

Job
 Job Number 5116-9
 Job Type CCTV-Res
 Job Status Job Complete
 System 48977 Access
 Labor Units 0. (0. Used)

Tasks

#	Phase	Task
1	Phase 01	Order Parts
2	Phase 01	Sch Install
3	Phase 01	Install
4	Phase 01	Activate
5	Phase 01	Jobcost
6	Phase 01	Prewire

*The job will be locked and the status will b

Job Task
 Job Status
 Phase Code
 Labor Hours
 Schedule Date

Customer 48977 Site

Load Equipment
 Enter the date the equipment was installed/removed on site.

Add Equipment
 Add the equipment in the list to the customer system by checking the box to its left.
 Uncheck the box to not add it to the customers equipment list.

Part Code	Description	Location	Local Zone	Qty	Serial No
<input checked="" type="checkbox"/> AX1005	SURFACE MOU...			1	
<input checked="" type="checkbox"/> OPTAX100SR	OPAX100SR FL...			1	

Remove Equipment
 Remove the equipment in th
 Uncheck the box to leave it

ing the box to its left.

Part Code	Description	Qty	Serial No

July 2023

25	26	27	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

Today: 7/26/2023