

SedonaOffice®

The #1 Financial Software for Security Companies

SedonaFSU



Technician Management Tool

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About this Document

This Reference Guide is for use by SedonaOffice customers only. Its purpose is to provide an overview of the content contained within and is to be used for reference purposes only.

SedonaOffice reserves the right to modify the SedonaOffice product described in this document at any time and without notice. Information contained in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted. In no event shall SedonaOffice be held liable for any incidental, indirect, special, or consequential damages arising from or related to this guide or the information contained herein. The information contained in this document is the property of SedonaOffice. The screenshots in this document reflect version 5.7.0.52. This document may be updated periodically. Please check our website at www.sedonaoffice.com for the most current version. Copyright 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017

Overview

The Technician Management Tool is the application that manages the Sedona Field Service Units, referred to as SedonaFSU. SedonaOffice staff will give service managers access to the Technician Management Tool when their company goes live with SedonaFSU. The Technician Management Tool is used to add, delete, and manage permissions for technicians. It also controls some overall settings for the application. It is often referred to as the 'Tech Tool'.

Requirements

Where to Access the Tech Tool From

The Technician Management Tool must be accessed from a machine that has SedonaOffice locally installed. For most users this means you will be able to access the Tech Tool from your work desktop. If you are a SedonaCloud customer, or use a remote desktop to open Sedona, then you will not be able to open the Tech Tool from your primary desktop. You must instead open it from your remote desktop.

Remote Desktop

SedonaCloud users must open the Tech Tool from their remote desktop. To access the remote desktop login to the SedonaCloud Portal and select the FSU Tech Tool icon (if the FSU Tech Tool icon does not appear contact Support@SedonaOffice.com to have this added). You will be asked to login to the remote desktop.

Your **username** is "sedonaasp\ followed by your SedonaCloud Portal username".

Your **password** is your SedonaCloud Portal password.

Once you are in the remote desktop follow the Tech Tool login steps as normal.



Which Internet Browser to Use

The SedonaFSU Technician Management Tool is a Silverlight application which must be opened from an internet browser that supports Silverlight, such as Internet Explorer or Firefox. Browsers that do not support Silverlight such as Chrome and Edge will not work. Be mindful that if you click on a link for the Technician Management Tool it will try to launch in your default browser even if that browser does not support Silverlight. You may have to copy the link into a Silverlight browser.

.Net

Your .Net must be up to date to run the Technician Management Tool. The current Tech Tool version requires .Net version 4.5 to operate.

Logging In

After making sure your desktop location and internet browser meet the requirements above:

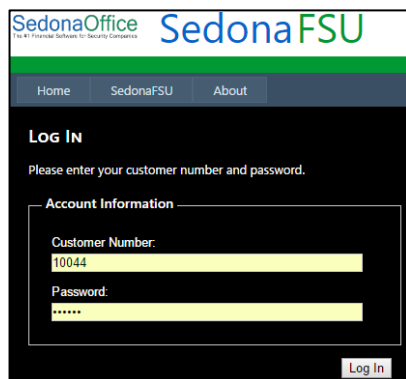
Open the following WebServices link in your Silverlight compatible browser:

<http://fieldserviceunitweb.customer.sedonaoffice.com>

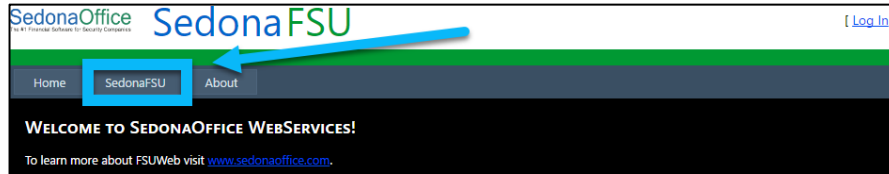
Select Login in the top right corner of the screen



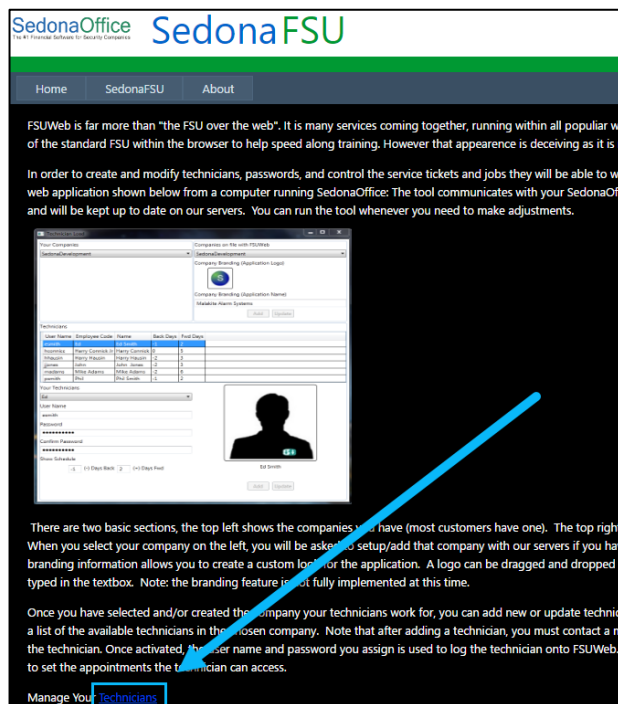
Enter your SedonaOffice Customer Number and the Technician Management Tool password provided to you by SedonaOffice and select Log In at the bottom. If you are unsure what your password is, contact support@sedonaoffice.com.



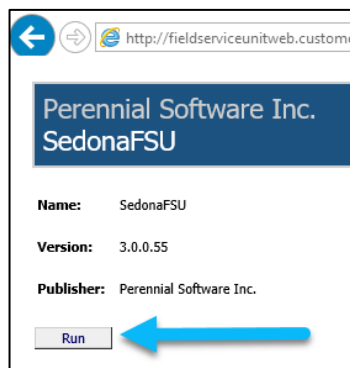
Once logged into WebServices, select the SedonaFSU tab near the top of the screen.



You will be presented with a summary of the Technician Management Tool. Select the blue hyperlinked 'Technicians' at the bottom of the screen.



The Tech Tool launch screen will open. Your .Net must be up to date to proceed. Select Run and the Technician Management Tool will open.



Technician Management Tool Areas

The screenshot displays the Technician Management Tool interface. It features a top navigation bar with the title 'Technician Tool'. The main content area is divided into several sections:

- Company Selection:** A dropdown menu labeled 'Your Companies' with 'FSU_Testing' selected. Below it is a 'SedonaFSU Service Resolution Codes' dropdown and an 'Updates' button.
- Company Options:** A section for 'Companies on file with SedonaFSU' showing 'FSU_Testing'. It includes a 'Company Branding (Reporting Logo)' image, a 'Select Image...' button, and fields for 'Company Branding (Application Name)' (SedonaFSU Web Edition), 'Acceptance Hyperlink Name', 'Legal Agreement', 'Acceptance Hyperlink (Actual link)' (a URL), and 'Acceptance Text'. There are 'Add' and 'Update' buttons at the bottom.
- FSU Technician List:** A table listing technicians with columns for name, ID, and various status indicators. A callout points to the 'Drop Down for Adding New Technicians'.
- Technician Options:** A section for 'Your Technicians' showing a list of technicians (e.g., CCooper, CCooper, CCooper) with fields for 'User Name', 'Password', and 'Confirm Password'. It also includes a 'Show Schedule & Security Level' section with a calendar view and a 'Maximum Deviation Minutes' field. A 'Control Flags' section contains checkboxes for 'Appt Reschedule', 'Manual Labor', 'System Updates', 'Inactivate Contacts', 'Access CC or Bank', 'Mandatory Signature', 'View Sub Charges', 'View Final Charges', and 'Closed Tickets'. There are 'Add', 'Update', and 'Delete' buttons.
- Technician Summary:** A section showing a 'Select Picture...' button and a 'Select Picture...' button with a picture of a cheetah.

Company Selection –

This section allows you to select which company database you will be working in. You can have multiple companies on file with the FSU. Remember billing is based on the number of active technicians you have entered into the Tech Tool across all of your company databases.

This section also has the option to select which resolution codes technicians are allowed to use on tickets for the selected company.

Company Options –

This section provides further FSU options that are not specific to any one technician, such as company branding and your terms and conditions.

FSU Technician List –

This section lists all of the technicians you have added to the FSU for the selected company. The columns show a summary of the technician's permissions. You can click on a technician here to view their detailed information below.

New Technician Drop Down –

This drop down lists all technicians you have in the SedonaOffice Technicians setup table for the selected company, regardless of whether they have been added to the FSU.

Technician Options –

This section displays all information and permissions for the currently selected technician.

Technician Summary –

This section shows which technician you have currently selected and provides add, update and delete options for them.

Adding Company Databases

To add a new Sedona company database to the FSU first contact Support@SedonaOffice.com and let them know which database you will be adding. Sedona will prepare the database and notify you when it is ready. After you receive the ready notice, login to the Technician Management Tool and follow these steps:

1. In the top left section, select the new company database from the Your Companies drop down. This drop down lists the company databases you have on file with SedonaOffice.
2. In the top right section, select the new company database from the Companies on file with SedonaFSU drop down. This drop down lists the company databases you have available to SedonaFSU. **The company database name you select here is the one your technicians will use to login to the FSU.**
3. Select Add at the bottom of the top right section.

The screenshot shows the 'Technician Tool' window. On the left, under 'Your Companies', there is a dropdown menu with 'FSU_Testing' selected, marked with a blue circle '1'. Below it is a 'SedonaFSU Service Resolution Codes' section with a dropdown and an 'Update' button. On the right, under 'Companies on file with SedonaFSU', there is a dropdown menu with 'FSU_Testing' selected, marked with a blue circle '2'. Below this is a 'Company Branding (Reporting Logo)' section with a placeholder image and a 'Select Image...' button. Then, a 'Company Branding (Application Name)' section with 'SedonaFSU Web Edition' entered. An 'Acceptance Hyperlink Name' section with 'Legal Agreement' entered. An 'Acceptance Hyperlink (Actual link)' section with a long URL entered. An 'Acceptance Text' section with 'Here are our terms and conditions. Please accept them, thanks.' entered, marked with a blue circle '3'. At the bottom right are 'Add' and 'Update' buttons.

Managing Company Databases

Some overall FSU options such as your company logo can be adjusted in the top right section of the Tech Tool. To edit any of the fields here select your company database from the top drop down, make your selection, and then click the Update button at the bottom of the section.

Companies on file with SedonaFSU

FSU_Testing

Company Branding (Reporting Logo)

Select Image...

Company Branding (Application Name)

SedonaFSU Web Edition

Acceptance Hyperlink Name

Legal Agreement

Acceptance Hyperlink (Actual link)

<https://onedrive.live.com/view.aspx?resid=9E080000000000000000000000000000&ithint=file%2cdocx&app=Word&authkey=ACnwxqlaXOvSui0>

Acceptance Text

Here are our terms and conditions. Please accept them, thanks.

Add Update

Select company, Make changes, and Select Update

Company Branding

Company Branding (Reporting Logo) - Upload an image here and it will appear on reports created from the FSU.

Company Branding (Application Name) – This field is not currently in use. You may enter your company name here for future applications.

Terms and Conditions

Before getting a customer signature on the FSU, there are two ways to present your terms and conditions to customers. If your terms and conditions are already on your company's website you can enter a link to that webpage. Technicians can click the link and the webpage will open.

Review Appointment Accept Notes Parts Labor Other

None

Signature

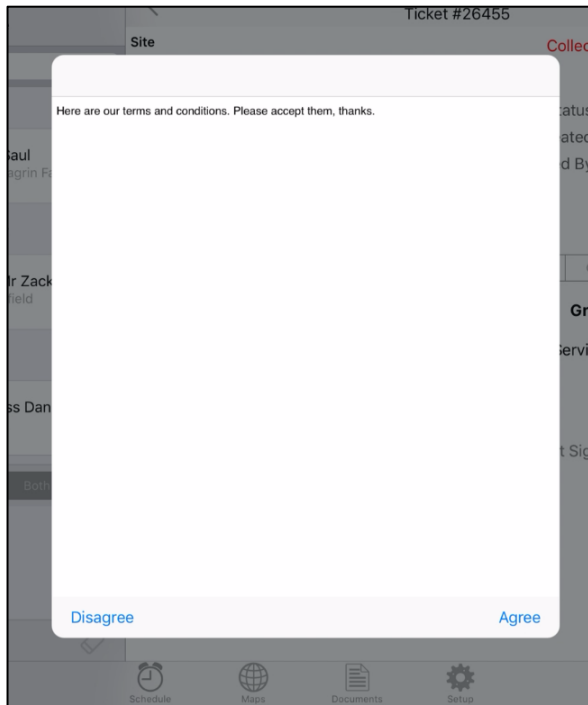
No Signer Available

Get Signature

Legal Agreement

Safari

Or you can enter your full terms and conditions on the FSU itself, and give customers the option to agree or disagree.



The terms and conditions options must be turned on by SedonaOffice staff. Once you have decided which option you will be using, please contact Support@SedonaOffice.com to have that feature activated.

Acceptance Hyperlink Name –If you will be linking to your terms and conditions, enter a name/label for the link here.

Acceptance Hyperlink (Actual Link) - Enter the URL for the website you are linking to. This field holds up to 255 characters.

Acceptance Text – If you would rather have your terms and conditions show in the FSU itself, enter them in this field. The text you enter here will pop up just before customers sign, and they will be asked to agree or disagree to the terms. The field has no character limit as long as your FSUs are hosted by Sedona.

Resolution Codes

SedonFSU Service Resolution Codes – This is the only company option that appears in the top left section, as opposed to the top right. Click the drop down and check the box for each resolution code your technicians should be allowed to use on the FSU. Then select Update to the right of the drop down.

Your Companies	
FSU_Testing	

SedonaFSU Service Resolution Codes	
<input checked="" type="checkbox"/>	Billable call user error Billable call user error
<input checked="" type="checkbox"/>	Billable call user error Billable call user error
<input checked="" type="checkbox"/>	Billable call was- handle Billable call was- handled overnight/weekend
<input checked="" type="checkbox"/>	Billable Physical damage Billable Physical damage to system
<input type="checkbox"/>	Billable call renovation Billable call renovation work being done

Update

Adding Technicians

Technicians must be added to the FSU using the Technician Management Tool. SedonaOffice cannot add technicians for you. Once you add a technician SedonaOffice must activate them before they can login. To have technicians activated please email Support@SedonaOffice.com. Remember, billing for the FSU is based on the number of activate technicians in your FSU database so it is important to keep your list of technicians current. To add a new technician to the FSU navigate to the bottom left portion of the Tech Tool.

Your Technicians

Mike Ash

User Name: MikeAsh

Password: [Redacted]

Confirm Password: [Redacted]

Show Schedule & Security Level

-7 (-) Days Back 3 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window []

Dispatch 2880 Arrival 2880 Departure 2880

Control Flags

Appt Reschedule [] Manual Labor [] System Updates [x]

Inactivate Contacts [x] Access CC or Bank [x] Mandatory Signature []

View Sub Charges [x] View Final Charges [x] Closed Tickets [x]

Mike Ash is not on file as an SedonaFSU technician.

Add Mike Ash to SedonaFSU?

Technician Select and Login Credentials

Your Technicians – This drop down lists all technicians you have entered in your SedonaOffice company database in the Technicians setup table. This drop down does not show what technicians have been added to the FSU, that information is in the FSU technician list above the drop down. From your list of SedonaOffice technicians, select the new one you would like to add to the FSU.

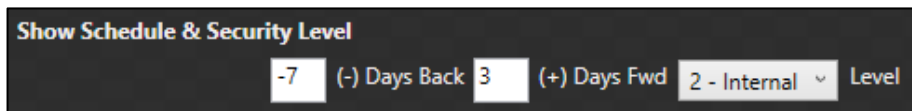
Select Picture... - You may select a picture to represent your technician using the Select Picture button in the area to the right of the technician drop down. This picture does not appear on the FSU, it is just a reference for users in the Tech Tool.

User Name - Enter the username your technician will use to log in to the FSU. The username must be at least six characters. This name is not linked to the technician's SedonaOffice login so it does not matter if it is the same or different from their SedonaOffice username.

Password – Enter the password your technician will use to log in to the FSU. The only password requirement is that it must be at least 8 characters long. Passwords can only be edited here; Technicians will not be able to change them from the FSU.

Confirm Password – Re-enter password created above.

Show Schedule and Security Level



(-) Days Back and (+) Days Fwd – These control how many dates back and forward technicians can see on their schedules in the FSU. For example, if you wanted your technician to be able to see tickets they worked on a week ago and also what tickets they will be working on in the next three days you would enter -7 for the (-) Days Back and 3 for the (+) Days Fwd.. Make sure to enter a (-) before the days backward to mark this as a negative number.

Security Level – This security level is associated with notes and documents. The three options are:

- 1 - General: Anyone can view General notes and documents, including customers using SedonaWeb.
- 2 - Internal: Only users with security level 2 or higher can view Internal notes and documents. Customers cannot see notes of this level or higher.
- 3 - Management: Only users with security level 3 can view Management notes and documents.

The technician's security level not only controls what level of notes and documents they can see, but also what levels they can assign to notes they enter.

Note: The security level does not control what levels technicians can assign to documents they enter as all documents uploaded via the FSU are uploaded at the SedonaOffice service setup default. The SedonaOffice service setup default also controls the default security level for notes entered from the FSU:

Description	Area
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM
Sales Departments	SM
Sales Department Maintenance	SM
Routes	SV

Service Setup

General Setup | GL Setup | GL Accounts for Misc Expense

General

Default Service Co. J.D.E Enterprises

Next Ticket # 4915

Ticket Printing ☒ Print the System Account on Service Tickets

☒ When Printing Tickets, break out the Trip Charge on the Summary

Note Access Level 2 - Customer Restricted

Maximum Deviation Minutes

Maximum Deviation Minutes

Lock Sliding Window ☐

Dispatch 2880 Arrival 2880 Departure 2880

This feature allows you to control when your technicians can enter their appointment times, and what those appointment times are allowed to be. You can keep this window very tight to ensure real time entry of your technician's times, or you give a large window to allow technicians to enter their times when it is convenient to do so.

Dispatch, Arrival, and Depart - Every appointment on a technician's schedule has a scheduled time when it is supposed to begin. Based on the problem code/labor task of the ticket/job, the appointment also has an estimated length of time it is supposed to take to complete. In the Dispatch, Arrival, and Departure fields, enter the maximum number of minutes the technician is allowed to deviate from these scheduled times. The number of minutes you enter will be divided in half, and the technician will be able to enter their times that many minutes before and after the scheduled time.

Example: A technician has an appointment scheduled for 8 AM and 30 has been entered in the Dispatch Maximum Deviation Minutes field. In this case the 30 minutes would be divided in half and the technician would be able to enter their dispatch time between 7:45 and 8:15 AM.

If the technician tries to enter times outside of their assigned window the buttons will be greyed out and the FSU will not allow the time entry. The technician would then have to call the office to have their times entered for them.

If you do not want your technicians deviating from their scheduled times you can enter a small number of deviation minutes such as 10. This would force the technician to enter their times within 10 minutes of when they were scheduled. You can enter as few as 0 minutes, but remember that in this case if the technician is even one minute late opening their FSU to enter times they will miss their window and be forced to call the office.

If your technicians often make their own judgement calls on when they should go to which appointment a larger window may be better. In this case, you may want to leave the default number of minutes, which is 2882. With 2882 minutes technicians can enter their times 24 hours before or after the scheduled time of the appointment. This works well for technicians who usually enter all of their times at the end of the day, rather than as they go. If you do not want to restrict when your technicians enter times you can enter tens of thousands of minutes.

When technicians click on dispatch, arrive, and depart those times default to the current time, but the technician can change this. It is important to remember that the maximum deviation minutes not only control when the technician can enter their appointment times, but also what they are allowed to change those times to be. So, a technician with a small window could click dispatch at 8:02, but then change their dispatch time to be 8:00. A technician with a large window could click dispatch at 7 PM and then change the dispatch time to be 4 PM the day before.

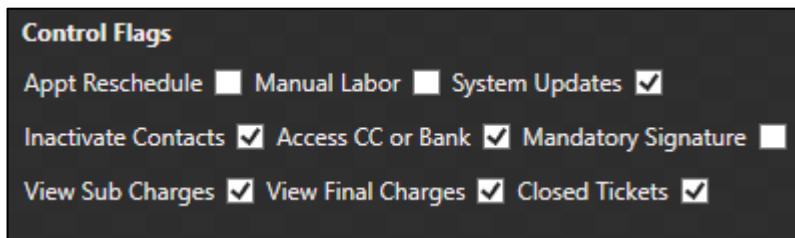
Example: For the table below let us again assume the technician has an 8 AM appointment and a 30-minute window, making their allowed window between 7:45 and 8:15 AM.

Current Time	Time Being Entered	Time Entry Allowed?	Reason
8:05 AM	8:00 AM	Yes	Current Time and Time Being Entered are both within the allowed window
8:05 AM	7:30 AM	No	Time Being Entered is outside the allowed window
8:17 AM	8:00 AM	No	Current Time is outside the allowed window
8:17 AM	8:20 AM	No	Current Time and Time Being Entered are both outside the allowed window.

Lock Sliding Window – This option controls whether all of your technician’s deviation minutes should be based on their scheduled times, or whether they should auto update to be based on the time entered just before them. Companies wishing to have a strict schedule should check the box to lock the sliding window. Companies where the technician’s schedule is more flexible should leave this box unchecked.

Example: Let us say a technician had an 8 AM appointment that is scheduled to take two hours. This means the technician is scheduled to leave the appointment at 10 AM. Now let us assume the technician is running late and entered 8:30 as their arrival time instead of 8. If lock sliding window is checked the window of time the technician has to enter their departure time will not change or ‘slide’; it will still be based on the 10 AM scheduled departure. If lock sliding window is not checked the window of time the technician has to enter their departure time will change/slide. The system will add two hours to their arrival time instead of their scheduled time and the new departure window will be based on an 10:30 estimated departure, rather than 10.

Control Flags



The screenshot shows a dark-themed interface titled "Control Flags". It contains several checkboxes with labels: "Appt Reschedule" (unchecked), "Manual Labor" (unchecked), "System Updates" (checked), "Inactivate Contacts" (checked), "Access CC or Bank" (checked), "Mandatory Signature" (unchecked), "View Sub Charges" (checked), "View Final Charges" (checked), and "Closed Tickets" (checked).

Control Flag	Status
Appt Reschedule	<input type="checkbox"/>
Manual Labor	<input type="checkbox"/>
System Updates	<input checked="" type="checkbox"/>
Inactivate Contacts	<input checked="" type="checkbox"/>
Access CC or Bank	<input checked="" type="checkbox"/>
Mandatory Signature	<input type="checkbox"/>
View Sub Charges	<input checked="" type="checkbox"/>
View Final Charges	<input checked="" type="checkbox"/>
Closed Tickets	<input checked="" type="checkbox"/>

Each of these boxes can be checked or unchecked to give the technician that specific permission. The permissions are:

Appt Reschedule – When checked the technician will be able to reschedule their own appointments. This option does not allow them to create new appointments, only to reschedule existing appointments.

Manual Labor – When checked the technician will be able to override labor charges. Appointment times will not be changed, only the labor billing amount.

System Updates – When checked the technician will be able to update the Panel Type, Panel Location, and Alarm Company for the system their appointment is for.

Inactivate Contacts – When checked the technician will be able to inactivate contacts on the customer’s account.

Access CC Or Bank: When checked the technician can see the last four digits of the credit cards and/or bank accounts the customer has on file, so that they can select which payment method the customer said they wished to use for the call. They can also add new credit cards to the customer account. When this is not checked, technicians cannot see payment method options on file and cannot add new ones.

Mandatory Signature: Typically, technicians have the ability to collect a signature, or select No Signer Available. When this box is checked the No Signer Available option will not appear and the FSU will not allow the technician to access their next appointment until a signature for the previous appointment is entered.

View Sub Charges – When checked the technician will be able to see dollar amounts for Parts, Labor, Job Units, Materials, Install charges, Purchase Orders, and Miscellaneous Charges on their respective tabs of the FSU. If this box is not checked the technician will not be able to see dollar amounts on these tabs.

View Final Charges – When checked the technician will be able to see the summary total of all charges for the ticket on the final Acceptance tab. If this box is unchecked the final summary charges for the ticket will not show. To prevent technicians from seeing any dollar values on the FSU make sure View Sub and View Final charges are both unchecked.

Closed Tickets – When checked appointments from closed tickets will not show on the technician's schedule even if they fall within their day range. Appointments from closed jobs will still show.

Add Technician

Below the control flags in technician options there is a red warning that says "[technician name] is not on file as a SedonaFSU technician" and below that a long button that says "Add [technician name] to the FSU?". The red warning is normal; it only means that you have not yet clicked the button to add the new technician.

Adding the technician is a three-step process:

1. **Add [technician name] to SedonaFSU?** – Click this long add button and the Add button in the bottom right section of the Tech Tool will highlight.
2. **Add** – Click the add button in the bottom right section of the Tech Tool.
3. **Contact Sedona** – At this point your technician has been added and you must contact Support@SedonaOffice.com to have them activated before they can login. Your billing will be adjusted based on the number of active technicians in the Tech Tool.

Your Technicians

Mike Ash

User Name

MikeAsh

Password

Confirm Password

Show Schedule & Security Level

-7 (-) Days Back 3 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window

Dispatch 2880 Arrival 2880 Departure 2880

Control Flags


Appt Reschedule Manual Labor System Updates

Inactivate Contacts Access CC or Bank Mandatory Signature

View Sub Charges View Final Charges Closed Tickets

Mike Ash is not on file as an SedonaFSU technician.

Add Mike Ash to SedonaFSU?



Select Picture...

Mike Ash

Mike Ash is ready to be added with user name MikeAsh.

Add Update Delete

Contact Support@SedonaOffice.com to have your technician activated

Once added your new technician will appear in the Tech Tool Technician List:

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	Remove Contacts	Access CC Bank	Mandatory Signature	View Sub Charges	View Final Charges	Closed Tick
AAdams	Ace Adams	Ace Adams	-20	8	3	✓		✓	✓	✓		✓	✓	✓
MikeAsh	Mike Ash	Mike Ash	-7	3	2			✓	✓	✓		✓	✓	✓
JamesBond	JBond	James Bond	-3	7	3	✓	✓	✓	✓	✓		✓	✓	✓
CCooper	CCooper	Connie Cooper	-15	14	2	✓	✓			✓		✓	✓	

Editing Technicians

The list of technicians you have added to the FSU appears in the middle of the Tech Tool. To expand the technician list and see more technicians at once hover over the bottom edge of the list until the double-sided arrow appears. Click and drag the arrow down.

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	Remove Contacts	Access CC Bank	Mandatory Signature	View Sub Charges	View Final Charges	Closed Tick
AAdams	Ace Adams	Ace Adams	-20	8	3	✓		✓	✓	✓		✓	✓	✓
MikeAsh	Mike Ash	Mike Ash	-7	3	2			✓	✓	✓		✓	✓	✓
JamesBond	JBond	James Bond	-3	7	3	✓	✓	✓	✓	✓		✓	✓	✓
CCooper	CCooper	Connie Cooper	-15	14	2	✓	✓			✓		✓	✓	
Mcuter	Mark Cutar	Mark Cutar	-7	2	1			✓	✓	✓		✓	✓	
jdebaggi	Justin D	Justin DeBaggis	-14	7	2	✓	✓	✓	✓	✓		✓	✓	

To edit a technician click on them in the technician list, or select them from the Your Technicians drop down. Make the desired changes, and then click on Update in the section to the right. Contact the technician and ask them to re-load their technician permissions. Changes made to technicians in the Tech Tool do not take effect until the technician reloads their FSU.

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	Remove Contacts	Access CC Bank	Max
AAdams	Ace Adams	Ace Adams	-20	8	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MikeAsh	Mike Ash	Mike Ash	-7	3	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
JamesBond	JBond	James Bond	-2			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CCooper	CCooper	Connie Cooper	-1			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Mcuter	Mark Cutar	Mark Cutar	-1			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Your Technicians

Mike Ash

User Name
MikeAsh

Password
.....

Confirm Password
.....

Show Schedule & Security Level

-7 (-) Days Back 3 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window ☐

Dispatch 2880 Arrival 2880 Departure 2880

Control Flags

Appt Reschedule ☐ Manual Labor ☐ System Updates ☒

Inactivate Contacts ☒ Access CC or Bank ☒ Mandatory Signature ☐

View Sub Charges ☒ View Final Charges ☒ Closed Tickets ☒

Select Picture...

Mike Ash

Add Update Delete

Select technician from the list or from the drop down

Make changes and select Update

Deleting Technicians

Notes on Deleting Technicians

When a technician no longer needs FSU access it is important that they be deleted from the FSU technician list. This helps keep your list clean, and ensures that you are not billed for the technician. Remember that you are billed based on the number of active technicians in your database, so it is important to keep this list up to date.

Deleting technicians must be done through the technician management tool. SedonaOffice cannot delete technicians for you. There is no need to notify SedonaOffice when a technician is deleted as SedonaOffice records will be automatically updated by the delete.

The technician record in the FSU database is not the same as the technician record in Sedona, so deleting the technician from the FSU will not affect your Sedona tables, and will not affect the history in Sedona for that technician. For this reason, it is perfectly safe to delete technicians from the FSU list.

To Delete

To delete a technician click on them in the technician list (or select them from the Your Technicians drop down) and select the Delete button from the section on the right.

If the Delete button is greyed out this means the technician is not active in the SedonaOffice setup tables. A Technician must be active in Sedona before they can be deleted from the FSU. In this case, open SedonaOffice and go to the SedonaSetup Employee table. Find and re-activate the technician in the Employee table. Return to the Tech Tool and delete the technician. After the technician is deleted you can once again inactivate their employee record in SedonaOffice.

The screenshot displays the 'SedonaFSU Technicians' interface. At the top is a table listing technicians. Below this is a 'Your Technicians' section with a dropdown menu and input fields for details. To the right is a detailed view for a selected technician, including a profile picture and action buttons.

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	Remove Contacts	Access CC Bank	Mail
AAdams	Ace Adams	Ace Adams	-20	8	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MikeAsh	Mike Ash	Mike Ash	-7	3	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JamesBond	JBond	James Bond	-	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CCooper	CCooper	Connie Cooper	-	-	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mcuter	Mark Cutar	Mark Cutar	-	-	-	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Your Technicians

Mike Ash

User Name: MikeAsh

Password: [masked]

Confirm Password: [masked]

Show Schedule & Security Level

-7 (-) Days Back 3 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window ☐

Dispatch 2880 Arrival 2880 Departure 2880

Control Flags

Appt Reschedule ☐ Manual Labor ☐ System Updates ☒

Inactivate Contacts ☒ Access CC or Bank ☒ Mandatory Signature ☐

View Sub Charges ☒ View Final Charges ☒ Closed Tickets ☒

Technician Details (Mike Ash)

Select Picture...

Mike Ash

Add Update Delete