

OFFICE **Sedona**™

#1 Accounting & Business Management
Software for Security Companies



Sedona FSU

“Field Service Unit”

Sedona FSU

The goal of any service organization is to be able to provide the best service possible to its clients while maximizing profitability and customer satisfaction. Achieving both profitability and customer satisfaction has been elusive to say the least. But not any longer!

With Sedona Office and the Sedona FSU (Field Service Unit) you will have the tools to achieve your goal of providing the best service possible to your clients. Improve profitably, while achieving the highest customer satisfaction you could ever imagine.

The Sedona FSU, an add-on application to Sedona Office, is a Windows PocketPC application that allows your field technicians to process their work real-time from the field. By extending your Sedona Office application to the technician in the field, both you and your technician will be in communication real-time so you will know what is being done from the field at any moment.

All the work of processing a service call is done from the field by the technician as they are performing their daily tasks. All the same functionality that was done by the home office is now done by the technician real-time, and automatically updates Sedona Office, so you know what's going on all the time. Data is captured as it occurs, not after the fact. This insures data accuracy and integrity.

The service technician has all the information to process the service ticket within the Sedona FSU. All the work they perform on the service call is recorded within the Sedona FSU, including their dispatch, arrival and completed times. The technician can review all the equipment on site as well as the service history for the system being serviced.

When the technician completes the service call they can record all the parts used and the service call resolution. The last step is to present the customer with the charges for the service call; which is calculated based on the warranty or service level in effect. The customer simply signs the device to acknowledge the work has been completed.

The information is then synchronized with the home office and you know that the call has been completed. The customer's signature is then saved within Sedona Office so you have a permanent record of the call completion. The parts used are automatically updated to the customer record and issued and expensed from inventory.

All the office needs to do is review the service ticket and with a single click create the invoice for the customer. It's that simple!

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Here's how the Sedona FSU works...

- Each service technician carries with them a Sedona FSU device. The device is any Windows PocketPC 2003 PDA. There are many different makes and models available; you can pick the best device for your needs and budget.
- The Sedona FSU application runs on the Windows Pocket PC 2003 PDA. The application and all the synchronized data resides on the device and operates independently from the main Sedona Office application.
- Based on the communication you desire, the device can communicate with Sedona Office either via the Internet, WIFI or through the PDA cradle. If you want real-time data synchronized between the technician and the home office, than an Internet connection is the best method.
- The service technician can review their daily schedule and click on any service ticket to see the details.



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- All the information that resides in Sedona Office for the service ticket is contained within the Sedona FSU for processing. The service technician can...
 - View the service ticket details
 - View the system details
 - View the history of service calls for the system
 - View all the equipment on site
 - Enter the dispatch, arrival and completed times
 - View notes created by the office
 - Add field notes
 - Enter parts used
 - Resolve the service ticket
 - Capture the customer's signature
- The final stage of closing a service ticket in the Sedona FSU allows you to present the customer with a summary of all the charges and then capture their signature.
 - Once the signature has been captured and approved by the customer the service ticket is locked down and no changes can occur. This insures what the customer approved is what is synchronized back with the home office.



Technical Details

Sedona FSU Device

- Each device is a Windows PocketPC 2003 device. There are numerous vendors of these devices including HP, Samsung and Toshiba. The device you select should be based on the communication protocol, features and functionality you desire.

Communication

- Most users of the Sedona FSU desire to have the device communicate via the Internet so the unit and the home office can synchronize throughout the day. Devices from Verizon and T-Mobile have built in cellular phones that allow real-time Internet connection. Both of these are excellent solutions.
- The Sedona FSU can also communicate locally (at your office) via the cradle included with each device or via WIFI. Used in this manner the Sedona FSU is generally updated each day when the technician is at your office.

Host Connection

- In order for the Sedona FSU to synchronize with the Sedona Office database; you will need to operate an IIS (Internet Information Services) connection. This can either be done on the Sedona Office server or any other server on your network. If you will be creating an Internet connection then you will need a static IP address and proper Internet firewall protection. Contact your local IT specialist to establish your Internet connection.

Replicated Database

- The Sedona FSU uses a SQL CE database (which is included with the Sedona FSU). The Sedona Office database is configured to run Merge/Replication on the SQL Server. Therefore you must have SQL Server 2000 to operate the Sedona FSU (not compatible with MSDE).

For more information on the Sedona FSU or any of the additional products offered by Perennial Software; contact us at (440) 247-5602 or via email at info@sedonaoffice.com, or visit us on the web at www.sedonaoffice.com.

