SOUC

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SedonaFSU

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PERENNIAL SOFTWARE

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What It Is

At Its Core

The SedonaFSU application is not a full gateway into to SedonaOffice, but a digital replacement for those paper service/job tickets. The intention behind the SedonaFSU application is to address several key problems that face security companies today.

- Lost Paperwork – You cannot bill what you never get back.

  "Why is this ticket still open from last year?"

- Messy Paperwork – Not very helpful if you cannot read it.

  "工作已完成 When did Bob learn Cantonese?"

- Project Hand-offs – Cannot send Tech B when Tech A has the paperwork.

  "Did you grab the paperwork? No, I thought you did! George has it but he called out sick today"

- Overall Communication – Constant interruptions are a drain on everyone.

  "Bob's 1:30 is on the phone looking for an ETA, where is he? I don't know he hasn't checked in."

iOS vs Silverlight

Currently there are two versions of the SedonaFSU program available for use, the newer iOS application and the older Silverlight web interface. Fundamentally, they provide the same functions and benefits, but the interfaces and platforms are completely different.

Notes

iOS Version – Available for both iPhones and iPads

- PRO: Utilizes the most current available programming options available to developers.
- PRO: Having it run on a smaller device like a phone or tablet makes it easier for Technician s to carry and use vs. lugging around a larger heavier laptop.
- CON: Misc. Appointments viewed in separate app.
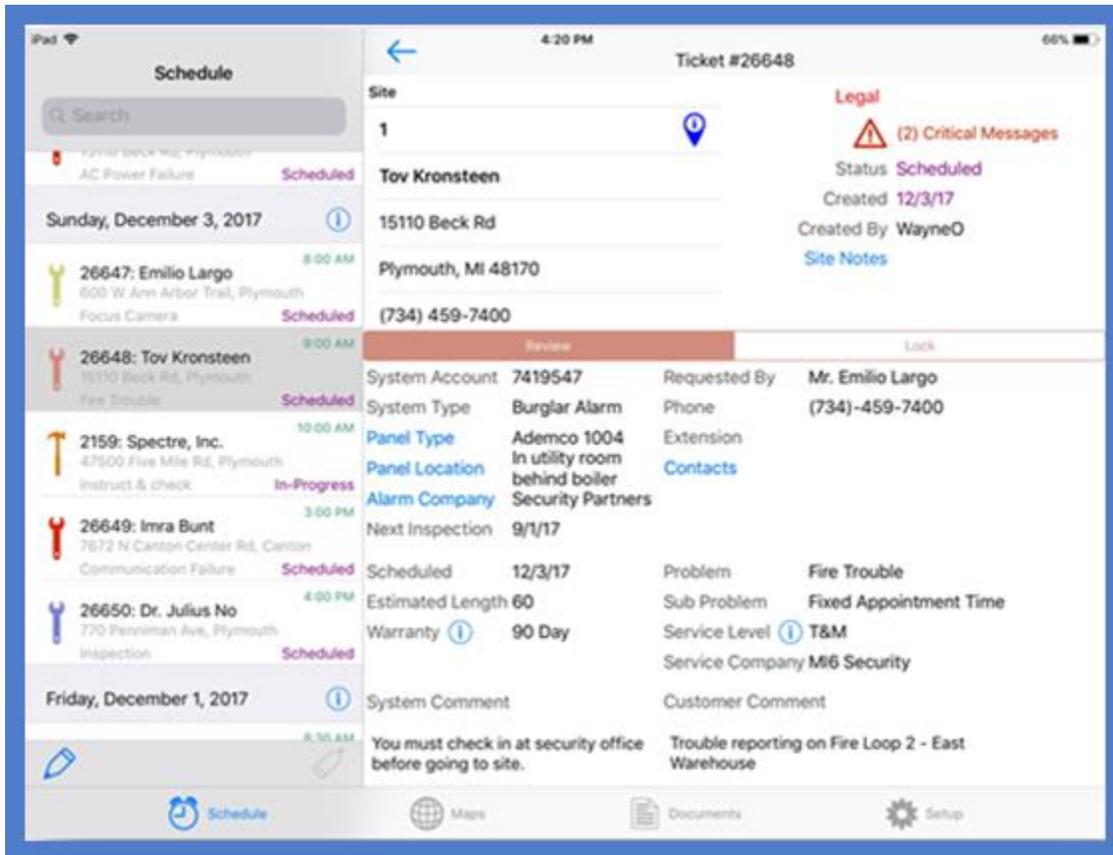
Notes

Silverlight – **Usable with Windows**

- PRO: Can be used via any internet browser that supports Silverlight like Internet Explorer
- PRO: Misc. Appointments are separated out but still viewable on from main web page.
- CON: Microsoft is phasing out Silverlight and few browsers still support it. Microsoft product support will end in 2021.

Notes

The iOS 11 Factor

In order to make the SedonaFSU application compatible with Apple's iOS 11, we had to utilize some of their new systems and infrastructure, which did not exist in earlier versions of the iOS. Any older device that Apple restricts from using their newest iOS will also not be able to install the most recent versions of many iOS apps.

If you have recently reset a device and need to reinstall an older version of the app, the process is listed below. Keep in mind that it will not be the newest version of the app, and it may be missing key bug fixes or functionality improvements. However, it will allow you to install the most compatible older version for your specific device.

- STEP 1 – On your iPad or iPhone
- Launch the **Setting** app
- Go to the iTunes & App Stores section
- Set the automatic downloads for **Apps** to be off
- STEP 2 – On your PC or Mac
- Launch **iTunes**
- Go to **iTunes Store** and download the **SedonaFSU** app
- STEP 3 – On your iPad or iPhone
- Launch the **App Store** app
- Go to the **Purchased** section
- Select the **SedonaFSU** app
- You will see "The current version requires iOS 11 or newer, but you can download the last compatible version." Press **Download**

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Service in a SedonaFSU World

What the Technician Can See

Running a Technician -based department with SedonaFSUs is a completely different experience. In order to grasp this methodology, it is important to have an understanding of all the data and options available to your Technician s in the field. To save paper, we will review the options as seen through iPad. Full how-to instructions on the usage of both versions of the SedonaFSU can be found on our website https://sedonaoffice.perennialsoftware.com/ under Resources & Education in the subsection Reference Documents.

The Schedule

The Technician can view their scheduled Job, Service and Inspection appointments by scrolling up and down the schedule bar on the left. How far forward and back the tech can see is customizable per tech via the online Technician Management Tool.

The schedule list will show the job or ticket number, customer name, street address, city, and problem code. Selecting the different appointments will open the Review tab for that particular appointment.
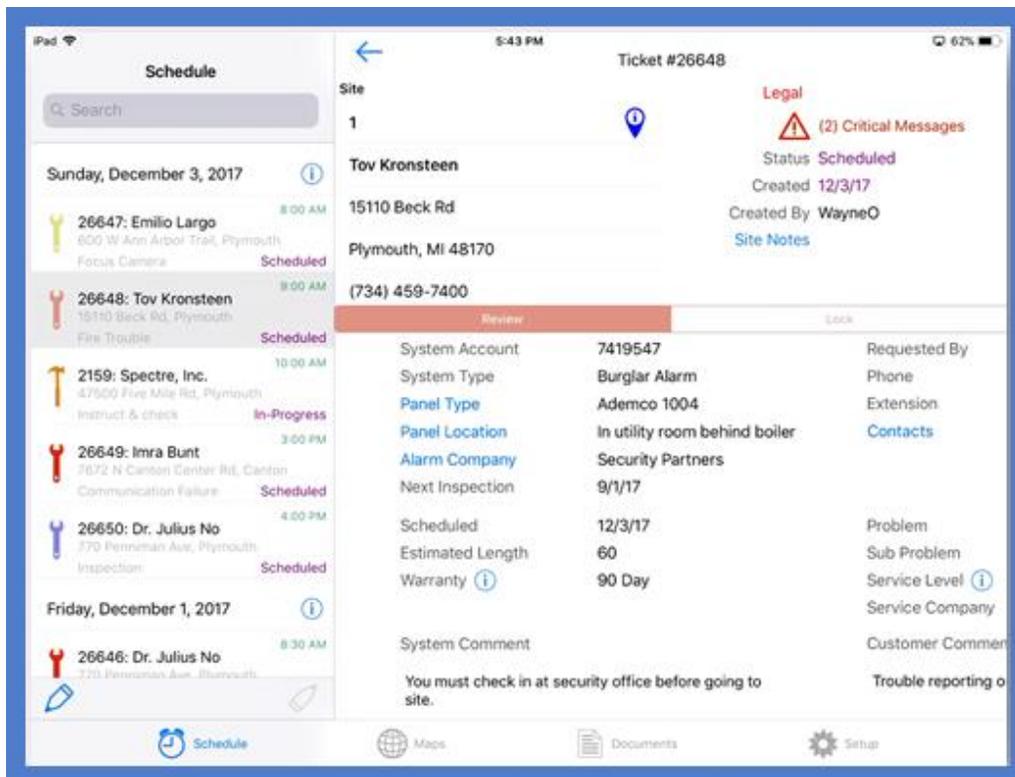
The Review Tab

The review tab provides all the base information for the work order.

The upper left section contains:

- Site Name, Address & Phone
- Customer Information - Accessible by scrolling down under the site address.

The upper right section displays:

- Customer's Collection Status
- Access to both System and Customer Critical Messages
- Accessible by pressing the ⚠ button.
- Ticket Status
- Scheduler Information & Creation Date
- All site level notes tied to the location may be accessed by pressing the blue Site Notes link.
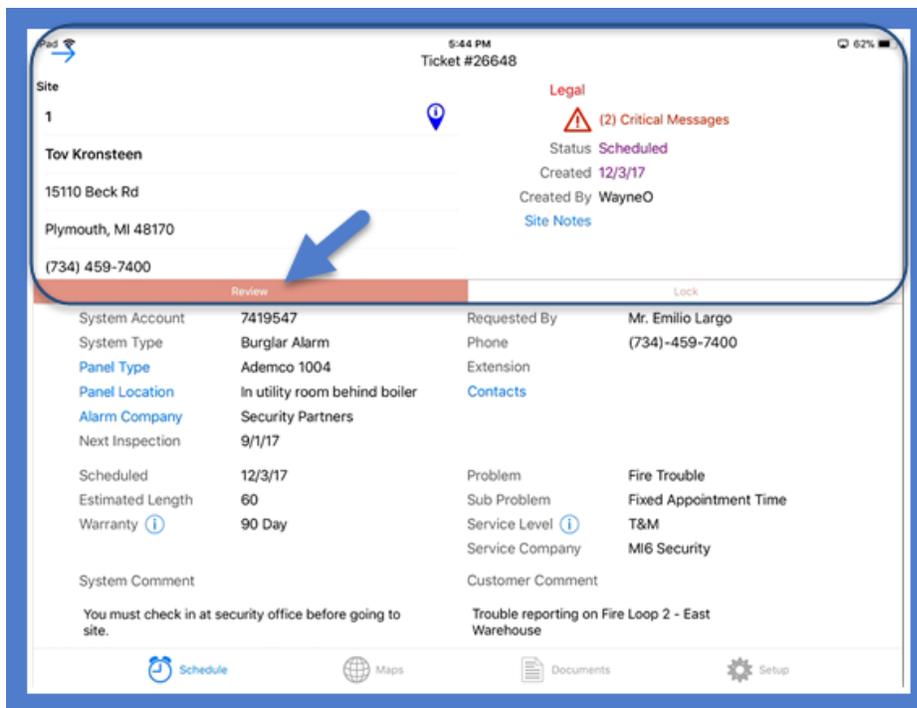
Notes

The Review Tab (continued)

The lower left section displays:

- System level information like Account Number and System Type
- Panel Type and Location
- Alarm Company (a.k.a. Monitoring Company or Central Station)
- If the system is setup for Inspections, the Next Inspection date will be displayed.
- Additional scheduling details such as Date and Est. Time.
- Warranty Information - Specific details of coverage and the expiration date are accessible by pressing the ⓘ button.
- System level comments

The lower right section displays:

- Information on who requested the service and their contact information.
- All contacts tied to the site - accessible by pressing the blue Contacts link.
- Problem and Secondary Problem codes
- Service Level & Service Company - More specific details of billing information and charges are accessible by pressing the ⓘ button.
- Customer Comments

The Notes Tab

Once the ticket is locked, you are able to access other tabs. The Notes tab contains all notes specific to this job or ticket. It will display all notes regardless of creator as long as those notes are within the Technician's security level. Security levels are set in two locations: they are set within SedonaOffice and are customizable per tech in the Technician Management Tool.

The SedonaFSU will use the more restrictive of the two options. They are separate so that a Technician can have more access in the privacy of the office vs the SedonaFSU in a potential public setting.
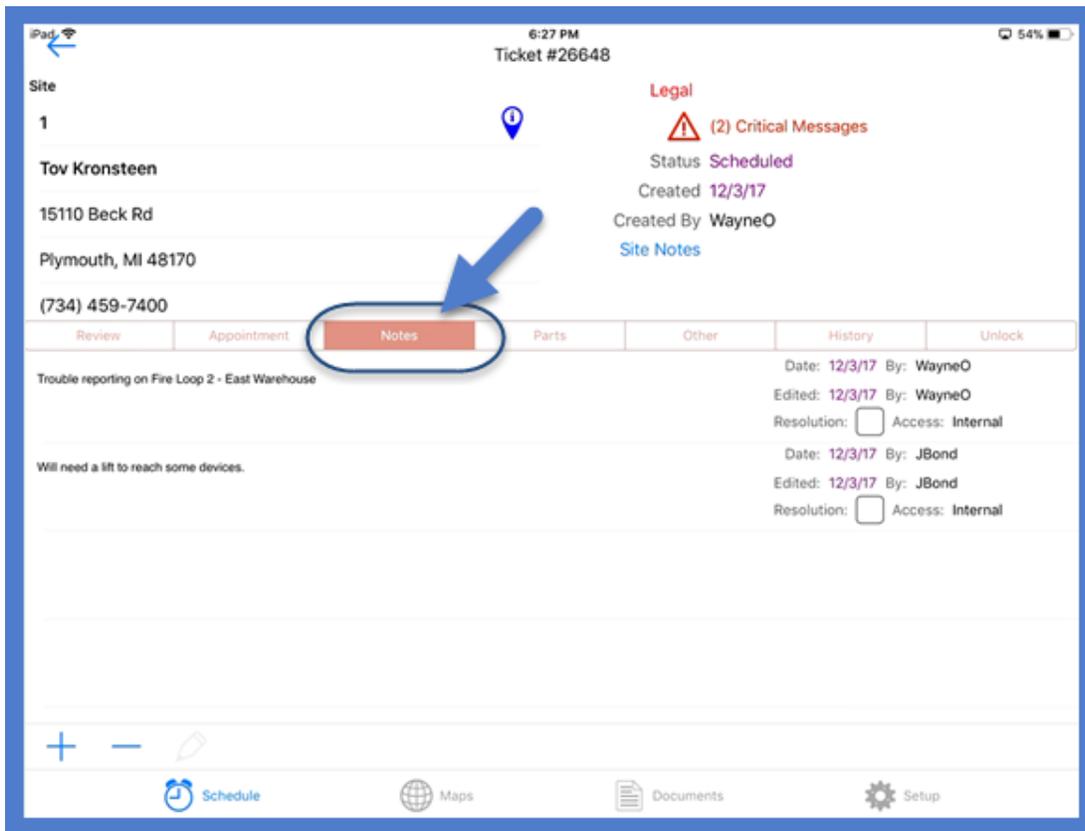
Notes

The Parts Tab

In the parts tab, the Technician can see not just the parts that are to be added to this ticket, but the existing equipment list of the customer. The existing equipment list is accessible by pressing the blue View/Hide System Equipment link.

Notes

The History Tab

One of biggest assets of the SedonaFSU vs paper tickets is complete access to all notes on all service and inspection tickets that have taken place on the system being serviced. This tab contains search and filter options.
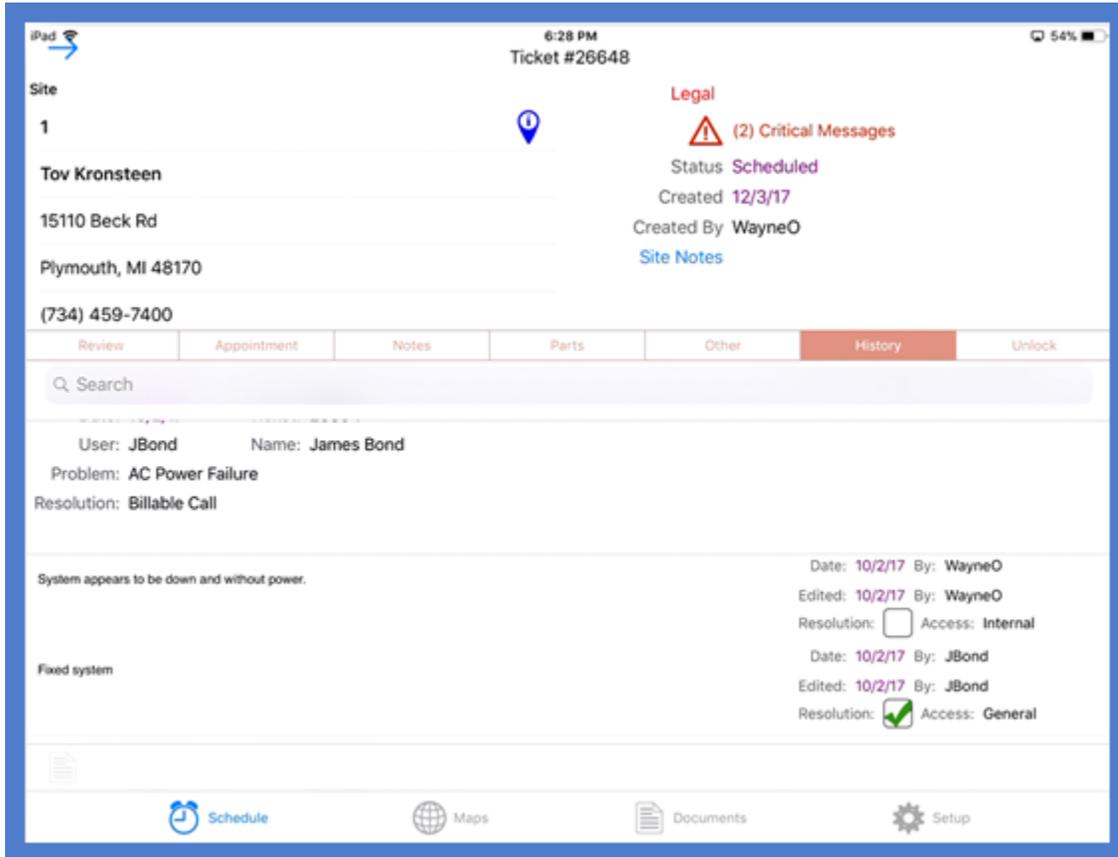
Notes
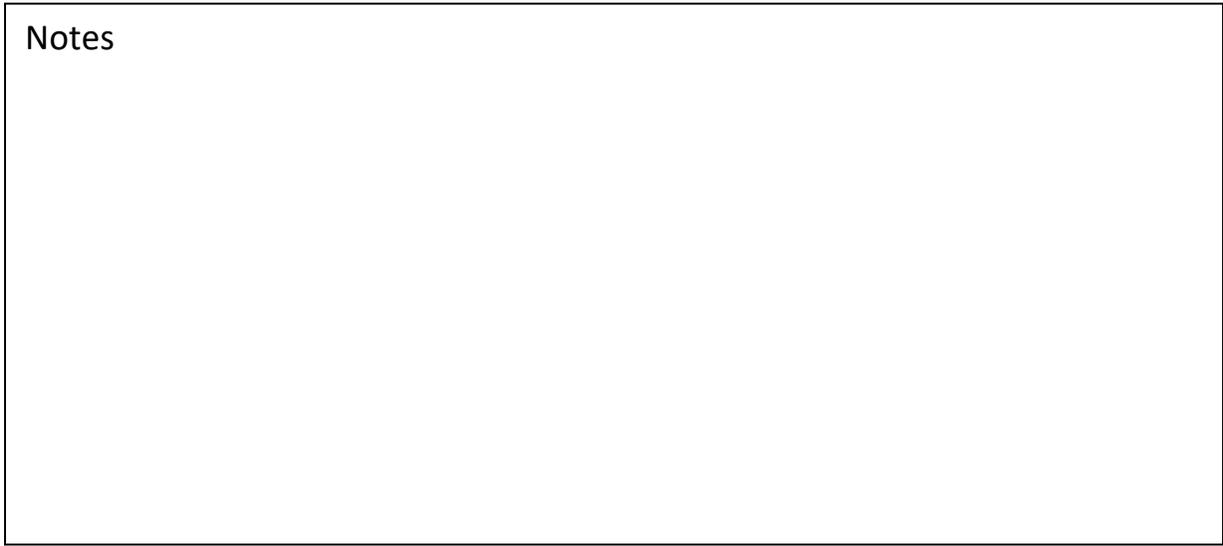
What the Technician Can Do

Data entry is still data entry. One of the greatest advantages of the SedonaFSU application is that now it only has to be performed once. In addition to the basic notes and parts used of a paper ticket, the Technician has access to other functions that could not be done via paper.

The Schedule Tab

The Technician   has the ability to reschedule an appointment to a different day or time within their own schedule. This is accessible by pressing the blue pencil $\varnothing$ button in the lower left of the schedule.

This feature can be enabled or disabled via the Technician   management tool.

Using search tools, the Technician   is also able to search for a specific ticket or job
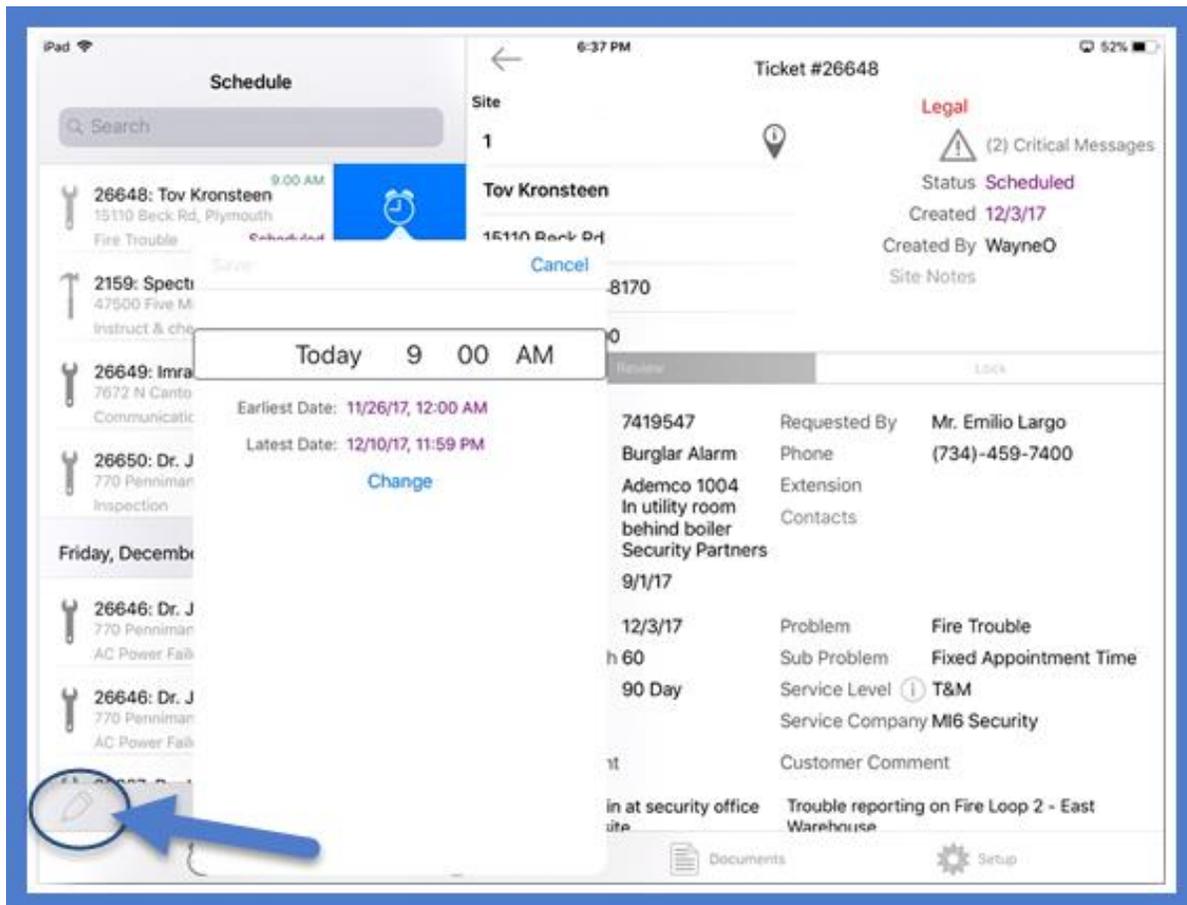
The Review Tab

Beyond viewing the details of the work order, the Technician has the ability to do several other functions. They can export the site address to the iOS device's GPS to give them directions to the site. This area is accessible by pressing the blue information button.

The Technician cannot only review other site contacts but has the ability to create, inactivate or update contacts. Updates can be anything from correcting a phone number or spelling of a name to collecting email addresses in the field, and is accessible by pressing the blue plus and minus links within the contacts link.
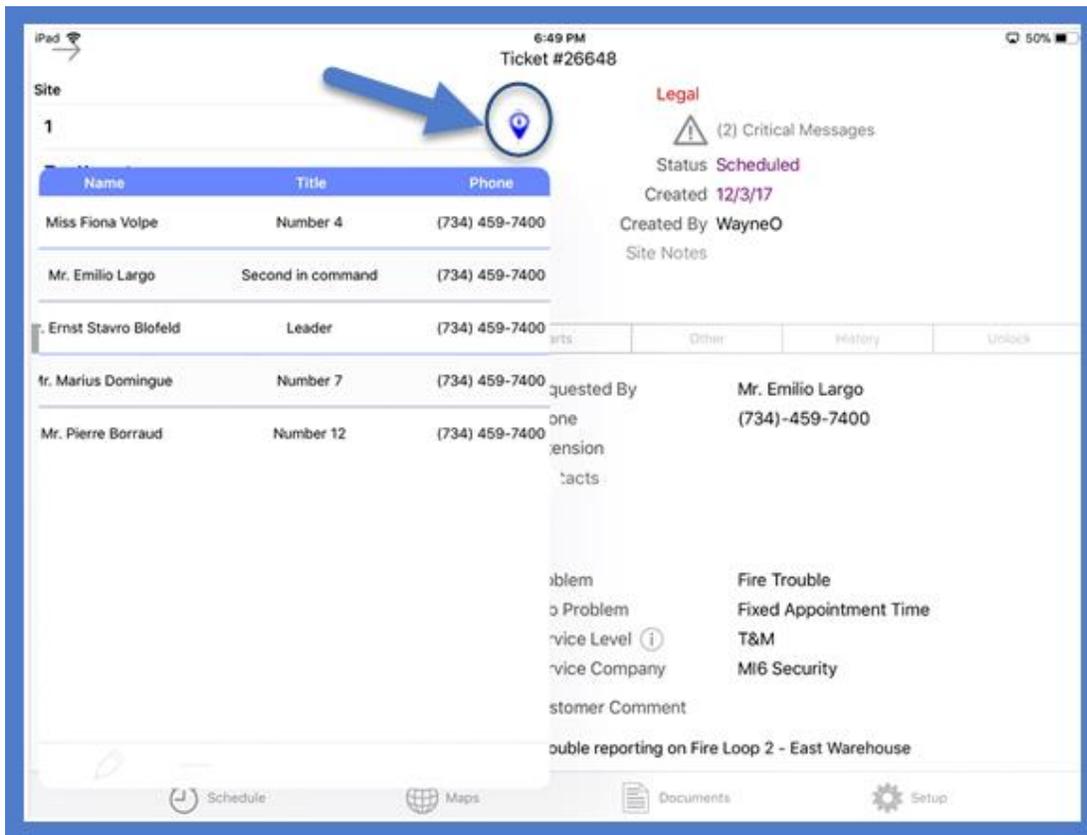
Notes

The Review Tab (continued)

The Technician   also has the ability to update three key pieces of system information Panel Type, Location & Monitoring Company. These areas are accessible by pressing the blue titles of each field.

This feature can be enabled or disabled via the Technician Management tool.
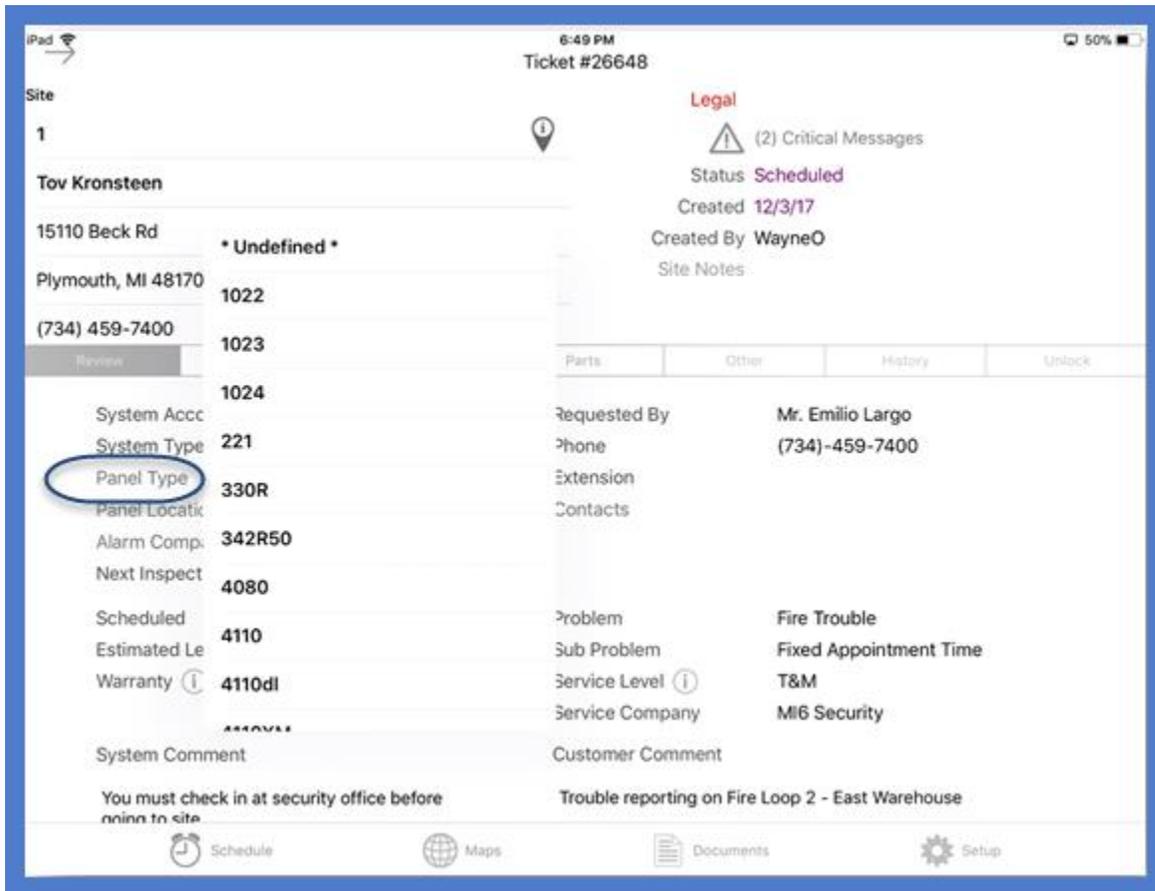

Notes

The Parts Tab

The Technician not only has the ability to add parts used to the ticket, but can search the stock of other warehouses for a needed part. This area is accessible by pressing the ⓘ information button next to the part during the search phase.

The Technician   can also mark if this part is a replacement and choose which part to substitute it with from the customer's equipment list. Part replacements can be done by dragging the preexisting part from the equipment list over the new part in the parts tab.
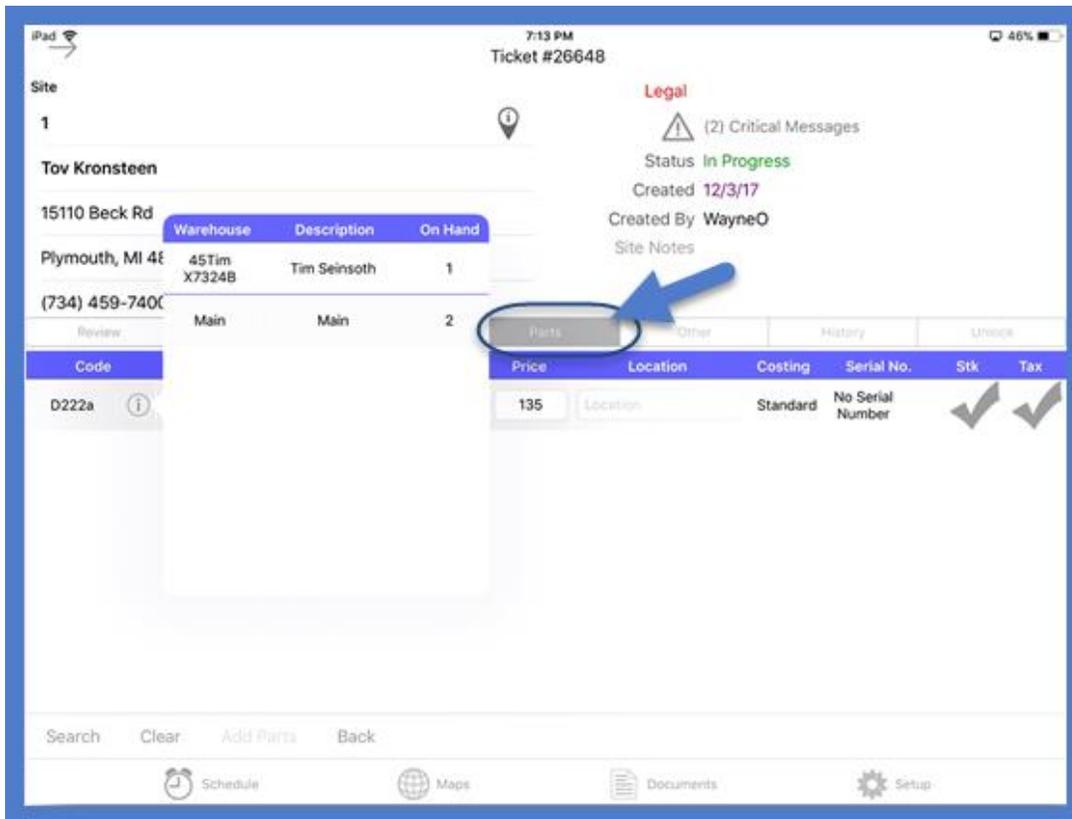
Notes

The Other Tab

The Technician   can also add any charges for non-part related items via similar search functions of the parts tab.

Notes

The Appointment Tab

After entering the appropriate times for dispatch, arrival and departure, the Technician will have three possible resolution options.

- Other – This resolves only this appointment
- Resolves Ticket – This resolves the ticket as a whole and marks it ready for billing review and/or closing.
- Go Back Queue – This special feature flags the ticket as having a reason to return. It will flag the ticket orange in the queue and place it in a special queue within SedonaOffice for follow-up.

Notes

The Labor Tab

Here is where the Technician   can override billable hours and labor rates for special circumstances.

The Technician   can also remove the Service Fee from billing. Please note that if your service fees include any portion of labor, like the first 30 minutes, when you remove the service fee you will also want to select Manual Labor to add back in the time that was part of the service fee so that it does not accidentally go unbilled.

Notes

The Accept Tab

Here is where the Technician can view a summary of the charges and obtain a signature for work complete. The Technician is able to override either the warranty or the service level to force the ticket to be billable when the service is for a non-covered reason.

The Technician can also view credit card and bank information on file and collect authorization to use them to pay for the charges for the ticket. This is accessible by pressing the ⓘ information button to right of Payment Method.
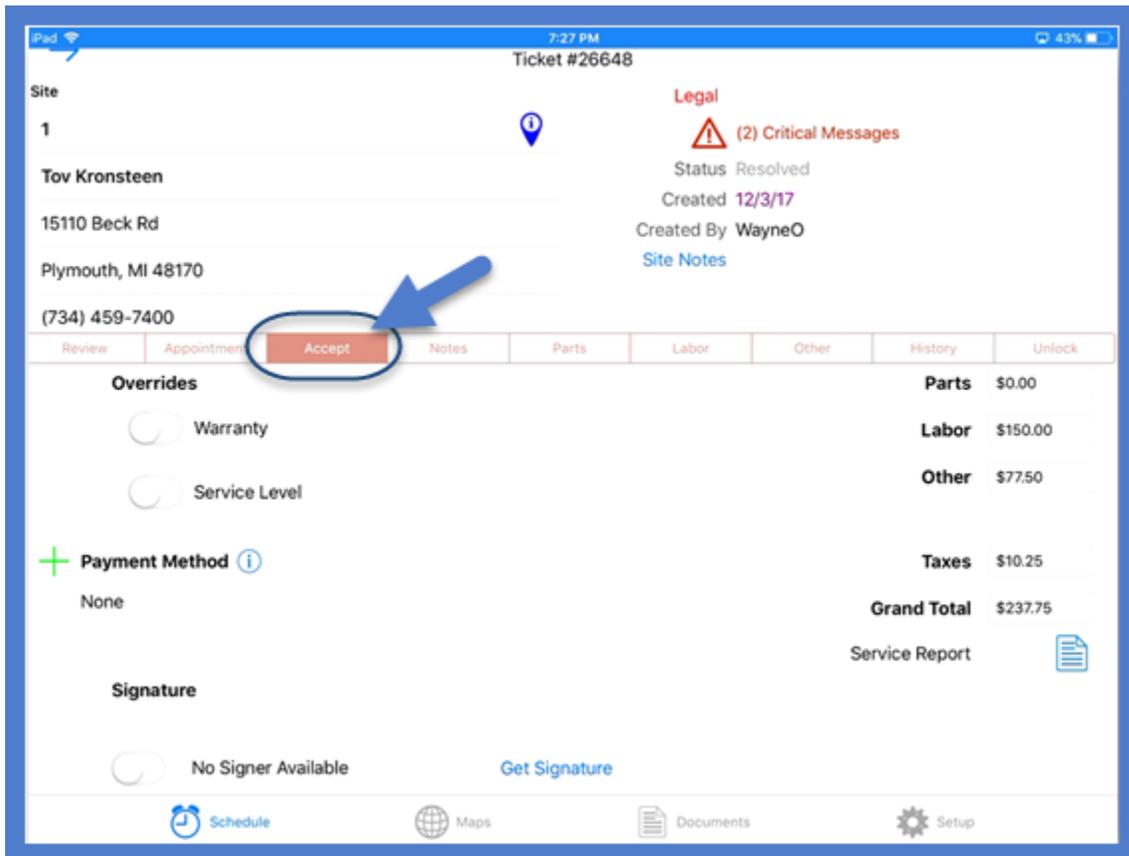
Notes

The Accept Tab (continued)

The Technician is also able to enter new credit card information to be used for the charges on the ticket. This is accessible by pressing the + button to left of Payment Method.

Both payment features can be enabled or disabled via the Technician management tool.

On this page, the Technician can obtain a signature or mark the ticket no signer available.

You can also have a link to your company's terms and conditions on your website as well as have a pop summary of your Terms and Conditions.

Technicians can also create a PDF of a traditional service ticket for those situations where the customer needs a copy. The is accessible by pressing the 📄 button next to the Service Report and then going to the Documents tab.
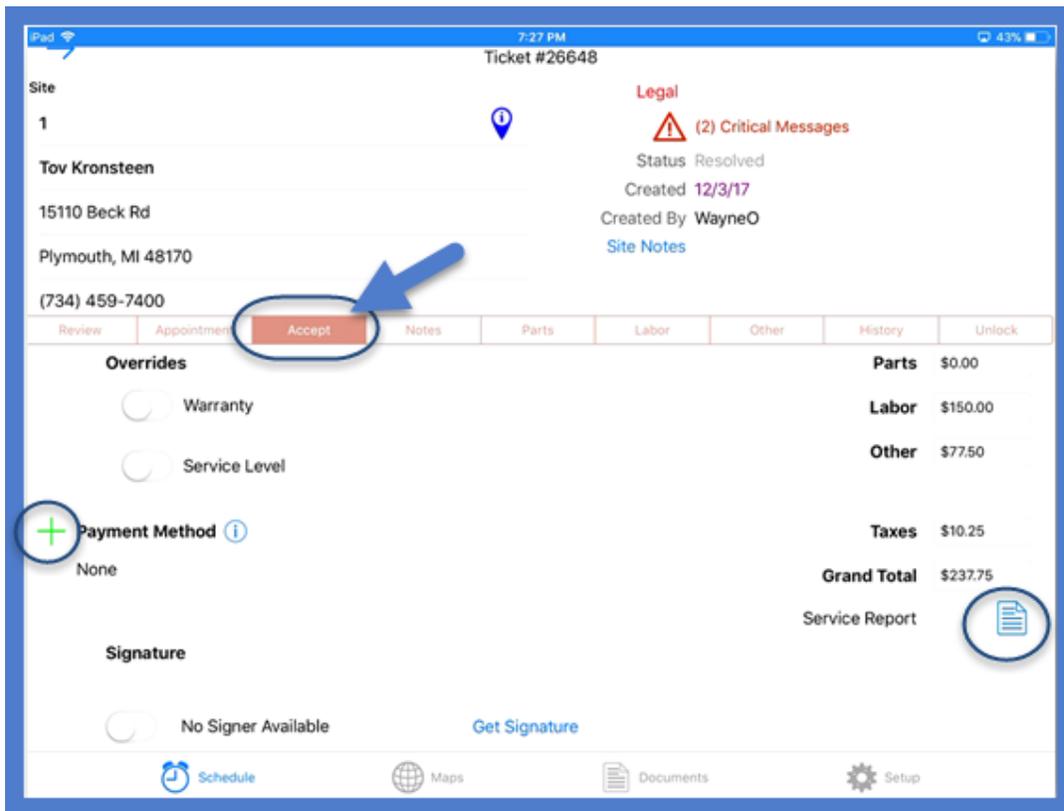
Notes

The Documents Screen

Here is where the Technician may view any documents within their security level associated with the specific ticket, system, site, etc. The SedonaFSU will not consume your data plan by automatically downloading all potential documents. Instead, it will provide a list of available documents from which the Technician may choose.

Additionally, the Technician may send the document via email or open the document in another application for editing and/or reimporting back into the SedonaFSU. This is a great option for items such as punch lists and inspection forms. This option is accessible by pressing the [ ] button.


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The Maps Screen

Here is where the Technician may quickly view of all the locations currently in their schedule.
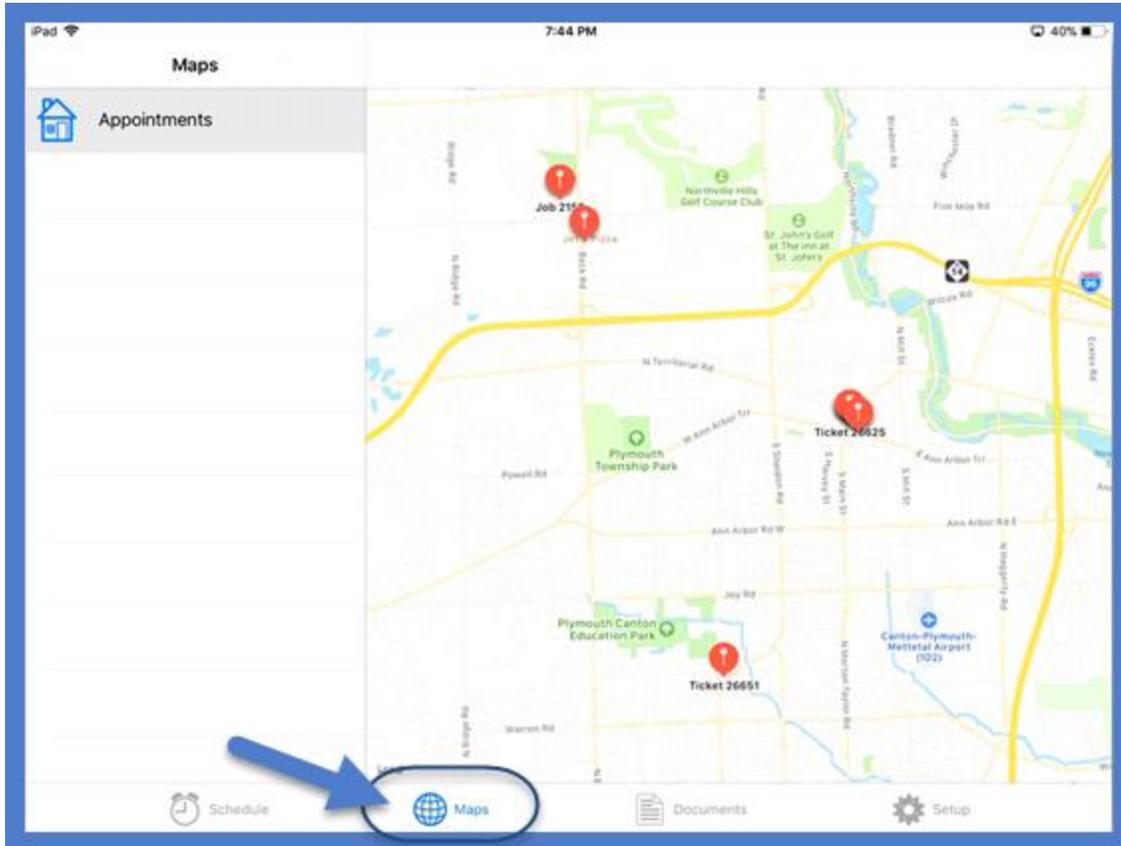
Notes

The Setup Option

In addition to the general login information, here is where the Technician is able to set the frequency of how often he/she wants the application to download various setup tables.

Note: The frequency may be set to the Technician's preference on each data item with the exception of General Setup, Technician and Parts. The frequency of these three item must be set to the value of 1.
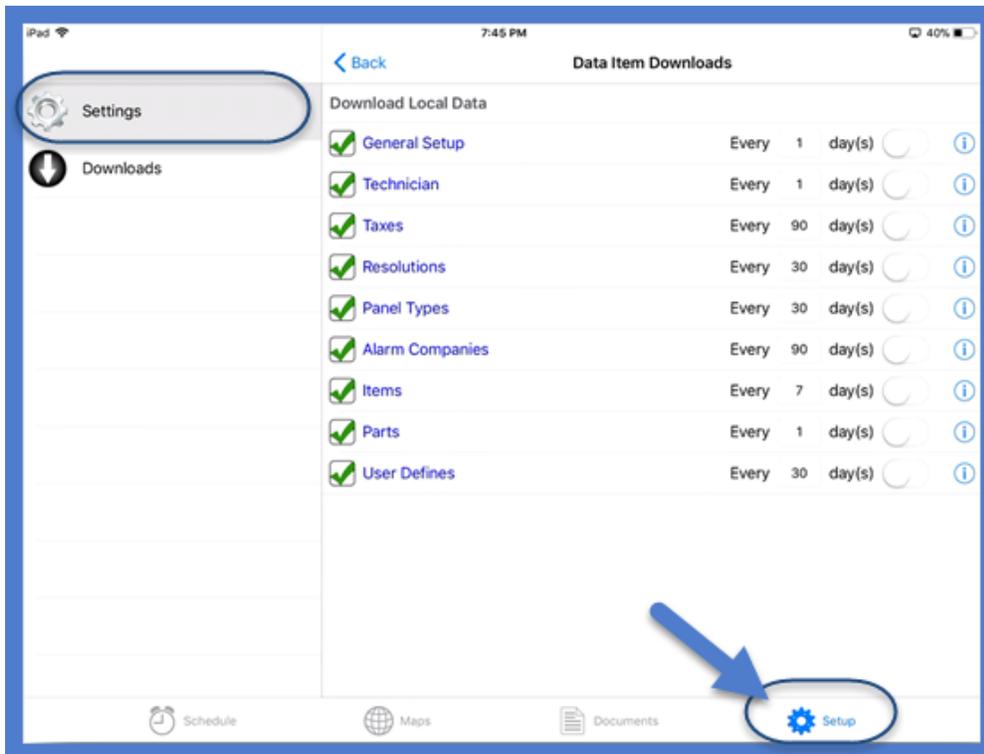
Notes

The Setup Option (continued)

The Technician may also export job, service, inspection and miscellaneous appointments into the device's Calendar application. This is accomplished by pressing the blue Service/Job Appointments and Miscellaneous Appointments links within the Downloads section.
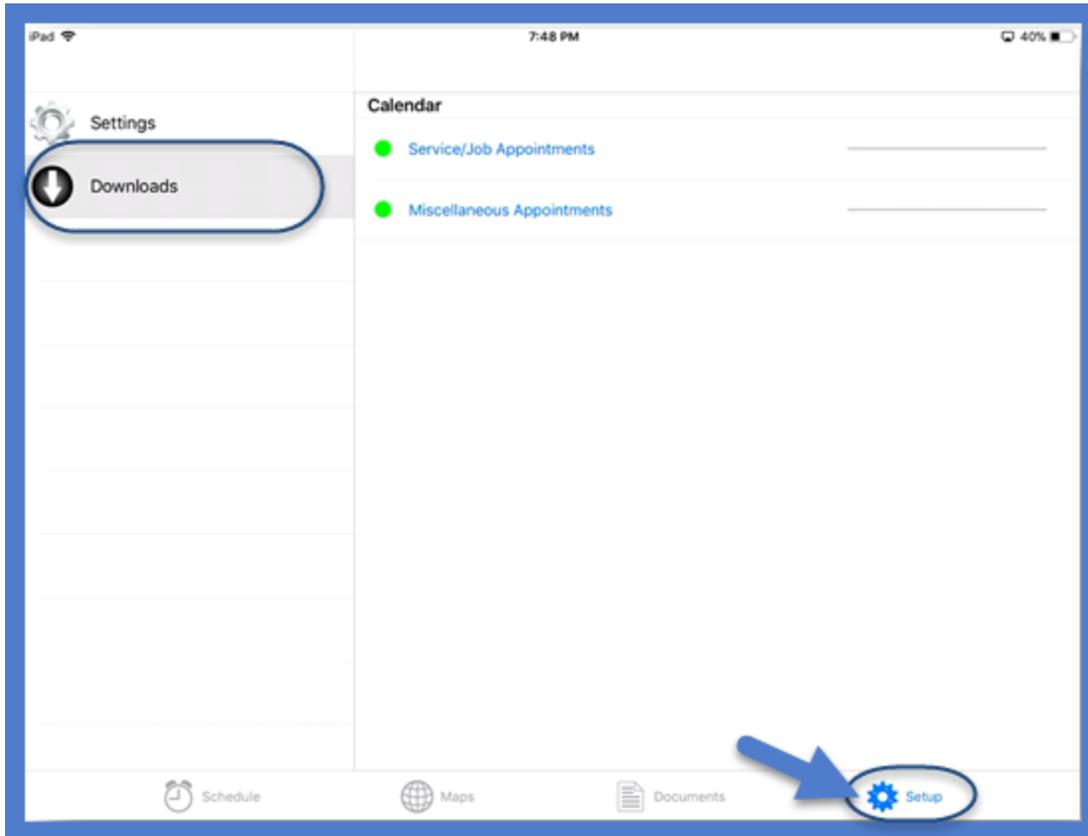
Notes

How Does the SedonaFSU Help Me?

The SedonaFSU provides several advantages to the operation of a Technician-based department.

Data Entry

Information is entered just once via the FSU application. Instead of office staff typing in data from a paper ticket into SedonaOffice, they are now proofreading the information for accuracy and completeness.

Live Data

The application synchronizes information back to SedonaOffice within seconds of data entry by the Technician. Schedulers will see appointments change color on the Schedule Board based on the status of the appointment.

- Blue – On the way to the site
- Green – On site
- Red – Departed the site
- Grey – Ticket complete and ready for billing and/or closing
- Gold – Ticket cannot be completed and needs a go back

As the Technician enters their time, the appointment will not only change colors but also update its location and size within the Schedule Board. This allows the Schedulers to see whether a Technician is running late or ahead of schedule. Schedulers can then act accordingly and either reschedule or add in an additional service call in the open time slot.

Data in both the Scheduler's and Technician's hands dramatically reduces the need for constant back and forth phone calls that interrupt the Technician's productivity, but also make schedulers unavailable to take customer calls.

Technicians can refresh the FSU application to see schedule changes. Technicians do not need to return to the office to collect paperwork and/or use generic blank tickets. When you make a change in SedonaOffice, all information will be available to the Technician in the field.

Special note: Schedule updates are not automatic within the FSU application, and will need to be refreshed manually. This is to prevent the application from draining the battery and overburdening the data plan by constantly synchronizing when unnecessary.

Notes

Tips & Tricks

SedonaFSU Field Basic

You can speak to 10 different companies and ask them how they handle a particular situation and receive 10 different answers. The biggest advantage and disadvantage to the Security/Fire/Integrator industry is customizable operations. Most of the fields that are displayed in the SedonaFSU are self-explanatory, but there are still some tips on how to get the most out of their usage.

Critical Message vs System Comment

Critical Messages

The critical message system within SedonaOffice is a great tool to convey important information about a customer or a system. However, the design is geared more toward office staff working in the SedonaOffice application. Within SedonaOffice, when accessing a customer record, Critical Messages are displayed as a pop up box; the user has to physically close the box to continue working within the customer.

This is not the case for Technicians via the SedonaFSU. Within the SedonaFSU application, the Technician must first click the critical message icon and then click the message within to view the critical message. Although completely functional, in the world of a Technician that wants to get in, get done, and get out almost on autopilot, there is a chance these types of messages will be overlooked.

System Comment

An alternative field to the Critical Message is the System Comment. The System Comment information is entered and maintained within a System record in SedonaOffice. Any data typed in this field will automatically be displayed on the main Review page of every appointment scheduled for that system. The Technician does not need to do anything special to access these comments – they are in plain view.
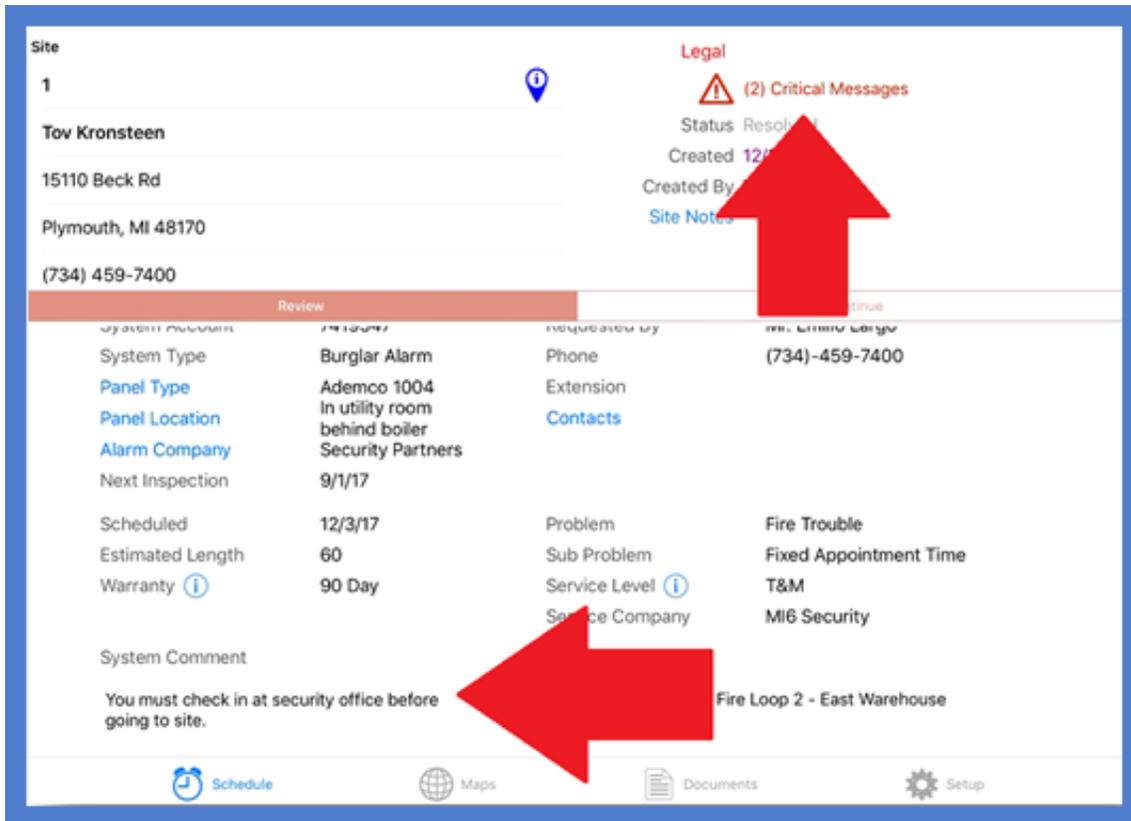
Notes

Panel Type

The use of the Panel Type may seem obvious at first, but there are ways to use it to its full potential. First, if you always list your panel types as Make and Model instead of just model, it will sort different brands panels together when scrolling through the list.

Ex. FireLite MS-9050UD

Panel Types are not exclusive to Intrusion and Fire type systems; they made be used for other system types as well. Here are just a few examples.

CCTV Systems:

- The Panel could be the DVR type like Clinton CE-EX4
- Zones could be various camera locations. A great way to tell if there are channels still available on the system or if an upgrade is needed to expand it.

Telephone Systems:

- Panel could be the server, Panasonic KX-NS1000
- Zones could be phone extensions or users. Again, handy to know how the system is setup and/or provide a phone call list to a customer.

Notes

Alarm Company

A legacy term from the early days of the security industry, this field is designed to indicate which central station is monitoring the system. Pretty straightforward but do not forget those "Non-Monitored", "App Only" and older "Direct Connect" options. These are great ways to give Technicians a heads ups on how to respond when it is not always clear where/how to place the system on test.

Service Level

This is the key field to letting your Technicians know whether a service plan is in place. Not only will the Service Level label provide the Technician a quick heads up that some services are covered, but can be set to govern discounts, and special part pricing so the billing is correct and automatic via the SedonaFSU.

Customer Comments

This data entry field is more philosophical in its usage. Every company will be a little different. However, if you have ever had a situation where a Technician blindly followed the instructions of the ticket without fact checking the situation, consider this golden rule. Your schedulers are your Triage Nurses; they collect the symptoms of the problem but do not tell the doctors what to do to fix it. The Technicians are your doctors in the field and it is up to them to truly diagnose and correct the situation. So instead of typing in "change battery on front door", consider "Low battery reporting form Zone 1 – Front Door". The solution may be obvious but what if the zone is incorrectly labeled or the sensor is malfunctioning and sending the wrong code.

Notes

Divergent Field Usage

Just because it says X does not mean you cannot use it for Y. There are several data fields that are purely informational, so their data has no effect on other areas of the software. Because of this, their usage can be "enhanced" or completely redefined.

System Type

Defining what a System Type is may be open for debate, whether it should define what the system does versus what the system is capable of doing. Keeping the system types focused on what the system is currently designed to do is not only a way of telling the Technician what type of system they are working on, but can also be a handy way to let the Technicians know if something is missing.

System says Burg/Fire but I only see burg zones on the zone list, I had better check to make sure the zone is up to date. Yes, here comes the fire department…

Service Company

If your company wants to separate the expenses of different Technician based upon areas of your company, consider using Service Companies to mark departments like Residential versus Commercial or Service versus Installs instead of just the company as whole. This can be a great way of making certain expenses will record to the appropriate department when those interdepartmental technician-sharing situations arise.

Notes

Problem Code

Problem codes may be as generic or detailed as you want, but a good suggestion is to focus on not just the types of problems your service department encounters, but types of service you may want to track. This can be particularly useful with situations such as go-back reporting. With some clever reporting, you can tell how often you had to return to a customer's site, but that does not tell you why. Consider using return types as problem codes.

- Return Recurring – Same problem surfaced as originally serviced, try an alternative repair.
- Return To Complete – Finishing work started on a previous ticket; check the history tab for notes on the other work order.
- Return Trip – Customer had a recent service call for an unrelated issue, be mindful and check for other potential issues. Zone 1 had a low battery last week, now its zone 2, maybe I should check the others while I am here.

Sub Problem Code

The Sub Problem Code (also referred to as a Secondary Problem Code) is a field this is often re-purposed. This is a static field that is always present and on the main review tab, and is an excellent place to store recurring style information that does not have an otherwise obvious place. Consider things like some of these scheduling note examples below. By having them in a static location, they are easier to identify instead of being buried in customer comments or notes.

- 2 Hour Arrival Window
- Do Not Reschedule
- Firm Appointment
- Can Go At Any Time
- Afternoon Appointment Only
- Two-Tech Team
- Multi-Day Service

Notes

Resolution Code

Have you ever wished you could have the same sort of multi-person queue system in service that exists within jobs? Consider using resolution codes to indicate the status of a ticket in addition to the resolution. The resolution code is a filterable field within the SedonaOffice ticket queue and you can filter which options are available for Technicians to use via the Technician Management Tool. The Technicians may select a Resolution Code such as "Tech – Replaced Part". This could be a flag to the inventory staff to review the parts on the ticket. When the inventory staff is finished, they can change the ticket resolution to something like "Reviewed – Part Replacement". The options are limitless, and having the status/person next at the beginning of the resolution makes it easier to filter the queue. Schedulers look for resolutions that begin with Tech, or Billing staff focus on resolutions starting with Reviewed.

Notes

Out of the Ticket Thinking

The data provided by the SedonaFSU may be used in numerous ways beyond simply billing for work performed.

Time Differences

By calculating the difference between the time the ticket was created, and the time of the arrival, you are able track the average time it is taking you to respond to your customers. This information may be great for marketing purposes if it is low and a great heads up to operations if it is high.

Why is it taking us an average of 8 days to get to our customers, are we scheduling efficiently?

Restocking Parts

Parts not being relieved from stock until the ticket is closed can be a challenge for inventory control, especially if tickets are not being closed the same day the service was performed. Using tickets added to the SedonaFSU is a great way report to inventory what parts the technician used so they can have the replacement stock ready the next day.

Notes

SedonaSync & SedonaFSU

SedonaFSU data used in conjunction with SedonaSync has limitless possibilities. Consider a sync event that sends an email to your customer letting them know the Technician is in route once they mark themselves as dispatched in the SedonaFSU.

Ticket Custom Fields

Custom Fields are also a great way to create custom automation, reporting and sync events using the SedonaFSU.

Special Note: By default, custom fields do not show up on the SedonaFSU unless data is already present. The feature is designed to push extra information out to the Technicians, but it is an excellent way to collect information from the Technicians. If you need to have the fields always appear so they are available for data entry, contact SedonaOffice support to have it setup.

Notes