



2013 SedonaOffice Users Conference

Sedona FSU Web Edition

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Overview

The Purpose of this guide is to provide Users of SedonaOffice an understanding of the SedonaFSU Web's (Field Service Unit) functionality and features. SedonaFSU Web is a web based field service unit device that allows your technicians to complete service, view and update inventory and other data instantly, while working through a service ticket. Any information the technician saves will be immediately updated and appear on customers SedonaOffice company database.

Requirements

The Web app that your technician will log into is dependent upon Microsoft Silverlight. To access this app you must use a notebook, netbook or tablet running Windows XP SP2+, Vista, Windows 7, OSx Snow Leopard or OSx Lion (32 or 64 bit for all). You may try some of the following O's and Browsers Internet Explorer 8 and 9, FireFox, Google Chrome, and Safari. Sedona FSU can communicate with your home office with some type of broadband connection via Wi-Fi, G3, G4, Wi-lan, etc.

Connect to FSU WEB

To Connect to FSUWEB you must select the proper time zone. This will be important for data accuracy when entering your departure, arrival, and dispatch times.

Eastern Time,

<https://fsuwebeast.sedonaoffice.com>

Central time,

<https://fsuwebcentral.sedonaoffice.com/>

Mountain time,

<https://fsuwebmountain.sedonaoffice.com/>

Arizona time,

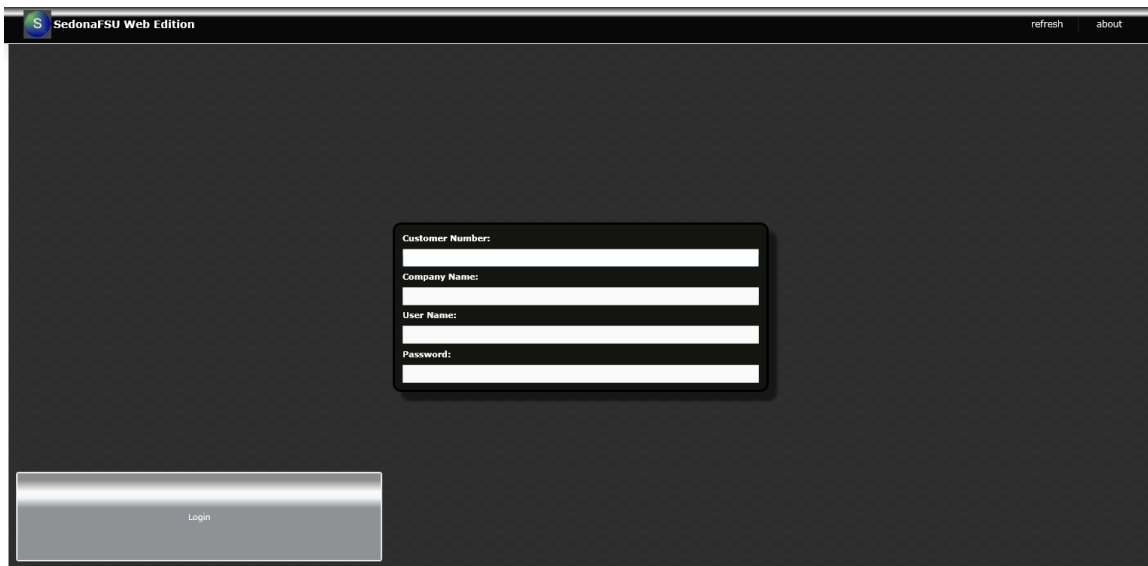
<https://fsuwebarizona.sedonaoffice.com>

Pacific time,

<https://fsuwebpacific.sedonaoffice.com/>

FSU Web Login

Once a customer shows interest in the FSU Web and notifies us of their intent to use the product, we activate the customer so they can add the technicians on their own using the technician management tool. Once they add a tech they simply need to email the first name of the technician to support@sedonaoffice.com. The FSU Web Login page appears as below for the technician:



Customer Number

Enter in the company number that all of the technicians will use when logging into the FSU.

Company Name

Enter in the company name

User Name & Password

Each technician will receive a username and password selected by the user during the installation. After the install, using the technician management tool the user can add individual technicians and set a unique password per technician. You must only notify SedonaOffice with the name of the technician and company for a first time activation. Once the technician has logged in successfully the browser will store all the values except the password so that they will come up automatically in the future. Be sure to write down all FSU Web Edition Login information in case the information does not display when logging in.

Service Ticket Display

When first logging into the FSUWeb; a list of tickets and Jobs assigned to that technician will display. The tickets below are scheduled for the day the technician chooses to view. To work in a particular ticket or job, highlight the row in the upper tier then click on the "Go to Service" button located in the center under the technician with the wrench. The ticket will contain the following information:

The screenshot shows the SedonaFSU Web Edition interface. At the top, there is a header with the SedonaFSU logo and the text "SedonaFSU Web Edition". Below the header is a table of service tickets. The table has columns for Type, Date, Time, Ticket/Job, Name, Address, City, Prob/Task, Status, and Map. The table is filtered for the date 12/28/2012 and shows 5 items. The first row is highlighted in blue. Below the table, there is an "Action Bar" with "Map" and "Appointments" buttons. The "Appointments" button is selected, and a calendar for December 2012 is displayed. The calendar shows the date 12/28/2012 selected. To the right of the calendar, there is a "Service Ticket 24922" section with a wrench icon and a "Go to Service" button. To the right of the "Go to Service" button, there is a "Ticket Details" button. The "Ticket Details" button is highlighted with a red box. To the right of the "Service Ticket 24922" section, there is a "Customer:" field with a value of "Customer:". Below the "Customer:" field, there is a "Time:" field with a value of "12/28/2012 08:15 AM". Below the "Time:" field, there is a "Problem:" field with a value of "AC Power Failure". Below the "Problem:" field, there is a "Status:" field with a value of "Scheduled".

Type	Date	Time	Ticket/Job	Name	Address	City	Prob/Task	Status	Map
	12/28/2012	08:15 AM	24922	Michael Jones	500 Main St.	Chagrin Falls	AC Power Failure	Scheduled	<input type="checkbox"/>
	12/28/2012	09:45 AM	24760	Carlesimo/Shumway	216 The Terrace	Sea Girt	Cant Set B/A	Scheduled	<input type="checkbox"/>
	12/28/2012	11:00 AM	24923	Lawz, Derek/esther	28 Driftwood Dr	Parlin	Carbon Monoxide Replacmen	Scheduled	<input type="checkbox"/>
	12/28/2012	01:15 PM	24925	Miele, Joseph/Emily	210 Colts Neck Rd	Farmingdale	Access Problem	Scheduled	<input type="checkbox"/>
	12/28/2012	02:45 PM	24926	Morretti, Ms Christina	6 North Ward Ave	Rumson	AC Power Failure	Scheduled	<input type="checkbox"/>

Date & Time

The dates and times that the tickets are scheduled for are listed. These are set dates and times, and, if incorrect, must be changed through the SedonaService module or reschedule tool.

Ticket/Job

This will show the work order number for the ticket or job your technician will be working on.

Name

The name of the customer you are providing service for.

City & Address

The sites city and address will be listed to help your technician locate the service site.

Problem Code/Task

This is the problem code or task that is selected when a ticket is being created.

Status

Status lets you know the progression of the ticket; Resolved, Completed, In Progress, Etc.

Ticket Details

Gives your technician a snap shot of the ticket detail on the home screen. The technician simply selects the ticket from the schedule, and opens/closes the detail to see more information.

Ticket Details	
System Acct	542922
System Type	Burglar Alarm
Panel Type	D6112
Next Inspection	
Contact	Mark Morretti
Phone	(732) 933-9397
Extension	
Service Level	T&M
Site Phone	
Map Code	
Cross Street	
Warranty	N/A
Warranty Expires	No Warranty
Customer Comment	Keypad flashes power failure, can't get to reset.
System Comment	system comment

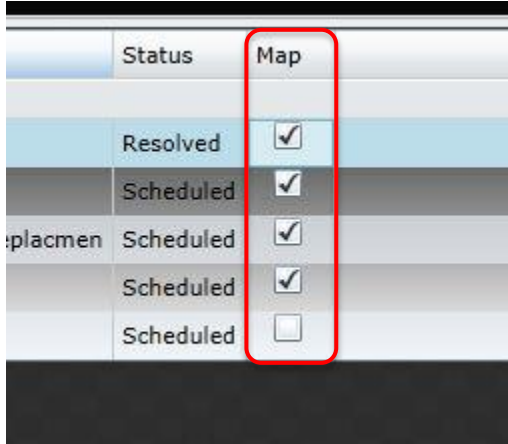
Service Ticket Calendar

In the bottom left side of the service ticket, the Service Ticket Calendar will be displayed. This tool allows for easy navigation amongst scheduled tickets. The days that have an X through them have no scheduled tickets for that specific day. Days that do not have an X through them have at least one ticket scheduled. The gray shaded day is the current day. The blue selected day is the date of the service tickets you are currently viewing. The days you can see in the past and future are assigned per technician in the technician management tool.



Site Mapping

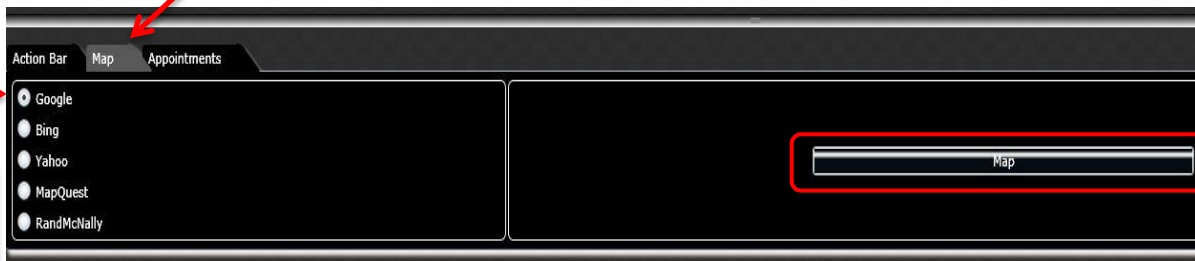
While the technician is in the home screen they may click on the “Map” checkbox to view the route to different site locations of two or more tickets.



	Status	Map
	Resolved	<input checked="" type="checkbox"/>
	Scheduled	<input checked="" type="checkbox"/>
placmen	Scheduled	<input checked="" type="checkbox"/>
	Scheduled	<input checked="" type="checkbox"/>
	Scheduled	<input type="checkbox"/>

Maps

In the bottom left of the technicians home page to the right of the “Action Bar” is the “Map” tab, allowing you to select 1 of the 5 various websites to view your route. Select the appropriate site you would like to use (Google, Bing, Yahoo, MapQuest, and RandMcnally) and then click the “Map” button to the right.

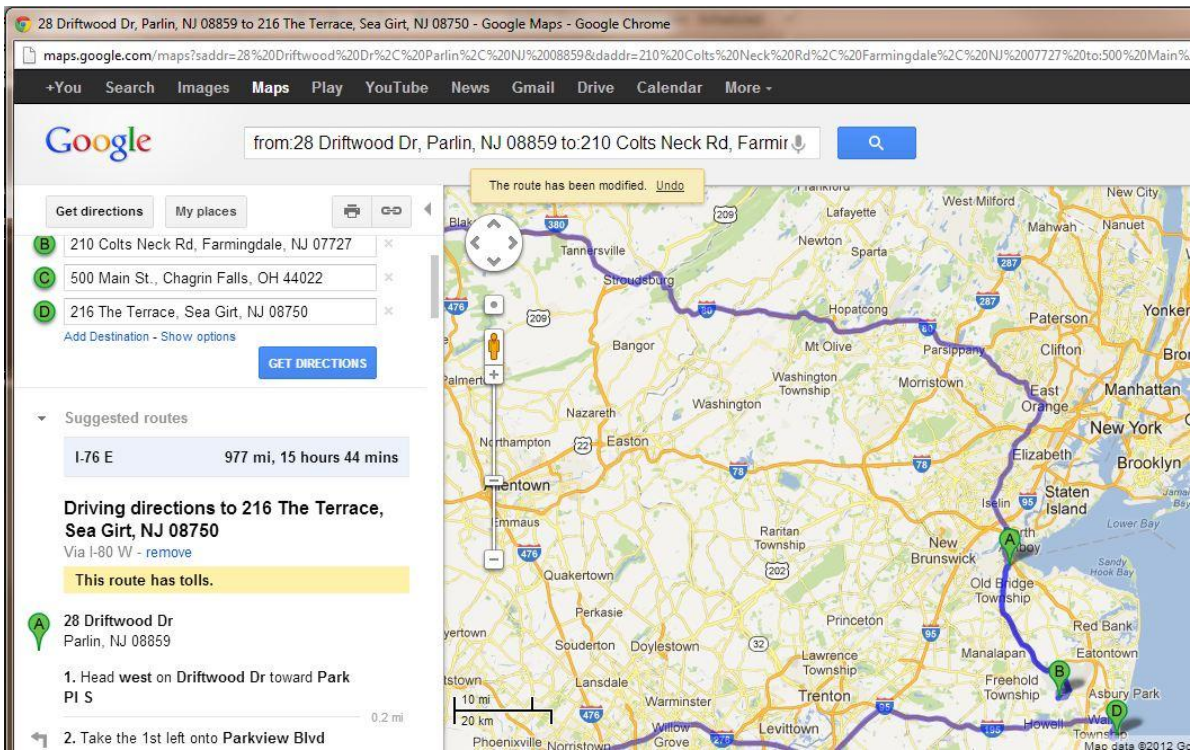


Select the checkbox next to the appropriate site you would like to use to map your route.

After you have checked off the service sites you would like to map and picked the appropriate webpage, select the map button located in the bottom right of the “Map” tab.

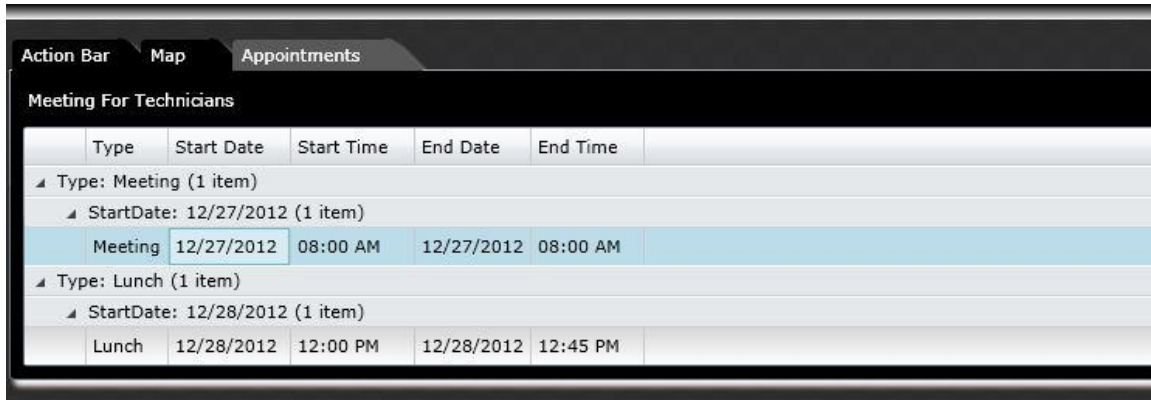


This is a webpage (Google Maps) of your site locations providing a detailed route to the appointment sites.



Miscellaneous Appointments

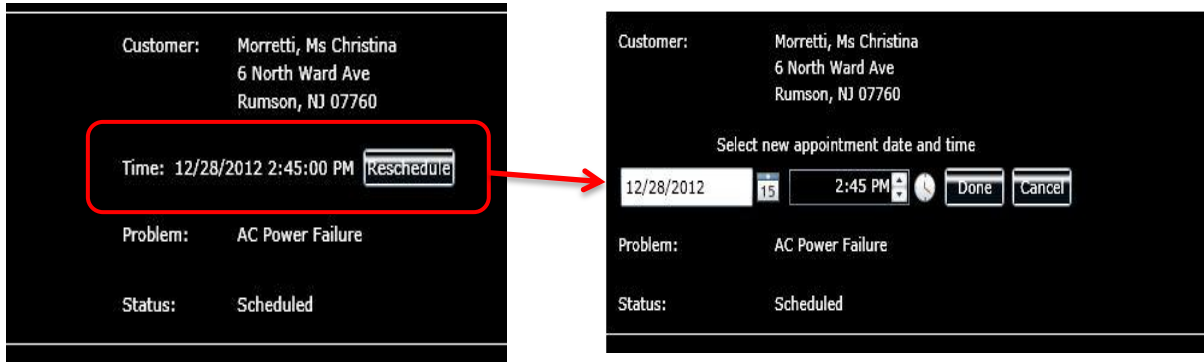
Next to the “Map” tab in the bottom right is the “Appointments” tab listing miscellaneous appointments that were created in the SedonaService Module. These will list the type of appointment, date scheduled for, and start/end time.



Type	Start Date	Start Time	End Date	End Time
Meeting For Technicians				
Type: Meeting (1 item)				
StartDate: 12/27/2012 (1 item)				
Meeting	12/27/2012	08:00 AM	12/27/2012	08:00 AM
Type: Lunch (1 item)				
StartDate: 12/28/2012 (1 item)				
Lunch	12/28/2012	12:00 PM	12/28/2012	12:45 PM

Reschedule Tickets

SedonaFSU Web Edition now allows the ability to select a new appointment time and appointment date. A technician has the flexibility to change the time to earlier in the day or later. They may also reschedule the appointment to any date in the future. These changes will update immediately on the FSU Web Edition and will also update the SedonaOffice Service Module. The permission to reschedule appointments is set in the technician management tool.



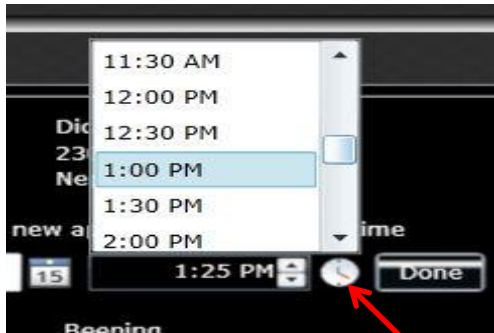
Calendar

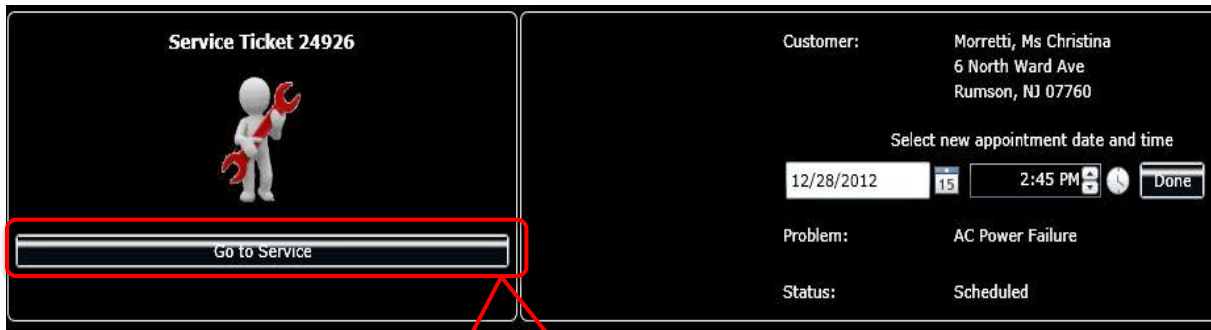
The area below the calendar icon will allow you to pick the proper date that your ticket is being rescheduled.



Time

The clock icon below allows you to pick the specific time you would like to reschedule your ticket for.





Select "Go to Service" to drill into the selected ticket or job.

Ticket Selection

To the right of the calendar you will find the display above. The icon below the Service Ticket number displays the specific type of appointment that is selected (job or service). The red wrench indicates a service ticket.

A job is displayed as the icon below:



Go To Service

To drill into a ticket you select the date from the Calendar, highlight the ticket you would like to work on from the scheduled list, and select the "Go to Service" button.

Ticket Detail

The ticket detail displayed below will go into full detail of the ticket, very similar to the view in the Service Module.

Customer 6975 Morretti, Ms Christina 6 North Ward Ave Rumson, NJ 07760	Status Open
Site 5911 Morretti, Ms Christina 6 North Ward Ave Rumson, NJ 07760	Created 12/22/11
	Created By JustinD

Ticket Detail	Appointment	Acceptance	Notes	Parts	Labor	Other	History	Documents
System Acct	542922	Contact	Christinia Morretti					
System Type	Burglar Alarm	Phone	(910) 421-3214					
Panel Type	D6112	Extension						
Next Inspection		Problem	AC Power Failure					
Site Phone	(732) -93-3-93 x97	Secondary Problem	N/A					
Map Code		Service Level	COD					
Cross Street		Scheduled	12/22/2011 10:15:00 AM					
Warranty	N/A	Estimated Length	60					
Warranty Expires	No Warranty	Customer Comment	Large dog in backyard					
System Comment								

System Information

A list of system information is available: the system account number, system type, panel type, and the next inspection date (if applicable) are listed in the area.

Site Information

This has the phone number and map code of the site and also if any warranty exists on the system and when it expires. A warranty override is available farther along in the progression of the ticket.

Contact

Listed is a customer contact that has been left if there is any need to call the contact for this ticket.

Problem Code & Service Level

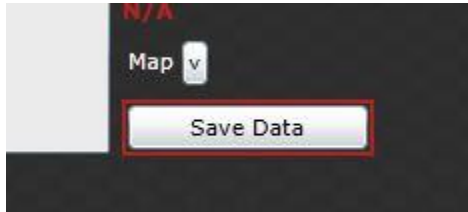
The problem code and service level are listed a long with the estimated length of time. This is selected when a ticket is created, a ticket may not be created without a problem code.

Customer and Site

In the top left you may view the site and customer address. The customer address displayed will be the primary mailing address for the customer and not necessarily the correct billing address.

Save Data

Throughout the ticket process, you will make changes and additions to the ticket. The application has a “Save Data” button that will appear to make all changes permanent. You must click this button to adequately save data for this ticket and for it to be saved for your dispatcher to view.



Home

Selecting the “Home” button in the top right will save all information added to the service ticket. After any information is entered you **HAVE TO** click “Save Data” or hit the “Home” button to save entries or they are at risk to be lost.



Progress Bar

The progress Bar is located on the left hand side of the ticket display. As the technician works through the ticket the progress bar will move to the appropriate stage.



Review

In the review stage you may review ticket information within the ticket detail tab.

In Progress

The progress bar will move to In Progress when the technician dispatches himself or is dispatched in SedonaOffice.

Resolve

When the Technician enters and saves their depart time, the progress bar will move to the Resolve column. You may then enter a resolution code and note.

Acceptance

The acceptance stage allows for you to present all billing information to your customer, capturing a signature, or payment.

Complete

When an appointment is resolved, the ticket will go into the complete stage and may no longer be edited by the technician.

Appointment Tab

The appointment tab allows the technician to easily configure the hours that have been spent on site. It allows for the entry of dispatched, arrival, and departure times, and notifies the dispatcher within seconds on the dispatch board. After the time is entered for each appointment the "Save Data" button must be clicked in the top right as we discussed on the previous page. The time on site will be displayed in the bottom of the page. The times entered may be changed by the technician until the ticket is resolved. Dispatched, arrival, and departure times may always be modified by a dispatcher as well in SedonaOffice Service module.

Dispatched, Arrived & Departed

For each of these specific displays you must click on the white button located to the right. This will put in the current time for your selected time zone. You may edit any of the times prior to resolving the ticket. After putting in all of the times spent on this specific ticket, in the bottom to the absolute amount of time on site before the company billing rules are applied.

The screenshot displays the SedonaOffice Appointment Tab interface. On the left is a vertical navigation menu with icons for Review, In Progress, Resolve, Acceptance, and Complete. The main content area shows customer and site details for 'Morretti, Ms Christina' at '6 North Ward Ave, Rumson, NJ 07760'. Below this is a tabbed interface with 'Appointment' selected. The 'Appointment Times' section contains three rows: 'Dispatched' (with a date of 12/28/2012 and time of 12:37 PM), 'Arrived', and 'Departed'. To the right of these rows are clock icons for time selection. A 'Save Data' button is located in the top right corner, highlighted with a red box. A callout bubble points to this button with the text: 'Always Select "Save Data" Button after data is entered'. A red arrow points to the clock icon next to the 'Dispatched' time field.

Date	UserCode	Notes	Edited	Edit UserCode	Resolution
12/28/2012	JustinD	Keypad flashes power failure, can't get to reset.	12/28/2012	JustinD	N

Access Level: 1 - General

Save New Delete

Notes Tab:

The notes tab permits you to read all of the notes recorded for this ticket. This can be very useful should a ticket take a long time to resolve, or if it has multiple technicians involved. Information can be stored within a ticket from SedonaOffice Service Module, as well as any new notes created from the field. The notes created on each ticket are available for the technician to view later when working on other tickets for that specific customer.

To Enter a Note:

1. Select an Access Level. (The technician may view or add notes based on his access level granted in the technician management tool)

Access Level: 1 - General

- a. General will create a note that will be visible for any user that has access to level 1 notes. This is typically information useful for a customer, or justifies work done on site should be classified as General. A customer will be able to view these notes if using SedonaWeb add-on module.
 - b. Internal will create a note which is available to your employees only. Internal notes are used for technical insight, passwords, or property information.
2. Create the note in the space above, located below the access level. Notes can be saved by clicking on the save button below the note.
 3. Notes can be read by clicking on the note summary above the access level selection box. In order to clear the display after reading, you must click on the "New" button

Parts Tab

When you open the parts tab, the parts already added to the ticket will be shown in the blank list above. If the service doesn't require a part listed, you can remove it by hitting the delete button. This action is immediate and is not reversible at any time.

Part Code	Description	Quantity	Price	Total	Location	Serial Number	From Stock	Taxable
03-HS2	03-HS2	1.0	10.00	10.00			<input checked="" type="checkbox"/>	Y

Equipment
My Parts

Removed	Part Code	Quantity	Location	Installed	Warrantied Until	Under Contract	Manufacturer Warranty Expires	Serial Number
<input type="checkbox"/>	6137	1		10/20/11				
<input type="checkbox"/>	AJ-C123L	1		10/20/11				
<input type="checkbox"/>	D6112	1	3RD FLOOR BATHROOM			N		
<input type="checkbox"/>	D620	2	Back Door & Master Bedroom			N		
<input type="checkbox"/>	Gr 100twh	4				N		
<input type="checkbox"/>	Gr 100twh	4				N		
<input type="checkbox"/>	GS100tw	7		05/22/01		N		

Equipment:

The equipment button opens up a window that lists a display of all equipment previously installed on the system. It is a list of all equipment that was installed at the "site" and "system" that your ticket was written for. If you are going to replace a part on a system (with a comparable or same part) you can select for the part to be removed. The removed equipment will be highlighted in red in the ticket in SedonaOffice Service Module.

Select	Part Code	Description	Quantity	Price	Location	Costing	Serial Number	From Stock	Taxable
<input type="checkbox"/>	1234	1234	1.0	0.25	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	A3-C123L	C-123L CHIME-INTERCOM	1.0	125.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	Aj-c123lw	Chime-com 2 Master Set	1.0	210.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	Aph C123la	Chime-com Intercom Master & Su	1.0	95.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	Aph C123lw	Set Of 2 Room Stations	1.0	211.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	E4-pl123a	3 volt lithium battery	1.0	0.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y
<input type="checkbox"/>	FB-XL1236	CONTROL PANEL	1.0	0.00	Please type location	Standard		<input checked="" type="checkbox"/>	Y

Parts Button and Search:

With the parts tab you may search for any available parts that you will be adding to the ticket. Since there are a large number of parts available, you may limit a search by (Part Code, Price, or Description).

To select a part from the list:

1. Select the part(s) from the list by checking the check box in the first column(Select)
2. Select the quantity in the quantity column
3. In the location field you may enter a specific location (Front Door, 1st Floor IT room, NE Camera Pole, Etc.)
4. If it is a serialized part, you must select the serial number for the part you will be installing.
5. Select "From Stock" if the part installed is from your van (warehouse) inventory. If the part was purchased with a PO for the Job, remove uncheck the "From Stock" check box.

Parts with Negative Inventory

For those enforcing no negative inventory, FSU Web will review existing on-hand quantities when a part is selected and not allow it to be used if it's not in the warehouse. A part might list on hand new quantity for a warehouse at 3. If a technician selects a part, and then ups the quantity to 4 or more, FSU Web will not allow the part to be used; will issue both a message and a log entry. FSU Web checks to see if this option is enabled beforehand.

There are three conditions that must be met when a part is added:

1. The Technician's service company must be setup to expense inventory.

Service Technician

Technician List

Technician	Service Company	Install Company	Expertise	Inactive
Mr. Keys	Alarm Controls		3	N
Ace Adams	Chicago	Chicago	5	N
april april	Garden State Fire & Sec	Chicago	5	N
Mike Ash	AllPhase	Chicago	3	N
John Black	vendor svcs	Chicago	3	N
Beau Chenard	Engineered Protection Sys		3	N
Ron Davis	Garden State Fire & Sec		4	N
Justin DeBaggis	Chicago	IT Sales	1	N
Michael Johnson	Inspections	Chicago	0	N
Pat Reynolds	Chicago	Chicago	3	N
John Smith	Chicago	Chicago	2	N
Sedona Test	Alarm Controls	IT Sales	3	N

Include Inactive

Technician Edit

Name:

Service Tech
 Installer
 Both

Service | Installation | Routes

Service Company:
Warehouse:
Text Message Address:
Expertise Level:

The Tech must be assigned to the correct service company and warehouse

Service Companies

Service Companies

Code	Description	Ticket Form	Inact...	Insp Form	Vendor
Aetna	Aetna	Standard	N	N	
Alarm Controls	Alarm Controls	Standard	N	N	
AllPhase	Pat Guice	Standard	N	N	
American Shredder	American Shredder	Standard	N	N	
CA	California Electronics	Standard	N	N	
Chicago	Chicago	Standard	N	N	
D.N.E. Security	Ken Egbert	Standard	N	N	
Engineered Protection Sys	Engineered Protection Sys	Standard	N	N	
Fire Security Technologie	Fire Security Technologie	Standard	N	N	
Garden State Fire & Sec	Garden State Fire & Sec	Standard	N	N	
Inspections	Inspections	AUI	N	N	
Sentinel Fire Protection		Standard	N	N	

Include Inactive Include Vendors

Inactive

General

Code: Description:

Company Detail | Labor Setup

Ticket Form: Category:

Does NOT use service ticket form for inspections.

Vendor: COGS Acct:

Warehouse:

Email:

Expense Inventory on Service Tickets
 When Invoiced

Primary
 Secondary

Critical Message
Expires On:

Apply New Delete

2. The system setup not to allow negative inventory.

Inventory Setup

Inventory Setup

Warehouse: Main

Transfer Account: 8000
Inventory Intercompany Transfer

Physical Adjustment Account: 5131
COG - Other

Negative Quantities:

- Do Not Allow
- Warning Message
- Allow

Inventory Processing

Asset Account: 1202
Inventory (New)

Default COGS: 5131
COG - Other

Invoice Item: Equipment

Purchase Price Variance Account: 2992

Use Material Handler for Warehouse Security:

Costing

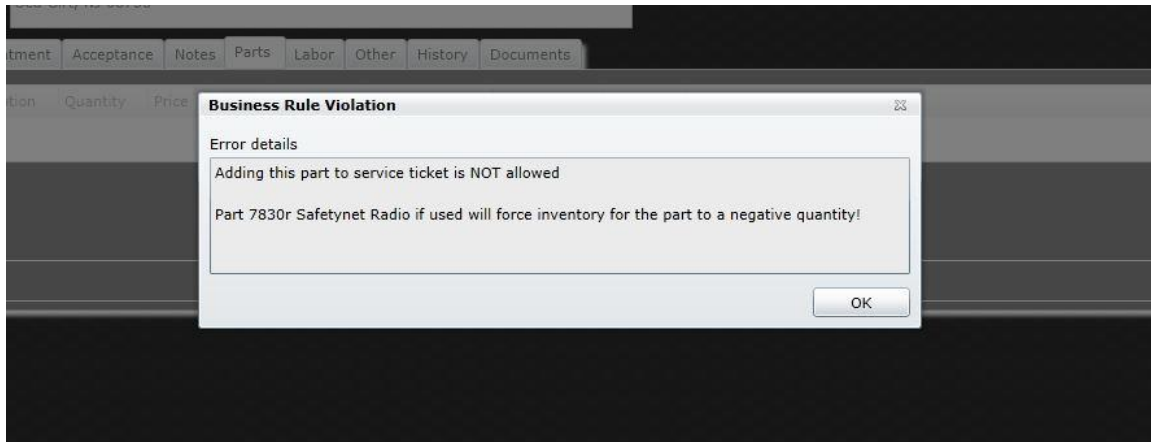
Default Method: Average

Use Standard Cost on Direct Expense Parts:

Apply

3. The On Hand New quantity for the particular part is less than the number of parts you try to add.

After all of the above is completed, the technician will not be allowed to add a part that allows inventory to go negative. When they attempt to do this they will receive the error message below.



Other

The **Other tab** allows you to add any other miscellaneous charges. You may specify your search by using the options in the section labeled "Search Criteria". To enter the charges just select the checkbox to the left of the appropriate item and hit select to add it to the billing.

Item Code	Description	Quantity	Price	Total	Taxable
Search Criteria					
<input type="radio"/> Item Code <input checked="" type="radio"/> Price <input type="radio"/> Description		1,000		Find	
0					
Select	Item Code	Description	Quantity	Price	Taxable
<input type="checkbox"/>	FinanceCharge	FinanceCharge	1.0	0.00	N
<input type="checkbox"/>	Finder's Fee/Commission	Finder's Fee/Commission	1.0	0.00	N
<input type="checkbox"/>	Late Fee	Late Fee	1.0	0.00	N
<input checked="" type="checkbox"/>	LATE FEE/	LATE FEE/FINANCE CHARGE	1.0	0.00	Y
<input type="checkbox"/>	MISC ADJ LABOR	MISC ADJUSTMENT	1.0	0.00	N
<input type="checkbox"/>	MISC CDREDIT LATE FEE	MISC CREDIT LATE FEE	1.0	0.00	N
<input type="checkbox"/>	MISC CREDIT EQUIP	MISCELLANEOUS CREDIT	1.0	0.00	Y

History

The **History tab** shows all service history for the customer. You may highlight a ticket and view the notes that were saved for each ticket. You may also view the Resolution Code used, technician, ticket number, problem code, and the date the appointment was created.

Ticket	Created	Problem	Sub Problem	Resolution	Technician	Name
177	02/05/2001	Return Install	N/A	BRW	Ralph	Ralph Villa
229	02/07/2001	Return Call	N/A	RCN	Ralph	Ralph Villa
1112	04/26/2001	Return Install	N/A	BRW	Ralph	Ralph Villa
1591	06/04/2001	Return Call	N/A	BRW	Ralph	Ralph Villa
1608	06/05/2001	Renovation	N/A	BRW	John	John Blish
2573	09/10/2001	Return Renovation	N/A	CSC	Ralph	Ralph Villa
4020	01/16/2002	Service Problem	N/A	CSC	Ralph	Ralph Villa

Date	Edit User	Notes	Edited	Entered By	Resolution
10/20/2011	JustinD	Return install finishing up renovations	10/20/2011	JustinD	N

Return install finishing up renovations

Appointment Resolution

Resolves Ticket

Put In Go Back Queue

Other

Resolution

BCI - Billable

Resolution Note

Power has been restored

Resolution:

All tickets need a resolution to determine the course of action after the appointment site visit. The Resolution Code sits in the **Appointment Tab**. If the ticket is resolved and needs no further action, you can check the “Resolves Ticket” checkbox. If you were unable to resolve the ticket and additional time or equipment is required put it in the “Go Back Queue”. From this queue the dispatcher can reschedule another appointment or add a second ticket.

Resolution Note

The resolution note created by the technician will display on the invoice if chosen to attach in SedonaOffice.

Resolution Code

The Resolution messages are set to account for the possible outcomes of a ticket. The codes and their description are created for each companies service levels. These resolutions codes will vary by company. Certain resolution codes are billable, while others are not.

Type	Hours	Rate	Labor
Regular	0.75	120.00	90.00
Overtime	0.00	135.00	
Holiday	0.00	180.00	

Dispatched	Arrived	Departed	Hours	Overtime	Holiday	Labor
12/31/2012 10:22:48 AM	12/31/2012 10:31:55 AM	12/31/2012 11:31:00 AM	0.50	<input type="checkbox"/>	<input type="checkbox"/>	60.00

Labor Totals

Other Appointment Labor	60.00
Total Labor	150.00
Tax	12.38
Total Amount	162.38

Trip Charge 95.00

Labor Tab

The labor tab allows a manual alteration of time and rates on the invoice. It will show the hours and rate that are set standard for the company. It can also include a trip charge as well.

Current Appointment

Lists the billable labor, applied to the service ticket, from the current appointment the technician is working on.

Multiple Appointments

Service labor from ALL appointments is now included in service labor totals. For those with many go back or multi-tech schedules this can be essential with managing labor.

Trip Charge

A trip Charge can be added or overridden if it is in accordance with company pricing procedures. There is a checkbox available for you to add or not add to the billing. The trip charge is added automatically through the SedonaOffice Service Module.

Manual Labor

The technician CANNOT go back to a previous appointment and change manual labor after the ticket is resolved. The technician may override all labor on a service ticket by selecting the Manual Labor checkbox. Manual labor, once selected on an appointment, negates all previous appointment labor.

Ticket Detail Appointment Acceptance Notes Parts Labor Other History Documents

Current Appointment

Manual Labor

Type	Hours	Rate	Labor
Regular	2	120.00	240.00
Overtime	0.00	135.00	
Holiday	0.00	180.00	

Dispatched	Arrived	Departed	Hours	Overtime	Holiday	Labor
12/31/2012 10:22:48 AM	12/31/2012 10:31:55 AM	12/31/2012 11:31:00 AM	0.50	<input type="checkbox"/>	<input type="checkbox"/>	60.00

Labor Totals

Other Appointment Labor	0.00
Total Labor	240.00
Tax	19.80
Total Amount	259.80

Trip Charge 95.00

Category	Amount
Parts	0.00
Labor	90.00
Charged as Other	95.00
Other	95.00
Taxes	15.27
Grand Total	200.27

Acceptance Tab

This tab is created to record a customer's acceptance of work. The customer may view all charges and submit a payment to their account.

Overrides

Provides the ability to bypass or "override" the charge exemption on Parts, Other Equipment, or Labor based on a Service Level or Warranty. For example, if the customer's service level covers Parts and Labor, but the customer should actually be paying for parts on the service ticket, selecting the service level override checkbox will result in the customer being charged for Parts and Labor(if no warranty is in force).

Remittance

You may select a remittance to let the dispatcher know that a payment has been received. Available is a drop down box listing specific methods of receiving payments through email, fax, or none.

Billable Charges

In the middle of the acceptance, all charges are available for this service ticket. It includes parts that were added, labor, trip charge, other charges, and taxes.

Payment from Account

The right hand column shows payments already on file for this specific customer. A customer may have a bank account or credit card already saved on file. This feature can be made available for your customer and technician when the ticket is created. If they would like to use a payment on file, the transaction will be posted to the account after the invoice is created and the payment is processed.

Signature Capture

A customer's signature may be captured with a tablet pc. After the customer signs, the signature will be saved into SedonaOffice and attached to the invoice.

SedonaService Module

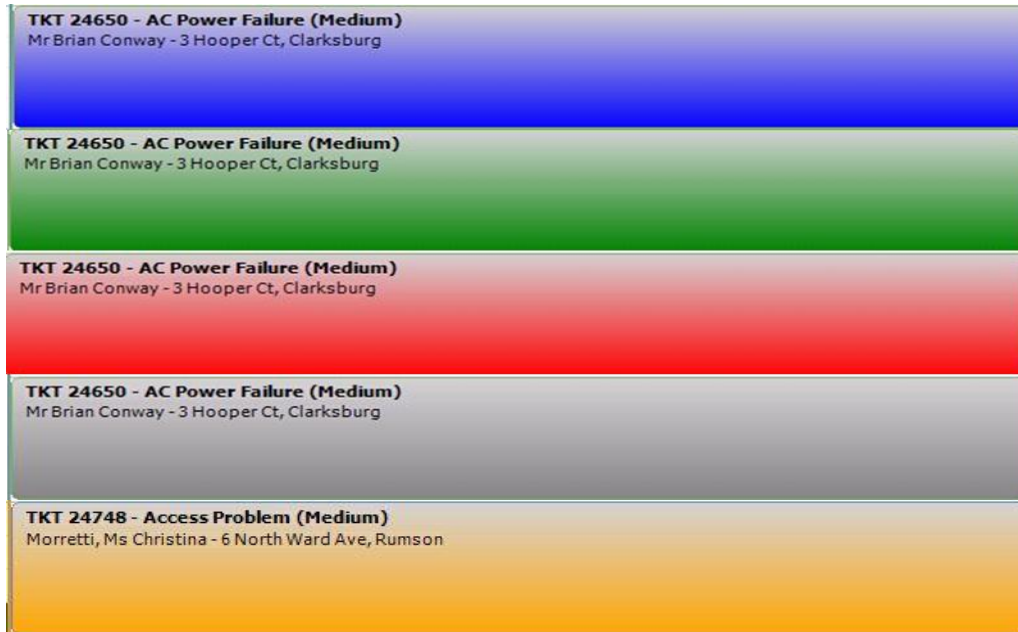
After the technician has resolved the service ticket your dispatcher can now view the work completed within the ticket and your progress on the upcoming appointment.

Ace Adams

- TKT 24922 - AC Power Failure (Medium)**
Departed @ 12:00 PM
Michael Jones - 500 Main St., Chagrin Falls
- TKT 24760 - Cant Set B/A (Medium)**
Dispatched @ 2:50 PM (04:20:01)
Carlesimo/Shumway - 216 The Terrace, Sea Girt
- TKT 24923 - Carbon Monoxide Replacmen (High)**
Departed @ 11:31 AM
Lawz, Derek/esther - 28 Driftwood Dr, Parlin
- Lunch**
Lunch - Take time for lunch break
- TKT 24925 - Access Problem (Medium)**
Departed @ 1:00 PM
Miele, Joseph/Emily - 210 Colts Neck Rd, Farmingdale
- TKT 24926 - AC Power Failure (Medium)**
Arrived @ 9:58 PM (00:12:52)
Morretti, Ms Christina - 6 North Ward Ave, Rumson

Technicians Tickets

In SedonaOffice Service Module, above is a screen shot of the technician (Ace Adams) and his tickets with the specified date. All of the tickets are viewable for the technician in his FSU device. As the service tickets are worked through by the technicians, you are notified back in the service module by color changes that appear on the ticket.



Technicians Progression Notifications

As the field technician progresses through a ticket it will update in real time in the SedonaOffice Service module. This will allow the dispatcher to view the status of the appointments.

- Blue = Dispatched
- Green = Arrived
- Red = Departed
- Gray = Resolved
- Orange = Go Back

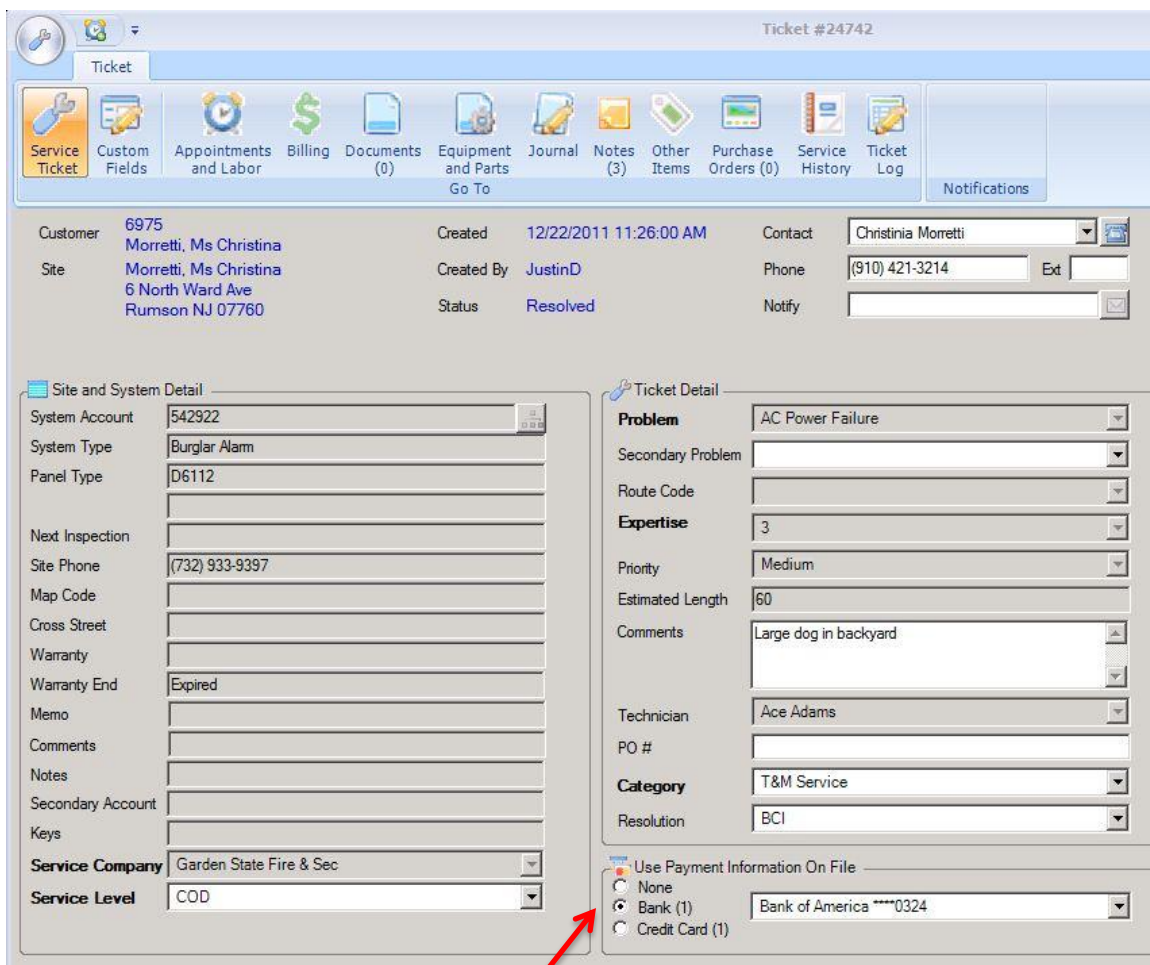
Locked Ticket

Dispatcher may drill into a service ticket **only** after the technician is not locked into that specific ticket; or the image below will be displayed. A technician will receive the same message if a dispatcher is drilled into a ticket in SedonaOffice.



Service Ticket

In the Service ticket you may select any bank accounts or credit card on file by simply selecting your choice under “Use Payment Information On File” in the bottom right.



The screenshot displays the 'Ticket #24742' interface. At the top, there is a navigation bar with icons for Service Ticket, Custom Fields, Appointments and Labor, Billing (highlighted), Documents (0), Equipment and Parts Go To, Journal, Notes (3), Other Items, Purchase Orders (0), Service History, and Ticket Log. Below this is a metadata section with fields for Customer (6975, Morretti, Ms Christina), Site (6 North Ward Ave, Rumson NJ 07760), Created (12/22/2011 11:26:00 AM), Contact (Christina Morretti), Created By (JustinD), Phone ((910) 421-3214), and Status (Resolved). The main area is divided into three sections: 'Billing Overrides' with checkboxes for 'Override Warranty' and 'Override Service Level'; 'Invoice' with a 'Third Party Bill To' checkbox, a 'Contact' dropdown, an 'Invoice Date' dropdown (set to 1/4/2012), and checkboxes for 'Add Resolution Note to Invoice' (checked) and 'Close Ticket After Invoicing', along with a 'Create Invoice' button; and 'Ticket Charges' which is a table showing costs and taxes for parts, labor, and other items, with a total pending resolution of \$211.10. At the bottom, the 'FSU' section shows 'Payment Received' (N), 'Remittance' (N), and 'Signer' (Chris M) with a handwritten signature and a 'Chris M' text box.

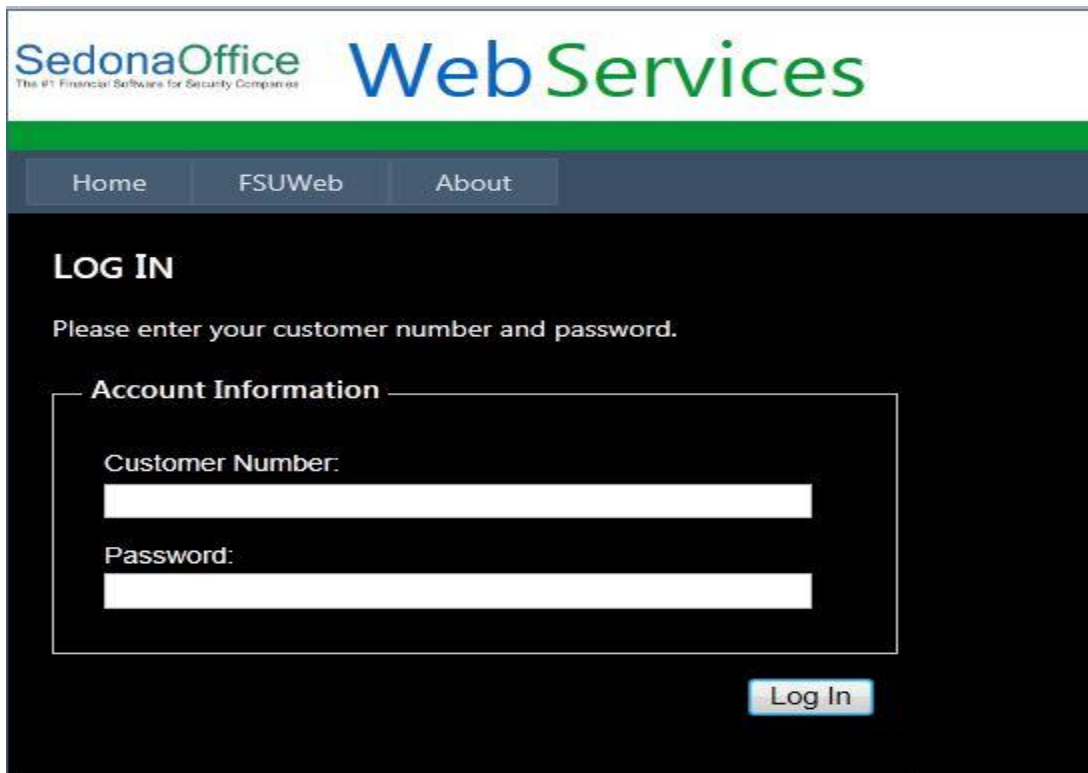
	Cost	Tax
Total Parts	10.00	0.83
Total Labor	90.00	7.43
Total Other	95.00	7.84
Sub Total	195.00	16.10
Total Pending Ticket Resolution		\$211.10

Billing

In SedonaOffice Service Module you can now view information created through the FSU. You may view if a payment was received, how the customer would like their remittance and the signature captured for this ticket. The invoice is now ready to be created and there is an option to add the resolution note to the invoice, and close the ticket after invoicing.

Technician Tool

The tech tool is a very important part of FSU Web. It is launched from a separate website (<http://fieldserviceunitweb.customer.sedonaoffice.com>) and communicates with your SedonaOffice database and our service database and will be kept up to date on our servers. This tool allows you to modify technicians, passwords, and control the service tickets and jobs they will be able to work with.



The screenshot shows the 'SedonaOffice Web Services' login interface. At the top, the SedonaOffice logo is on the left, and 'Web Services' is on the right. Below the logo is a navigation bar with 'Home', 'FSUWeb', and 'About' buttons. The main content area is dark and features a 'LOG IN' heading. Below the heading is the instruction 'Please enter your customer number and password.' A white-bordered box labeled 'Account Information' contains two input fields: 'Customer Number:' and 'Password:'. A 'Log In' button is located at the bottom right of the form area.



There are two basic sections, the top left shows the companies you have. The top right shows the companies our servers are aware of.

Company Branding

The company logo and branding 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 text box. (Branding feature is not fully implemented at this time.)

FSU Web Technicians

Once a company is selected, the technicians activated can be viewed. You can add a new technician or update technicians already saved. After a technician is added 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 FSU Web.

Your Technicians

This shows a list of the available technicians in the company you choose.

Back and Forward Days

This allows you to set the appointments the technician can access.

Security Level

This allows you to have control of each tech's access level to view and add notes.

Resolution Codes

You may view all resolution code and update the codes the technicians can see and use.

NOTES: