

SedonaFSU Technician Management Tool



PERENNIAL SOFTWARE
Makers of SedonaOffice and AlarmBiller

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Requirements

The SedonaFSU Technician Management Tool is run as a Silverlight application. You will need to follow the steps provided in the guide using **Internet Explorer** as your browser and SedonaOffice locally installed. The Management Tool **WILL NOT** work with FireFox, Chrome, or any other browsers. You must create and delete SedonaFSU technicians in the Management Tool. SedonaOffice can't add or delete technicians for you, this must be done through the tool. Once a technician is added to the Management Tool email support@sedonaoffice.com to have it activated. You will not be able to log in with the credentials until a representative at SedonaOffice verifies the activation of the user.

Log In

Web Services

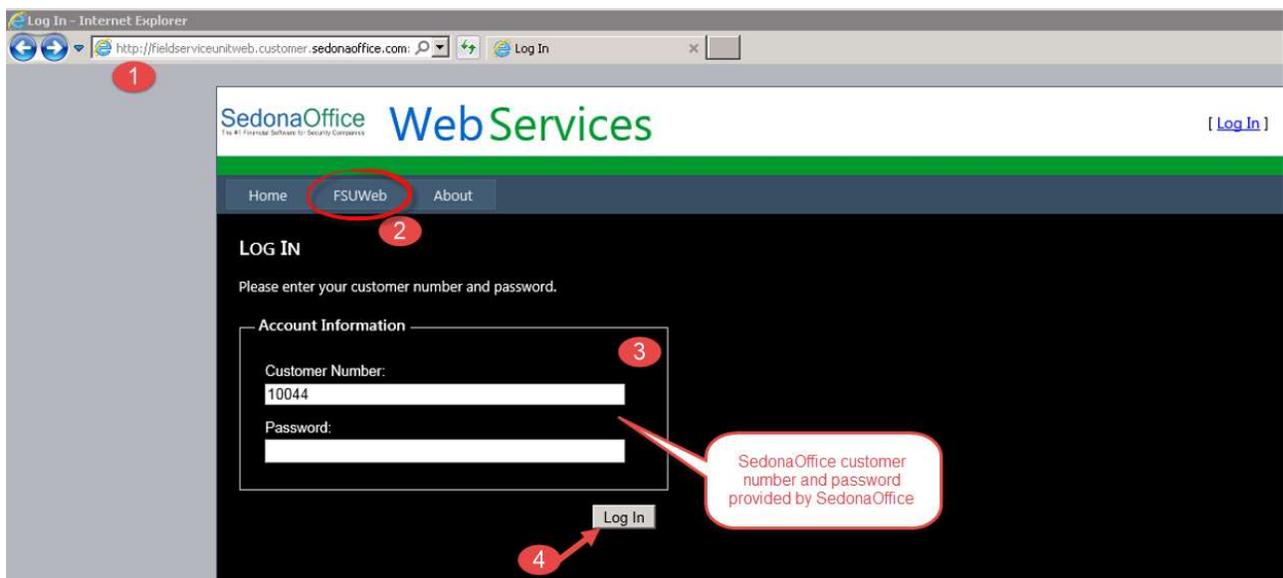
To access the login page for the SedonaFSU Management Tool, use the link provided using only **INTERNET EXPLORER**.

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

Account Information

Type in your SedonaOffice Customer Number and Password.

2. When logged in, click on the FSUWeb Tab
3. Account Information
 - Customer Number: SedonaOffice customer number
 - Password: Password is provided by SedonaOffice. Contact support@sedonaoffice.com to attain your password
4. Select Login



Manage Technicians

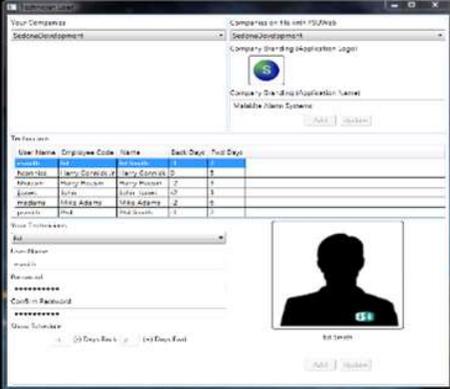
Basic instructions are provided in the screen shot below after logging in. To access your technicians, scroll down to the bottom left and click the Manage Your Technicians link.

SedonaOffice WebServices Welcome **10044!** [[Log Out](#)]

Home FSUWeb About

FSUWeb is far more than "the FSU over the web". It is many services coming together, running within all popular web browsers. It currently has the "appearance" of the standard FSU within the browser to help speed along training. However that appearance is deceiving as it is much more capable.

In order to create and modify technicians, passwords, and control the service tickets and jobs they will be able to work with, you download and run the technician web application shown below from a computer running SedonaOffice: The tool communicates with your SedonaOffice database as well as our service database and will be kept up to date on our servers. You can run the tool whenever you need to make adjustments.



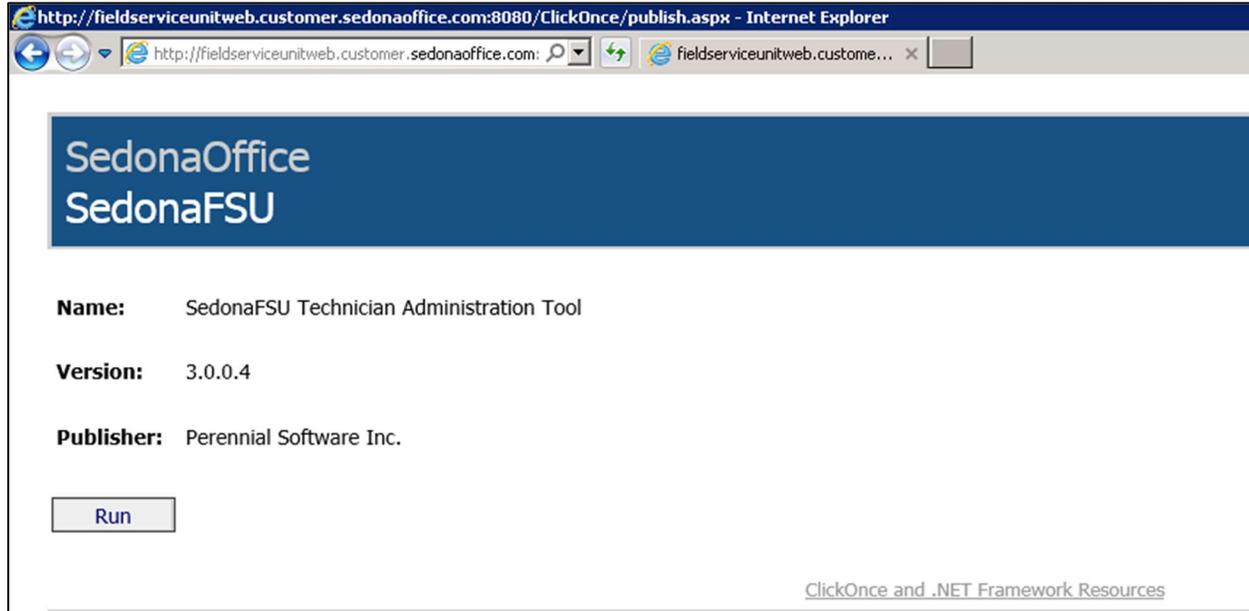
Use Name	Original Code	Hours	Back Days	For Days
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0
Admin	Admin	10	0	0

There are two basic sections, the top left shows the companies you have (most customers have one). The top right shows the companies our servers are aware of. When you select your company on the left, you will be asked to setup/add that company with our servers if you have not already done so. The company logo and branding information allows you to create a custom look for the application. A logo can be dragged and dropped onto the screen and the main menu text can be typed in the textbox. Note: the branding feature is not fully implemented at this time.

Once you have selected and/or created the company your technicians work for, you can add new or update technicians. The combo box "Your Technicians" shows a list of the available technicians in the chosen company. Note that after adding a technician, you must contact a member of the SedonaOffice team to activate the technician. Once activated, the user name and password you assign is used to log the technician onto FSUWeb. The "Days Back" and "Days Forward" allow you to set the appointments the technician can access.

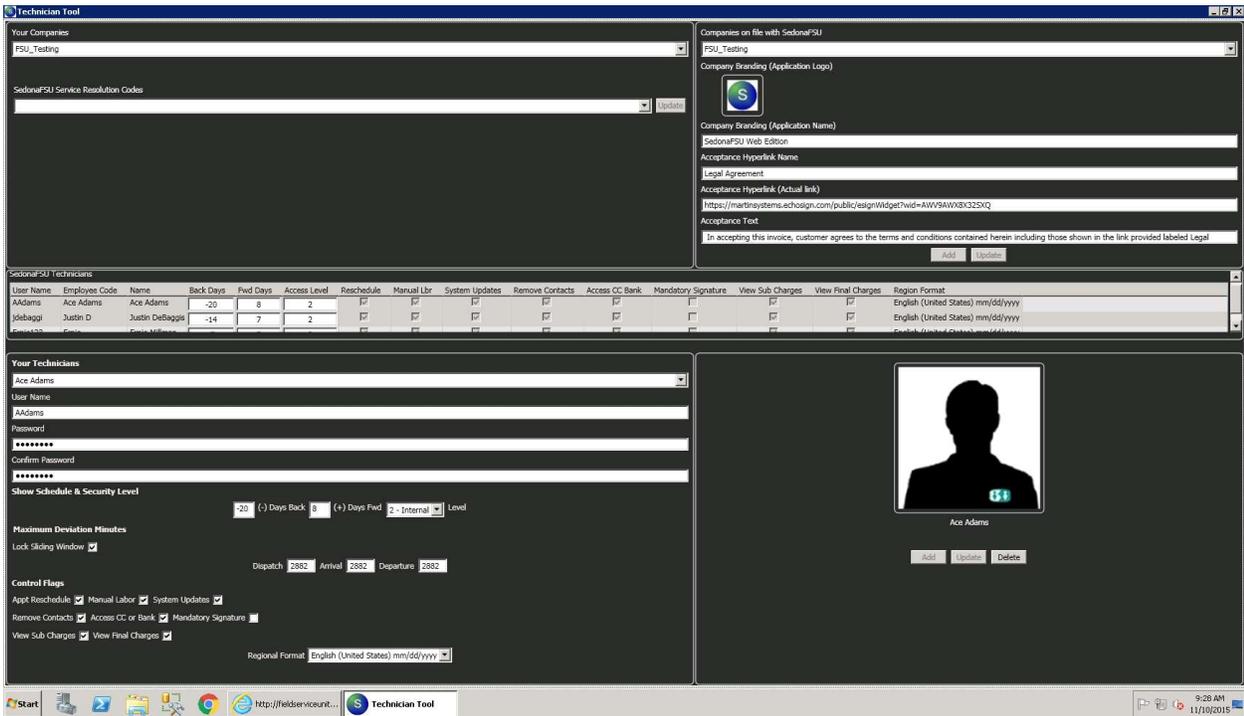
[Manage Your Technicians](#)

Select Run.



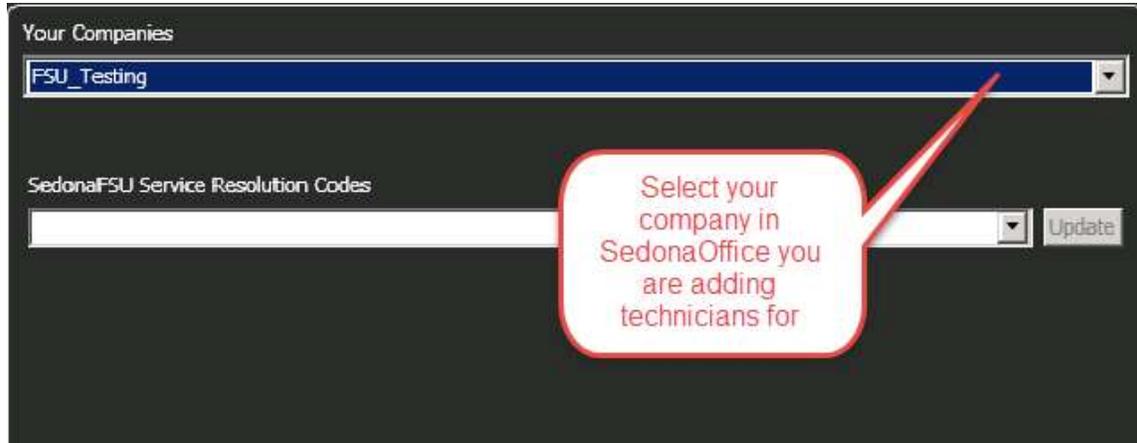
Technician Tool

Once the tool opens up, you can manage your SedonaFSU companies on file and technicians associated.



Adding Your Companies

These are your company databases on file in SedonaOffice (top left). If you intend on adding companies to use with the SedonaFSU, you will need to inform SedonaOffice so that the SedonaFSU scripts can be run on the company database.



Companies on File with SedonaFSU

In the top right is a list of companies SedonaOffice's servers are aware of. If your company is not listed please contact support@sedonaoffice.com. This is the company name you will use to log into the SedonaFSU.

Companies on file with SedonaFSU

FSU_Testing

Company Branding (Application Logo)



Company Branding (Application Name)

SedonaFSU Web Edition

Acceptance Hyperlink Name

Legal

Acceptance Hyperlink (Actual link)

http://www.sedonaoffice.com

Acceptance Text

In accepting this invoice, customer agrees to the terms and conditions contained herein including those shown in

Add Update

Terms and Conditions

*To activate this portion, email support@sedonaoffice.com

- **Acceptance Hyperlink Name:** Name that will appear in the SedonaFSU application under the Acceptance tab. The link text may be up to 255 characters
- **Acceptance Hyperlink (Actual Link):** Hyperlink that will show in the Acceptance tab under the signature that you may present to the customer. Ex: A link covering your service agreement. The link itself can be up to 255 characters. For example you may use a link to a contract you created in Adobe EchoSign for a customer to sign.
- **Acceptance Text:** Add acceptance verbiage to present to the customer when they are signing a ticket. The acceptance text allows up to 1024 characters.

Company Branding (Application Name)

SedonaFSU Web Edition

Acceptance Hyperlink Name

Legal

Acceptance Hyperlink (Actual link)

http://www.sedonaoffice.com

Acceptance Text

In accepting this invoice, customer agrees to the terms and conditions contained herein including those shown in

Add Your Technicians

The “Your Technicians” drop down displays the entire list of technicians that you have configured in SedonaOffice. This is where you can add your technicians to SedonaFSU. Select a technician you want to add and populate the User Name and Password.

The screenshot shows a form titled "Your Technicians" with a dark background. At the top is a dropdown menu. Below it are three text input fields labeled "User Name", "Password", and "Confirm Password". At the bottom left is a button labeled "Show Schedule". A red callout bubble points to the dropdown menu with the text: "Select from the list of technicians you have created in SedonaOffice".

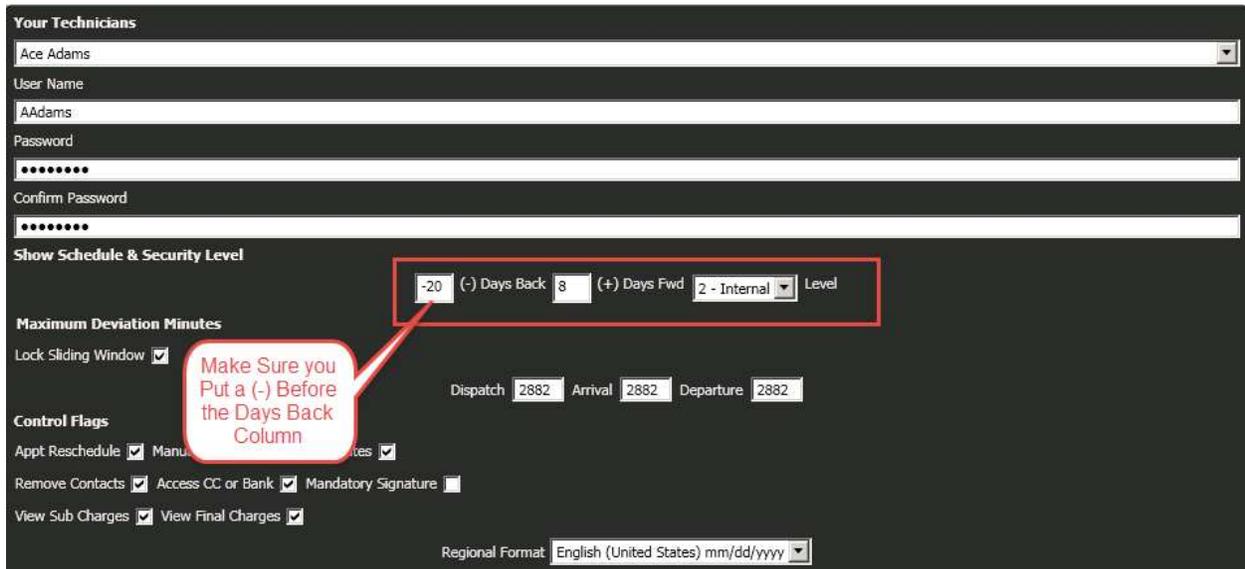
Technician Username & Password

The technician will use this user name and password along with the company name and company number to log into their account for the SedonaFSU.

User Name: Create a User Name for your technician that they will use to log into the SedonaFSU.

Password: Create a password for your technician that they will use to log into the SedonaFSU.

Show Schedule & Security Level



Your Technicians
Ace Adams
User Name
AAdams
Password
Confirm Password

Show Schedule & Security Level

(-) Days Back (+) Days Fwd Level

Maximum Deviation Minutes
Lock Sliding Window

Control Flags
Appt Reschedule Manual
Remove Contacts Access CC or Bank Mandatory Signature
View Sub Charges View Final Charges

Regional Format

Dispatch Arrival Departure

Make Sure you Put a (-) Before the Days Back Column

(-) Days Back: Set the number of days back technicians can see appointments on their schedule (example, -7)

**You must put (-) before the number in Days Back.*

(+)Days Forward: Set the number of days forward technicians can see appointments on their schedule (example, 7).

Security Level: This controls the technician's access level to view and add notes and documents (if you have purchased SedonaDocs).

***If you purchased SedonaWeb portal Level 1 notes show up on the service tickets for customers to view.**

Maximum Deviation Minutes

The maximum minutes feature has seen a significant improvement towards a "real time" environment. You now have the ability to specify a true window (in minutes) around any of the dispatched, arrived, or departed times. The current time is used as the window center point during the initial adjustment (Dispatch Now, Arrive Now, or Depart Now buttons). The window can be locked with the first change, or sliding using the current value of the respective time.

The default for each of the windows is 2882 (-24 hours + 24 hours) which allows the technician to adjust the date control by one (1) day backward or forward. You may tighten this to as much as 20 minutes on either side (40 or less).

Show Schedule & Security Level

-20 (-) Days Back 8 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window

Dispatch 2882 Arrival 2882 Departure 2882

Control Flags

Appt Reschedule Manual Labor System Updates

Remove Contacts Access CC or Bank Mandatory Signature

View Sub Charges View Final Charges

Regional Format English (United States) mm/dd/yyyy

Lock Sliding Window: If checked, the first adjustment time itself becomes the center point. Check to lock the maximum minute's window around the first dispatch, arrival, or departed time.

Dispatch: Select the maximum amount of time in (even) minutes the technician can deviate around the current time when dispatching. The minutes are divided by two and subtracted/added to the current time. Once the dispatch time is set, the window behavior depends on whether it is locked or unlocked. If set to 0, the dispatch now button is used exclusively.

Arrival: Select the maximum amount of time in (even) minutes the technician can deviate around the current time when arriving. The minutes are divided by two and subtracted/added to the current time. Once the arrival time is set, the window behavior depends on whether it is locked or unlocked. If set to 0, the arrive now button is used exclusively.

Departure: Select the maximum amount of time in (even) minutes the technician can deviate around the current time when departing. The minutes are divided by two and subtracted/added to the current time. Once the depart time is set, the window behavior depends on whether it is locked or unlocked. If set to 0, the depart now button is used exclusively.

Example 1 - Maximum Departure is set for zero (0) minutes. In this scenario, only the "depart now" button is available and maximum control over the technicians. When the technician selects this button, the current time is placed into the departure time. No

further adjustment can be made.

Example 2 - Maximum Departure is set to 5; five (5) minutes. Like the above, the "depart now" button when selected places the current time into the departure time. The technician can modify the departure time from the current time plus five (5) minutes. If the clock on their computer says it's 3:00 PM, they are kept honest by only being able to adjust as far as 3:05 PM.

Control Flags

***Check the boxes if you want these features to be available for your technician.**

***Uncheck the box if you want to disable the use for your technician.**

Appt Reschedule: Check to allow a technician to reschedule an appointment (this does not allow them to create a new appointment).

Manual Labor: Check to allow a technician to override charges in the Labor tab using Manual Labor button.

System Updates: Check to allow a technician to update the Panel Type, Panel Location, Alarm Company, and add/edit Contacts in the Review screen.

View Sub Charges: Check to allow a technician to view sub charge amounts for Parts, Labor, Job Units, Materials, Install charges, Purchase Orders, and Miscellaneous Charges. If this tab is disabled no dollar values are shown in any screens before the Acceptance tab in a service ticket.

View Final Charges: Check if the technician can see final charges (in the acceptance tab). If unchecked this will disable a technician and customer from viewing total amounts for parts, labor, other, taxes, and grand total.

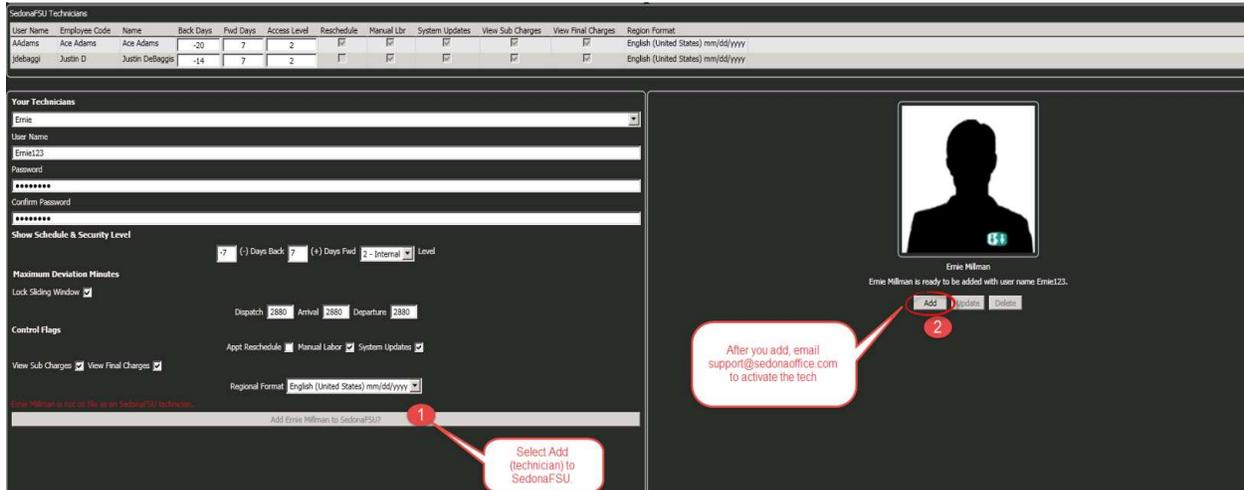
Remove Contacts: Check to not allow technicians to delete a contact

Access CC Or Bank: Permission to not allow technicians to have access to CC or Bank information. When unchecked in the technician setup tool, there is no ability to view or select any existing credit card or bank accounts for service ticket billing. Also, adding credit cards is not allowed nor can the iDynamo card reader product be used.

Mandatory Signature: Make customer signature mandatory, so that technician cannot select “no signer available”.

Save Technician

When you have these settings filled out, select **Add (Technician Name) to SedonaFSU?** as shown in step 1 below. Then select Add in step 2 to complete the process.



Important Rule: Whenever you add a technician to Management Tool, you need to email justind@perennialsoftware.com or support@sedonaoffice.com. We will activate the login so the technician can begin using it. Your billing will be adjusted based on the number of active technicians in the technician tool.

SedonaFSU Technicians

Once you save the technician a listing of all your current SedonaFSU technicians in SedonaFSU will appear. This area can be resized by dragging the border of that middle frame up or down in order to display more technicians at once.

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	View Sub Charges	View
aadams	Ace Adams	Ace Adams	-20	7	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Deleting Technicians

Deleting technicians must be done through the technician management tool. SedonaOffice can't delete technicians for you. This will only delete the technician from the technician management tool so they are no longer able to log into SedonaFSU. This will not affect the technician information in SedonaOffice.

1. Select the technician you would like to delete.
2. Select Delete.

SedonaFSU Technicians

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	Region Format
AAdams	Ace Adams	Ace Adams	-20	8	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States) mm/dd/yyyy				
jdebaggi	Justin D	Justin DeBaggis	-14	7	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States) mm/dd/yyyy				
Emil123	Emil	Emil Milnes				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English (United States) mm/dd/yyyy				

Your Technicians

Ace Adams

User Name
AAdams

Password

Confirm Password

Show Schedule & Security Level

-20 (-) Days Back 8 (+) Days Fwd 2 - Internal Level

Maximum Deviation Minutes

Lock Sliding Window

Dispatch 2882 Arrival 2882 Departure 2882

Control Flags

Appt Reschedule Manual Labor System Updates

Remove Contacts Access CC or Bank Mandatory Signature

View Sub Charges View Final Charges

Regional Format English (United States) mm/dd/yyyy

Ace Adams

Add Update Delete

Select Delete

Select the Technician you would like to delete.

Modify Technician Information

If you need to change modify a technicians information in any way you must do it through the technician management tool.

1. Highlight the technician you would like to make changes for.
2. Make the appropriate adjustments.
3. Select Update.

*As soon as you select update these changes will take effect immediately.

The screenshot displays the 'SedonaFSU Technicians' management interface. At the top, there is a table with columns: 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, and Region Format. The first row is highlighted, and a red callout with the number '1' points to the 'Update' button in the 'Remove Contacts' column.

Below the table is a form titled 'Your Technicians' for editing 'Ace Adams'. The form includes fields for User Name, Password, Confirm Password, and a 'Show Schedule & Security Level' section with 'Maximum Deviation Minutes' set to -20, 'Days Back' set to 8, and 'Days Fwd' set to 2. A red callout with the number '2' points to the 'Level' dropdown menu. The 'Control Flags' section has several checkboxes checked, including 'Appt Reschedule', 'Manual Labor', 'System Updates', 'Remove Contacts', 'Access CC or Bank', 'Mandatory Signature', 'View Sub Charges', and 'View Final Charges'. A red callout with the number '3' points to the 'Update' button at the bottom right of the form.

On the right side of the form, there is a profile picture placeholder for 'Ace Adams' and buttons for 'Add', 'Update', and 'Delete'. A red callout with the number '3' points to the 'Update' button.