

SedonaFSU Technician Management Tool



PERENNIAL SOFTWARE
Makers of SedonaOffice and AlarmBillr

Table of Contents

Requirements	3
Log In	3
Web Services	3
Technician Tool	6
Adding Your Companies	7
Terms and Conditions.....	7
Companies on File with SedonaFSU	8
Add Your Technicians	9
Save Technician	11
SedonaFSU Technicians	11

Requirements

The SedonaFSU Technician Administration Tool is run as a Silverlight application. You will need to take the following steps from an Internet Explorer browser. This does not work with FireFox, Chrome, or any other browsers. Before working with your technicians is SedonaFSU it is necessary to add them in SedonaOffice.

Log In

Web Services

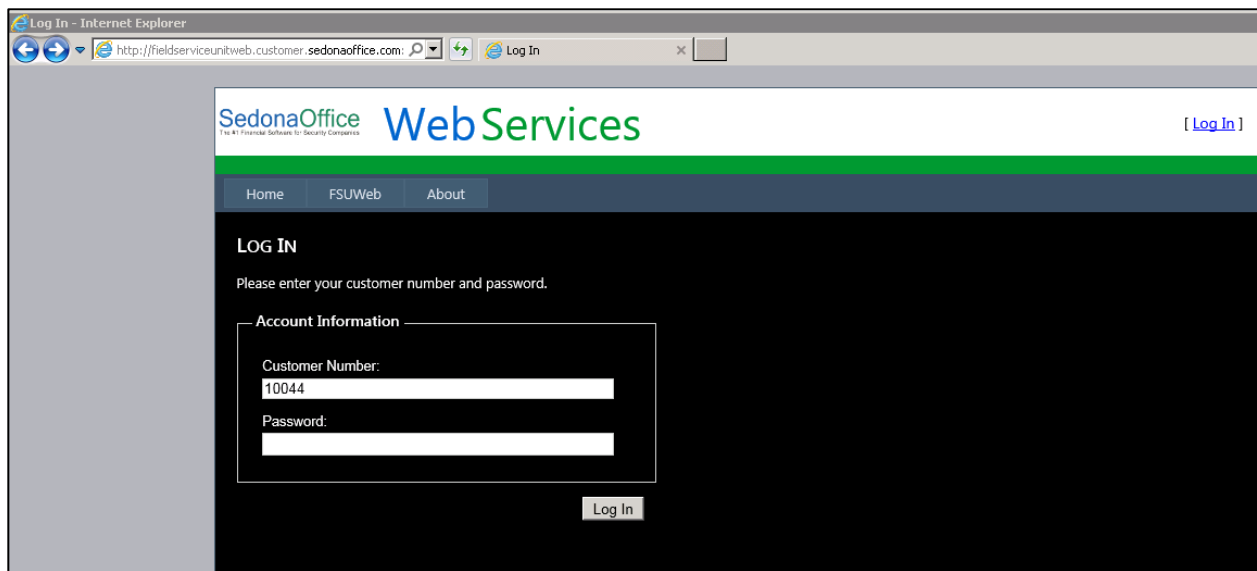
To access the login page for the FSU Administration Tech Tool, use the link provided:

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

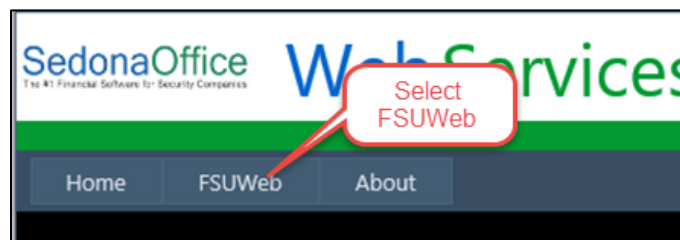
Account Information

Type in your SedonaOffice Customer Number and Password.

- Customer Number: SedonaOffice customer number
- Password: Password is provided by SedonaOffice. You may notify SedonaOffice what you would like the password to be set as.



When logged in, click on the FSUWeb Tab



Manage Technicians

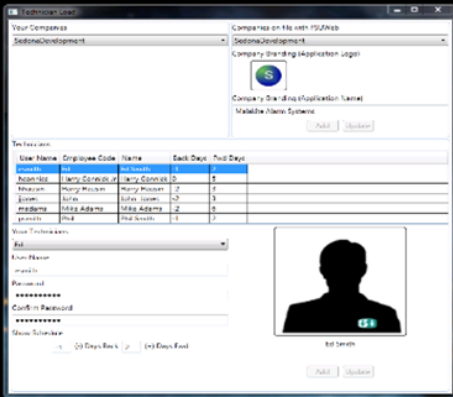
Basic instructions are provided in the screen shot below when logging into the technician tool. To access your technicians, scroll down to the bottom left and click the Manage Your Technicians link.

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.



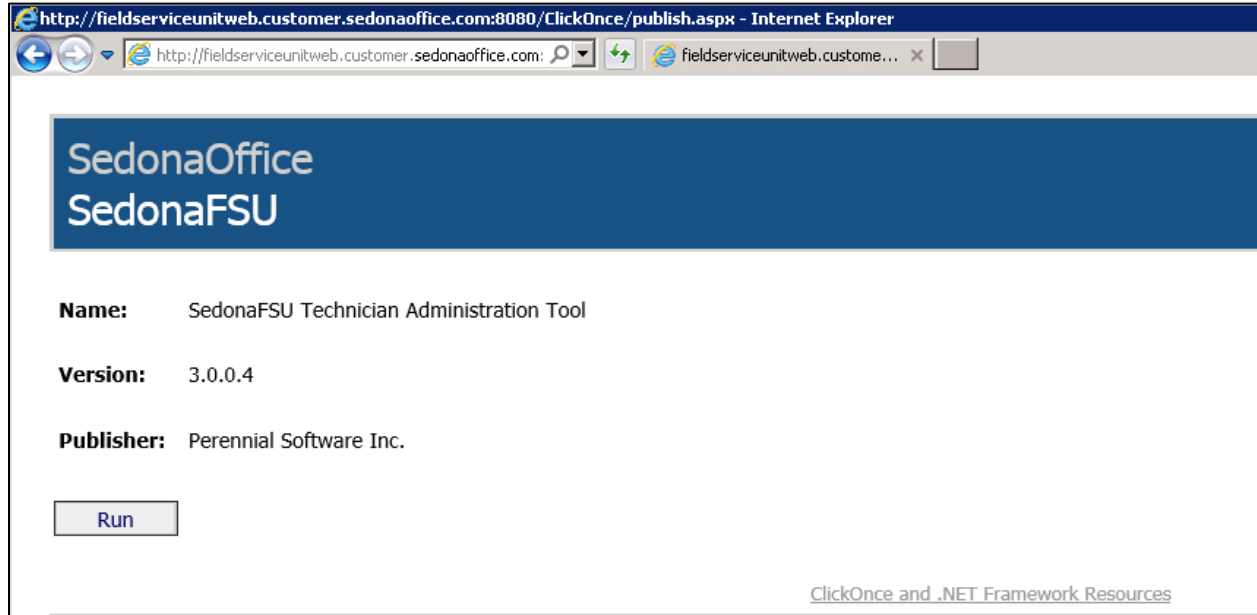
Use Name	Employee Code	Name	Back Days	For Days
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	0	0
Admin	1000000000	Admin	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](#)

Click Run to open the SedonaFSU Technician Administration Tool.



Technician Tool

Once the tool opens up, you can manage your FSUWeb companies and technicians.

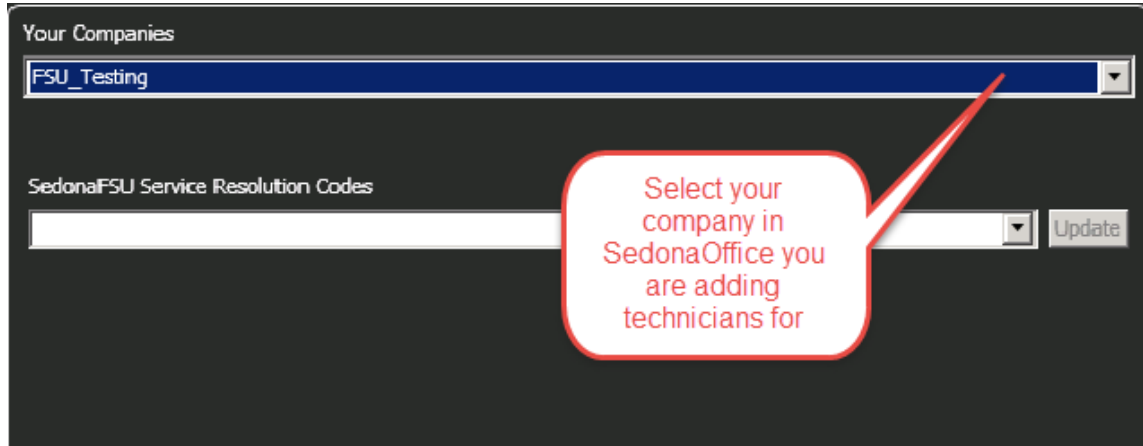
The screenshot displays the 'Technician Tool' interface. It is divided into several sections:

- Your Companies:** A dropdown menu currently shows 'FSU_Testing'. Below it is a 'SedonaFSU Service Resolution Codes' dropdown with an 'Update' button.
- Companies on file with SedonaFSU:** A dropdown menu also shows 'FSU_Testing'. Below this is the 'Company Branding (Application Logo)' section with a logo icon. Further down are fields for 'Company Branding (Application Name)' (filled with 'SedonaFSU Web Edition'), 'Acceptance Hyperlink Name' (filled with 'Legal'), 'Acceptance Hyperlink (Actual link)' (filled with 'http://www.sedonaoffice.com'), and 'Acceptance Text' (filled with 'In accepting this invoice, customer agrees to the terms and conditions contained herein including those shown in'). 'Add' and 'Update' buttons are at the bottom.
- SedonaFSU Technicians:** A table listing technician details.

User Name	Employee Code	Name	Back Days	Fwd Days	Access Level	Reschedule	Manual Lbr	System Updates	View Sub Charges	View Final Charges	Region Format
aadams	Ace Adams	Ace Adams	-20	7	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English (United States) mm/dd/yyyy
- Your Technicians:** A form for adding or updating a technician. It includes fields for 'User Name', 'Password', and 'Confirm Password'. The 'Show Schedule' section has input fields for '(-) Days Back' and '(+) Days Fwd', a 'Security Level' dropdown (set to '1 - General'), and a 'Maximum Departure' field in minutes. There are checkboxes for 'Appt Reschedule', 'Manual Labor', and 'System Updates'. At the bottom, there are checkboxes for 'View Sub Charges' and 'View Final Charges', and a 'Regional Format' dropdown (set to 'English (United States) mm/dd/yyyy'). 'Add', 'Update', and 'Delete' buttons are at the bottom right.

Adding Your Companies

These are your companies in SedonaOffice. If you intend on adding companies to use with SedonaFSU Web, you will need to inform SedonaOffice so that the FSUWeb scripts can be run on the company database.



Your Companies

FSU_Testing

SedonaFSU Service Resolution Codes

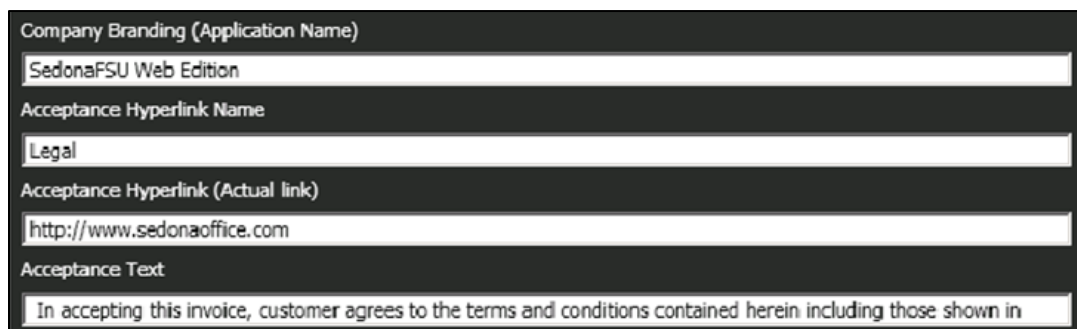
Select your company in SedonaOffice you are adding technicians for

Update

Terms and Conditions

*To activate, 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.
- 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

Companies on File with SedonaFSU

These are a list of companies SedonaOffice's servers are aware of. If your company is not listed please contact support@sedonaoffice.com

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

Let support know if you add a new company

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.

Your Technicians

User Name

Password

Confirm Password

Show Schedule

(-) Days Back (+) Days Fwd

Security Level Maximum Departure Minutes

Appt Reschedule Manual Labor System Updates

View Sub Charges View Final Charges

Regional Format

***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.**

- 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: Set the days back (example, -7) and Days Forward (example, +7). These settings show you how far back and forward the technician can see appointments on the schedule.
*You must put – before the number in Days Back
- Security Level: This allows you to have control of each tech's access level to view and add notes and documents (if you have purchased SedonaDocs).
- Maximum Departure: The maximum amount of time in minutes the technician can deviate from the current time when departing.

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.

- Appt Reschedule: Check to allow a technician to reschedule an 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 see sub charge amounts for Parts , Labor, Job Units, Materials, Install charges, POs, 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 from viewing total amounts for parts, labor, other, taxes, and grand total.

Save Technician

When you have these settings filled out, select Add at the bottom right to complete the process.

The screenshot shows a form titled "Your Technicians" with the following fields and options:

- User Name
- Password
- Confirm Password
- Show Schedule: (-) Days Back
- Security Level: 1 - General
- Maximum Departure: Minutes
- Appt. Reschedule: Manual Labor: System Updates:
- View Sub Charges: View Final Charges:
- Regional Format: English (United States) mm/dd/yyyy

At the bottom right, there are three buttons: Add, Update, and Delete. Two red callout boxes provide instructions: "Enter in your technician information" points to the password fields, and "Select Add after the technician information is entered" points to the Add button.

Important Rule: Whenever you add a technician to SedonaFSU Web, you need to email and include a list of the technicians you recently added. We will activate the login so the technician can begin using it. Your billing will be adjusted based on the number of technicians added/deleted.

SedonaFSU Technicians

Once you Save the technician a listing of all your current 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"/>	