

Inspection Templates and Reports In SedonaOffice

01/03/2024 4:39 pm EST

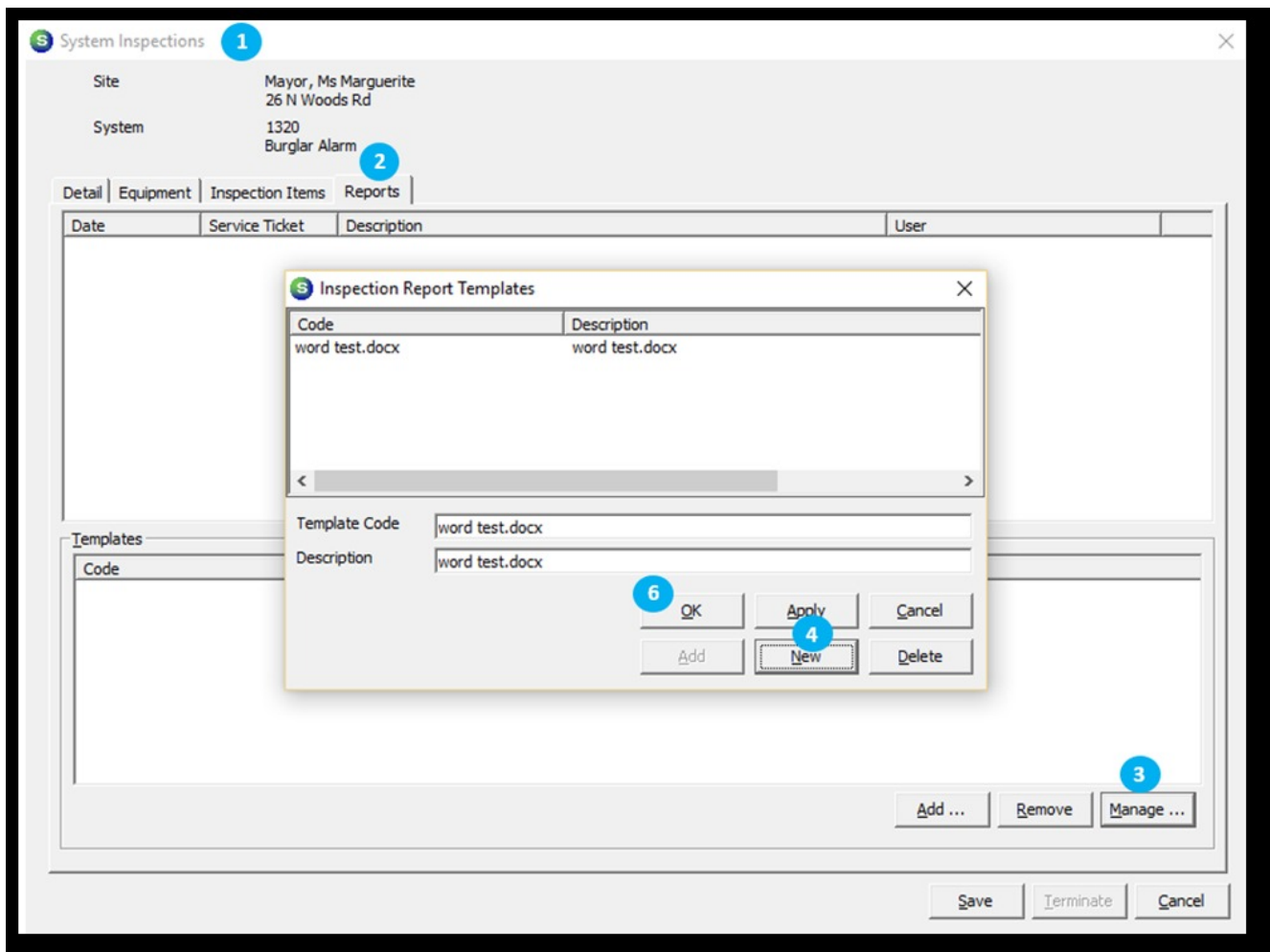
Inspection Templates and Reports

Inspection templates can be added to inspection records. These templates are then automatically added to any service tickets created from that inspection record.

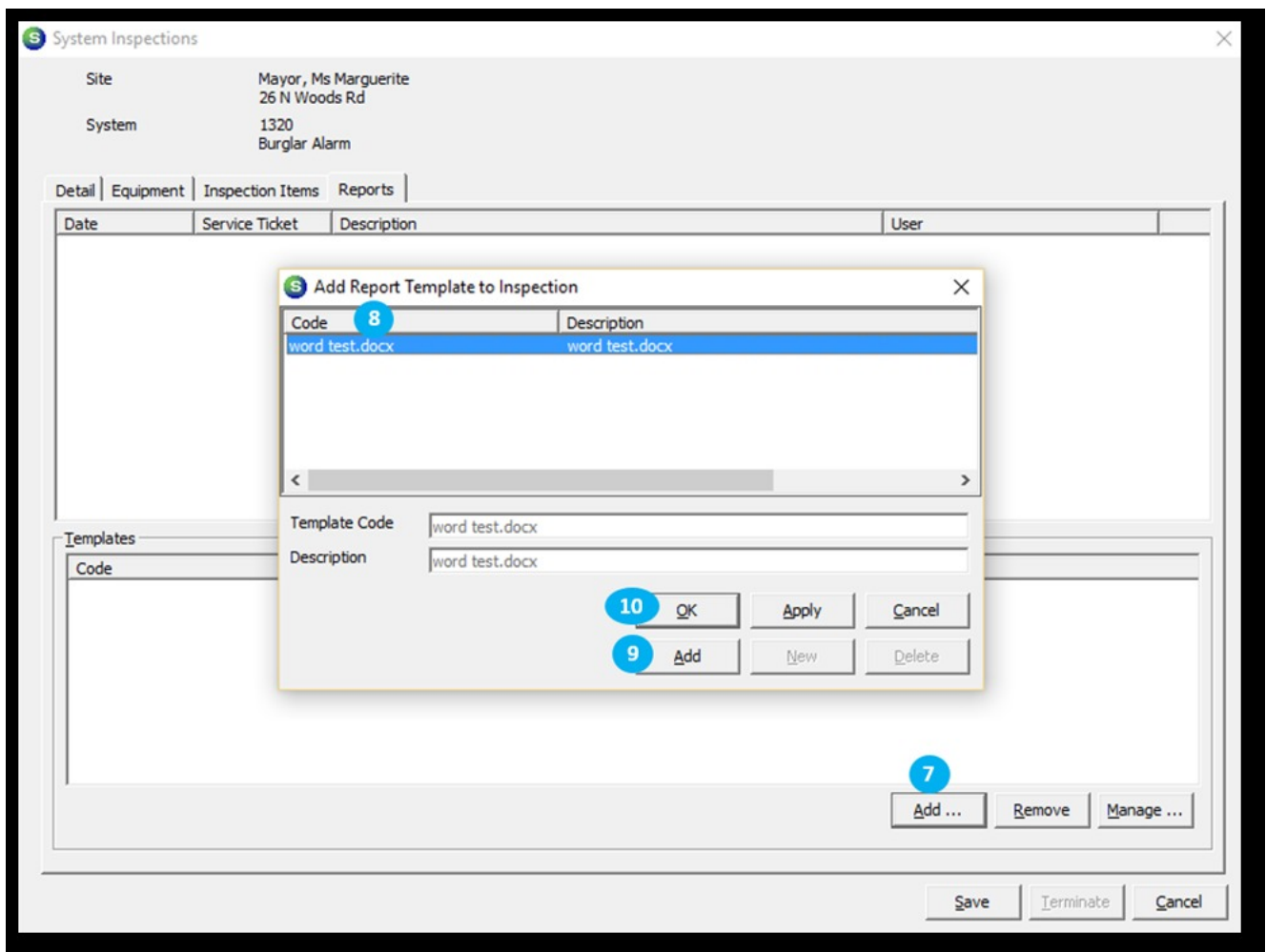
Note – Changes technicians make to these documents must be saved to the ticket as a new document, meaning the original inspection template is not affected. The next time an inspection ticket is generated, the original inspection template without any changes, will be added to the new ticket. To change the document that automatically attaches to tickets, users must edit the template manually in the SedonaOffice customer record.

To add an inspection template first create the template in your desired format (.docx, .pdf, .excel, etc.) and save it to your machine. Then:

1. In SedonaOffice open an inspection record
2. Select the Reports Tab
3. Click on Manage...
4. Click New
5. Browse for your template document
6. Click Okay



7. Still on the Reports Tab, click Add...
8. Select your document
9. Click Add in the smaller window
10. Click Okay



The top portion of the Reports Tab is the Reports section, the bottom portion is the Templates section. Once your template is added it will appear in the Templates section.

System Inspections

Site: Mayor, Ms Marguerite
26 N Woods Rd

System: 1320
Burglar Alarm

Detail | Equipment | Inspection Items | Reports

Date	Service Ticket	Description
Reports Section		

Templates

Code	Description
word test.docx	word test.docx

Templates Section

At this point you can create the inspection ticket as normal and the inspection template will auto attach to the ticket as an Inspection Report.

Viewing Inspection Reports

Once the inspection ticket is created click on the documents tab of the ticket. The inspection report will show in the new "Inspection Reports" section.

Ticket #26212

Ticket

Service Ticket Custom Fields Appointments and Labor Billing Documents and Reports (1) Equipment and Parts Go To Journal Notes (0) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Customer 1320 Mayor, Ms Marguerite
Site Mayor, Ms Marguerite
26 N Woods Rd
Wayside NJ 07712

Created 9/21/2016 10:38 AM
Created By JesslynnL
Status Open

Contact [dropdown]
Phone [text] Ext [text]
Notify [checkbox]

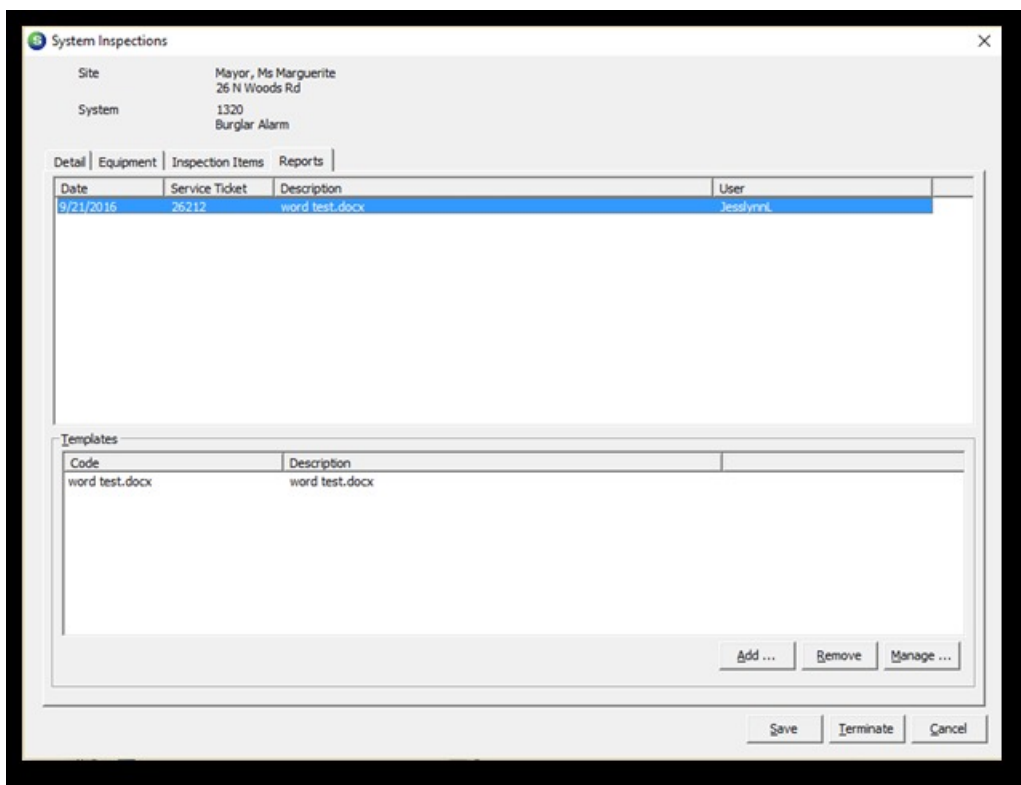
Documents

File	Description	Type	Level	User	Uploaded

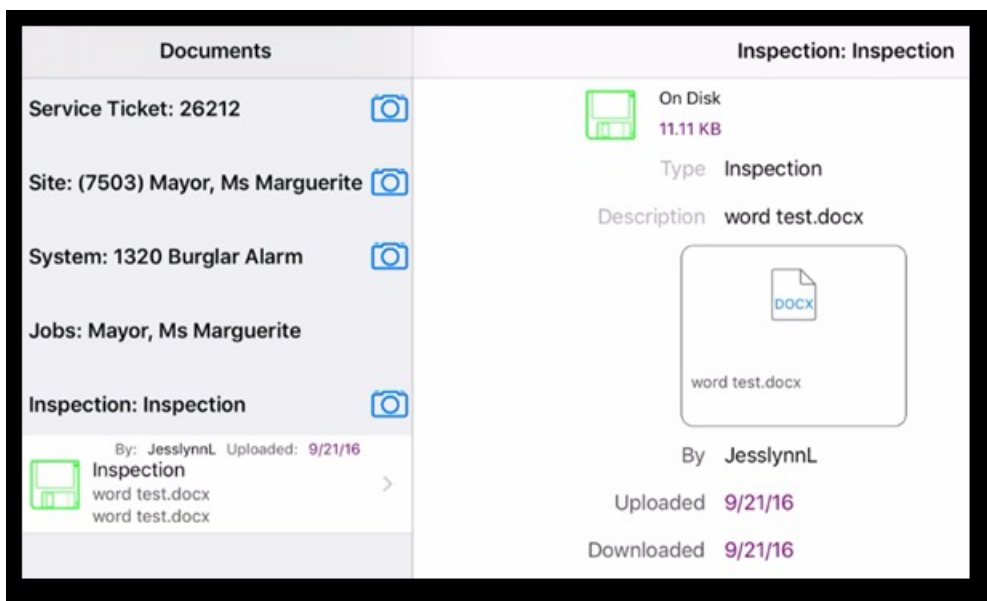
Inspection Reports

Description	User	Uploaded
word test.docx	JesslynnL	09/21/2016

If you return to the inspection record you will see your template is now also listed in the top Reports section, which indicates it has been added to your ticket.



On the FSU the Inspection Report can be viewed in documents under the new Inspection section.



Working with Inspection Reports

The Inspection Report can be downloaded and edited just like any other document.

When you upload a document to the FSU you will be given the option to upload it as a normal document or as an inspection report. To upload the new document as an inspection report:

1. Set the radio button to Inspection

2.

Cancel Upload Document Upload

Type: ⓘ

File: word test-1

Desc:

☒ Service Ticket ☐ Job

Select the ticket the document is for

Done

Wednesday, September 21, 2016

26212: Mayor, Ms Marguerite 10:15 AM
26 N Woods Rd, Wayside Scheduled

3. Select Upload

Cancel Upload Document Upload

Type: Inspection ⓘ

File: word test-1

Desc: test

☐ Service Ticket ☐ Job

☒ Inspection

26212: Mayor, Ms Marguerite 10:15 AM
26 N Woods Rd, Wayside Scheduled

After an Inspection Report has been uploaded via the FSU it will appear on the FSU in the Inspection section. It will also appear in SedonaOffice on the service ticket under Documents - Inspection Reports. Finally it will appear in the inspection record under the Reports tab in the Reports section.

When a new ticket is created for that inspection the documents in the Reports section will not automatically be

attached to the new ticket. Only documents in the Template section auto populate onto new inspection tickets.

System Inspections

Site: Mayor, Ms Marguerite
26 N Woods Rd

System: 1320
Burglar Alarm

Detail | Equipment | Inspection Items | **Reports**

Date	Service Ticket	Description	User
9/21/2016	26212	word test.docx	JesslynnL
9/21/2016	26212	testing 2	CCooper
9/21/2016	26212	test	CCooper
9/21/2016	26212	test	CCooper
9/21/2016	26213	word test.docx	JesslynnL

This section simply lists reports attached to tickets for this inspection record

Templates

Code	Description
word test.docx	word test.docx

Only documents in this Templates section will auto populate onto new inspection tickets.

Add ... Remove Manage ...

Save Terminate Cancel