

SedonaFSU Web Edition (Internal) (Deprecated)

04/09/2025 12:48 pm EDT

SedonaFSU Web Edition only worked with Internet Explorer which is now no longer available. This how to document is kept for historical reference purposes.

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 Desktop, notebook, netbook or tablet running Windows XP SP2+, Vista, Windows 7, Windows 10, OS X 10.5 or Greater. You may try some of the following Operating Systems and Browsers Internet Explorer 11, FireFox, and Safari. (Microsoft Edge Browser does not Support Silverlight, Google Chrome No Longer Support Silverlight as well) 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://sedonafseast.sedonaoffice.com>

Central Time,

<https://sedonafscentral.sedonaoffice.com>

Mountain Time,

<https://sedonafsumountain.sedonaoffice.com>

Arizona Time,

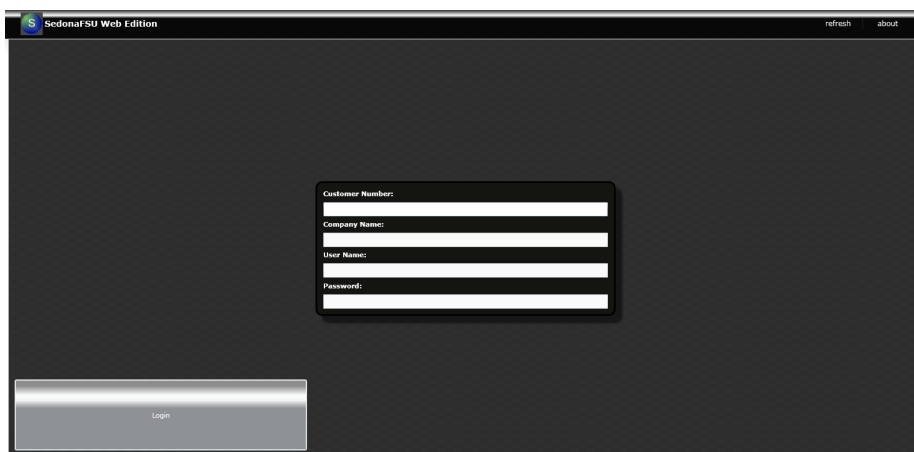
<https://sedonafsuarizona.sedonaoffice.com>

Pacific Time,

<https://sedonafsupacific.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's a header with the SedonaFSU logo and the text "SedonaFSU Web Edition". Below this is a table listing tickets. The table has columns: Type, Date, Time, Ticket/Job, Name, Address, City, Prob/Task, Status, and Map. Five tickets are listed for 12/28/2012. The third ticket, Ticket 24923, is highlighted. Below the table, there's a section titled "Service Ticket 24922" which includes a calendar view for December 2012, a 3D character holding a wrench, and a "GO TO SERVICE" button. To the right of this section, there's a form with fields for Customer, Time, Problem, and Status.

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	☐
	12/28/2012	09:45 AM	24760	Charlesimo/Shumway	216 The Terrace	Sea Girt	Cant Set B/A	Scheduled	☒
	12/28/2012	11:00 AM	24923	Lawz, Derek/esther	28 Driftwood Dr	Parlin	Carbon Monoxide Replacmen	Scheduled	☐
	12/28/2012	01:15 PM	24925	Miele, Joseph/Emily	210 Colts Neck Rd	Farmingdale	Access Problem	Scheduled	☐
	12/28/2012	02:45 PM	24926	Morretti, Ms Christina	6 North Ward Ave	Rumson	AC Power Failure	Scheduled	☐

Service Ticket 24922

Customer: _____

Time: 12/28 _____

Problem: _____

Status: _____

GO TO SERVICE

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	
Site Phone	
Map Code	
Cross Street	
Warranty	N/A
Warranty Expires	No Warranty
Contact	Mark Morretti
Phone	(732) 933-9397
Extension	
Service Level	T&A
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.

December, 2011

Su	Mo	Tu	We	Th	Fr	Sa
					2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

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	☒	
	Scheduled	☒	
emplacmen	Scheduled	☒	
	Scheduled	☒	
	Scheduled	☐	

Maps

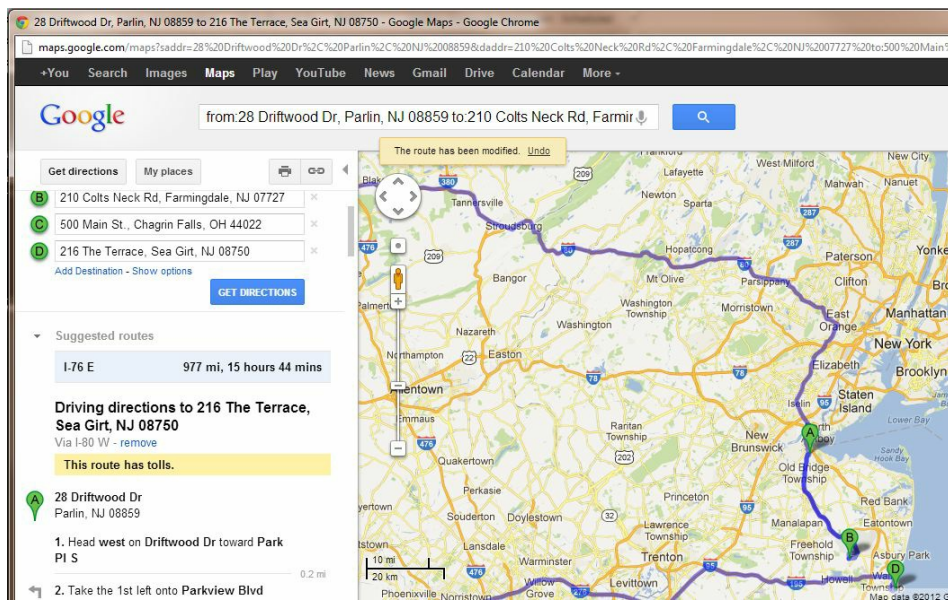
In the bottom left of the technicians home page to the right of the “Action Bar” is the “Map” tab, allowing you to select 1 of the 5 various websites to view your route. Select the appropriate site you would like to use (Google, Bing, Yahoo, MapQuest, and RandMcNally) and then click the “Map” button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



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.

Action Bar

Map

Appointments

Meeting For Technicians

	Type	Start Date	Start Time	End Date	End Time								
Type: Meeting (1 item) StartDate: 12/27/2012 (1 item) <table> <tr> <td>Meeting</td> <td>12/27/2012</td> <td>08:00 AM</td> <td>12/27/2012</td> <td>08:00 AM</td> <td></td> <td></td> </tr> </table>							Meeting	12/27/2012	08:00 AM	12/27/2012	08:00 AM		
Meeting	12/27/2012	08:00 AM	12/27/2012	08:00 AM									
Type: Lunch (1 item) StartDate: 12/28/2012 (1 item) <table> <tr> <td>Lunch</td> <td>12/28/2012</td> <td>12:00 PM</td> <td>12/28/2012</td> <td>12:45 PM</td> <td></td> <td></td> </tr> </table>							Lunch	12/28/2012	12:00 PM	12/28/2012	12:45 PM		
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.

Customer:	Morretti, Ms Christina 6 North Ward Ave Rumson, NJ 07760
Time:	12/28/2012 2:45:00 PM Reschedule
Problem:	AC Power Failure
Status:	Scheduled

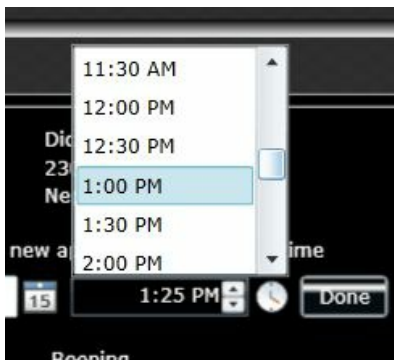
Calendar

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.



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

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

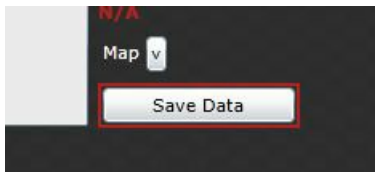
The problem code and service level are listed along with the estimated length of time. This is selected when a ticket is created, a ticket may not be created without a problem code.

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.

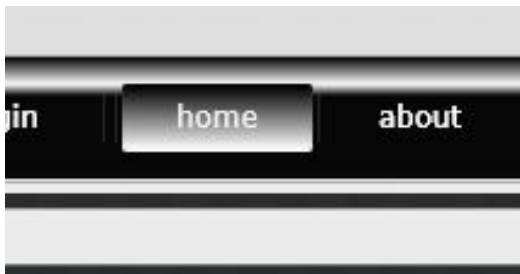
Save Data

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.

Customer 6975
Morretti, Ms Christina
6 North Ward Ave
Rumson, NJ 07760

Site 5911
Morretti, Ms Christina
6 North Ward Ave
Rumson, NJ 07760

N/A
Map

Ticket Detail Appointment Acceptance Notes Parts Labor Other History Documents

Appointment Times

Dispatched 12/28/2012 15 12:37 PM

Arrived

Departed

Time On Site

Visit 1

Review
In Progress
Resolve
Acceptance
Complete

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)
 1. 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.
 2. 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

Access Level
1 - General

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.

Ticket Detail
Appointment
Acceptance
Notes
Parts
Labor
Other
History
Documents

Part Code	Description	Quantity	Price	Total	Location	Serial Number	From Stock	Taxable	
03-HS2	03-HS2	1.0	10.00	10.00			☒	Y	

Equipment

My Parts

Select

Delete

Ticket Detail
Appointment
Acceptance
Notes
Parts
Labor
Other
History
Documents

Part Code	Description	Quantity	Price	Total	Location	Serial Number	From Stock	Taxable	
Removed	Part Code	Quantity	Location	Installed	Warrantied Until	Under Contract	Manufacturer Warranty Expires	Serial Number	
☐	6137	1		10/20/11					
☐	AJ-C123L	1		10/20/11					
☐	D6112	1	3RD FLOOR BATHROOM			N			
☐	D620	2	Back Door & Master Bedroom			N			
☐	Gr 100twh	4				N			
☐	Gr 100twh	4				N			
☐	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.

Search Criteria

Part Code

Price

Description

☐ Part Code
☐ Price
☒ Description

☒ Only Parts In Stock

Find

Find

Select	Part Code	Description	Quantity	Price	Location	Costing	Serial Number	From Stock	Taxable	
☐	0-319.5-pk	ITI Crystal door/window sensors 25 pack	1.0	1166.00	Please type location	Standard		☒	Y	
☐	010-320dvd	GE storesafe pro dvr 320gb w/dvd burner	1.0	6000.00	Please type location	Standard		☒	Y	
☐	01290090110	Soc 163-MR 16/3 600V Soc Cord	1.0	0.00	Please type location	Standard		☒	Y	
☐	016-600DVR	GE storesafe pro dvr 600 gb w/dvd burner	1.0	8381.00	Please type location	Standard		☒	Y	
☐	06-SSU01089	SPS 40/24VDC 3.5AMP	1.0	0.00	Please type location	Standard		☒	Y	
☐	1-22-7-2j8	22/2 stranded jacketed cm/d2r 1000' box grey	1.0	50.00	Please type location	Standard		☒	Y	
☐	1-22-7-4j8	22/4 stranded stationwire cm/d2 1000' box grey	1.0	\$5.00	Please type location	Standard		☒	Y	

Select

Delete

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). You may also select the new checkbox “Only Parts In Stock” to filter the parts on the search to only show those that have quantity in stock.

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

Ace Adams

Address...

1 Industrial Way W
Plymouth, MI 48170

☐ Service Tech

☐ Installer

☒ Both

Service

Installation

Routes

Service Company

Chicago

Warehouse

Main

Text Message Address

Expertise Level

5

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

General

☐ Inactive

Code:
Description:

Company Detail | Labor Setup

Ticket Form:

☐ Does NOT use service ticket form for inspections.

Category:

COGS Acct:

☒ Expense Inventory on Service Tickets

☒ When Invoiced

☒ Primary
☒ Secondary

Vendor:
Warehouse:
Email:

Critical Message
Expires On:

Apply

New

Delete

1. 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

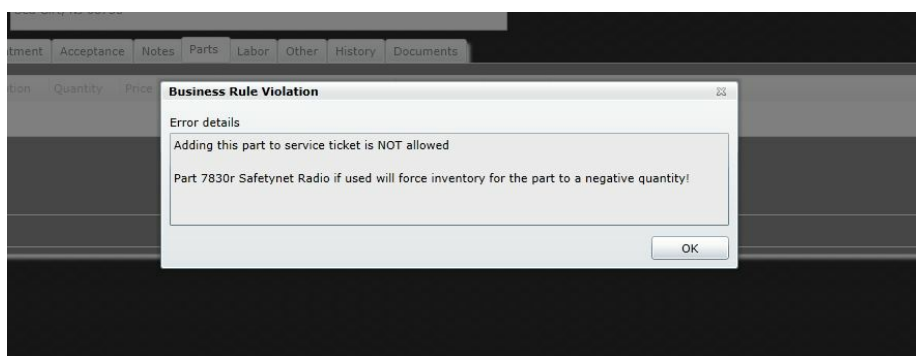
Default Method: Average

Use Standard Cost on Direct Expense Parts: ☐

Apply

1. 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
FinanceCharge	FinanceCharge	1.0	0.00		N
Finder's Fee/Commission	Finder's Fee/Commission	1.0	0.00		N
Late Fee	Late Fee	1.0	0.00		N
☒ LATE FEE/	LATE FEE/FINANCE CHARGE	1.0	0.00		Y
☐ MISC ADJ LABOR	MISC ADJUSTMENT	1.0	0.00		N
☐ MISC CDREDIT LATE FEE	MISC CREDIT LATE FEE	1.0	0.00		N
☐ 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.

The screenshot displays the 'Labor' tab within a software interface. At the top, a navigation bar includes 'Ticket Detail', 'Appointment', 'Acceptance', 'Notes', 'Parts', 'Labor', 'Other', 'History', and 'Documents'. The 'Labor' tab is active.

Current Appointment

☐ Manual Labor

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

Below the table, a summary row shows: Regular 0.75, Overtime 0.00, Holiday 0.00, and a total Labor of 90.00.

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	☐	☐	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	☐	☐	60.00		
Labor Totals								
						Other Appointment Labor	0.00	
						Total Labor	240.00	
						Tax	19.80	
						Total Amount	259.80	
☒ Trip Charge								
95.00								

Ticket Detail	Appointment	Acceptance	Notes	Parts	Labor	Other	History	Documents
Overrides								
☐ Warranty								
☐ Service Level								
Remittance			Trip Charge			☒ Use Account		
☐ Payment Received			Parts	0.00	*An account has been pre-authorized for this service ticket.			
☐ None			Labor	90.00				
			Charged as Other	95.00				
			Other	95.00	BANK Christina Morretti *****0324 Checking			
			Taxes	15.27				
			Grand Total	200.27				
Signature								
☐ No Signer Available								
Signer			Accept Clear					

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.

Ticket #24742

Ticket

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Go To Journal Notes (3) Other Items Purchase Orders (0) Service History Ticket Log Notifications

Customer 6975 Morretti, Ms Christina
Site Morretti, Ms Christina
6 North Ward Ave
Rumson NJ 07760

Created 12/22/2011 11:26:00 AM
Created By JustinD
Status Resolved

Contact Christina Morretti
Phone (910) 421-3214
Ext
Notify

Site and System Detail

System Account 542922
System Type Burglar Alarm
Panel Type D6112
Next Inspection
Site Phone (732) 933-9397
Map Code
Cross Street
Warranty
Warranty End Expired
Memo
Comments
Notes
Secondary Account
Keys
Service Company Garden State Fire & Sec
Service Level COD

Ticket Detail

Problem AC Power Failure
Secondary Problem
Route Code
Expertise 3
Priority Medium
Estimated Length 60
Comments Large dog in backyard
Technician Ace Adams
PO #
Category T&M Service
Resolution BCI

Use Payment Information On File

None
Bank (1) Bank of America ****0324
Credit Card (1)

Ticket #24742

Ticket

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Go To Journal Notes (3) Other Items Purchase Orders (0) Service History Ticket Log Notifications

Customer 6975 Morretti, Ms Christina
Site Morretti, Ms Christina
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Created 12/22/2011 11:26:00 AM
Created By JustinD
Status Resolved

Contact Christina Morretti
Phone (910) 421-3214
Ext
Notify

Billing Overrides

☐ Override Warranty
☐ Override Service Level

Invoice

☐ Third Party Bill To

Contact
Invoice Date 1/ 4/2012
☒ Add Resolution Note to Invoice
☐ Close Ticket After Invoicing
Create Invoice

Ticket Charges

	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

FSU

Payment Received N
Remittance N
Signer Chris M

Chris M

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.
