SedonaFSU iOS Edition Help Doc (Internal)

12/05/2024 12:32 pm EST

Note - this document was under review when the company decided to move away from FSU and move forward with SedonaX Mobile. As such there are notes within the document about updates that were meant to be made to the help doc, but were never completed.

Overview

This guide is intended to provide SedonaOffice users an understanding of the SedonaFSU iOS Edition functionality and features. SedonaFSU iOS Edition is an application downloaded to your iPhone or iPad device. The app allows technicians to work through service ticket, inspection, and job appointments, automatically updating their company's SedonaOffice database as work if performed. They can issue parts, record statuses, collect payment methods, and more in real time from the field.

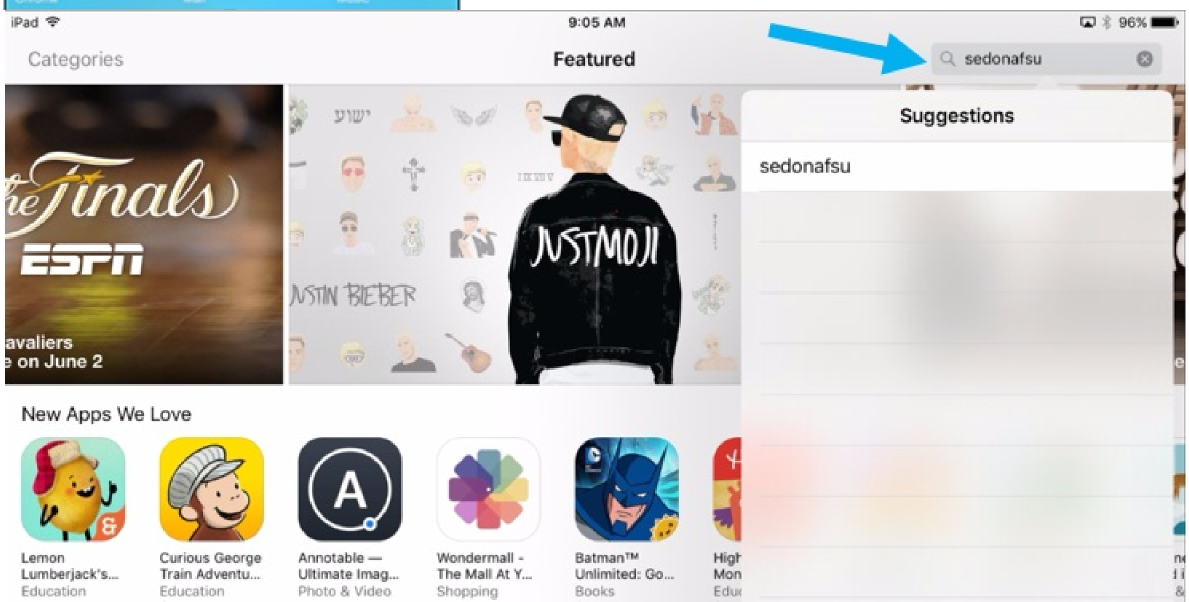
A service manager must setup technicians using the Technician Management Tool prior to using SedonaFSU. There is a separate guide on our website that walks managers through using this setup tool.

Requirements

The SedonaFSU iOS Edition can run on any iPad, iPhone 6/6+, or iPad mini using iOS 11.0 (is this right?) or above. We recommend **NOT** setting the device to automatically install new iOS updates so that we have a chance to first test and resolve any issues with the new release.

Download

To begin, download SedonaFSU from the iPad or iPhone's App Store. On the Home Screen of your device, select App Store. Search for SedonaFSU in the top right corner and select Install.



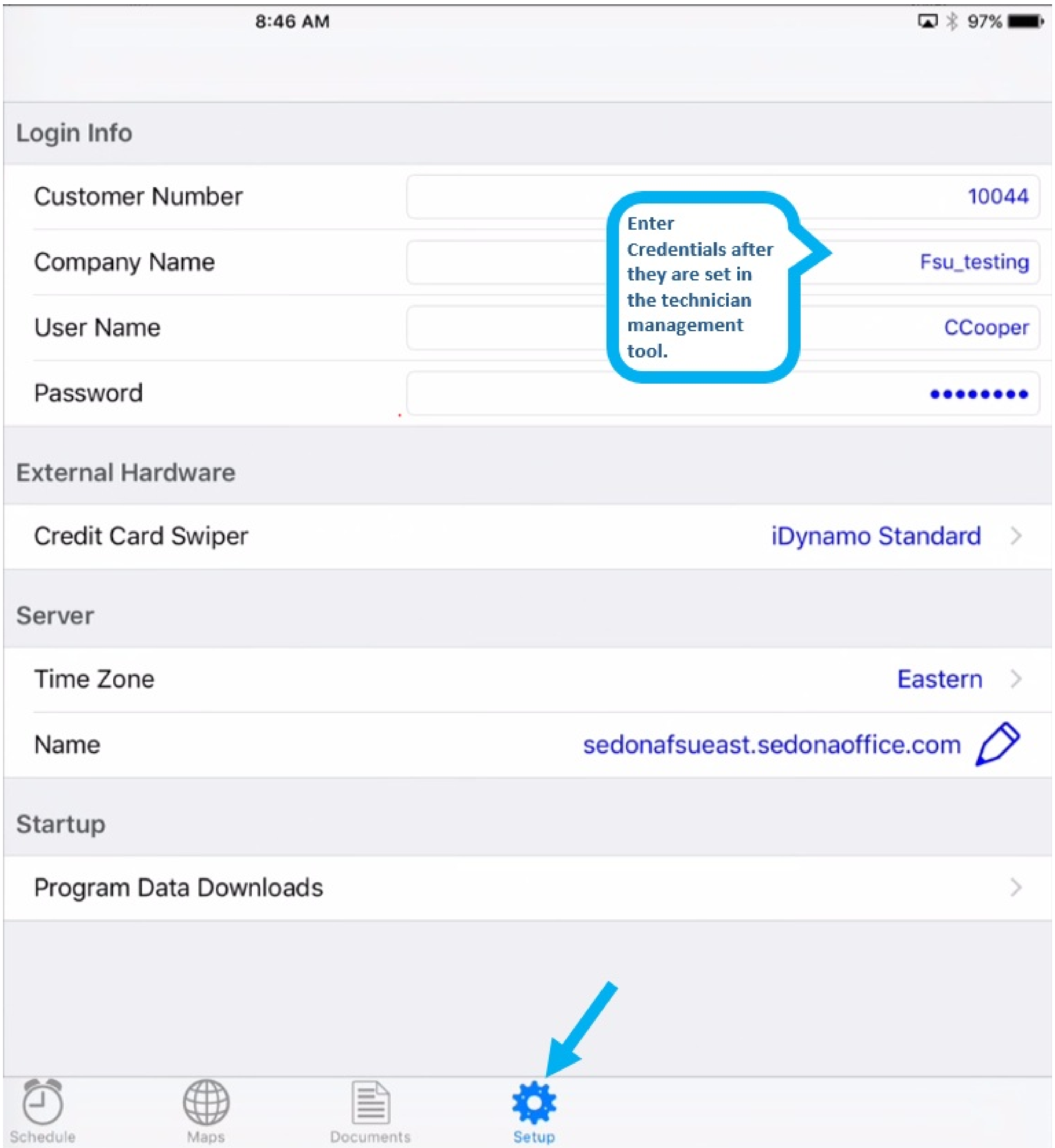
need screenshot where is says install

Enter your Apple ID password to confirm and the app will install. SedonaFSU (the FSU) will then appear on the home page of your device. Tap the icon to open the app.

Login & Setup

Entering Credentials

A pop up asking for credentials will appear the first time you open the FSU. Tap dismiss on the pop up and the app will direct you to the Setup tab. After your first login, you will not need to re-enter your credentials. The FSU will save them and automatically log you in each time you open it.



Get new pic with Login button

Login Info: Your service manager will provide your login credentials (service managers please see the Technician Management Tool Guide for a walk through on adding technicians to the FSU, creating their credentials, and adjusting their permissions). The credentials are:

- Customer Number and Company Name – These are your customer number and company name with SedonaOffice. They will be the same for all technicians at your company.
- User Name and Password – These are setup by your service manager and are specific to each technician.

External Hardware: If your company uses credit card swipers, select the correct model here (Idynamo, Udynamo, or cDynamo). Remember to contact SedonaOffice for the encryption key before purchasing card readers. Will this process be changing?

Server: Select your time zone and enter the corresponding server name from the list below:

- sedonafsuatlantic.sedonaoffice.com
- sedonafsueast.sedonaoffice.com
- sedonafsucentral.sedonaoffice.com
- sedonafsumountain.sedonaoffice.com
- sedonafsuarizona.sedonaoffice.com
- sedonafsupacific.sedonaoffice.com
- sedonafsuhawaii.sedonaoffice.com

Login

After entering your credentials, select Login to load your company's information to the FSU. As the FSU loads it will say Login Successful with a green check mark, if your credentials were entered correctly. Below this, it will display the name of each setup item as it loads, and a progress bar for that item. If a setup item is slow to load a Download Later option will appear. Selecting this option helps you speed up the load process if you are in a hurry. Do not select Download Later on your first login; allow all items to fully load; this may take a few minutes.

NEED NEW SREENSHOT WITH download later showing

When the login is complete the app will open to the Schedule tab. Leave this tab for now, and instead return to the Setup tab to complete setup.

add tabs screenshot

Program Data Downloads

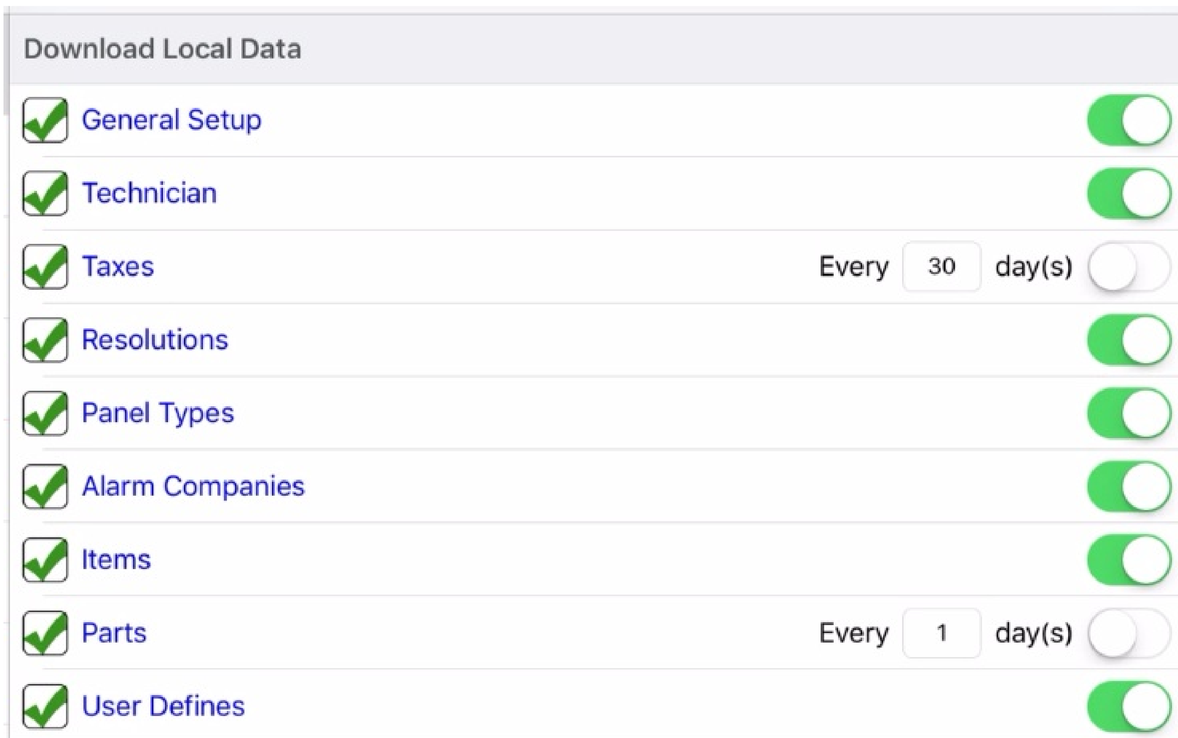
This section controls what basic setup information loads when you refresh the FSU. The first time you login to the FSU you must load all setup data, but doing so is time consuming. Program Data Downloads allows you speed up the process by telling some types of data to load less frequently than others. For example, the number of parts in your warehouse may change and need to be refreshed daily. Whereas, what resolution codes your company uses do not often change, so they rarely need to be refreshed.

Note - Program Data Downloads only controls when setup items load on your FSU **from** SedonaOffice. This section does not control the information you send from the FSU **to** SedonaOffice; that information updates automatically.

Select Program Data Downloads and a list of all FSU setup items appears. If the item was loaded successfully, a green check appears beside it. If loading the item was skipped or failed, a red x will appear instead. Note that if your company does not use service ticket custom fields your User Defines setup option will always show a red x; this is normal.

To control how often a setup item updates toggle the switch to the right of the item. Toggling the switch to green means the item will update every time the FSU is refreshed. Toggling the switch to white allows you to enter a number of days. The item will then update periodically based on how many days you enter. Do not enter a number of days and then also toggle the item to green. Doing so will force the item to ignore the number of days you entered, and instead update every time the FSU is refreshed.

We recommend setting up your downloads as in the screenshot below. General Setup and Technician should always be set to refresh. Parts controls not just the parts themselves, but also the quantities of these in your warehouse, which means it needs to load more frequently than other items. Everything else can be set to update monthly.



new screenshot needed with recommended general and tech green, parts every 1 day, and all else every 30.

To update a single setup item on the fly, without refreshing the entire FSU, select the blue ‘i’ for that item on the far right. A window will pop up with the item’s details:

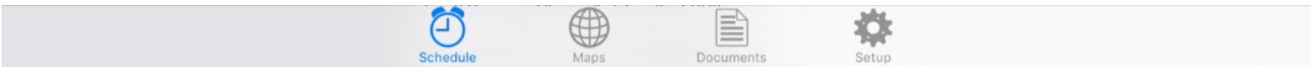
1. what information is included in that setup item
2. how many pieces of data there are (for example, how many resolution codes there are)
3. how many of those pieces of data successfully downloaded the last time the item updated.
4. the date and time of the last update.

Select Download Now to update the data for that setup item only. This can be helpful if the office transfers parts to your warehouse mid-day, and you need to quickly refresh just your part quantities.

Screenshot of resolutions for this

Schedule View

After successfully logging in and loading setup data, select Schedule on the bottom left of the app. The Schedule tab displays a list of the technician's appointments on the left, and a summary of the currently selected appointment on the right.

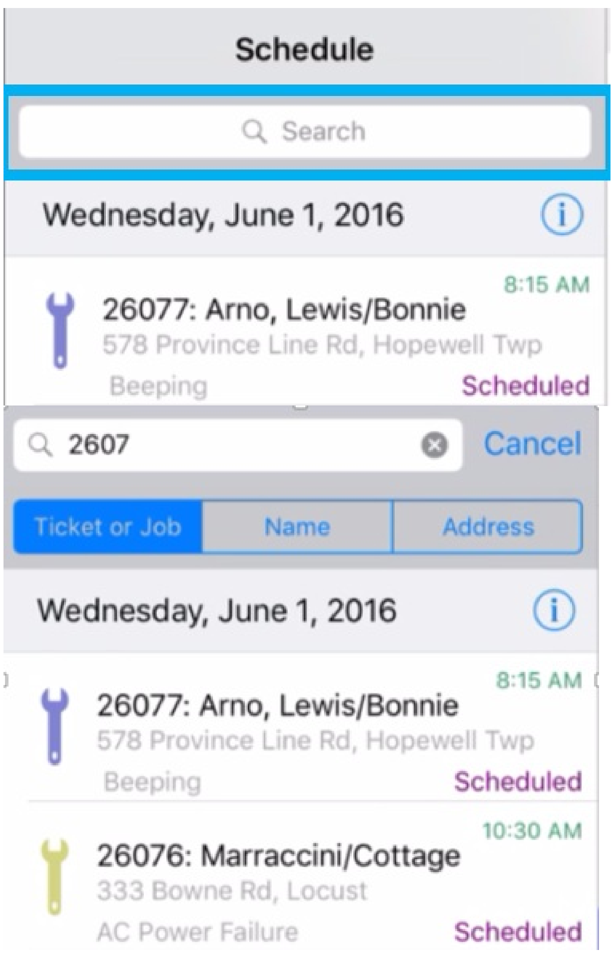


Screenshot of schedule view

Components of the Schedule

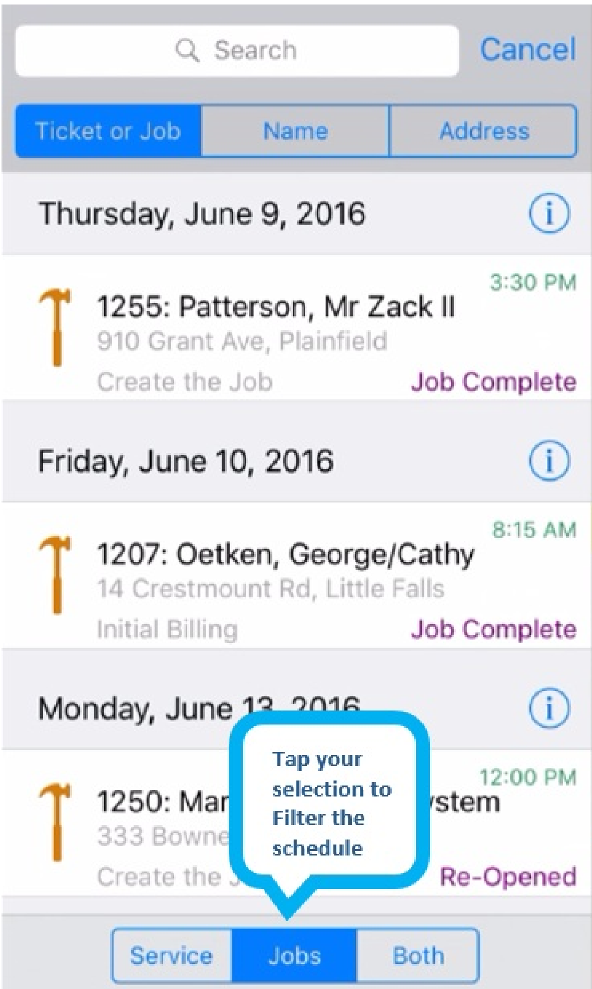
Search

The search bar at the top of the schedule allows you to search for a specific appointment based on the ticket/job number, the customer site name, or customer site address.



Filter

The filters at the bottom of the schedule determine what types of appointments appear. Select Service, Jobs or Both and the FSU will display only appointments of the selected type. You can use this filter option while you are searching, and when simply viewing the schedule.



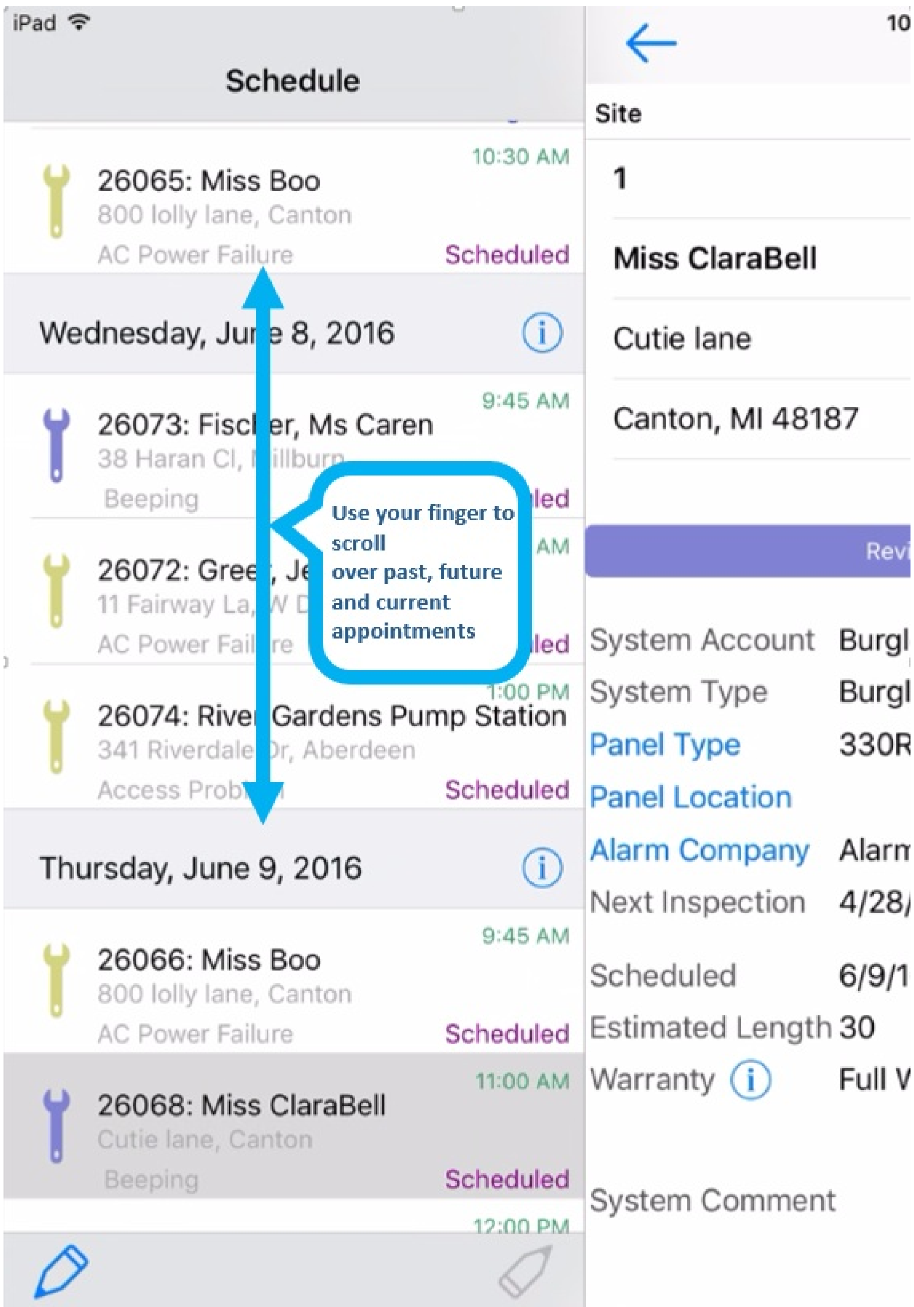
Unscheduled

Directly below the search bar unscheduled appointments appear. Unscheduled appointments are tickets the technician is assigned to, but no appointment has been created yet. You can view information for these tickets, but you cannot edit them until an appointment is scheduled.

SCREENSHOT

Date Headers

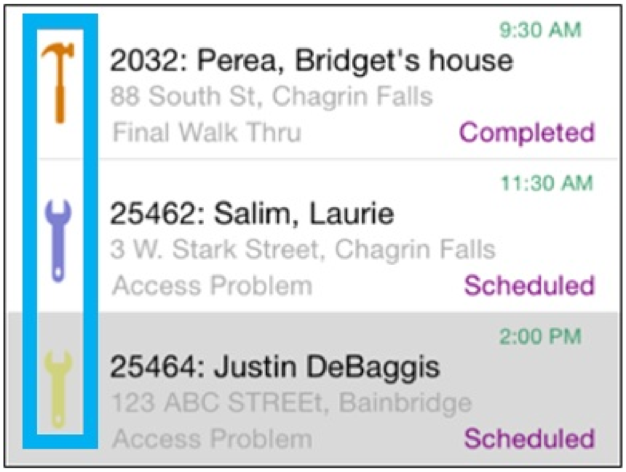
Below the unscheduled tickets, the technician's actual appointments appear. A grey date header bar shows above all of the appointments for that specific day. You can scroll up and down on the schedule to view appointments from different dates. The number of days forward and backward you can scroll is determined by your service manager using the Technician Management Tool. Appointments are arranged with the most recent (and/or future) at the top of the list and the oldest appointments at the bottom.



Appointments

Each appointment on the schedule has a colored icon followed by key ticket/job information for that appointment. This tiny summary shows the:

1. Ticket/job number
2. Site name
3. Site address
4. Scheduled time
5. Ticket/job status

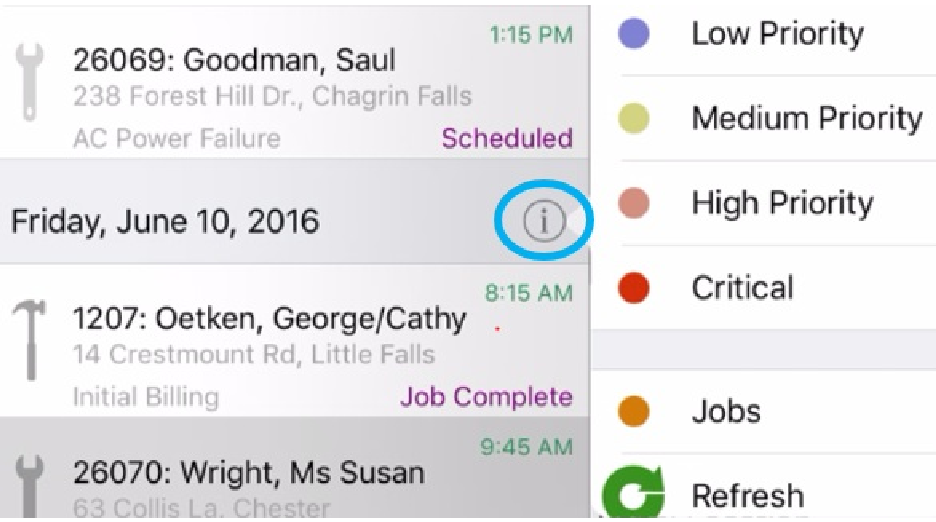


New labeled screenshot

For the appointment icon symbol:

- Hammer - Indicates a Job (installation)
- Wrench - Indicates a Service/Inspection Ticket

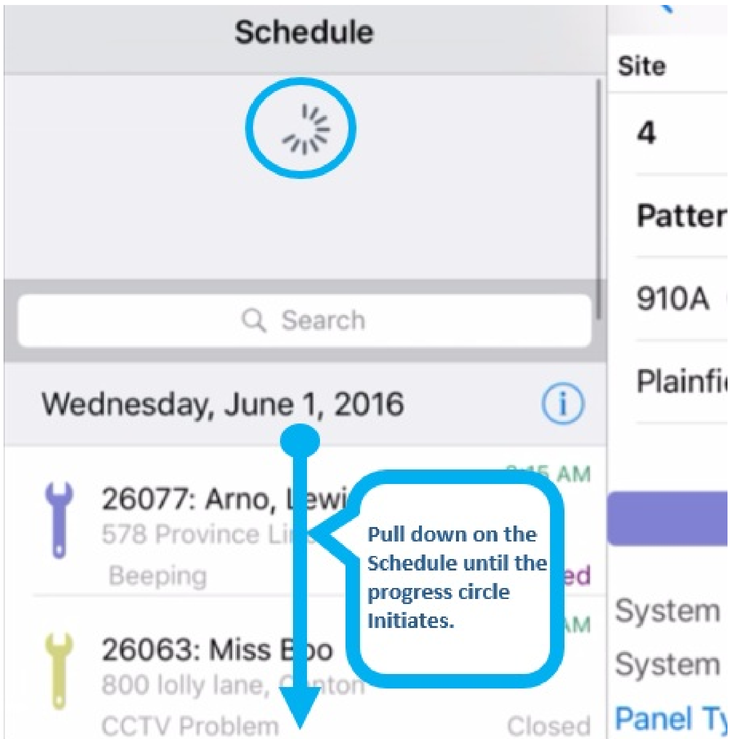
The color of the appointment icon indicates priority. Select the blue (i) to the right of any date header to see the full list of all priorities and their color. Job appointments do not have priorities, and always show as orange. Ticket appointments may have a priority anywhere from Low (purple) to Critical (red). Click on one of the priorities here and the schedule will rearrange the appointments on the selected day with your chosen priority at the top.



Refreshing

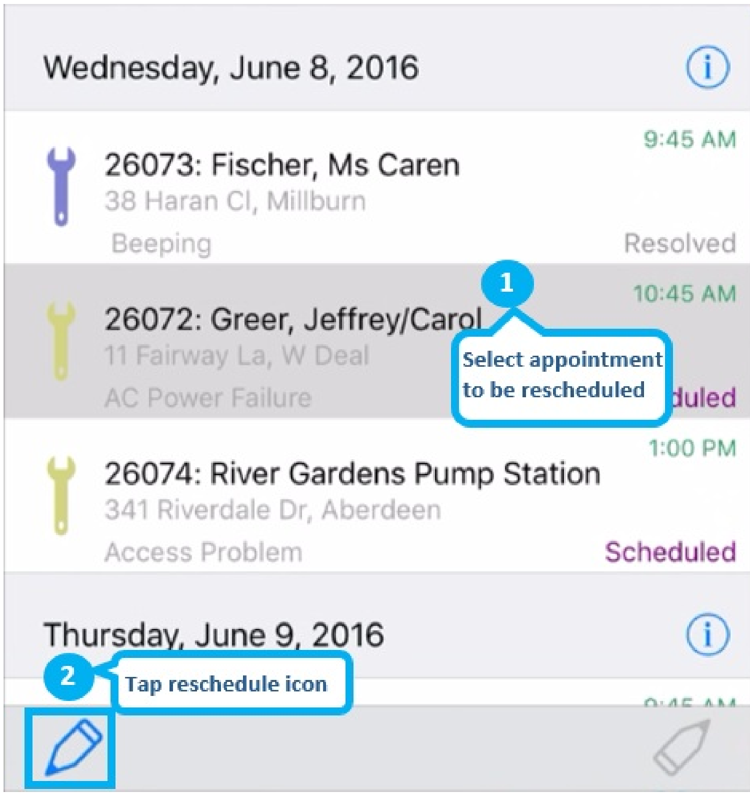
If a change is made to a technician's schedule in SedonaOffice the FSU schedule does not automatically reflect the change. Technicians must periodically refresh their schedule manually to see changes. To do this scroll to the top of the schedule, and pull down on the schedule until the progress circle starts to spin. Let go of the schedule and wait for it to load.

Note: Refreshing the schedule does not refresh your setup data. To refresh setup data close and re-open the app, or navigate to Setup – Program Data Downloads to select a specific item to refresh.

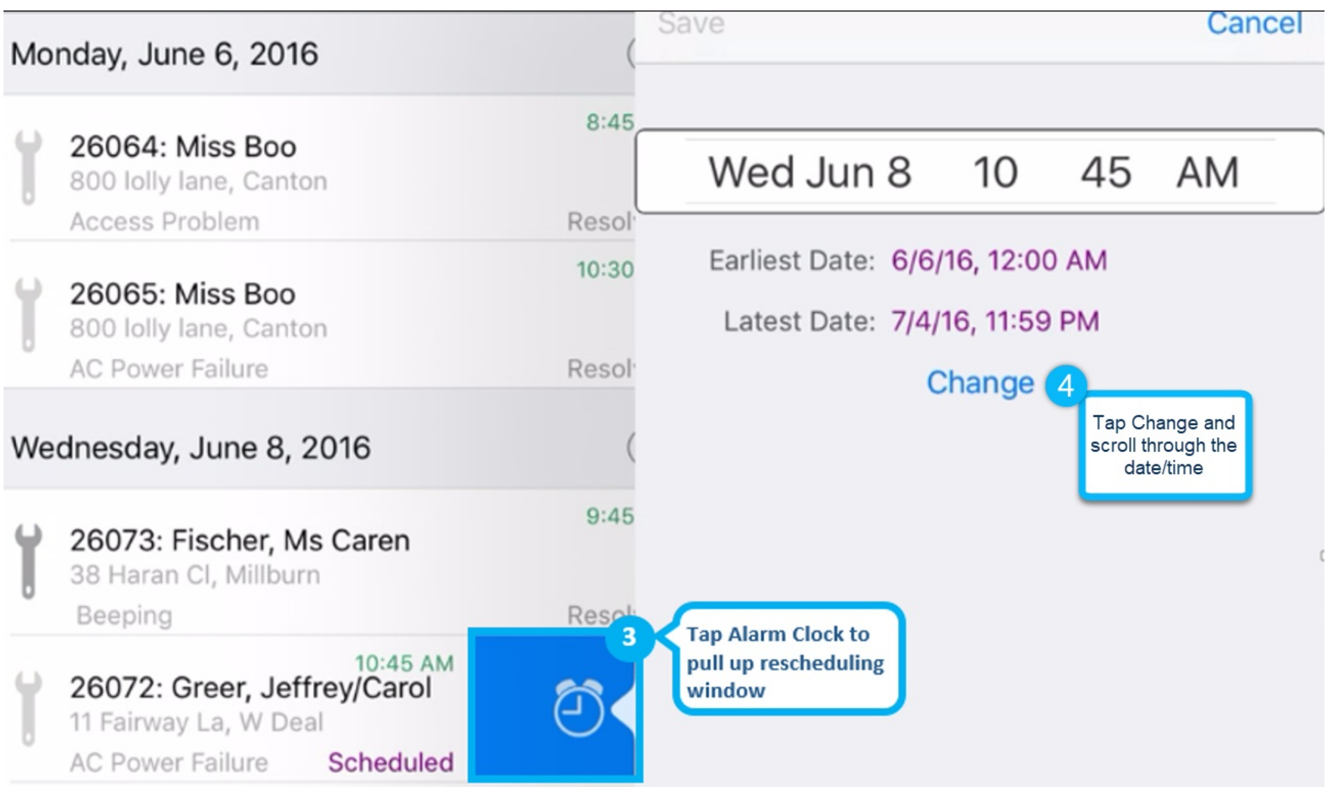


Rescheduling Appointments

If the service manager has given technicians permission to do so, they can reschedule their own appointments through the FSU. To reschedule an appointment, select the appointment and tap the Pencil Icon on the bottom left of the schedule.



A clock icon will appear on the appointment; tap the clock icon, and then tap change. Scroll up or down on the day and/or times to select the new scheduled date, and then tap Save. The Earliest and Latest Date fields above the Change button show the soonest and the latest times the appointment can be rescheduled for.

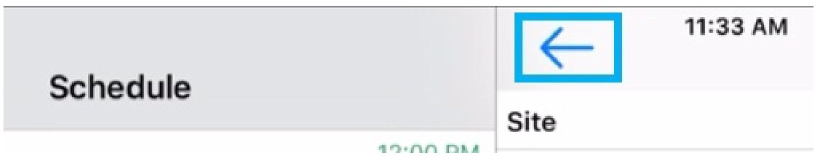


Ticket/Job View

On the schedule, tap the appointment you would like to view. A summary of that ticket/job will appear on the right with a header at the top, tab selection in the middle, and tab information at the bottom.

Show/Hide Schedule

After selecting your desired appointment, you may tap the blue arrow in the top middle of the screen to hide the schedule and view the ticket/job information full screen. Select the arrow again to bring the schedule back.



Ticket/Job Header

The top header portion of the ticket/job summary contains customer and site information in the left column, and basic ticket/job information and warnings on the right.

Customer/Site Info

You can scroll through the left column to see the customer's site number, site name, site address, and contact phone. Followed by their customer number, customer name, and customer address.

TWO SCREENSHOTS DEMONSTRATING SCROLL box indicating site vs customer info

Site report

In between the site and customer info is the Site Report, also referred to as the Service Sales Summary Report (FSU). This is a custom report made to the specifications of one customer. To run this report select the blue paper icon, and then choose to save the report to the ticket, site, or system. You may select more than one. Select Get Report and the report generates as a document on the FSU. Please see the documents section of this guide for more information on managing documents in the FSU.

SCREENSHOT SITE REPORT BUTTON

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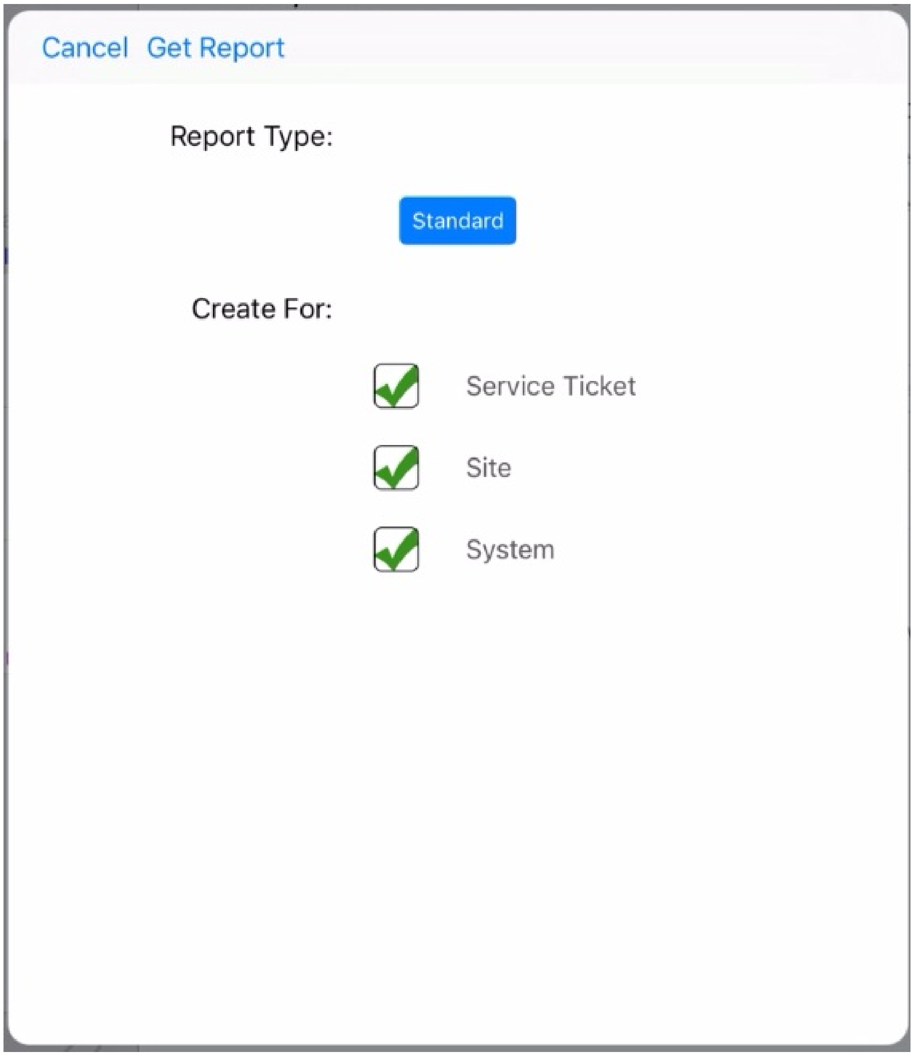
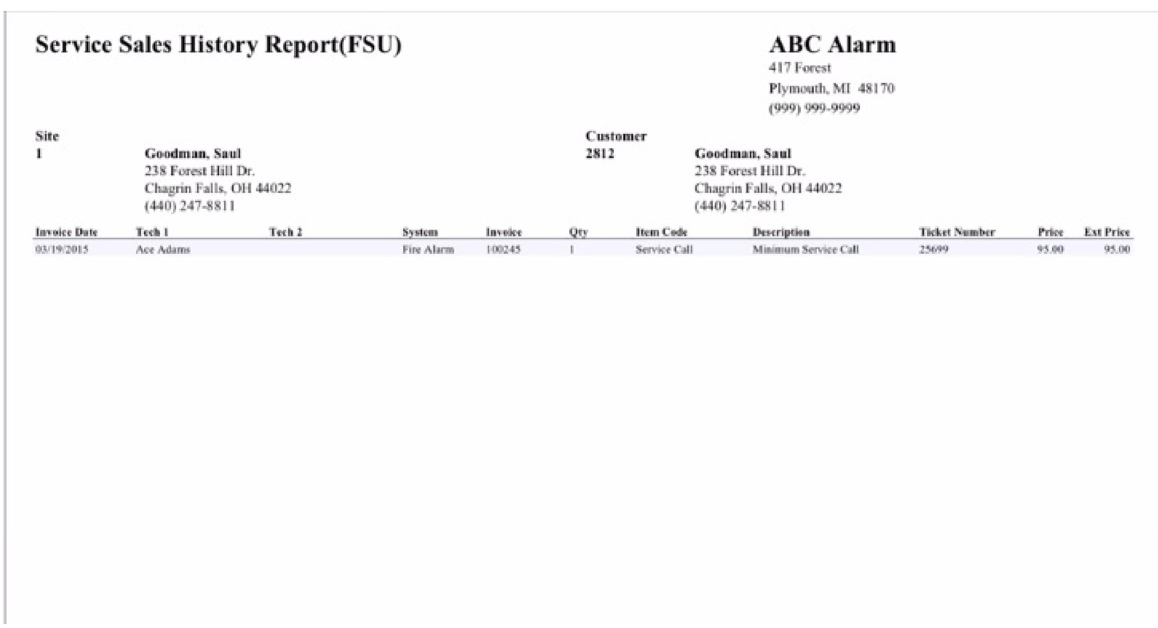


Example Site Report, Generated for Service Ticket:



Service Sales History Report(FSU)

ABC Alarm
417 Forest
Plymouth, MI 48170
(999) 999-9999

Site
1 — **Goodman, Saul**
238 Forest Hill Dr.
Chagrin Falls, OH 44022
(440) 247-8811

Customer
2812 — **Goodman, Saul**
238 Forest Hill Dr.
Chagrin Falls, OH 44022
(440) 247-8811

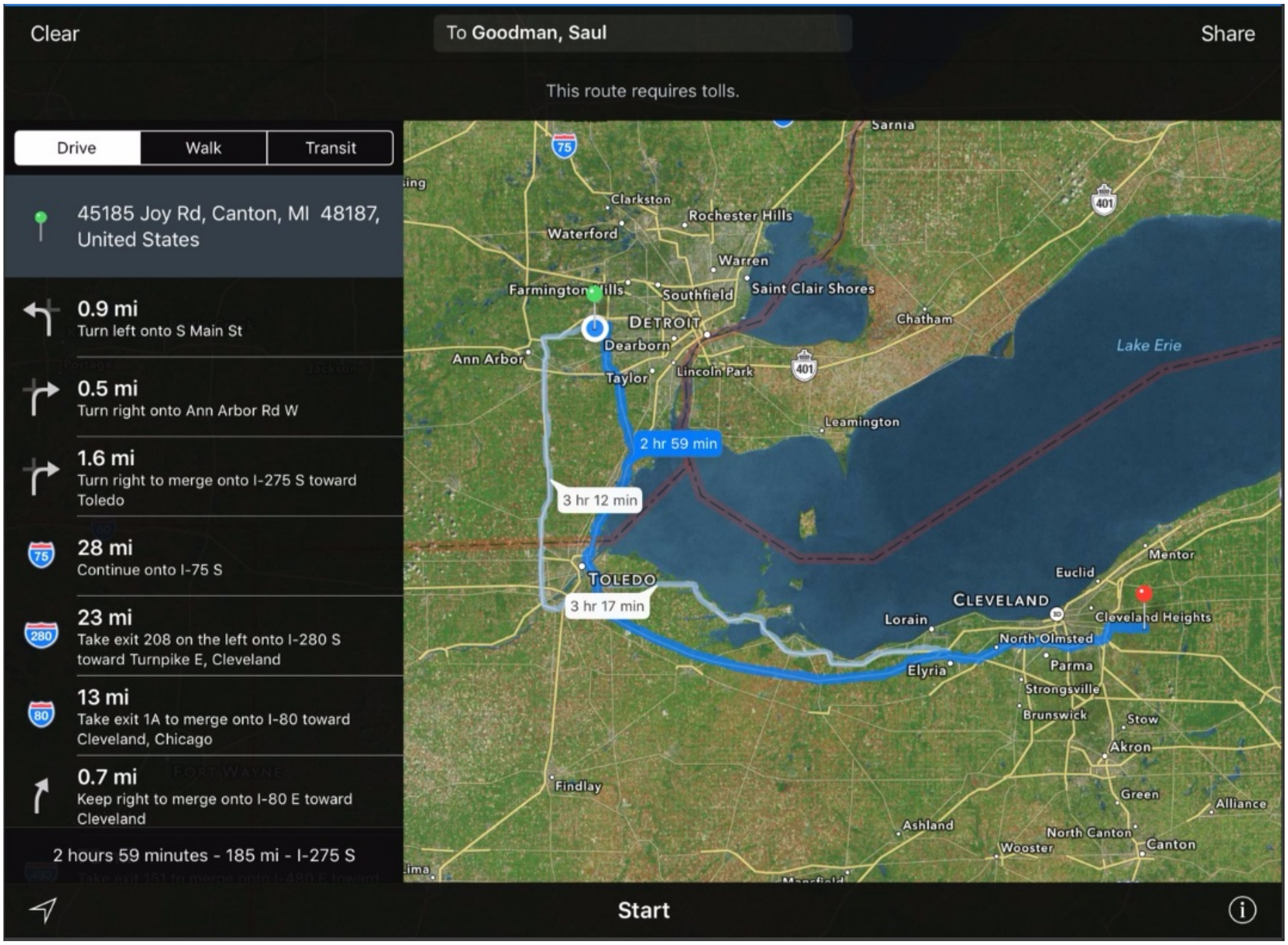
Invoice Date	Tech 1	Tech 2	System	Invoice	Qty	Item Code	Description	Ticket Number	Price	Ext Price
03/19/2015	Ace Adams		Fire Alarm	100245	1	Service Call	Minimum Service Call	25699	95.00	95.00

Maps and Directions

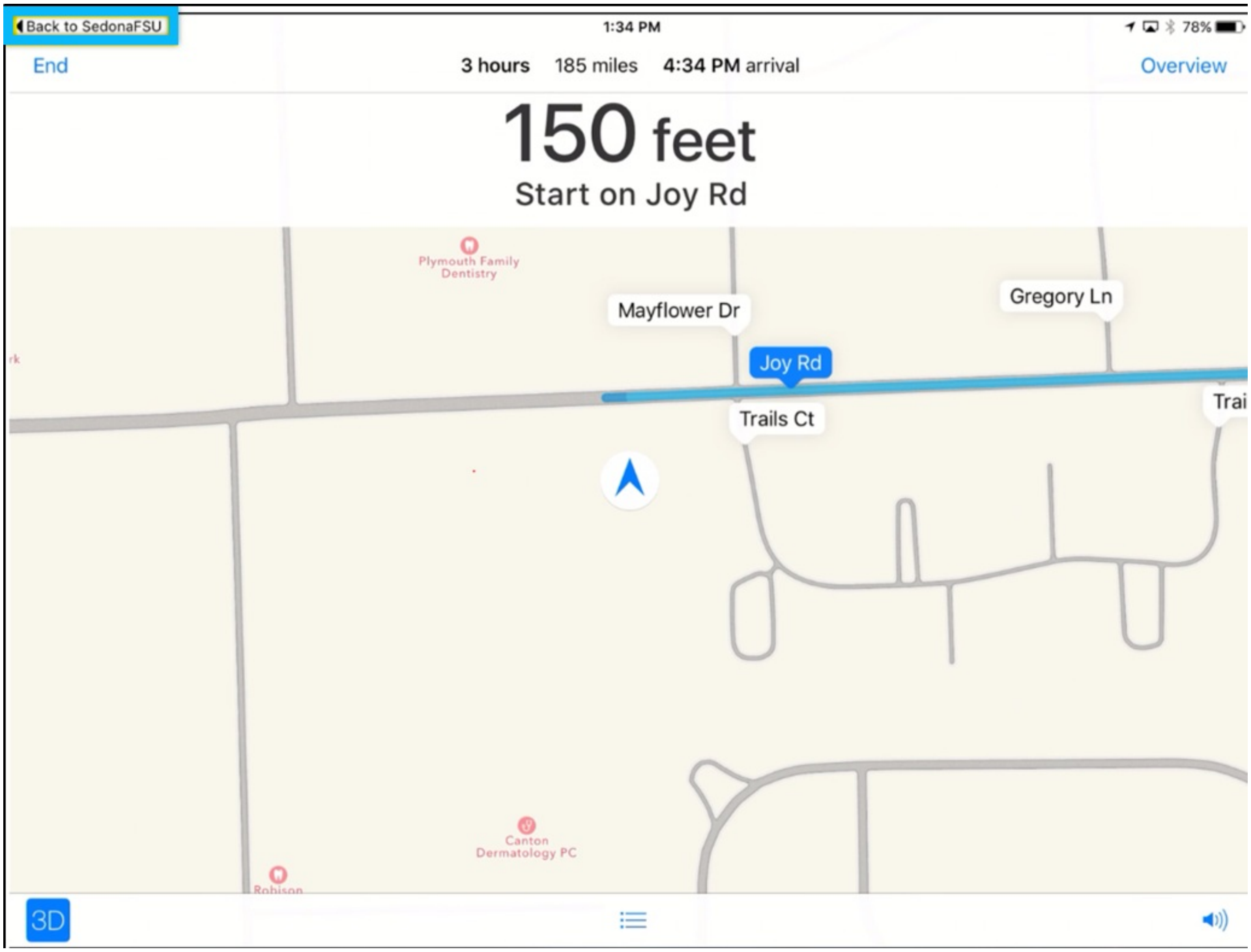
Users can click on the blue (i) beside the site address to get directions to that site.

SCREENSHOT OF MAP ICON

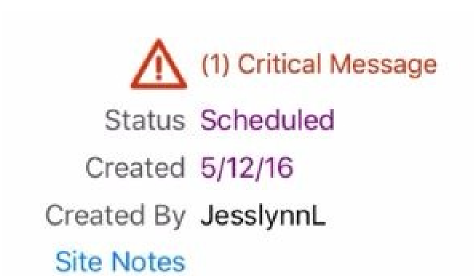
Click the blue (i) and the FSU redirects you to your devices Maps application, and automatically enters the site address. A map of the route appears at right, and written directions on the left.



Select start at the bottom to begin GPS navigation. You can select 'Back to SedonaFSU' in the top left corner to return to the FSU app.



Basic Ticket/Job Info and Warnings

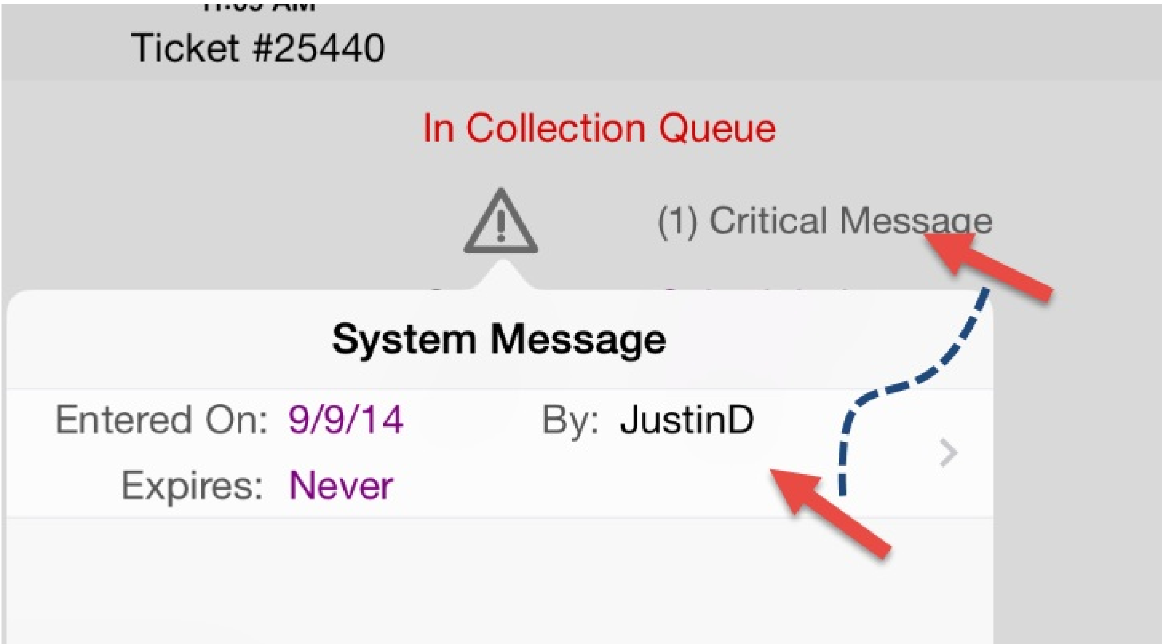


Get better screenshot with in collection

The top right section of the header displays the ticket/job status, the date the ticket/job was created, and the name of the user who created it. There are three other fields that may or may not display depending on whether they are applicable to the customer.

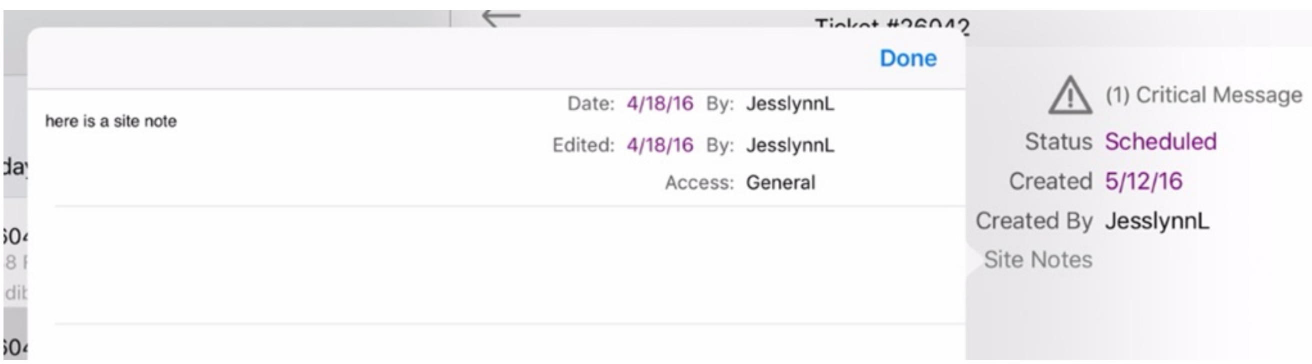
In Collection Queue – A warning will display marking the customer as in collections if they are delinquent on current payments.

Critical Message – If the customer has a critical message you should be aware of, the Critical Message option will appear. This message (or messages) can come from the customer, the system, the customer's primary service company, and/or their secondary service company. Tap Critical Message and a new window will pop up listing the message(s). Tap a message on the list to read it.



GET BETTER SCREENSHOT AND A SECOND SCREENSHOT OF THE ACTUAL MESSAGE

Site Notes – This option appears if the customer has one or more notes entered directly to their site. Tap this option to read the note(s).



Time and Attendance - Will this show if the company is not setup with t&a? Time and Attendance is another SedonaOffice module which can be used to track payroll. If your company uses this Time and Attendance you may select it here to enter information into that module from the FSU. Please see the separate Time and Attendance help documentation for a full walk through of this module.

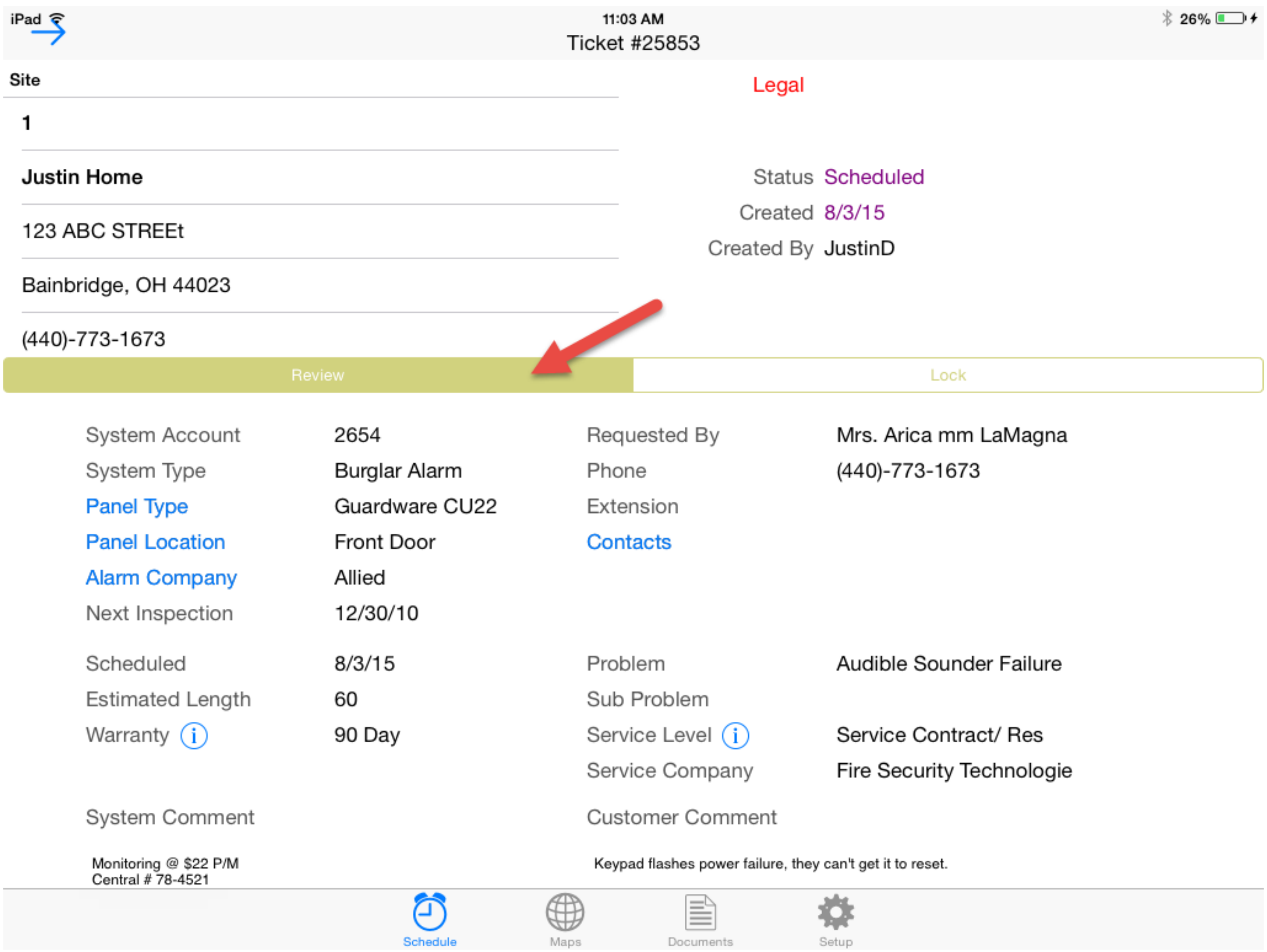
The Time and Attendance options available from the FSU are:

- Clock In – Select this when you first begin your FSU appointment in order to start your shift in Time and Attendance.
- Clock Out – Select this when you complete the FSU appointment to end your shift in Time and Attendance.
- Web View – Select this to view your shift in Time and Attendance.

If you clock in to Time and Attendance in this section, more Time and Attendance options will become available to you when entering your times on the FSU appointment. Need Screenshot

Review Tab

When you first select an appointment you are defaulted to the Review tab, which lists basic system and ticket/job information below the tab heading. Some of this information can be edited and some cannot.



BETTER SCREENSHOT

On the Review tab, the following fields are display only, and cannot be edited:

- System Account – The system account number being serviced on this ticket/job.
- System Type – The type of system being serviced.
- Next Inspection: The next inspection date for the system, if the system has an inspection record.
- Scheduled: The date the appointment is scheduled for
- Estimated Length – The estimated time in minutes required to complete the appointment.
- System Comment – Displays any notes entered in the system comments field in SedonaOffice. This cannot be edited from the FSU.
- Requested By – The name of the customer who requested service.

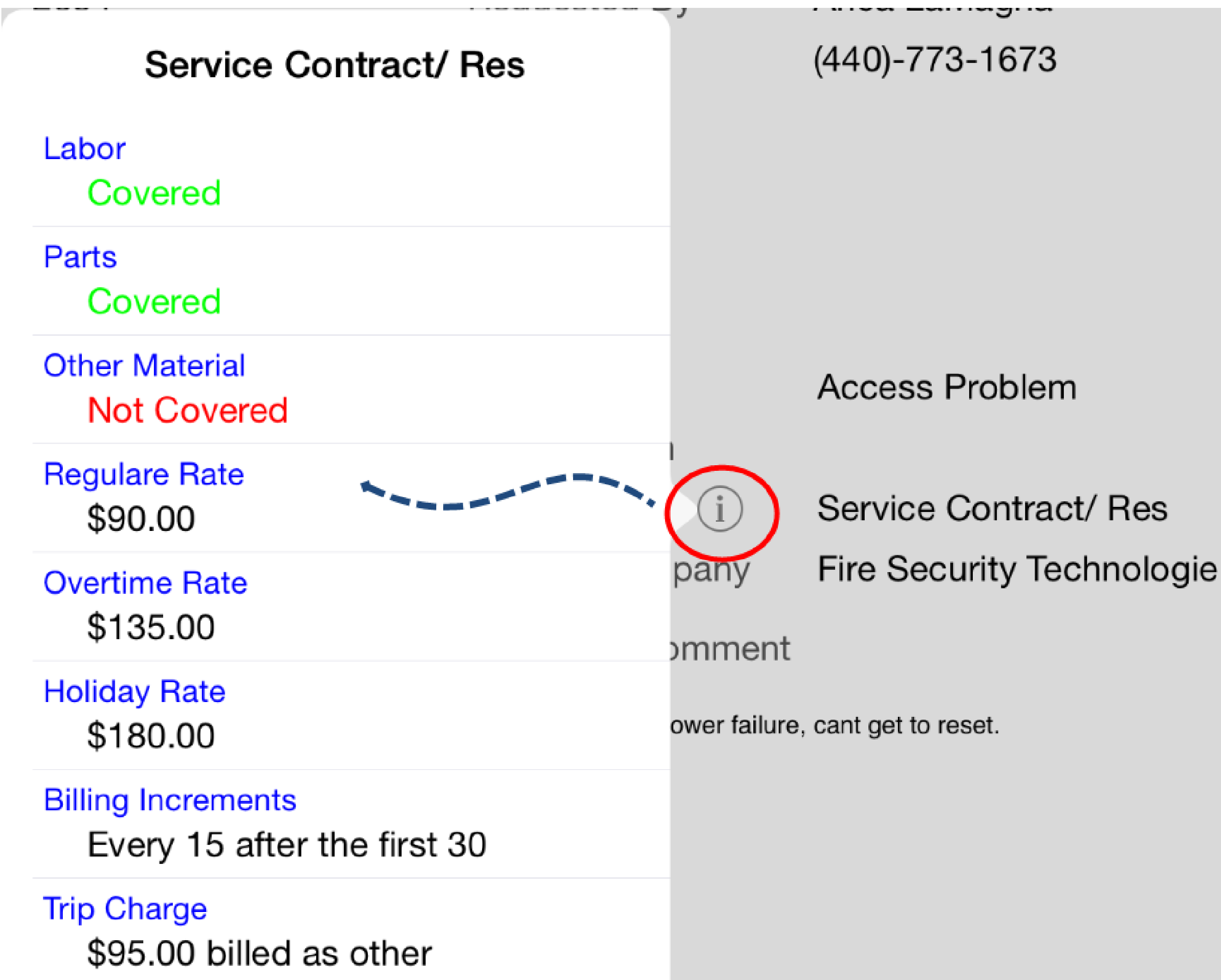
- Phone and Extension – The phone number for the customer who requested service.
- Problem – States why the customer is requesting service.
- Sub Problem – Further details on the reported issue.
- Service Company – The service company assigned to the ticket.
- Customer Comments – Notes from the customer on their reported issue.

Warranty and Service Level – these fields cannot be edited, however, selecting the blue (i) to the right of these fields will give you more information on them.

For Warranty, what items are covered under warranty and the warranty expiration date displays.

BETTER Screensht

For Service Level, you can see what items are billable and not billable based on the type of service being performed. This option also shows the labor billing rate, the billing increments for labor, and whether or not there is a trip charge.



betterscreenshot

The following Review tab fields can be edited:

- Panel Type – The Panel type of the system being serviced. This is a drop down field, where you can select the correct panel type from the list.
- Panel Location – The place where the main panel is located. This is a text field you can type in.
- Alarm Company – The alarm company monitoring the system. This is a drop down field, where you can select the correct alarm company from the list.
- Contacts – Tap this field to open a new window displaying all contacts from the customer's site. Users can edit, inactivate, and add new contacts from this window.

Note - The ability to inactivate contacts is permission controlled by service managers using the Technician Management Tool.

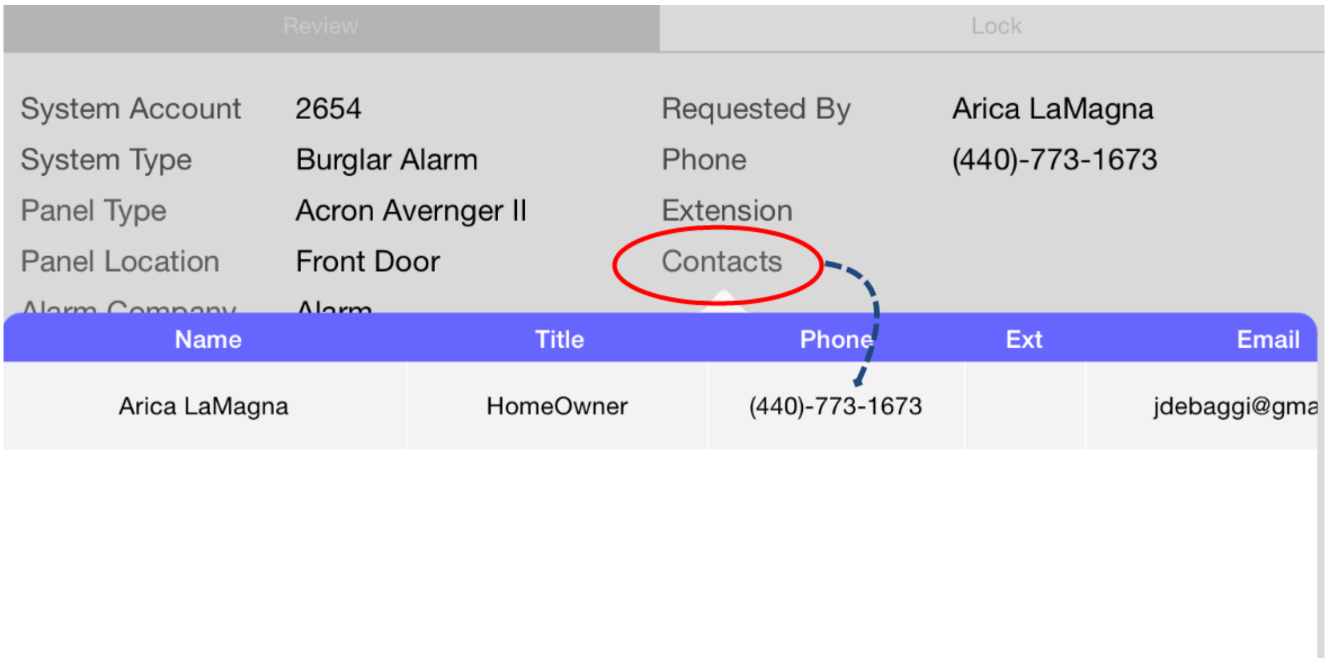
To **inactivate** a contact, select their name, and then select the (-) icon at the bottom of the window.

To **update** a contact, select their name and then select the pencil icon at the bottom of the window

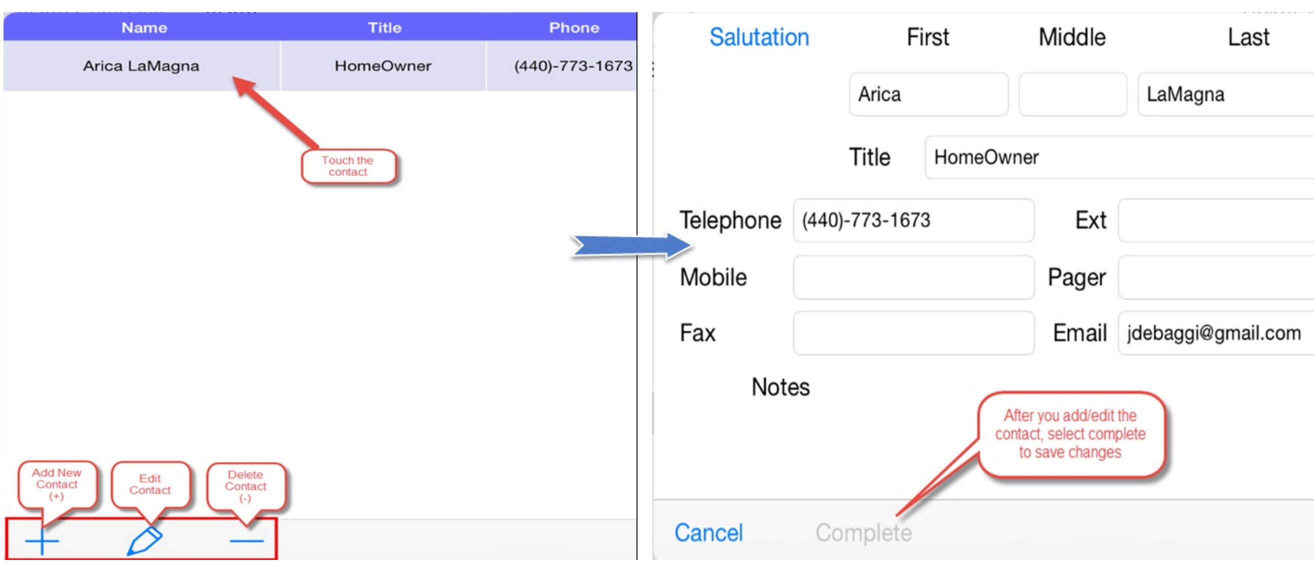
To **add** a new contact select the (+) at the bottom of the window.

When you edit or add a contact the contact information window appears with all basic contact fields such as name, email, and phone number. Add or edit any of these fields as needed and then click Complete at the bottom of the window.

Note – There is no way to change which contact is listed in the requested by field from the FSU.



NEW SCREENSHOT



new screenshot

Job Appointments

Because of the difference between the way jobs and service tickets are handled in SedonaOffice, some fields appear only for service ticket appointments, and some appear only for job appointments. The Problem, Sub problem, Service company, Customer Comments, Warranty, and Service Level fields do not appear for job appointments as they do not apply to jobs. Did I miss any?

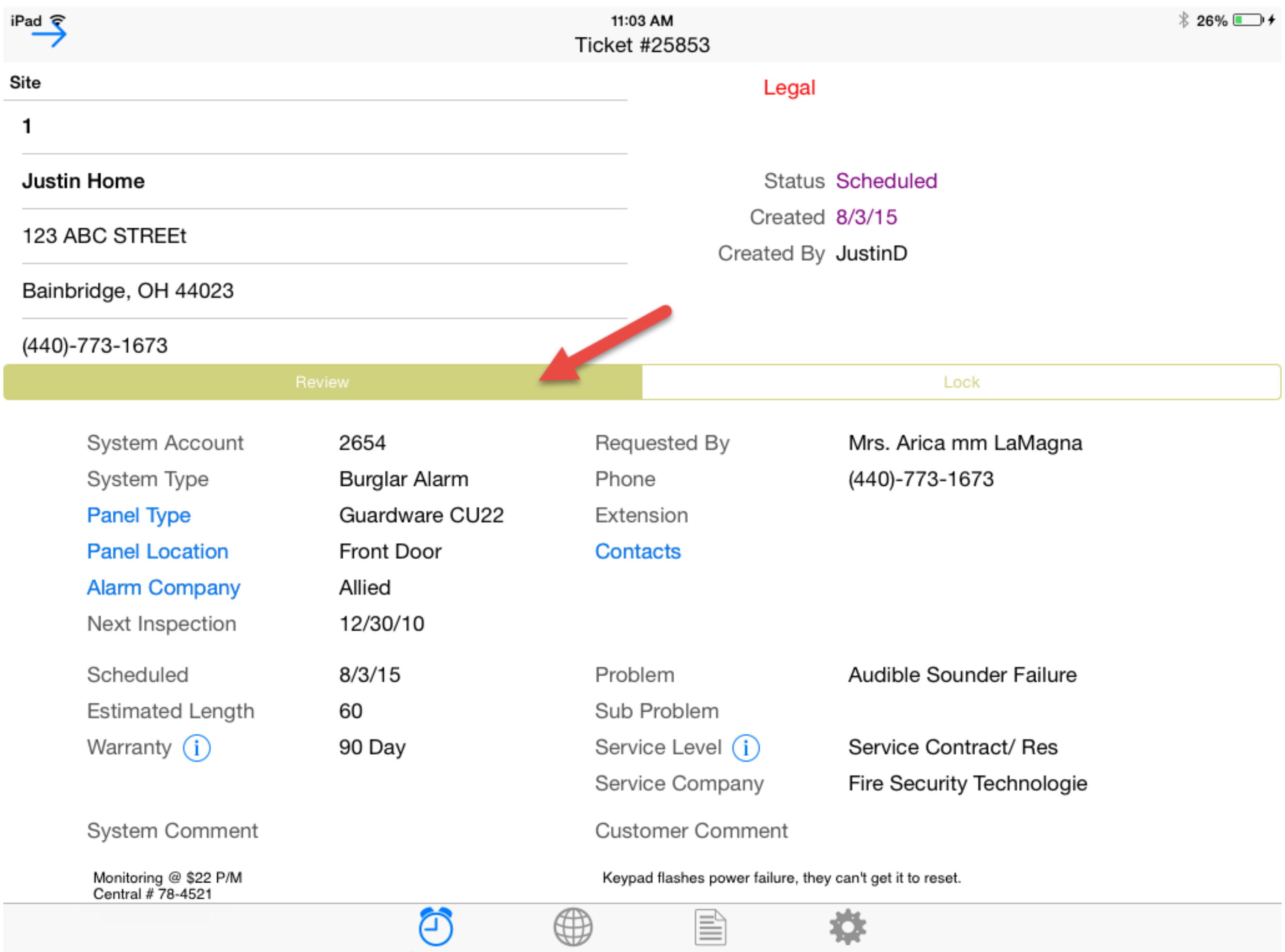
Jobs appointments do however, display a listing of what purchase orders are attached to the job. Tap the PO icon to see what POs exist and whether or not they have been received. You can only view the PO list here, you cannot see PO detail or edit the PO. NEED SCREENSHOT

Did this job section from memory, edits may be needed

Lock Ticket/Job

Below the ticket/job header is the Review and Lock bar. When you first select an appointment, Review is highlighted. To view and enter appointment details you must select Lock. No other user will be able to edit the ticket/job while you have it locked. Once you select Lock all of the working tabs for the appointment will appear. Review is one of the working tabs, so you may still view and edit this information while the ticket/job is locked.

Whenever you finish, or pause working on an appointment, press the last tab labeled Unlock, to release the ticket/job.



BETTER SCREENSHOT

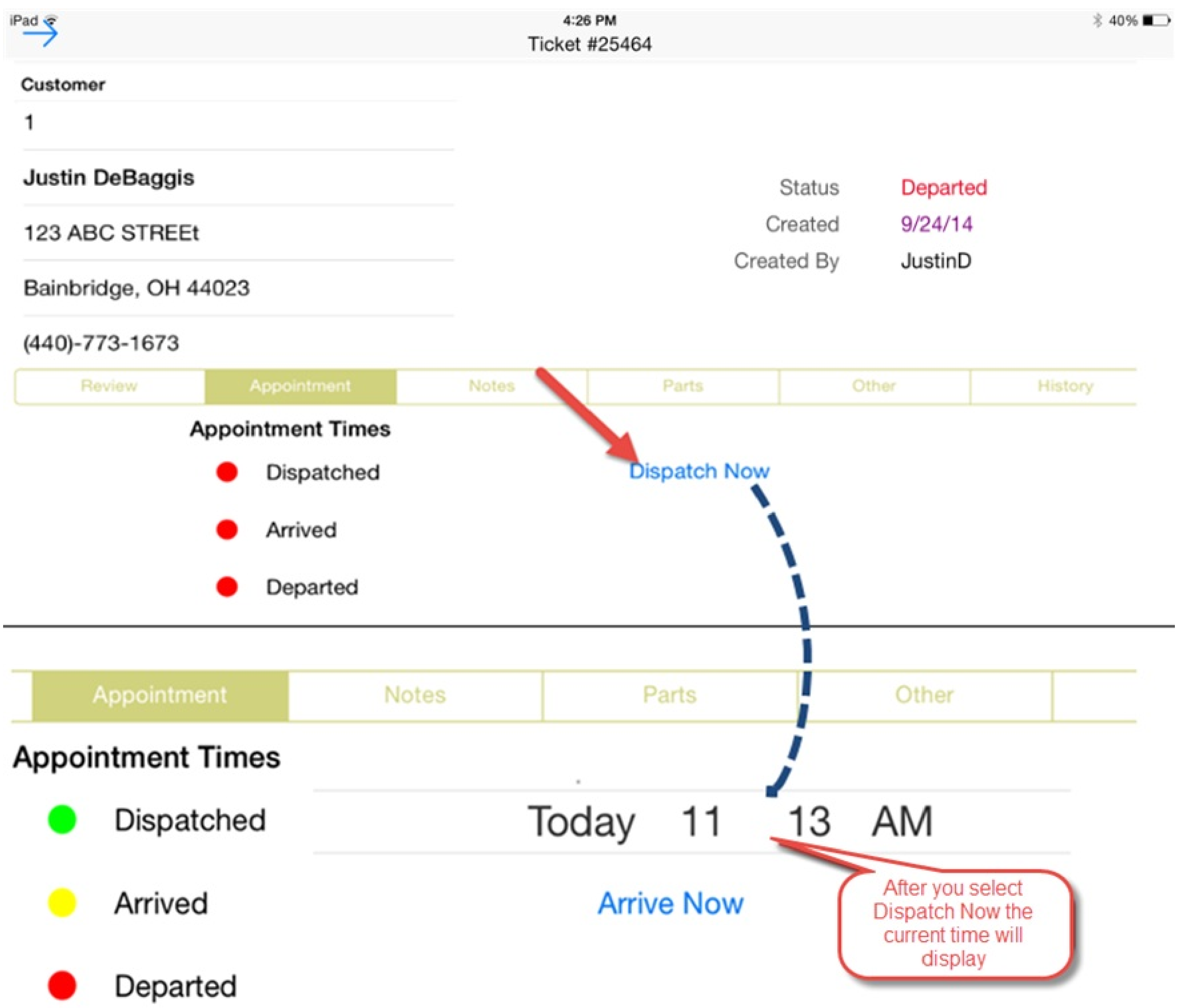
Screenshot of working tabs highlighting review tab

Appointment Tab

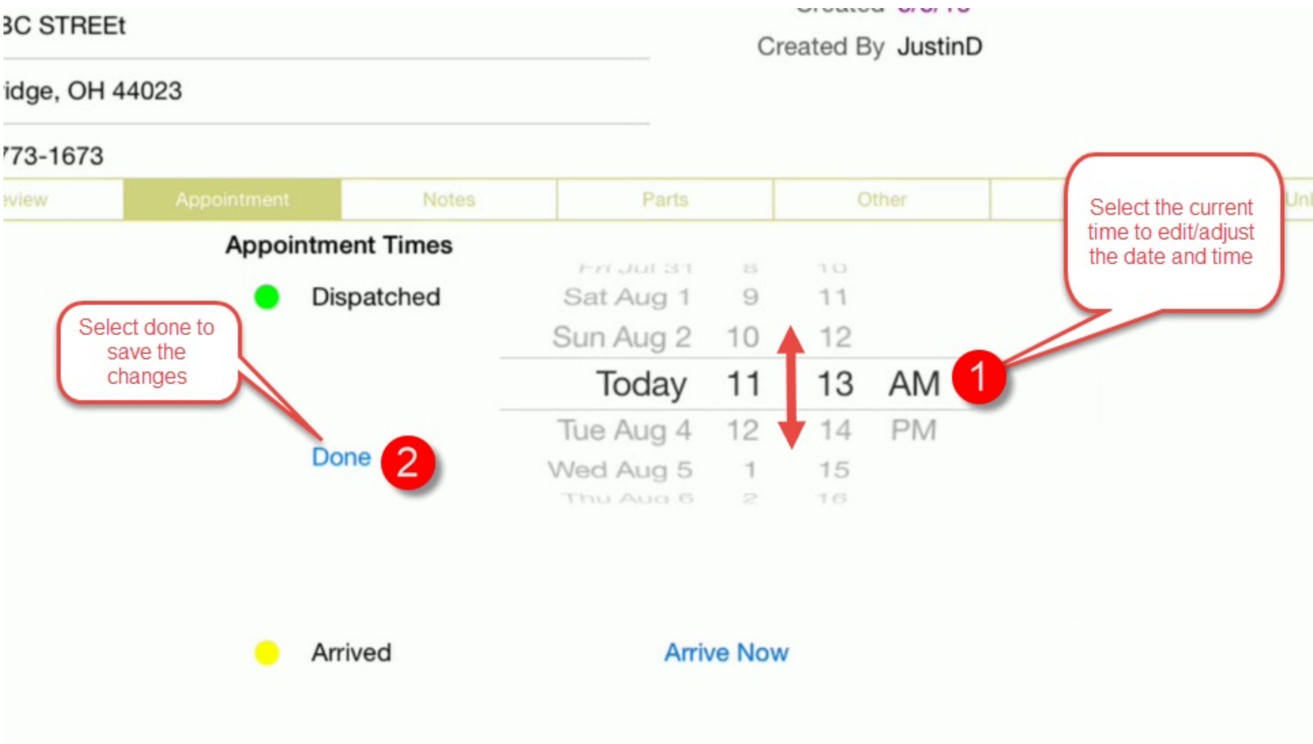
The appointment tab allows users to enter what times they dispatched for, arrived at, and departed from the ticket/job appointment. To begin, select Dispatch Now; this is the time you left for the appointment. You must select Dispatch Now before the FSU will allow you to enter any other information in the ticket/job. The FSU will default the current time into the dispatch field, but you can edit this by tapping on the time and scrolling through the date and time fields. Tap Done when the correct date and time have been selected.

Arrive now refers to when you arrived at the ticket/job site, and Depart refers to when you left. These options function the same as the dispatch time. Tap them to have the FSU default the current time and then adjust these times as needed.

Note - service managers can control how far back you can scroll to enter times using the Technician Management Tool. They may set permissions so that you must enter your dispatch time within 5 minutes of the scheduled appointment time, or they may allow you to enter the dispatch time days after the original appointment was scheduled.



new screenshots



new screenshots

Time and Attendance

If you clicked in to Time and Attendance at the beginning of the appointment, then you will see a check box beside your Dispatch time for this, labeled TA. If you leave this box checked it means you intend to begin a new task in Time and Attendance for your dispatch time. If you only want to record your shift overall, and not the specific tasks within it, you may uncheck this box.

If the box is checked a window will pop up for Time and Attendance after you enter your dispatch time. You will be asked to enter the information for your Time and Attendance task. For more details on Time and Attendance shifts and tasks, please see separate Time and Attendance help documentation.

The same TA check box will also appear beside your Arrival and Departure times, and you may again choose to check this box and enter a T&A task for the associated time, or leave the box unchecked. AGAIN, THIS SECTION WILL NEED SCREENSHOTS AND REVISIONS.

Notes Tab

The notes tab allows you to review, add, edit, and remove ticket/job notes. Any notes already entered on the ticket/job from SedonaOffice appear on this tab, along with any notes entered from the FSU. Notes appear with the newest notes at the bottom. The list of notes shows:

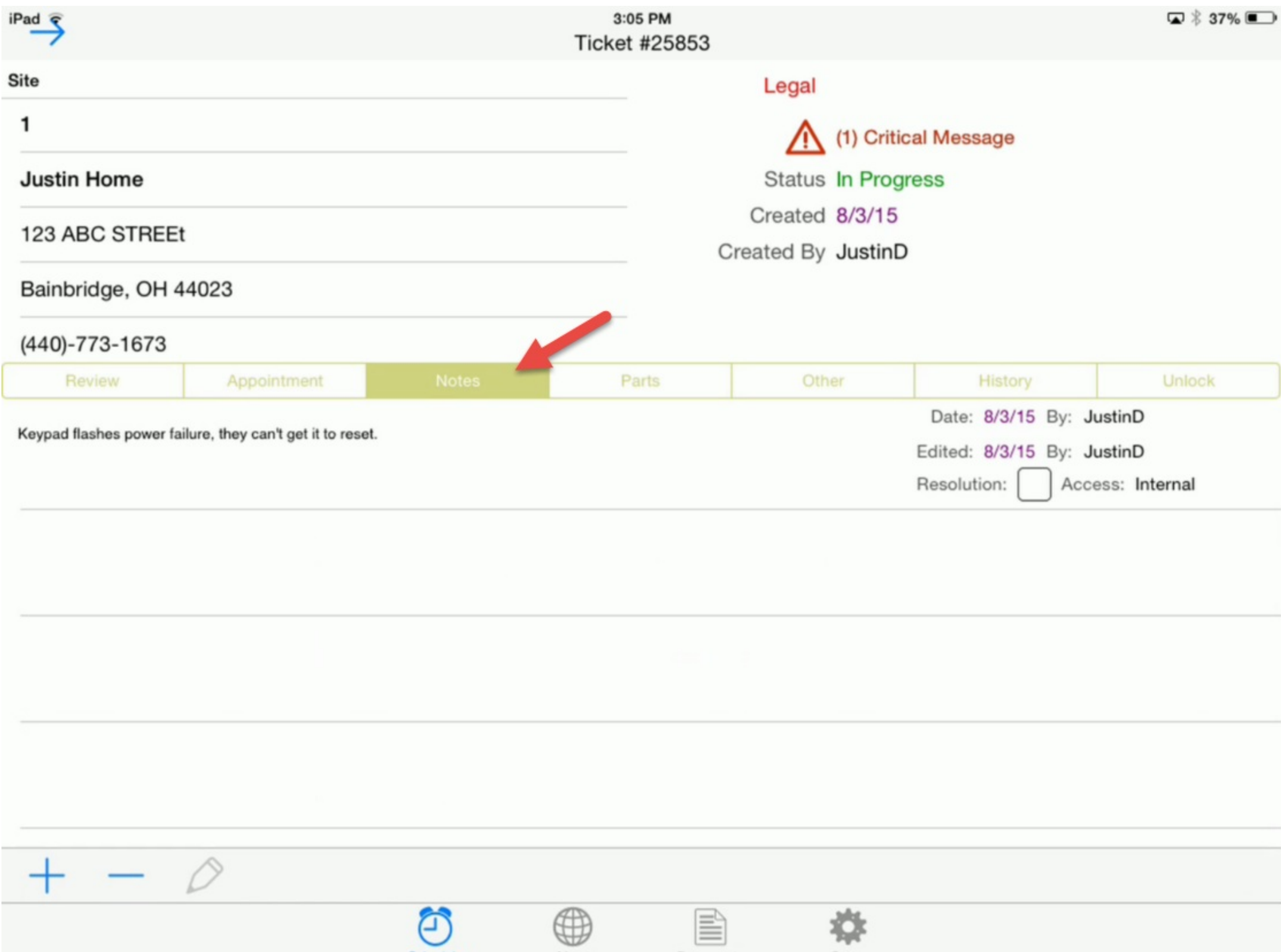
- The note itself
- When the note was entered and who it was entered by
- When the note was last edited and who it was edited by

- Whether or not it is the resolution note for the ticket
- Whether it has been marked as an internal or external note. Internal notes can only be seen by users at your company. General notes can be seen by everyone, including customers viewing their ticket online.

To remove an existing note - tap the note and then select the (-) icon at the bottom of the screen. Service managers can prevent technicians from being able to remove notes using the Technician Management Tool.

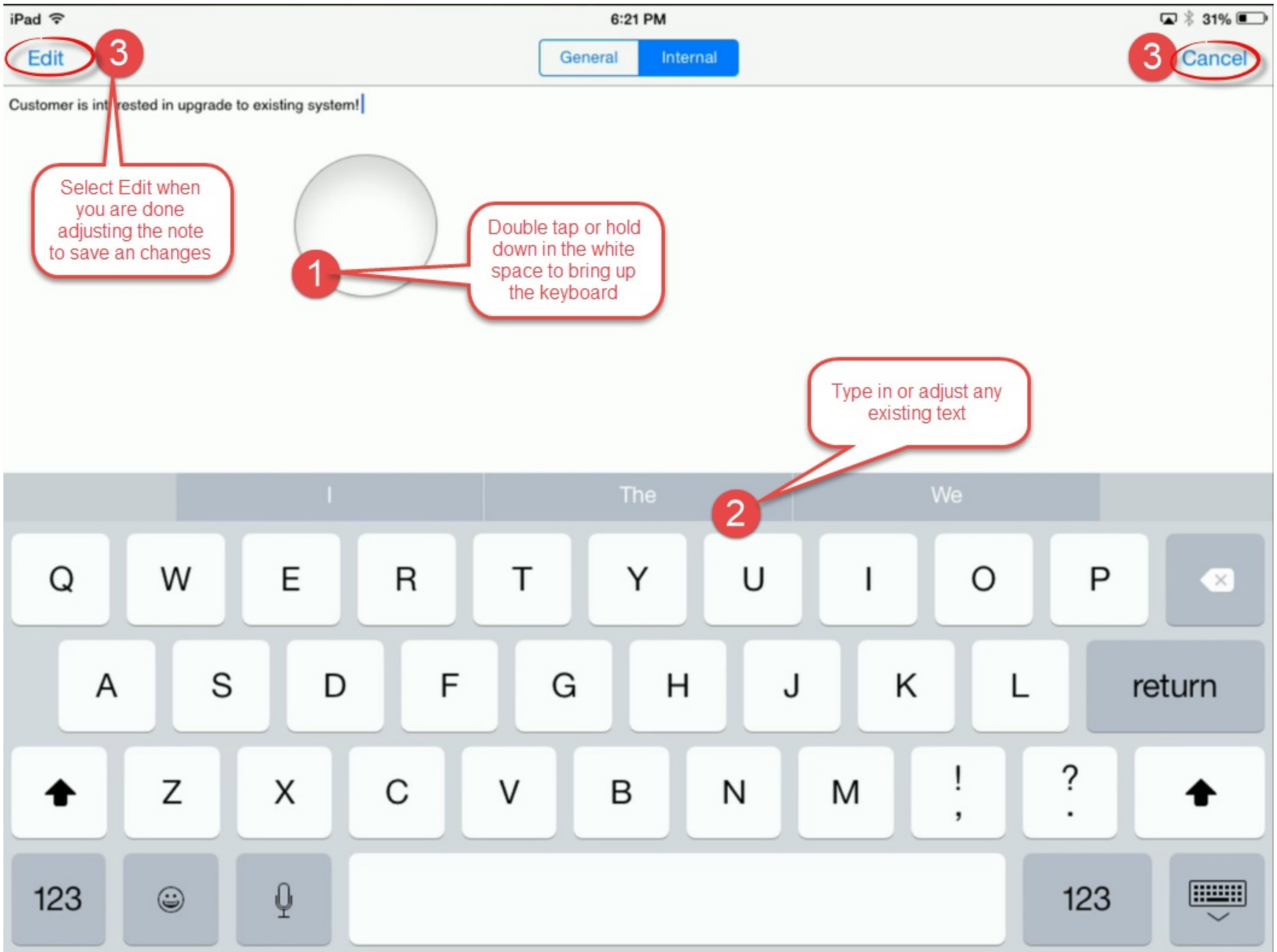
To edit a note - select the note and tap the pencil icon.

To add a note - tap the (+) icon.



new Screenshot of notes screen

When you edit or add a note the note edit window will appear. Tap anywhere in the white space and your iPad or iPhone's keyboard will pop up for you to begin typing the note. You can cancel at any time by clicking the cancel button in the top right. When you have finished editing or entering your note select the Return button on your iPad's keyboard, and select the (+) icon button in the top left corner to save.



better Screenshot of note add/edit screen

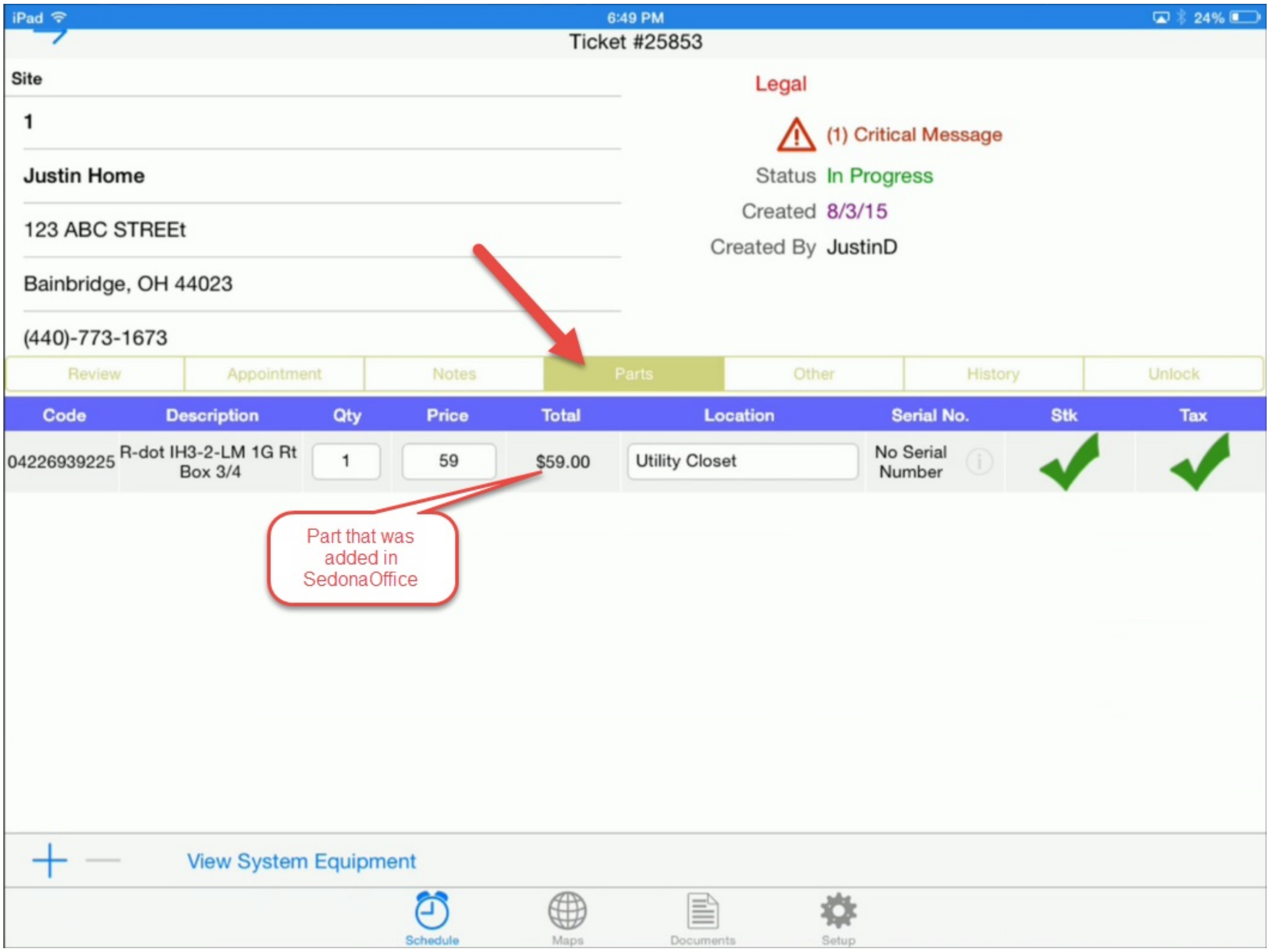
Important – The FSU does not save note text as you type it. The FSU stores the note text and then sends it to SedonaOffice all at once when you click the (+) icon to save. This means that if your FSU loses internet connection while you are typing a very long note, you may be in danger of losing the note. For this reason, when typing long notes please copy the note before saving so that you can simply paste it again if connection is lost.

Parts Tab

The parts tab shows equipment that is already on the customers system, and new parts being added to the system on this ticket. If any parts have already been entered on the ticket/job they will be show here. The part list shows:

- Part code
- Part description
- Quantity of the part being added to the ticket/job
- Price for a quantity of one for the part
- Total amount customer will pay (the price of the part multiplied by the quantity)
- Location of the part at the customer's site
- Serial number – only applies to serialized parts
- Space for check mark indicating if the part is being pulled from stock

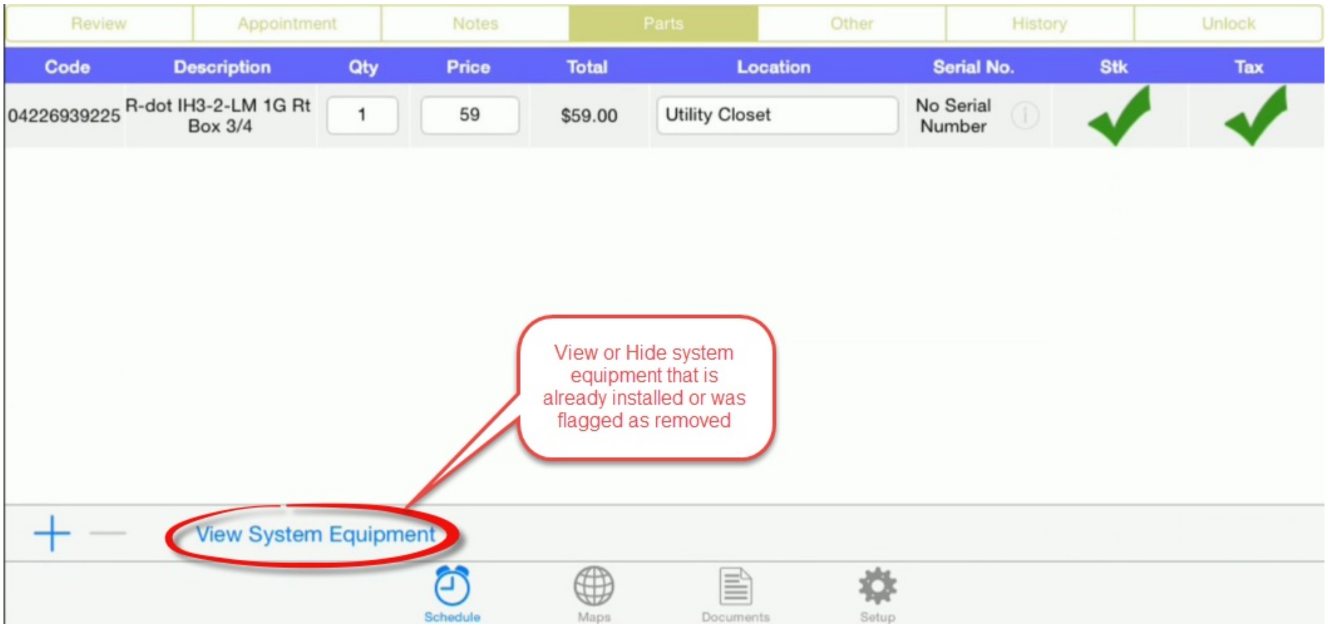
- Space for check mark indicating whether or not the part is taxable



need new screenshot

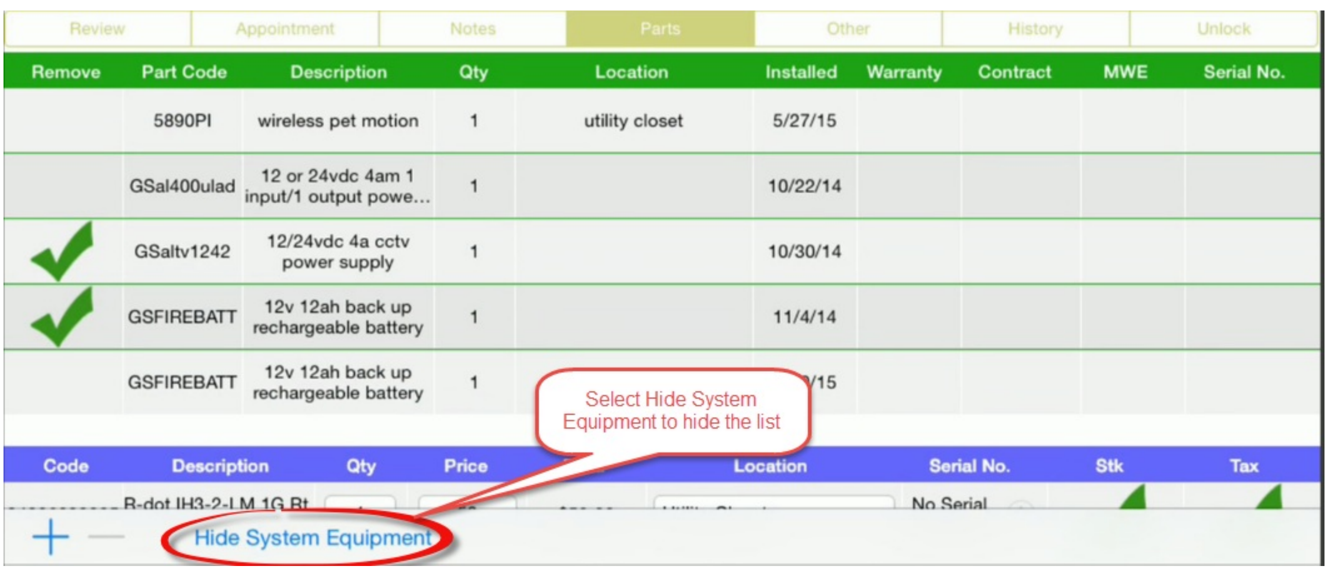
View System Equipment

To see all equipment previously installed on the customer's system select the View System Equipment button on the bottom left.



need new screenshot

This section lists the part code, description, quantity, location, install date, warranty, contract, manufacturer warranty, and serial number for all existing equipment on the customer's system. Select Hide System Equipment to return to the list of parts being added on this specific ticket.



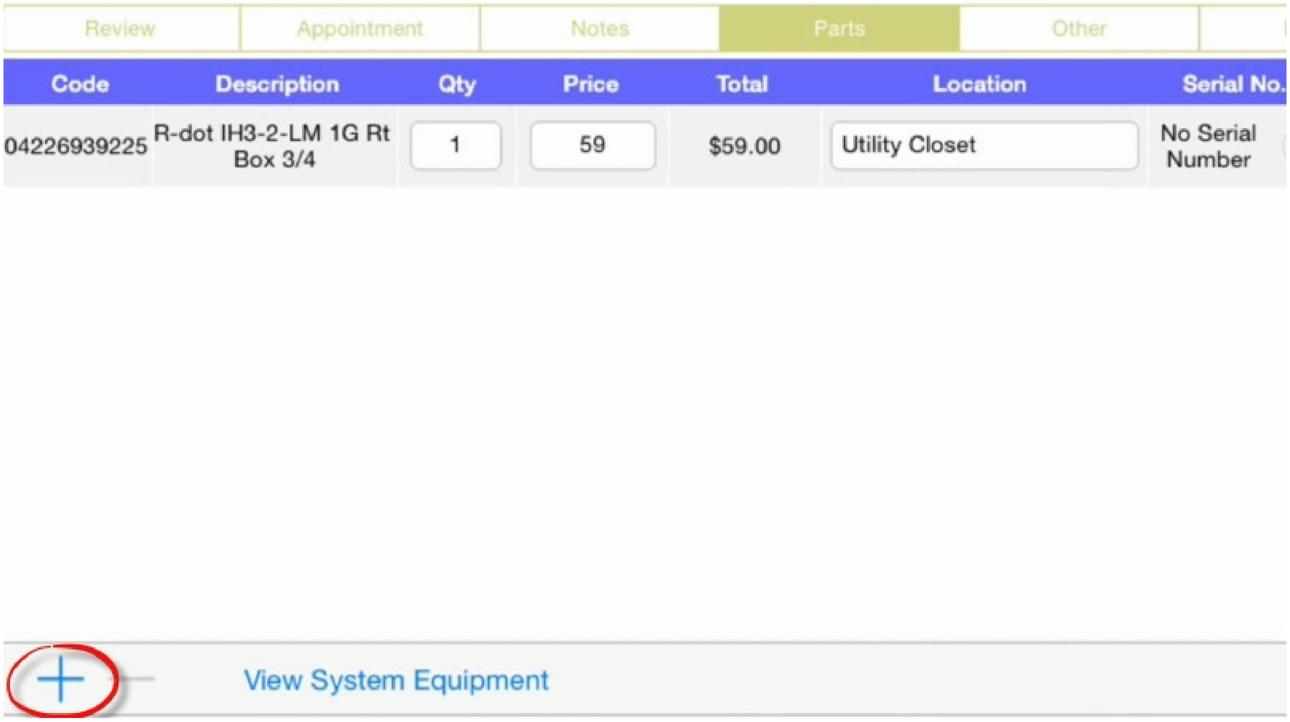
need new screnshot

Job Appointment

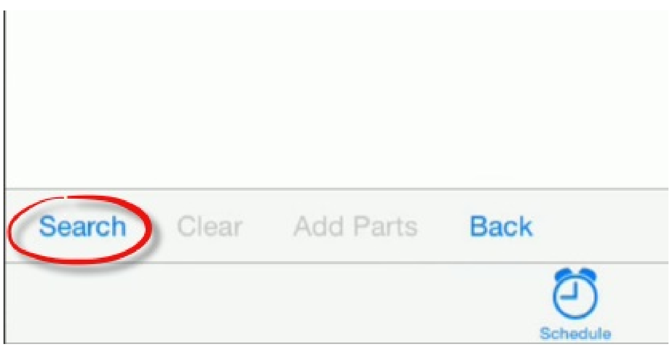
Parts for job appointments cannot be added, edited, or removed via the FSU. If your appointment is for a job then the parts tab will be view only. The following sections regarding the adding, editing, and removing parts via the FSU apply to service ticket appointments only. CAN YOU REMOVE EQUIPMENT STILL OR NO?

Adding Parts

Remember you must at least enter a dispatch time on a ticket before adding parts. To add a part tap the (+) icon on the bottom left and then tap Search. The Part lookup window will appear.



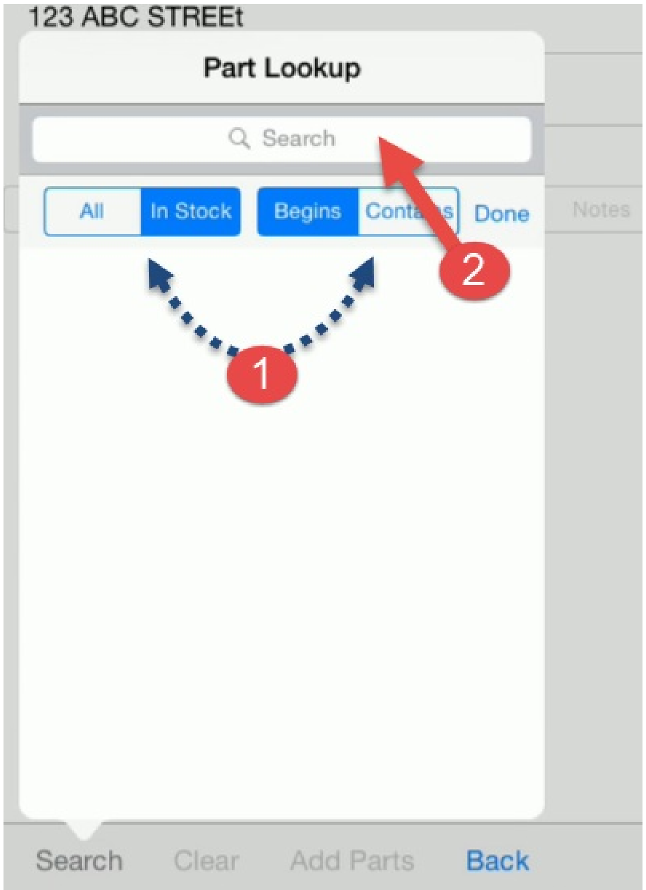
new screenshot



new screenshot

All vs. In Stock – to search all parts in your warehouse select All. To search only for parts which are actually in stock in your warehouse select In Stock.

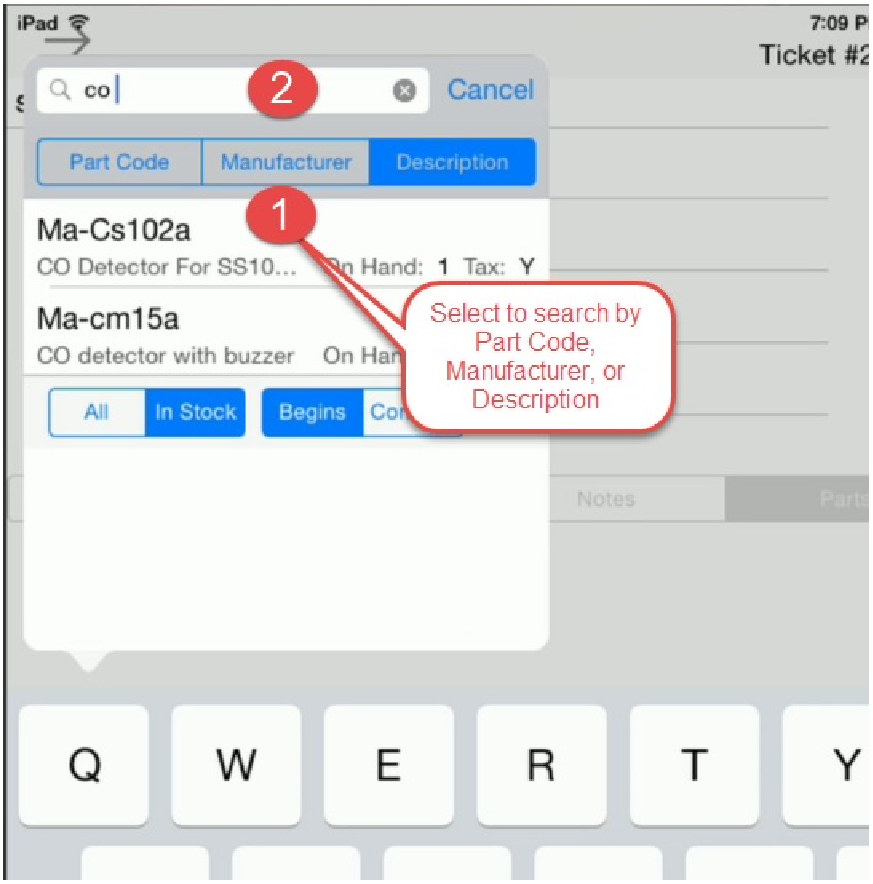
Begins vs. Contains – To search for parts that begin with the letters/numbers you type select Begins. To search for a part that contains the letters/numbers you type anywhere in the part code select Contains.



new screenshot

The least restrictive search criteria, is to search for **All** parts that **Contain** the letters/numbers you type.

After making your search criteria selection tap in the search field and one more set of criteria will appear. By default, the search looks for parts based on part code, but you can change this to search by manufacturer part code, or by part description instead. Begin typing and parts that match all of your criteria will appear. Tap a part on the list to select it.



need new screenshot

The part will then appear on the ticket's part list, but it is not yet saved. If you have more parts to add you may select search again at the bottom of the screen, and repeat the part search process as many times as needed. When all parts have been chosen, tap them on the list so that they show highlighted in light blue. Then select Add Parts at the bottom of the screen.

Important – The parts you search for are not saved to the ticket until you select Add Parts. If you search for parts, and then click to a different tab without selecting Add Parts your parts will not be saved.

You also have the options at the bottom of the screen to Clear the list of parts you have searched for, and to go Back to the general parts screen. If you select either of these options your changes will not be saved.

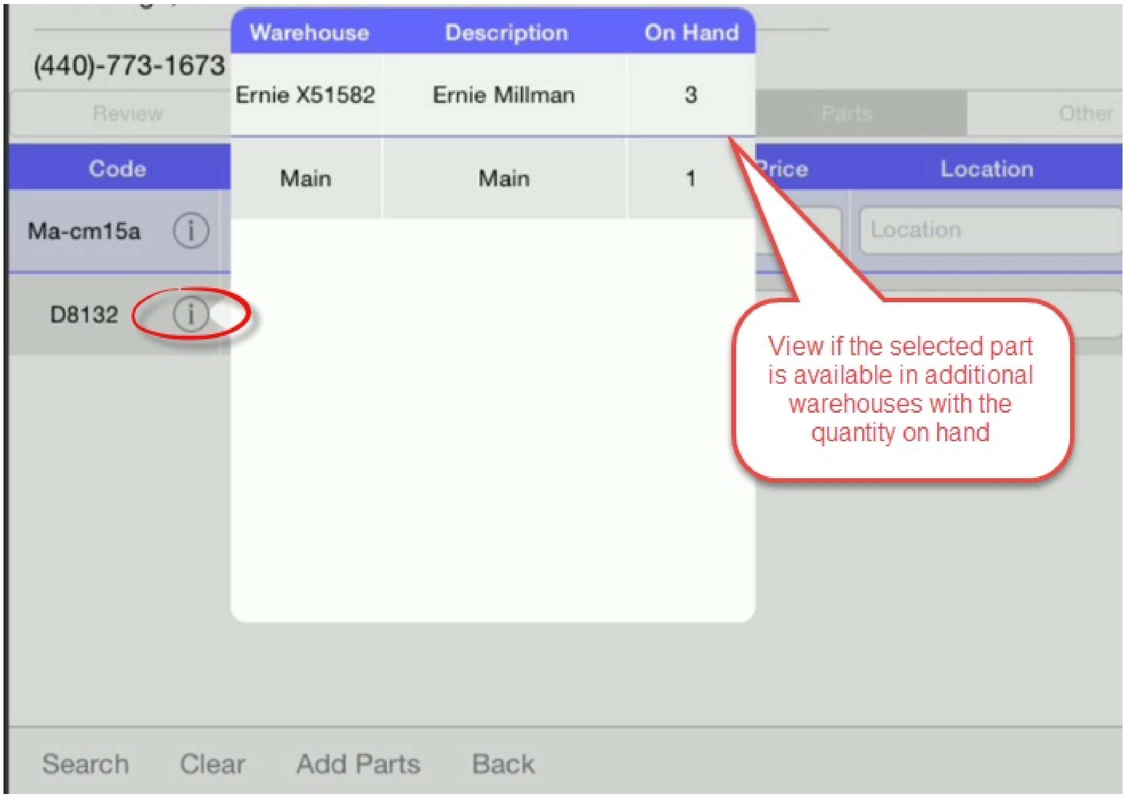
need new screenshot

Editing Parts

You may edit parts right after searching for them, before they are added to the ticket. Or you may edit them after they have been added. To edit a part, tap the field you wish to change and type in the new entry on your keyboard. You may edit:

- Qty – The quantity of the part being added to the ticket.
- Price – The total price of that part to the customer. Service managers can remove the technician's ability to see these prices using the Technician Management Tool.
- Location – Where the part is installed at the customer's site.
- Serial Number – Tap this field to select an available serial number from the list, if the part is serialized. If the part is not setup as serialized in SedonaOffice no entry is allowed in this field.
- Stk – If this part will be pulled from stock, press and hold on this column to check the box. If the part must be ordered on a PO press and if the part will be pulled from stock, and uncheck the box if the part must be ordered on a PO.
- Tax – Press and hold on this column to check the box if the part price is taxable. Uncheck the box if the part price is not taxable.

Tapping the blue (i) to the right of the part code shows how many of that part are in stock in your warehouse, and in the main warehouse. If no parts are in stock in your warehouse, but you see there are some in the main warehouse, you may want to contact the offer to ask them to transfer parts to you.

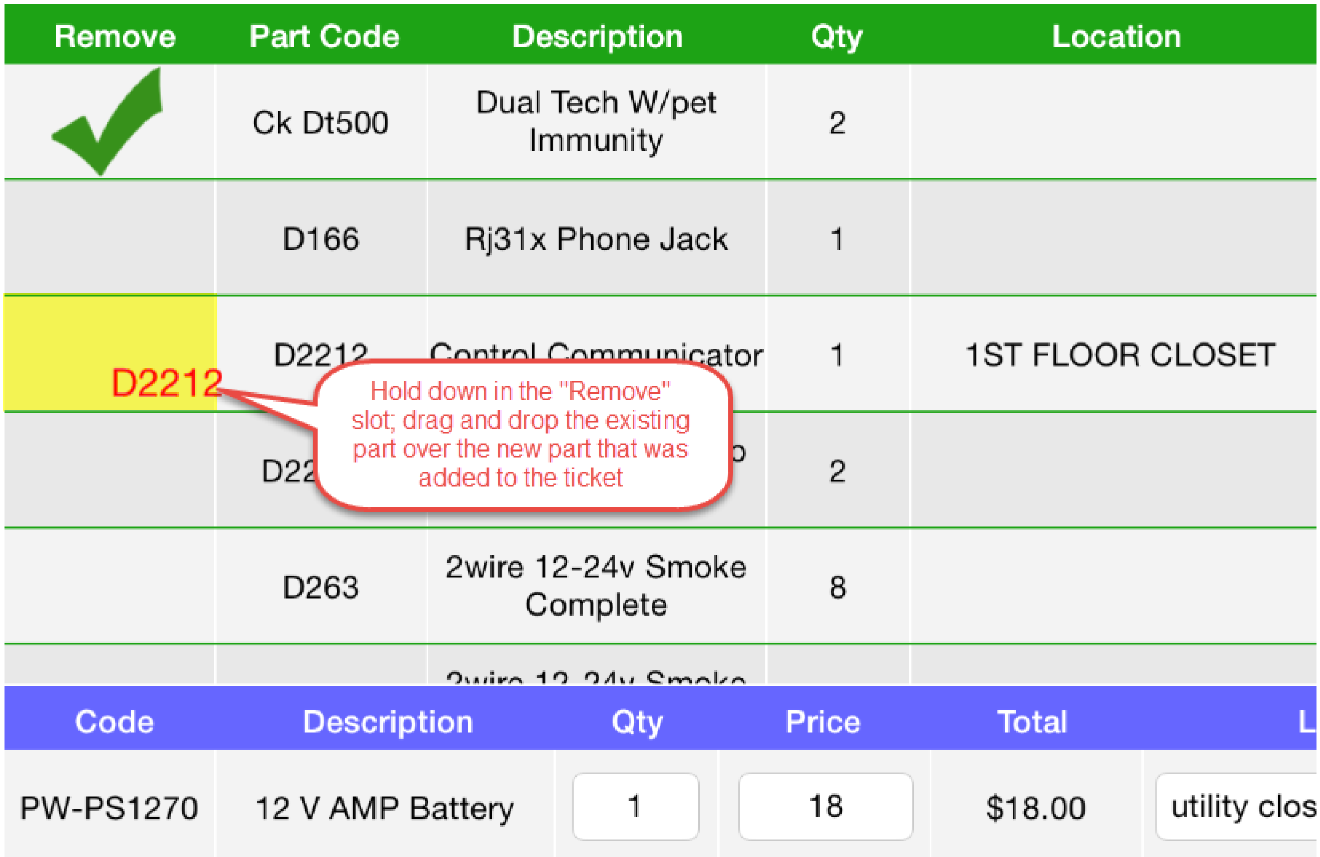


new screenshot

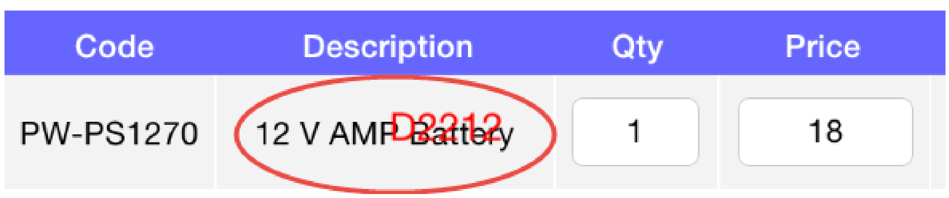
Replacing/Removing Equipment

The FSU can be used to replace an existing part on the customer's system with a new part. To do so go to the parts tab and:

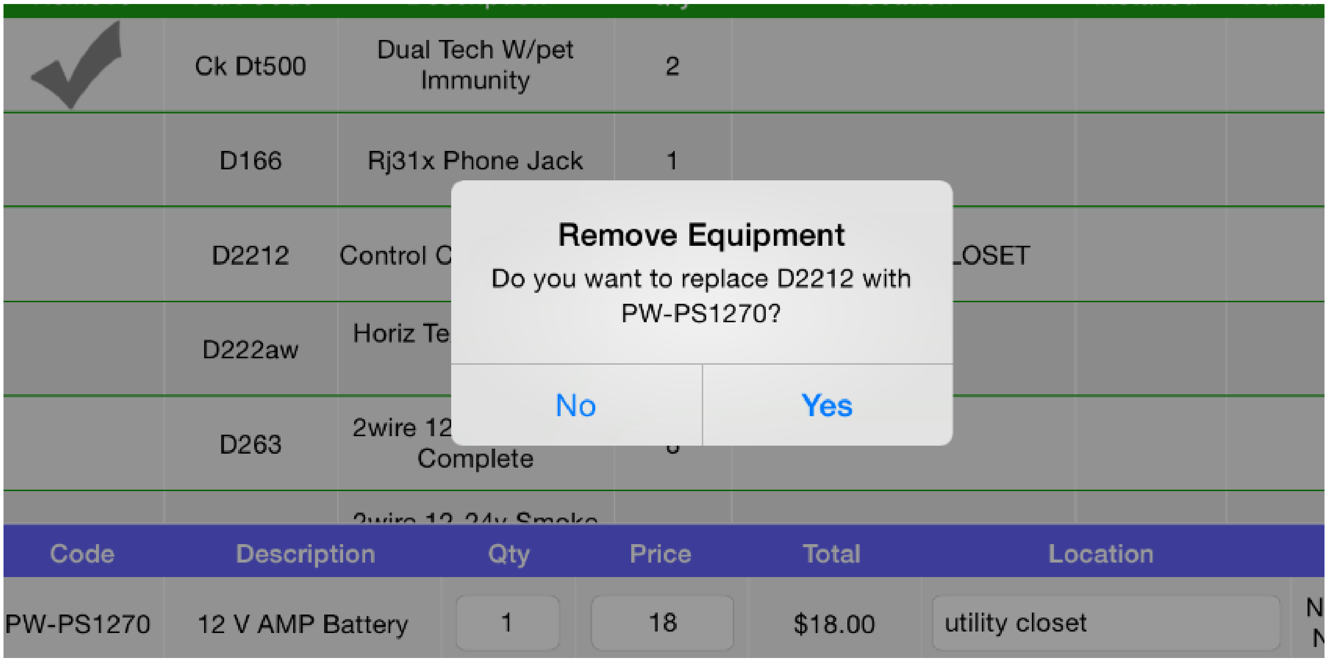
1. Follow the add parts steps to add the new replacement part to the ticket.
2. From the main parts screen, select View System Equipment.
3. Scroll to the part you plan to replace, then tap on the blue header of the new parts being added and drag this up until both the old part and the new part are visible on the screen at once.
4. Tap and hold on the remove box for the part that is being replaced, and wait until the part code turns red.
5. Without lifting your finger, drag and drop the part down on top of the new part that is replacing it.
6. Release your finger.
7. The FSU will pop up and ask you if you wish to replace the old part with the new. Select Yes.



new screenshot

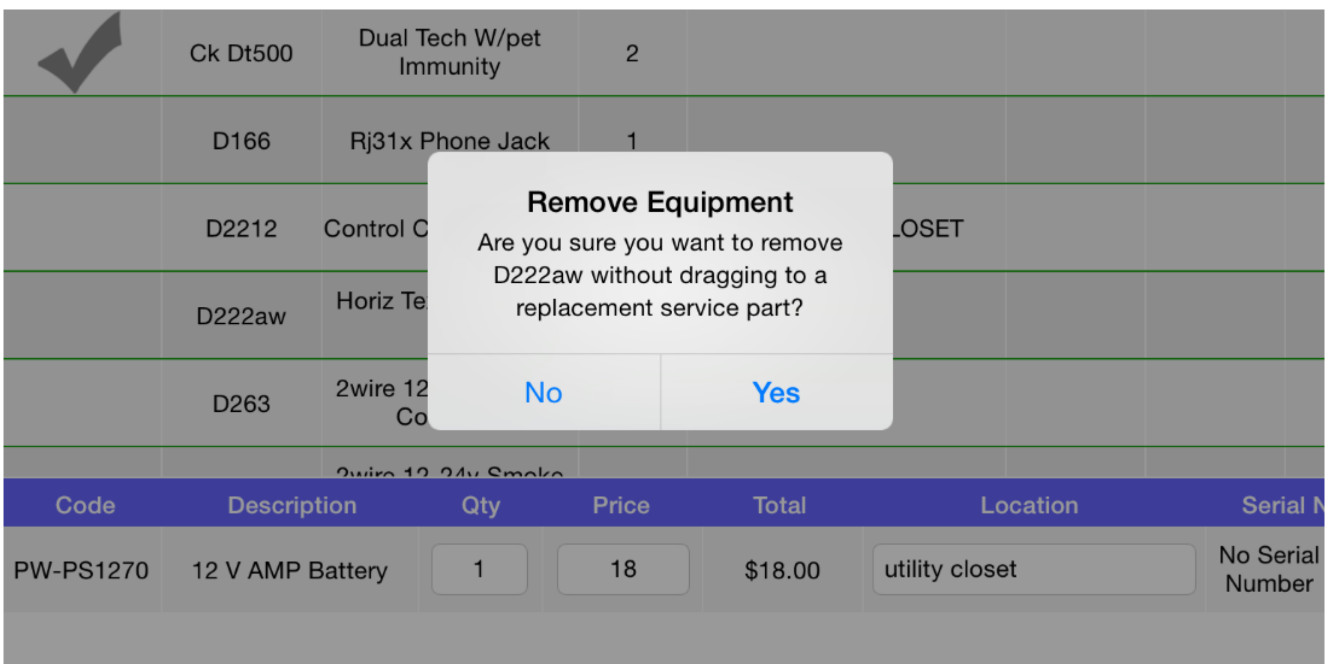


new screenshot



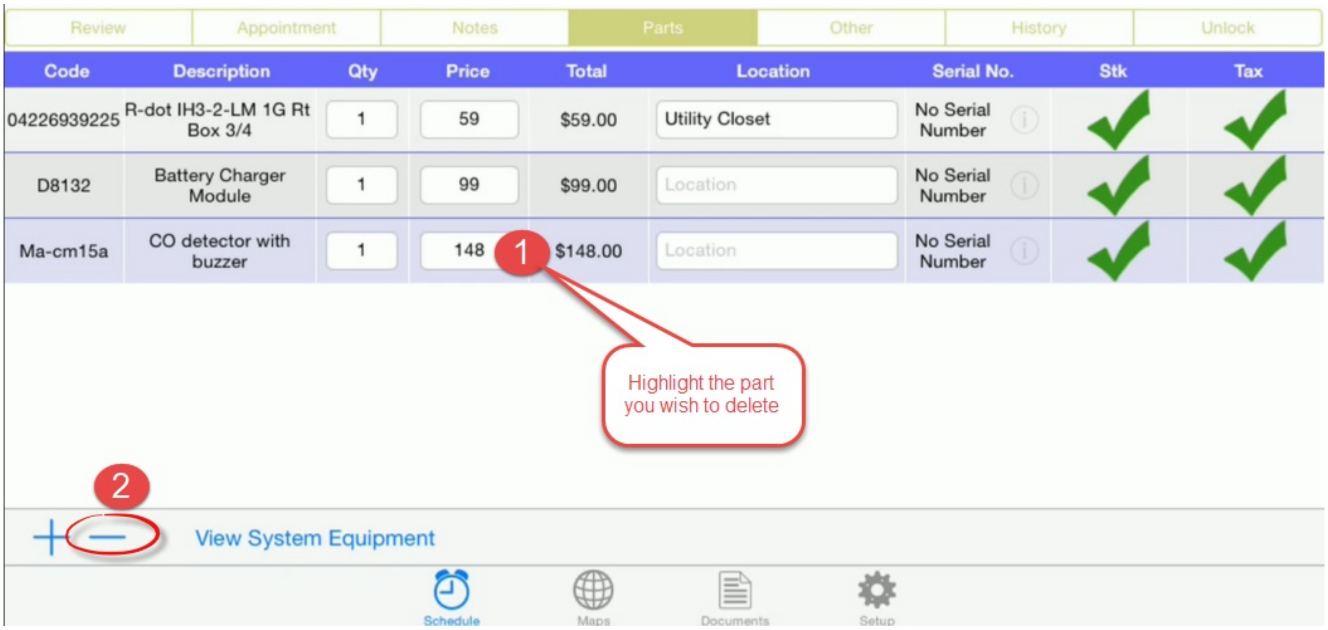
new screenshot

To remove a part with no replacement, touch the box in the Remove column on the appropriate part, you do not need to hold your finger on the box. The message below will then show. Select Yes to remove the part.

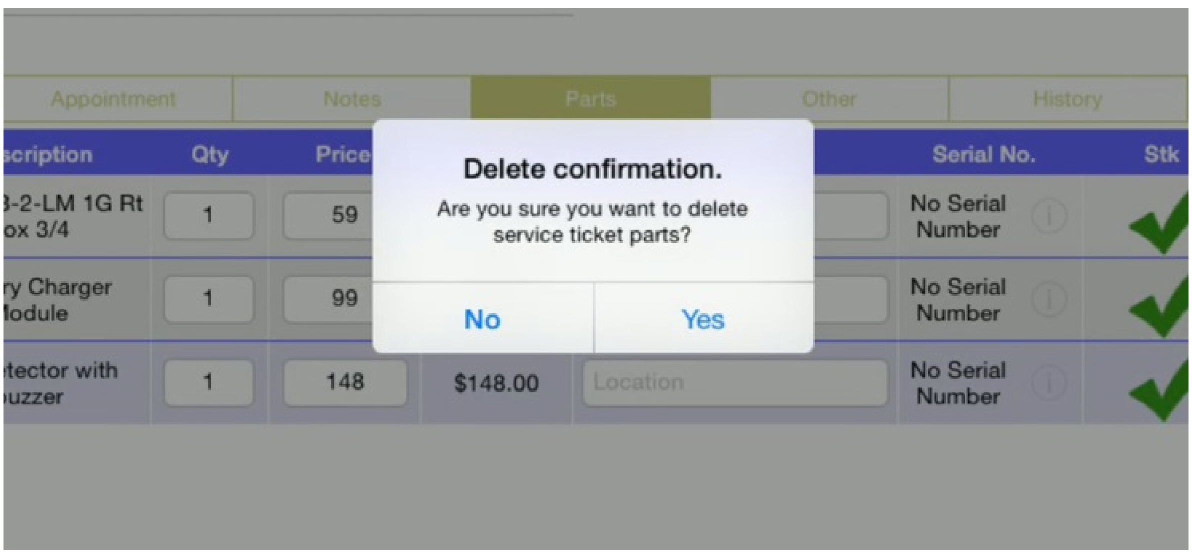


Removing Parts

If a part is erroneously added to a ticket, you can remove it by tapping the part and selecting the (-) icon at the bottom of the screen. The FSU will ask you to confirm the deletion of the part from the ticket. Select Yes and the part will no longer show on the parts tab.



new screenshot



Other Tab

The Other tab allows you to add miscellaneous charges to the ticket not already accounted for in the ticket's part and labor charges. These may be billable items such as permits. Note that miscellaneous charges can only be added to tickets, not jobs. This tab will not appear for job appointments.

new screenshot

To add this type of miscellaneous charge:

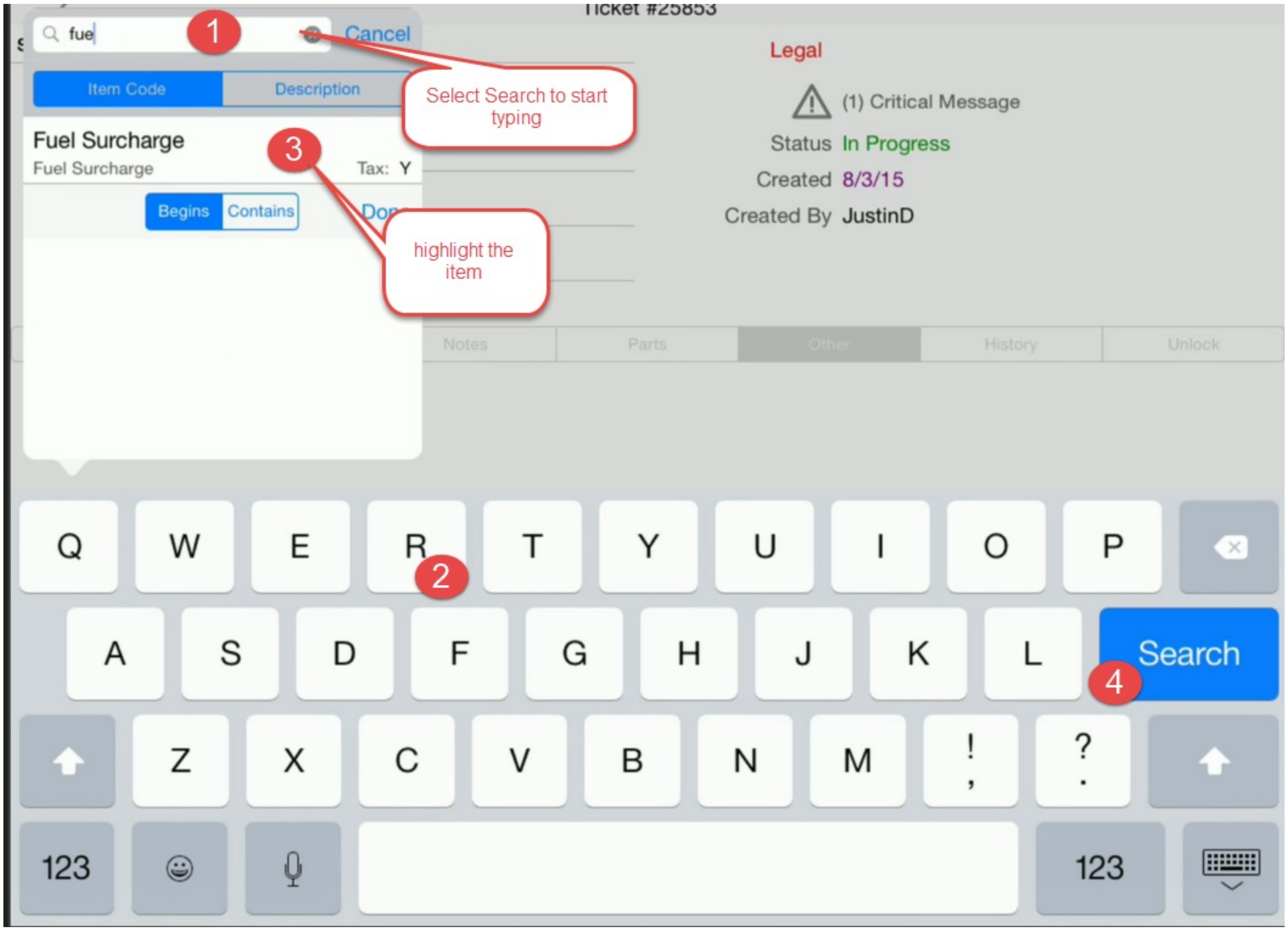
1. Select the (+) icon in the bottom left corner.
2. Select Search from the options that appear at the bottom of the screen and a search window will pop up
3. Choose to search for items that Begin with the letters/numbers you are about to type, or to search for items that Contain the letters/numbers you are about to type.
4. Tap in the search field and two new options will appear. Select whether you would like to search based on Item Code, or item Description.
5. Tap in the search field again and enter your search criteria. A list of items that match your criteria will display.
6. Tap an item, and it will appear on the Other items list, but it is not yet saved.
7. If you have more items to add you may select search again at the bottom of the screen, and repeat the item search process as many times as needed.
8. When all items have been chosen tap them on the list so that they show highlighted in light red.
9. Select Add Items at the bottom of the screen.

Important – The items you search for are not saved to the ticket until you select Add Items. If you search for items, and then click to a different tab without selecting Add Items your items will not be saved.

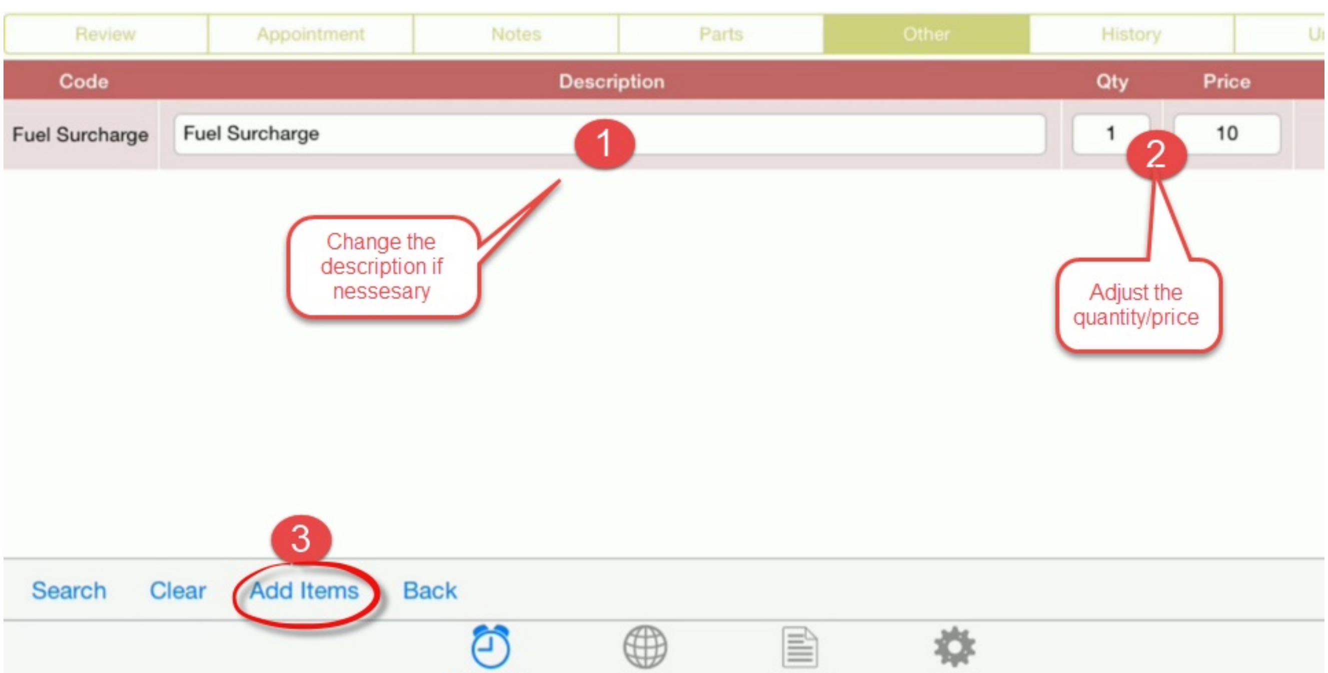
You also have the options at the bottom of the screen to Clear the list of items you have searched for, and to go Back to the general Other items screen. If you select either of these options your changes will not be saved.

THIS PROCESS IS PRETTY MUCH THE SAME FOR ADDING PARTS. IN THE PARTS SECTION I ENTERED THE STEPS IN PARAGRAPH FORM. HERE I NUMBERED THE STEPS. I WOULD LIKE FEEDBACK ON WHICH WORKS BETTER.

new screenshot



NEW SCREENSHOT



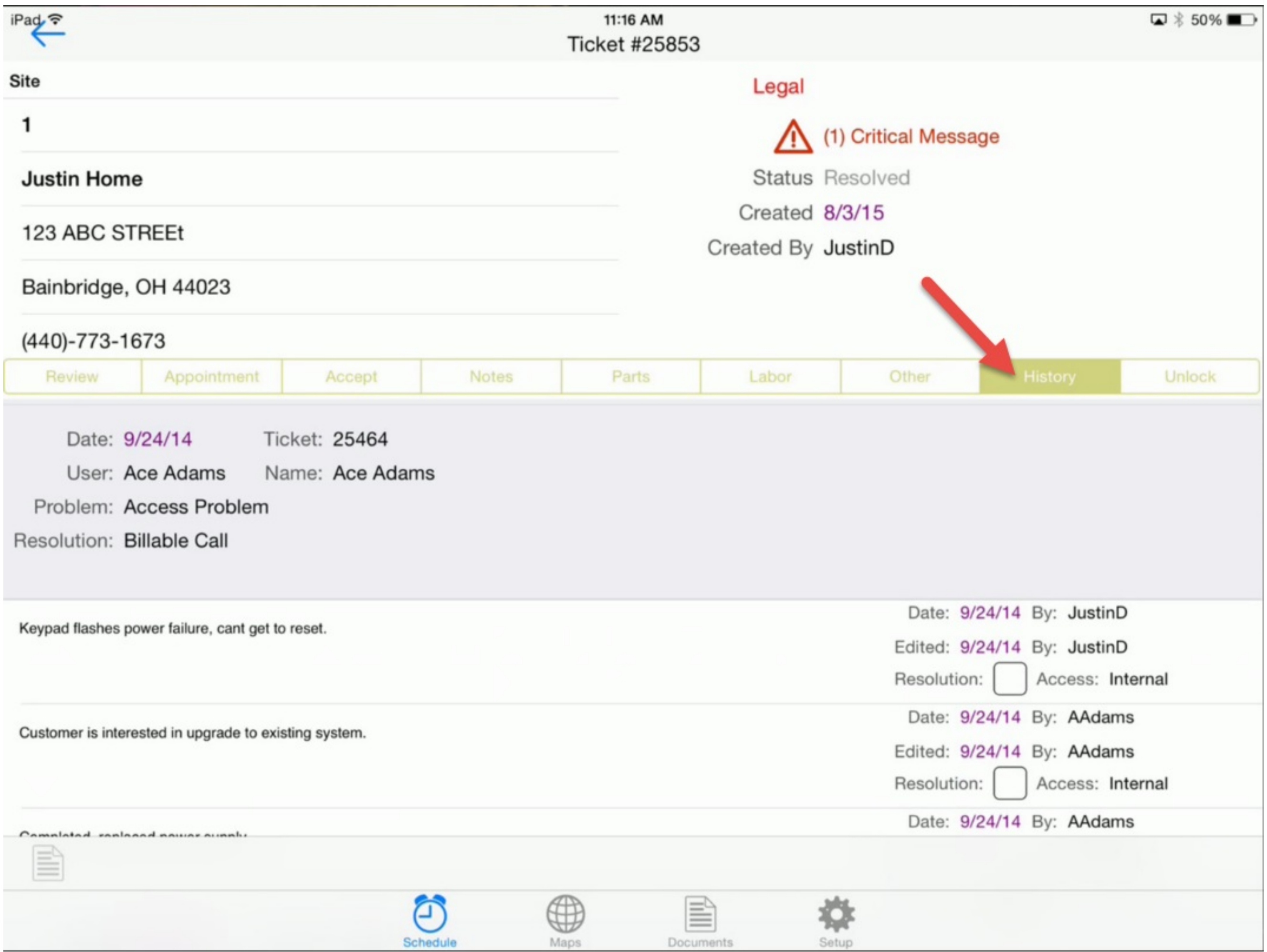
NEW SCREENSHOT

History Tab

The History tab shows all prior service ticket history for the system, including Ticket Number, Creation Date, Problem code, Resolution code, and the Technician that worked on the ticket. Historical tickets appear with the most recent ticket at the top. Swipe up and down on the list to scroll through historical information. WHAT IS DIFFERENT ABOUT THIS FOR JOBS, I CAN"T REMEMBER AND I CAN"T CHECK

You can search for specific tickets/notes by NEED INFO FOR SEARCHING

Tap on a ticket to see the detail and notes for it. To view the full note, select it, and then select the blue paper icon in the bottom left.



new screenshot

new screenshot

Custom Fields Tab

This tab is used to track additional data, specific to your company, that the FSU does not already have a field for. Some companies do not use custom ticket fields, and if this is the case the tab will not appear. Your service manager will notify you if your company uses any custom fields.

When you select the custom fields tab it defaults you to the drop down custom fields. At the bottom of the screen other types of custom fields are listed. Your company may use custom TextFields, CheckBoxes, and/or custom Currency and Dates fields. Tap on any of these options to be directed to custom fields of that type.

Tap any custom field to make an entry for it. To select an entry for the drop down fields tap the blue (i) to the right of the field and select an option from the list. For Text, Money, and Date fields, tap the field and enter the appropriate information. For check boxes, tap and hold down on the field to check or uncheck the box. Custom fields that have 'User' in the name, are placeholder fields that are not being used by your company, such as 'User Table 3' in the screenshot below.

new screenshot

new screenshot

ARE THERE ANY DIFFERENCES FOR JOBS? I CAN"T REMEMBER

Job Only Tabs

I DO NOT REMEMBER WHAT THESE ARE

Labor Tab

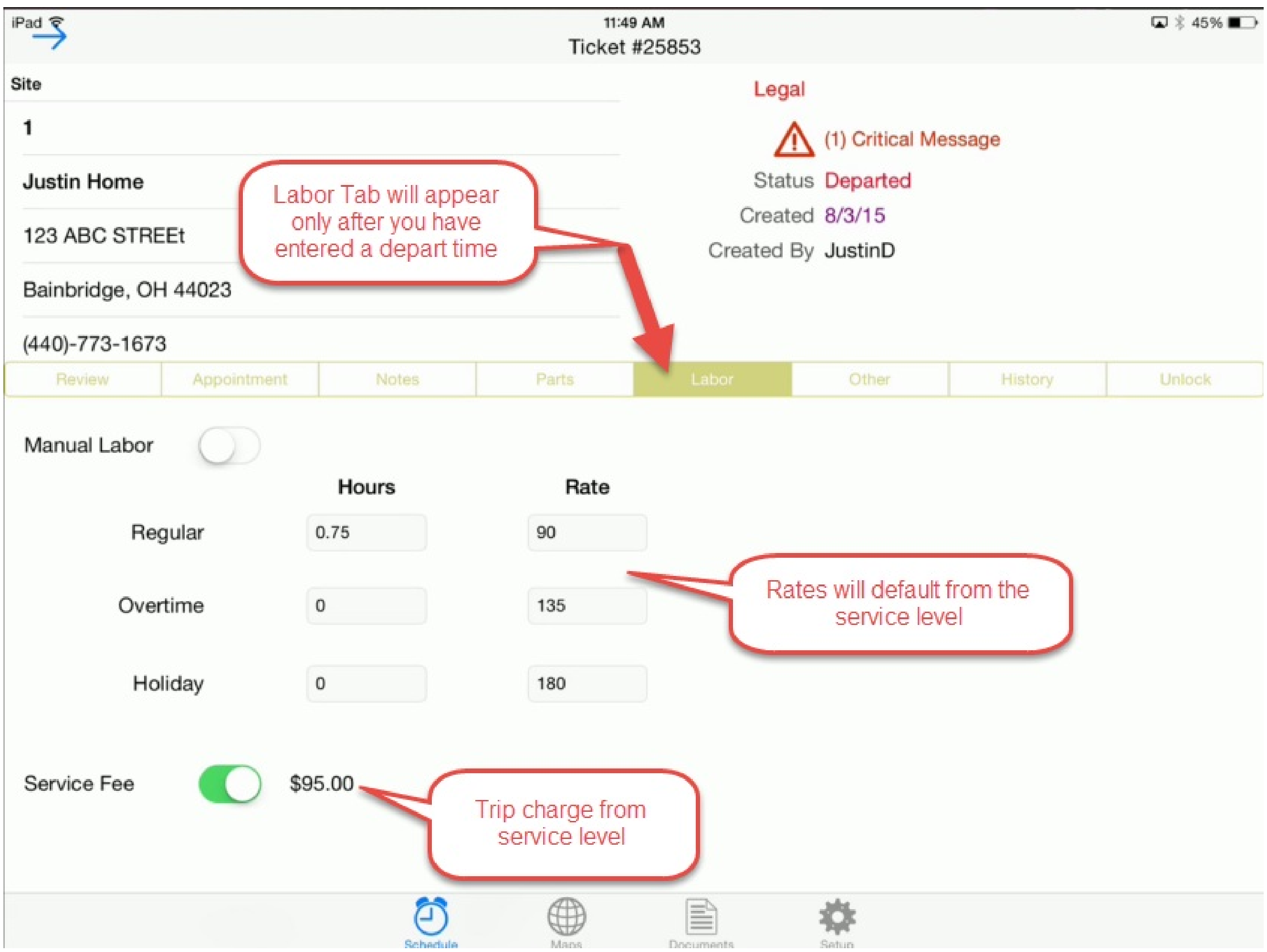
The Labor tab summarizes appointment labor hours and labor charges to the customer based on the service level setting in SedonaOffice. The appointment must be complete before labor can be calculated, so users must enter a dispatch, arrival, and departure time, and then the Labor tab will appear directly to the right of the Parts tab. The labor tab only appears for service ticket appointments. No labor tab will appear for job appointments even after their departure time has been entered.

The labor tab breaks down the number of Regular, Overtime, and Holiday hours on the ticket, and the rates for these hours. If there are multiple appointments on the ticket, the labor tab will add together all the amounts from all of the appointments. You may override the number of labor hours on the ticket, and/or the labor rate by toggling the Manual Labor option. Selecting the Manual Labor option opens up the Hours and Rates fields so that they can be edited.

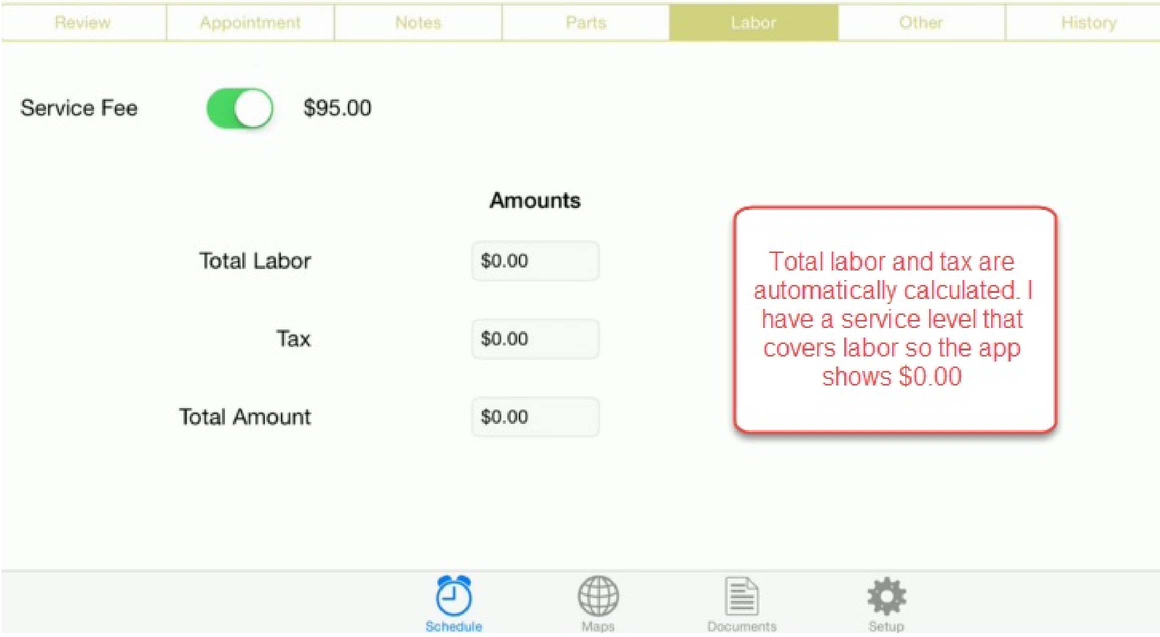
If the ticket has an automatic trip charge this will show below the labor. This option can also be toggled to turn off or on the trip charge.

Finally, you may scroll down to view the total labor charges, any associated tax, and the final labor billing amount for the whole ticket. Note that service managers can remove the technician's ability to see and edit all labor rates and charges using the Technician Management Tool.

GET SCREENSHOT OF WHAT EVERYTHING LOOKS LIKE WITH CHARGE PERMISSONS OFF other screens too



new screenshot



new screenshot

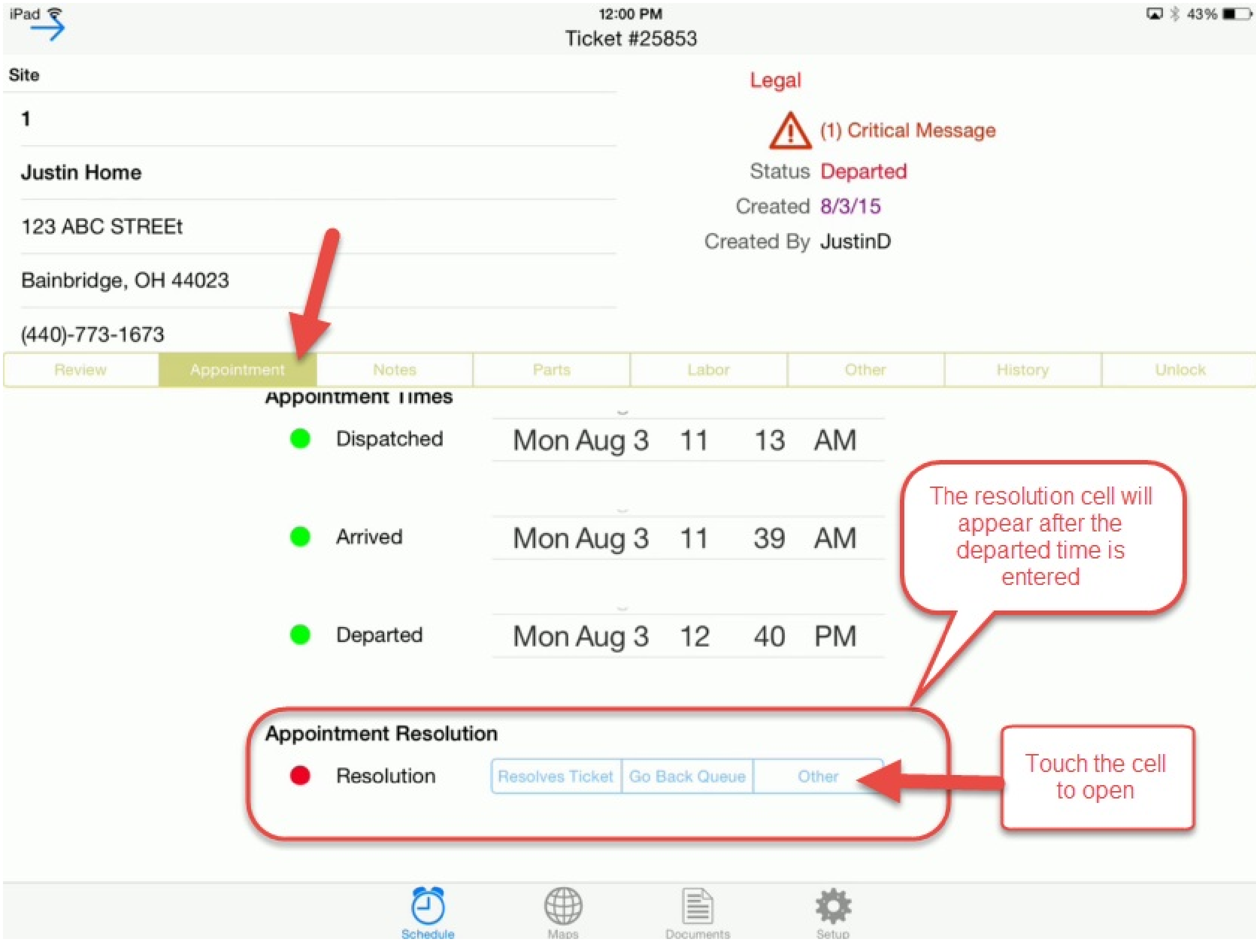
Resolving Ticket Appointments

Note that only service ticket appointments can be resolved. Jobs in SedonaOffice are not resolved in the same way as tickets, and so they cannot be resolved from the FSU.

When all necessary information has been added to a ticket, including time, parts, notes, other items, and custom fields, the appointment must be resolved. Note that the resolution for your appointment and the resolution for the ticket as a whole may be the same, or they may be different. While resolving your appointment you have the opportunity to select whether you are resolving the whole ticket, or just your appointment. To resolve an appointment:

1. Navigate to the appointment tab
2. Make sure the dispatch, arrival, and departure times have all been entered. When this is done the appointment resolution options appear.
3. Select one of the three resolution options. These are:

1. Resolves Ticket – select this option if the entire ticket is resolved and you are ready to collect the customer's signature. This option will apply your appointment resolution to the ticket as a whole.
2. Go Back Queue – select this option if your appointment is resolved, but a new appointment will need to be scheduled for follow up work to complete the ticket. This option will put the ticket into Go Back status. The new appointment must be created from within SedonaOffice and cannot be scheduled from the FSU.
3. Other – select this option if you are not the only technician on the appointment, and other technicians still need to resolve their own appointments. Only the last technician on a ticket should select Resolves Ticket, everyone else should select Other.



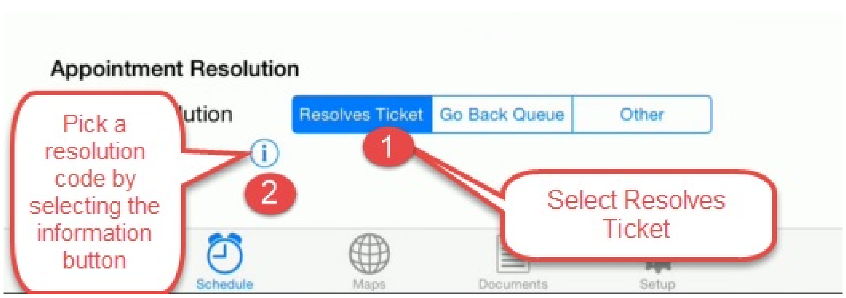
new screenshot

4. When the appointment resolution type is selected a blue (i) will appear beneath this area, tap the (i) and a list of resolution codes will appear.

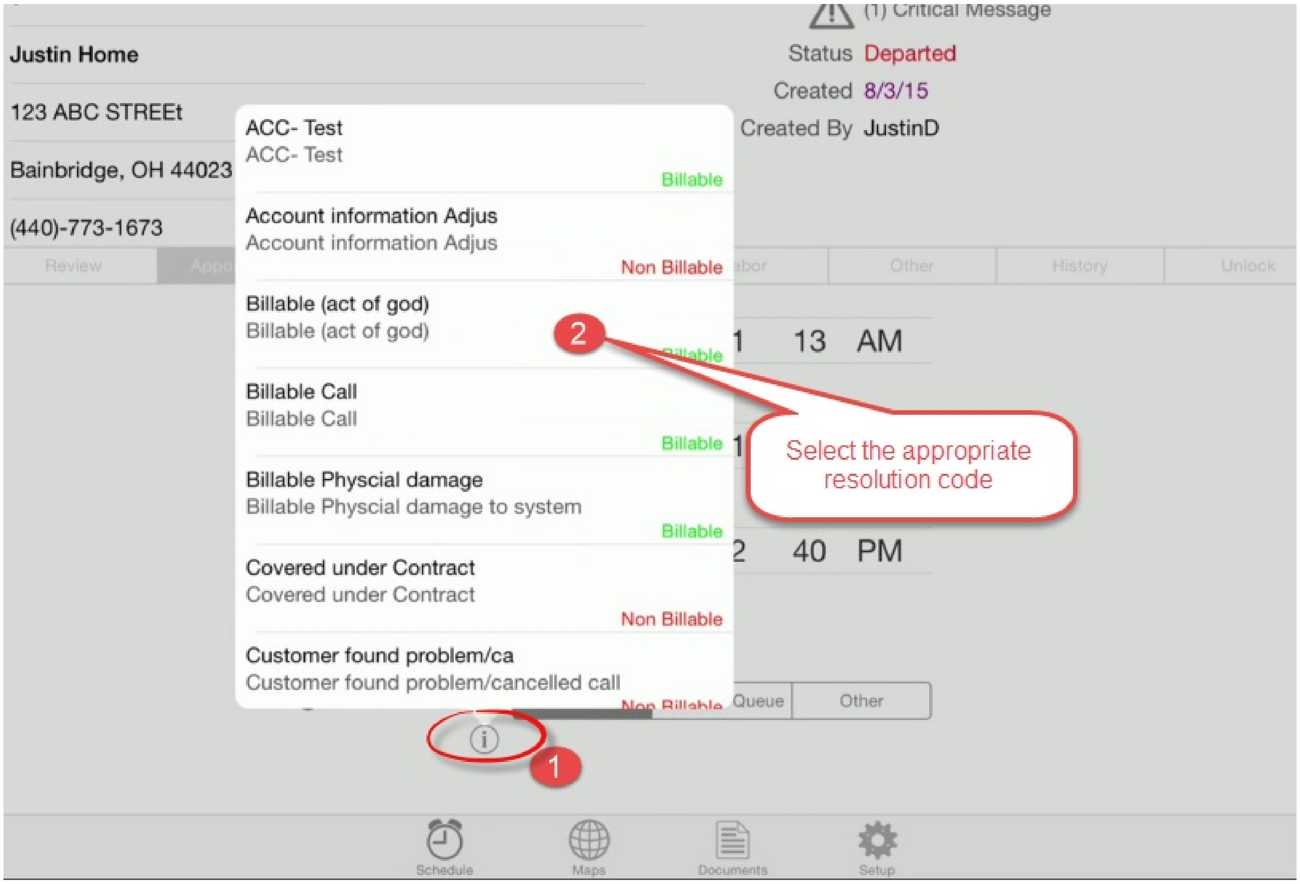
5. Resolution codes indicate, not just how the ticket was resolved, but also whether the work done was billable. Select the correct resolution code for the ticket and a blue paper icon will appear.

6. Tap the blue paper icon and the notes screen will appear, so that a resolution note can be entered. There is no need to navigate to the notes tab, the note typed here will automatically be added to the ticket notes, marked as resolution. Remember that resolution notes are general notes that can be seen by the customer.

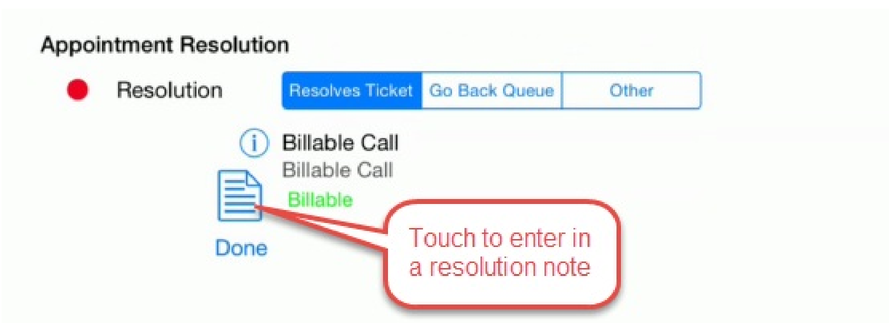
7. Once the resolution note has been entered a Done option will appear. Tap this to finalize resolving the appointment.



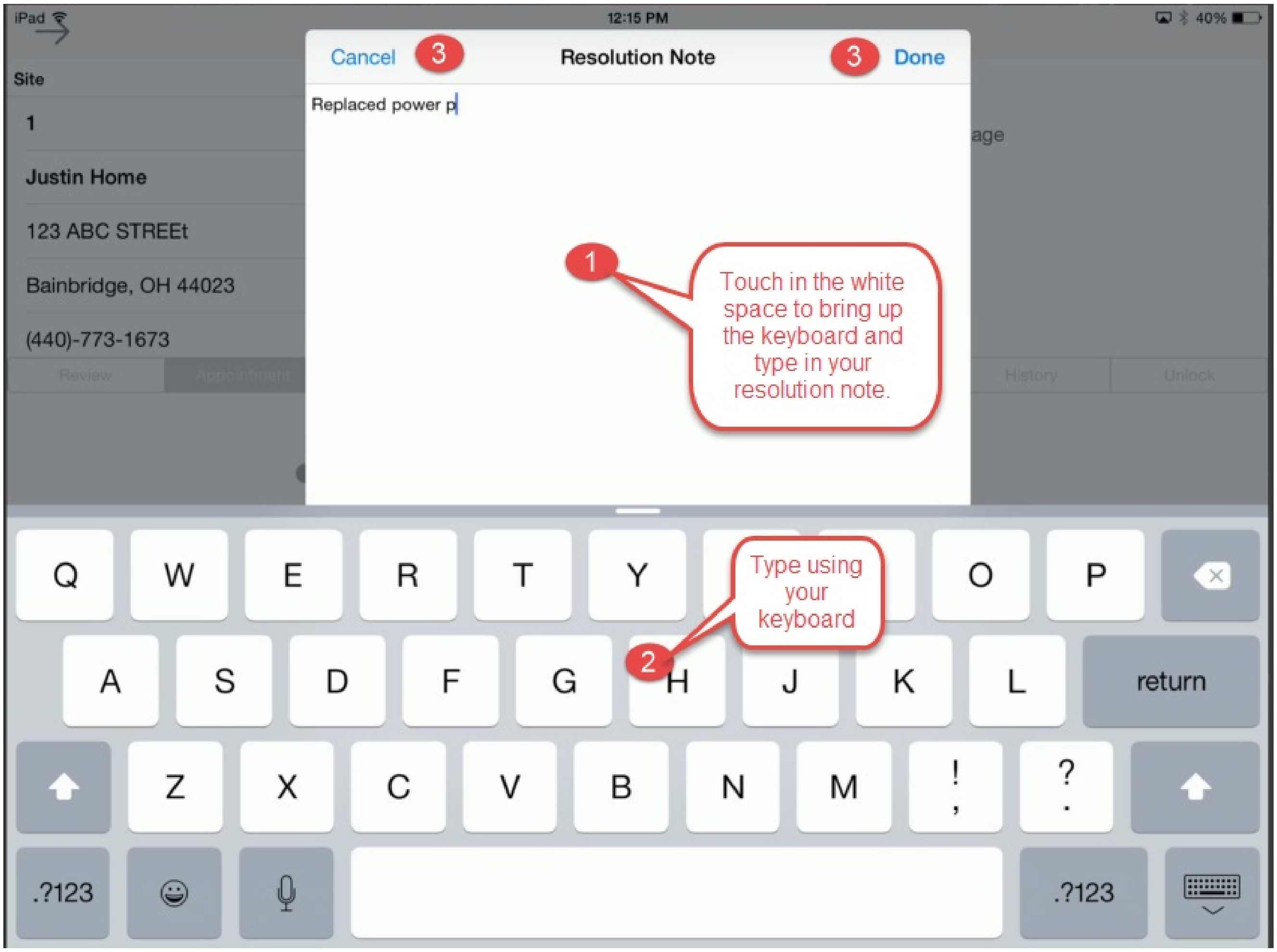
new screenshot



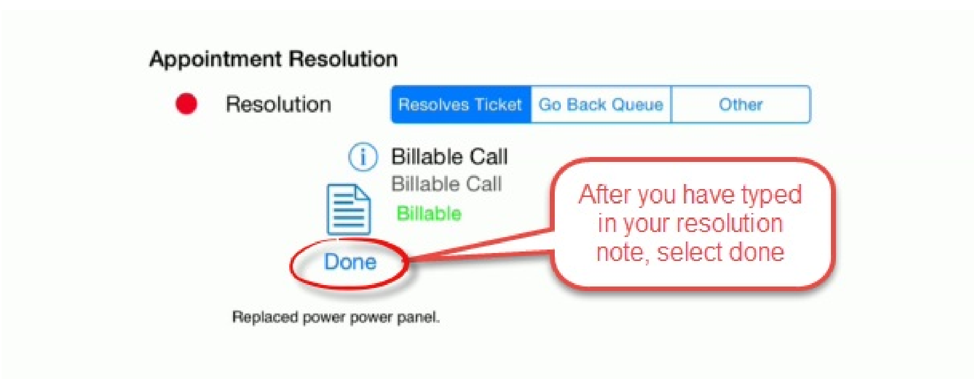
new screenshot



new screenshot



new screenshot

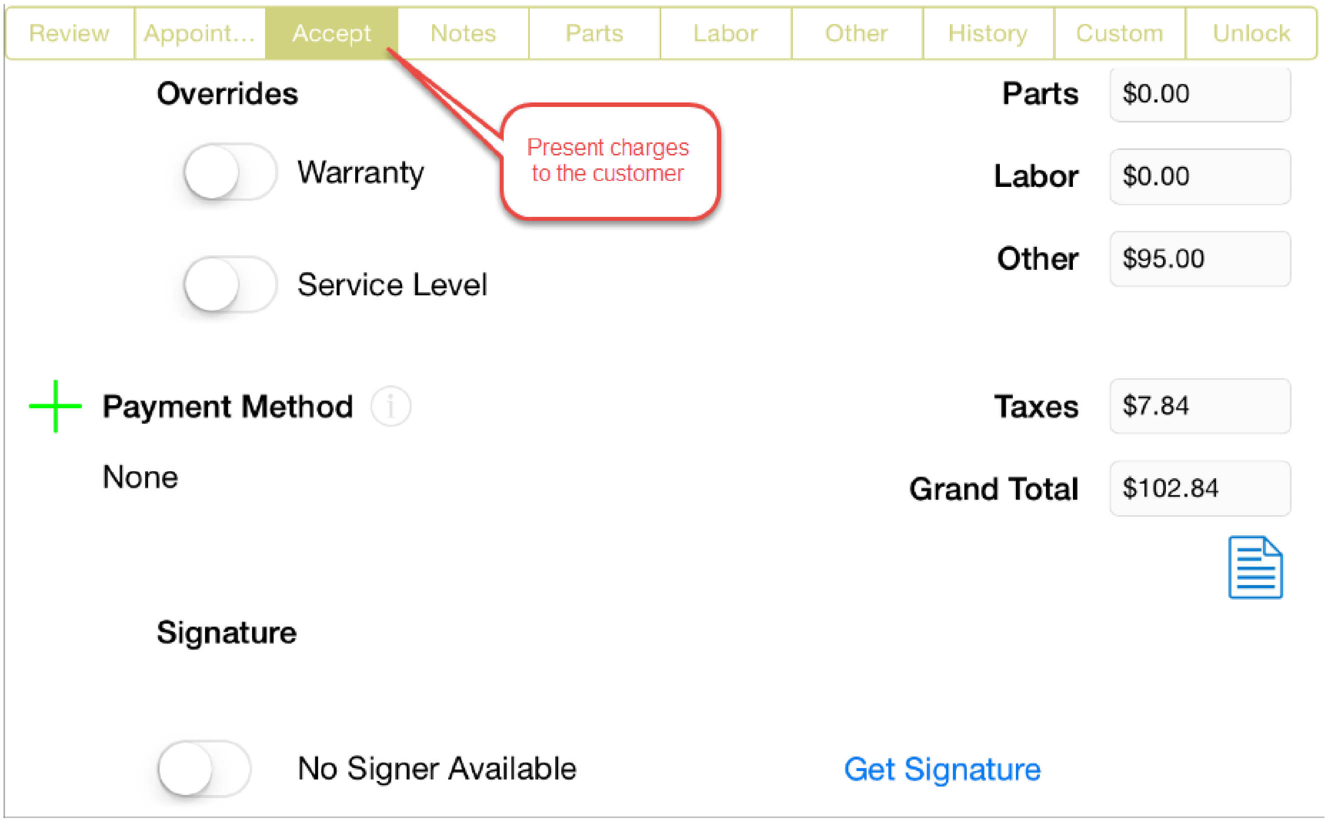


new screenshot

Accept Tab

If the appointment is resolved, and the Resolves Ticket option was selected, a new Accept tab will appear to the right of the Appointment tab. The Accept tab shows final billing for the customer's review and signature, and so the entire ticket must be resolved for this tab to appear. Again, Job appointments cannot be resolved from the FSU, and so there is not Accept tab for job appointments.

The accept tab contains total ticket charges, overrides, payment method selection, a ticket report, and a signature section.



new screenshot

Charges

The Parts, Labor, and Other sections on the accept tab show the total billable amount for each of those items for this specific ticket. Taxes are listed below this, and the Grand Total billable on the ticket below that. This is the total amount of charges customers should sign off on at the end of the service call. Remember that service managers can remove the ability for technicians to see ticket billing using the Technician Management Tool.

Overrides

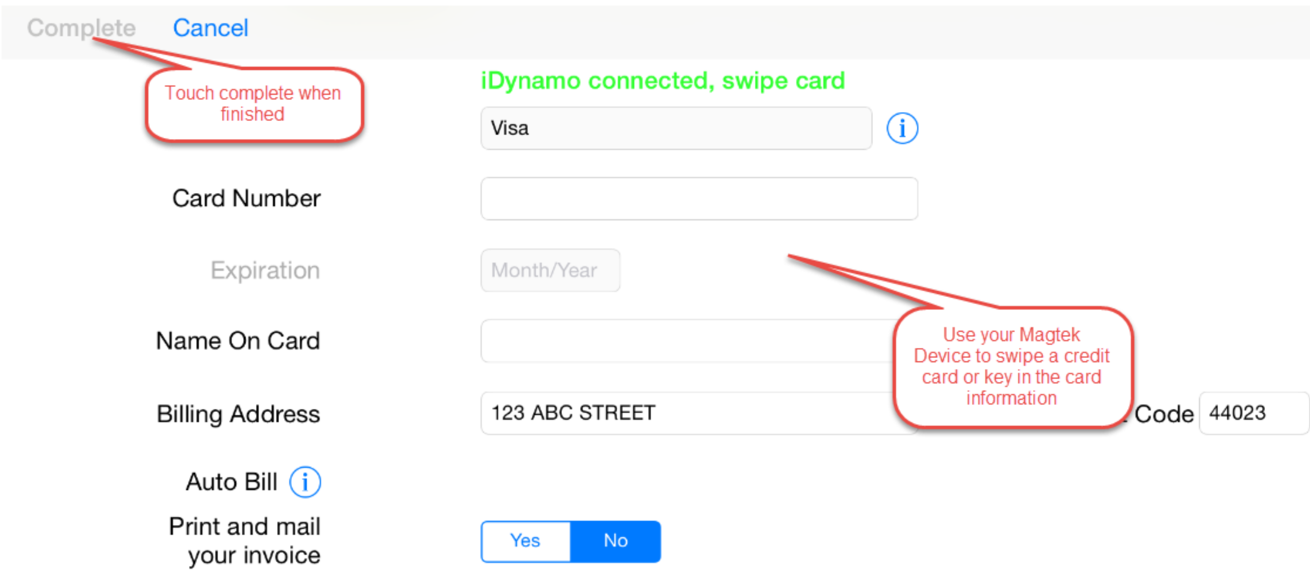
If the system is still under warranty, charges for the ticket will not be billable, and the charges section of the Accept tab will show as 0.00 even if labor, part, etc. were added to the ticket. Some service levels are also setup to include costs so that some or all charges on the ticket would not be billable to the customer. If you did add charges to the ticket and the accept tab is showing 0.00, check to see if these charges were covered under the warranty and/or service level. If the charges were covered, and you need to override this to make the charges billable again, simply toggle the option to override the warranty and/or service level as needed and the charges will appear.

Payment Method

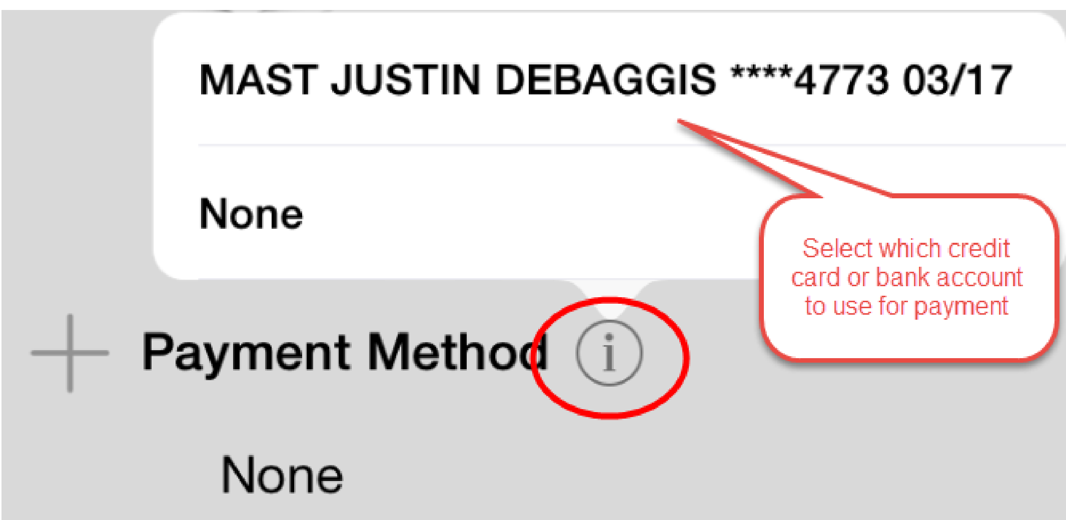
The FSU cannot charge money to a customer's credit card, however, it can select what payment method the customer would like to use to pay for the service call. If the customer provides a credit card the FSU can record the card info, and then users in SedonaOffice can bill the card.

If the customer already has a credit card or bank account on file the (i) icon to the right of Payment Method will be highlighted in blue. If the customer wishes to use one of these existing payment methods tap the blue (i) icon and then select the payment method from the list.

If the customer wishes to use a new payment method tap the green (+) icon to the left of Payment Method. You will be redirected to a secure payment method entry screen to enter their card information. HOW WILL NEW SCREEN LOOK AND HOW WILL CARD SWIPERS WORK IN NEW VERSION?



new screenshot



new screenshot

Signature

Service managers have the option to make customer signatures required on the FSU, in which case the Signature section of the accept tab will only display Get Signature. If signatures are not required technicians will see both the No Singer Available, and the Get Signature options.

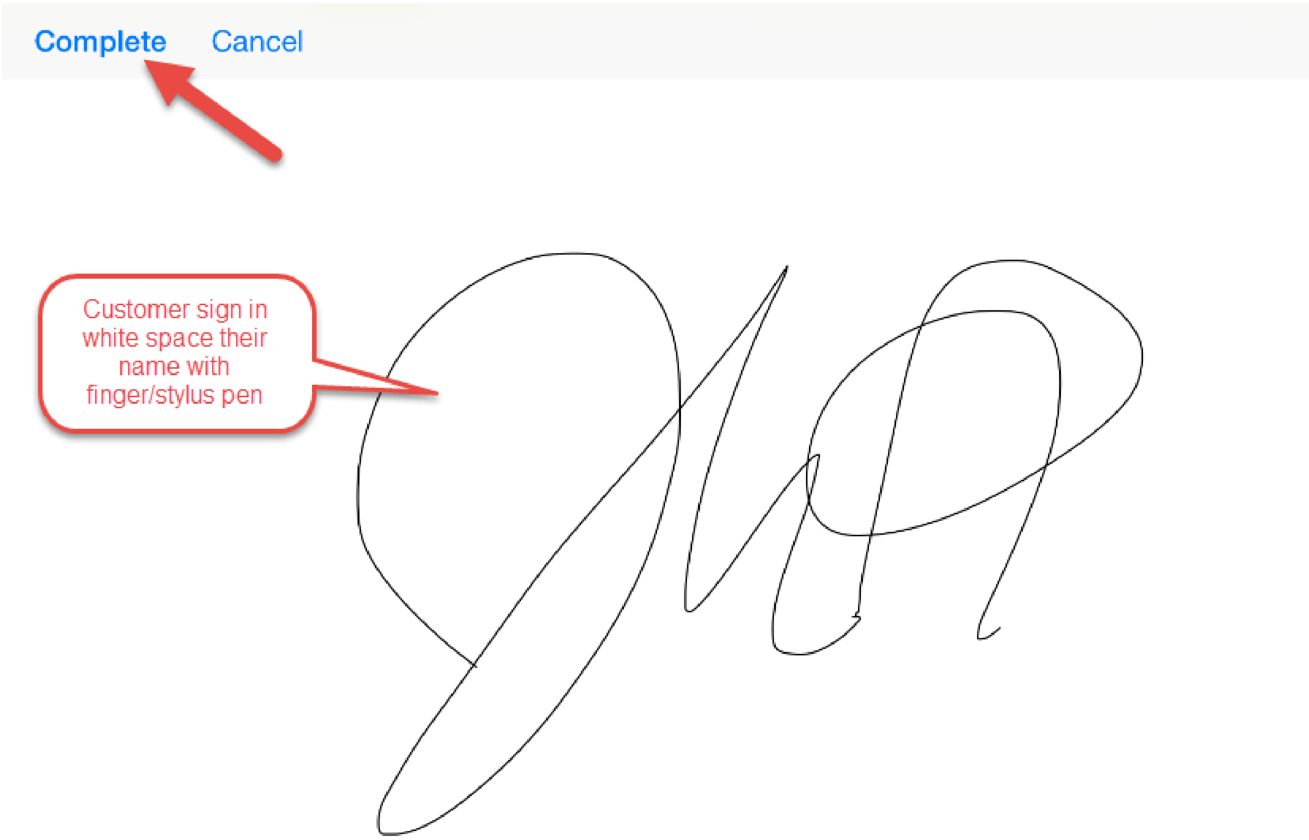
No Signer Available – If no customer is available to review the accept tab, or your customers are not required to do so, select No Signer Available. A field will open so that you can type your own name, verifying that you completed the call, and that no signature was attained.

Get Signature – Before collecting a signature, have the customer review the information on the accept tab. Most companies also have their customers review their terms and conditions.

There are two ways to display terms and conditions on the FSU. Your service manager will select which option your company uses in the Technician Management Tool.

- If a blue Legal Agreement option appears at the bottom of the accept tab, select this and allow the customer to read the terms and conditions listed here. Then close this window and tap Get Signature.
- If the Legal Agreement option does not appear, simply select Get Signature, and the legal agreement should pop up at that time. The customer will be asked to read and select Accept on the legal agreement before continuing to the signature screen.

Once Get Signature has been selected (and the legal agreement has been accepted) a window will open where customers can use their finger to sign anywhere in the white space. Tap complete in the top left when they are finished signing.



new screenshot

In case the signature is not legible, a Signer field will appear below the captured signature. Tap in this field and type in the name of the person who signed, then select Accept.

new screenshot

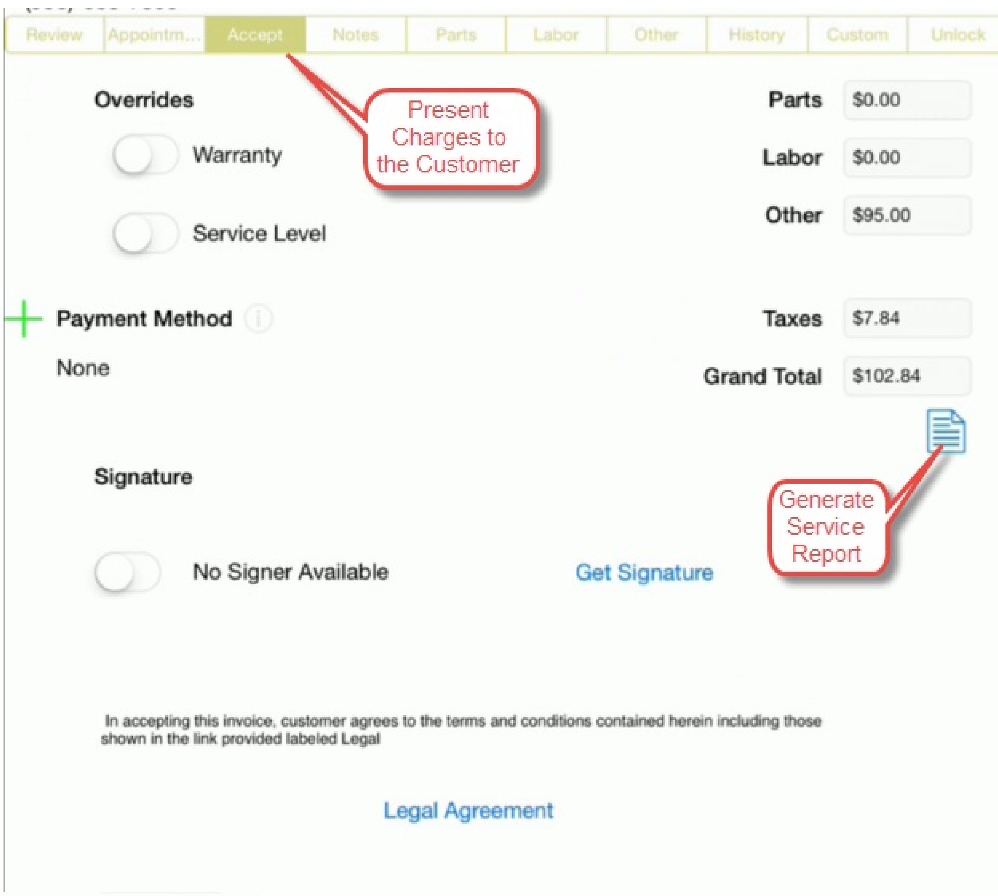
Service Report

A service report is a document that summarizes the appointments and charges of the service ticket. This can be generated on the accept tab, saved to the ticket, and emailed to the customer from the iPad or iPhone. To generate the Service Report:

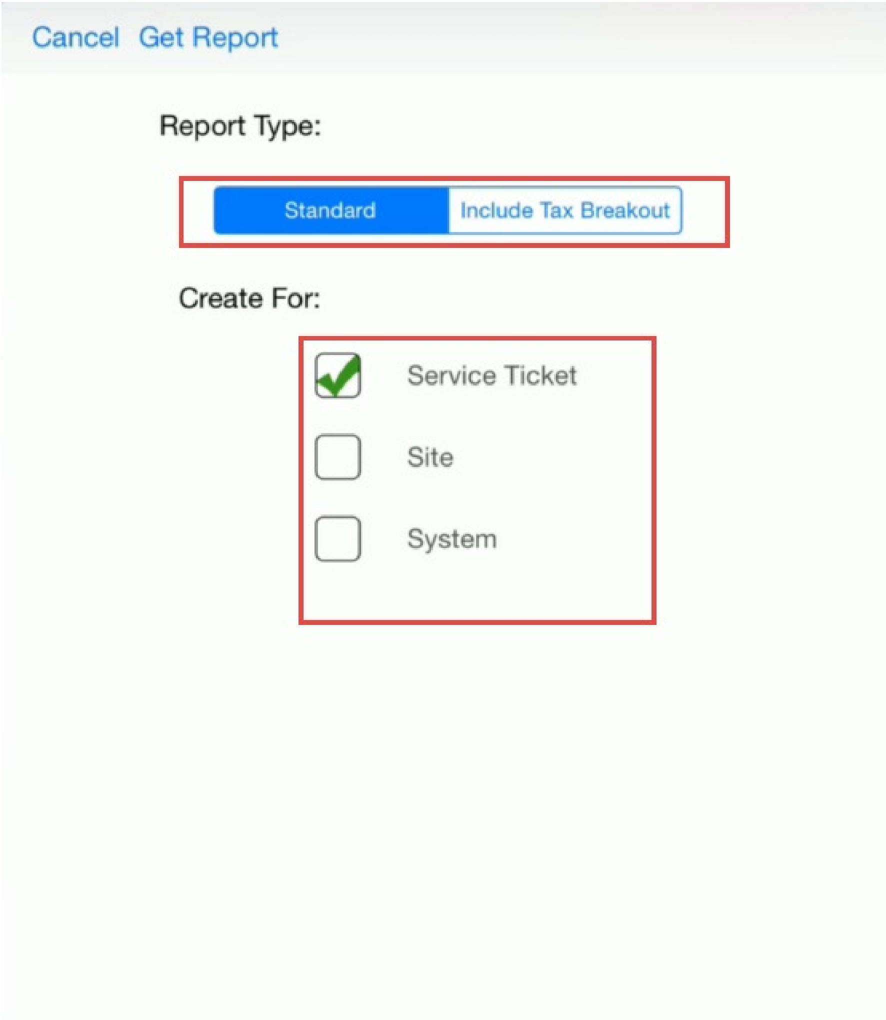
1. Select the blue paper icon below the grand total service charges. A window will pop up with options for

generating the report.

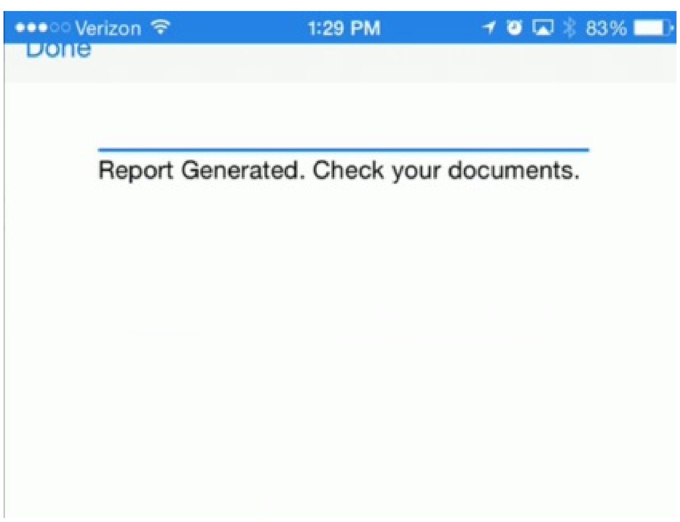
2. In the Report Type section, select whether you would like the Standard report, or if you would like the report to Include Tax Breakout.
3. In the Created For section, select if you would like to save a copy of this report to the service ticket, the site, or the system. You may check more than one box to save the report to more than one location.
4. Select Get Report at the top. The report will generate, and a window will pop up letting you know when it is complete. The message that pops up also directs you to check your documents to view the report.
5. Select Done in the top left of the window. The report is now viewable in the documents section of the FSU.
6. Select the Documents option at the very bottom of the FSU to view ticket documents. See the help doc section on Documents for a walk through of how to navigate documents on the FSU.

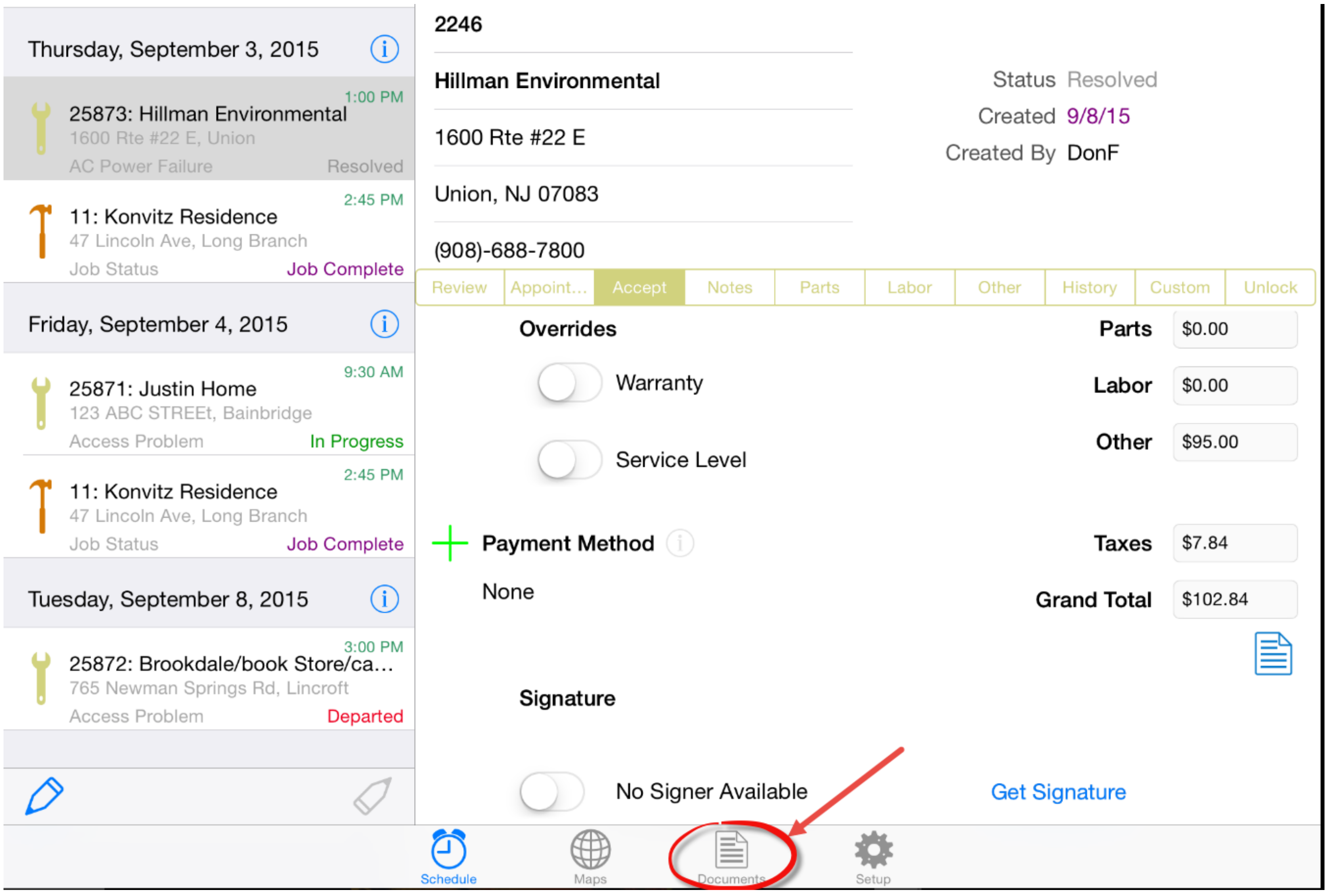


new screenshot



new screenshot

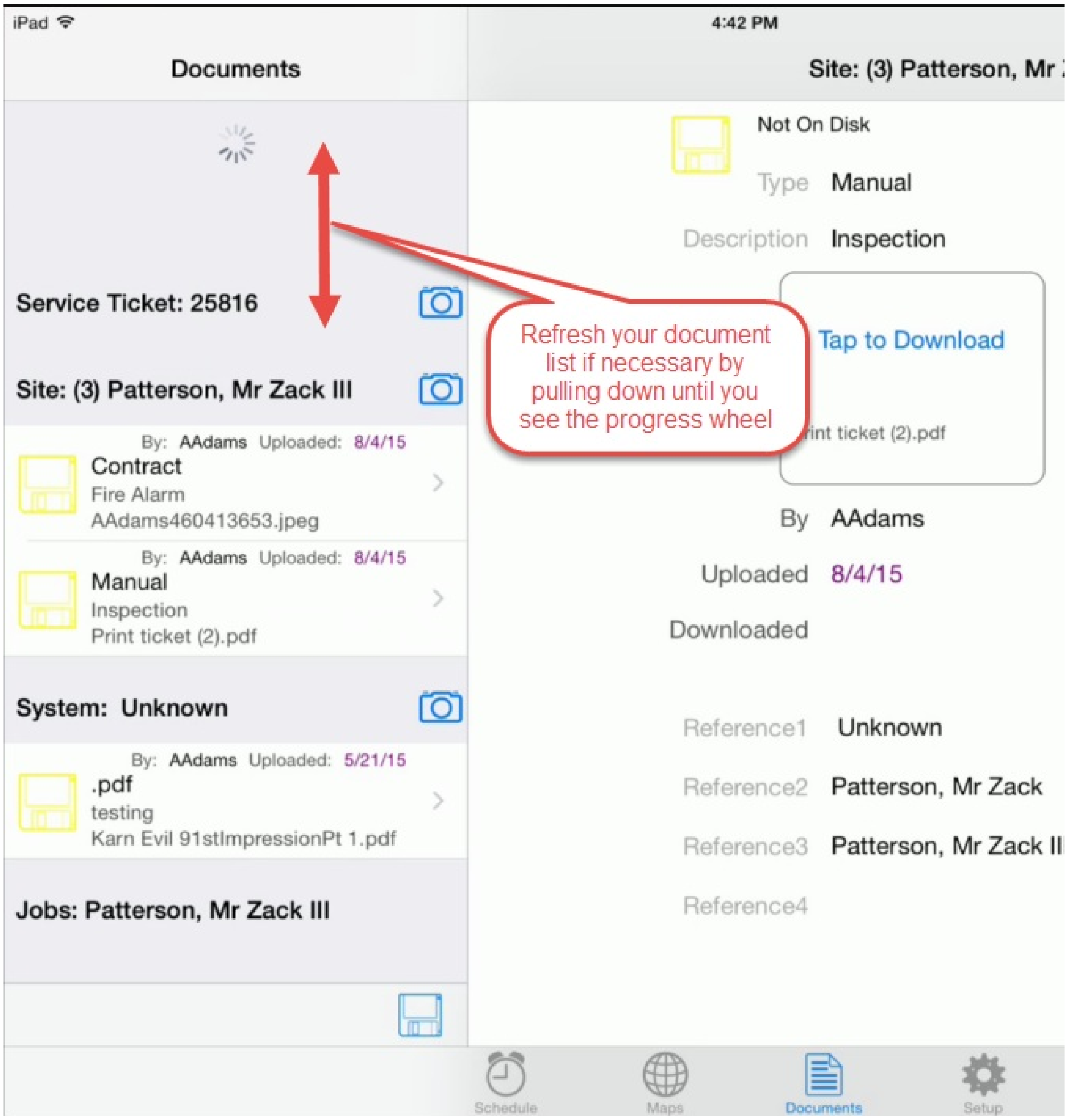




new screenshot

Documents

If there are documents saved to the customer's site, system, ticket, and/or job from SedonaOffice, they can be viewed from the FSU. You can also save new documents to these places from the FSU by generating the Site or Service report, or uploading a picture or file from your device. Your company must have the SedonaDocs module to use the FSU document features. Service Managers control what level of documents users have access to using the Technician Management Tool.



new screenshot

Viewing Documents

To view documents, select an appointment on the schedule, and then tap Documents from the very bottom FSU options to see documents for that appointment. It does not matter what tab of the ticket/job you are on when you select Documents.

The Documents tab has a list of documents on the left, and a summary of the currently selected document on the right. If you do not see the list of documents, turn your device sideways instead of vertical and the list should appear.

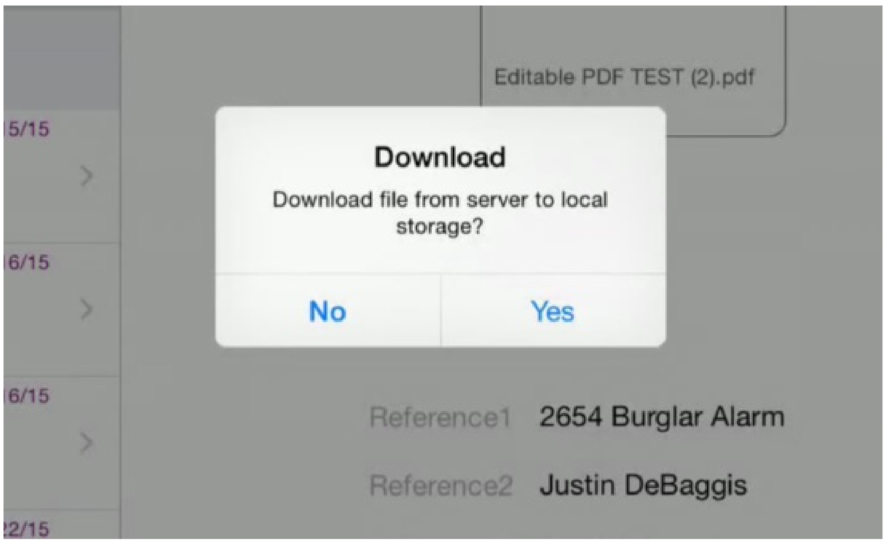
You can pull down on the document list to refresh it. If new documents were added since the last time you refreshed they will appear on the list.

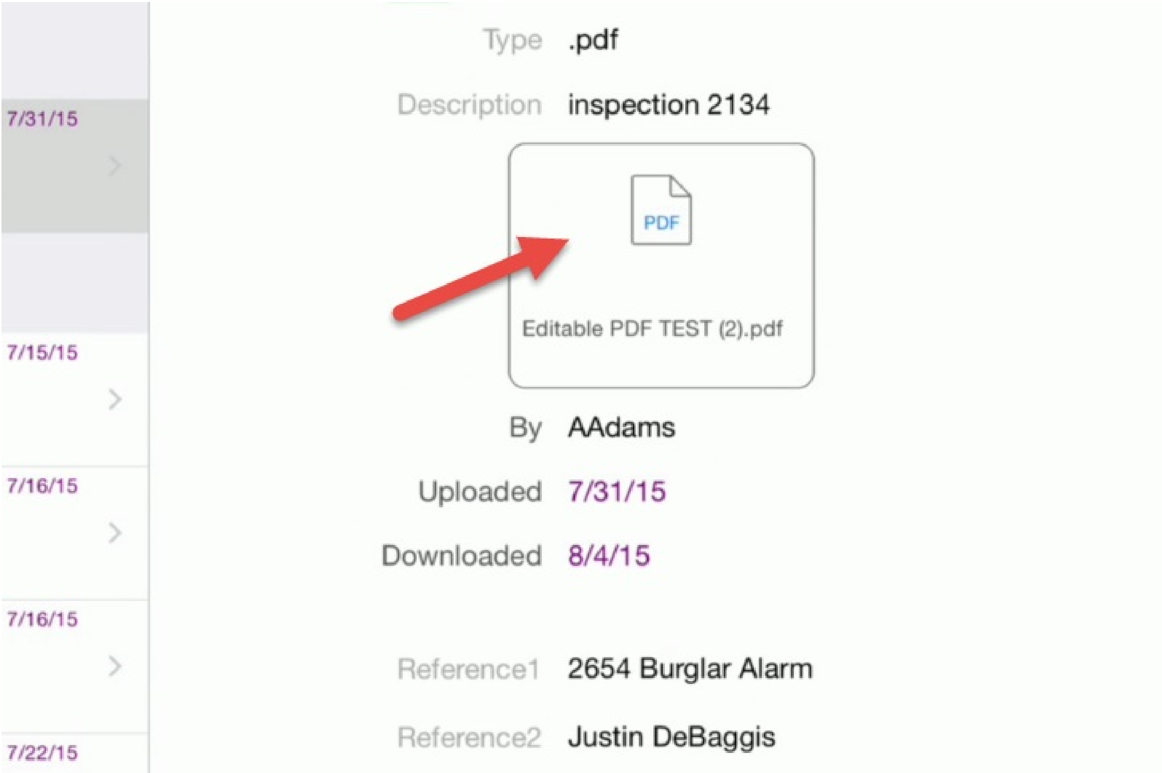
Headers appear on the left for Service Ticket, Site, System, and Job. The heading the document appears beneath indicates where in SedonaOffice the document is saved.

Each document has a yellow or green floppy disk icon beside it. A yellow icon indicates the document is saved in SedonaOffice, but is not downloaded to your iPad/iPhone. A green icon indicates the document is saved in SedonaOffice, and is also downloaded on your device.

To view a document, first select it from the list. A summary of the document will appear on the right including the **Type** of document, a **Description** of it, who it was uploaded **By**, when it was **Uploaded**, and a **Reference** number indicating which site, system, ticket or job it is saved to.

The floppy disk icon will also appear at the top, indicating whether or not the document is on your device's disk. If the document is not on your disk, select the 'Tap to Download' option. A window will pop up, asking if you would like to download the document from the SedonaOffice server to your device, select Yes. The Tap to Download option will be replaced with an icon for your newly downloaded document. Tap the icon to view the document.





new screenshot

I CAN"T REMEMBER IF THERE ARE DIFFERENCES BETWEEN JOB APPT DOCS AND SVC APPT DOCS, IF SO NEED TO ENTER THOSE HERE

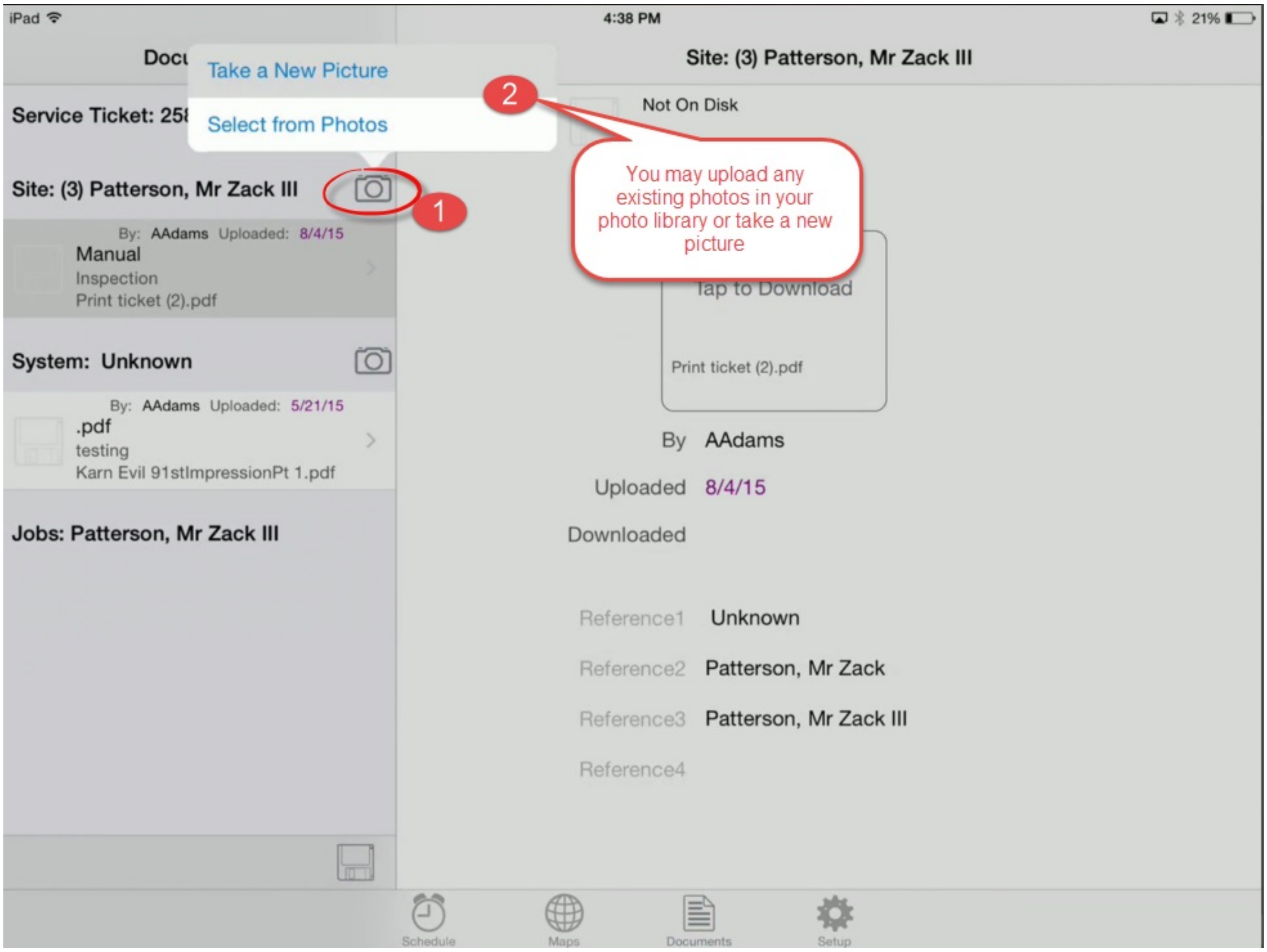
Uploading Documents

There are two reports, the Site Report and Service Report, which can be generated from the FSU. When generated these reports automatically upload as documents to SedonaOffice. See the help doc sections on the Review tab and Accept tab for details on generating these reports from the FSU.

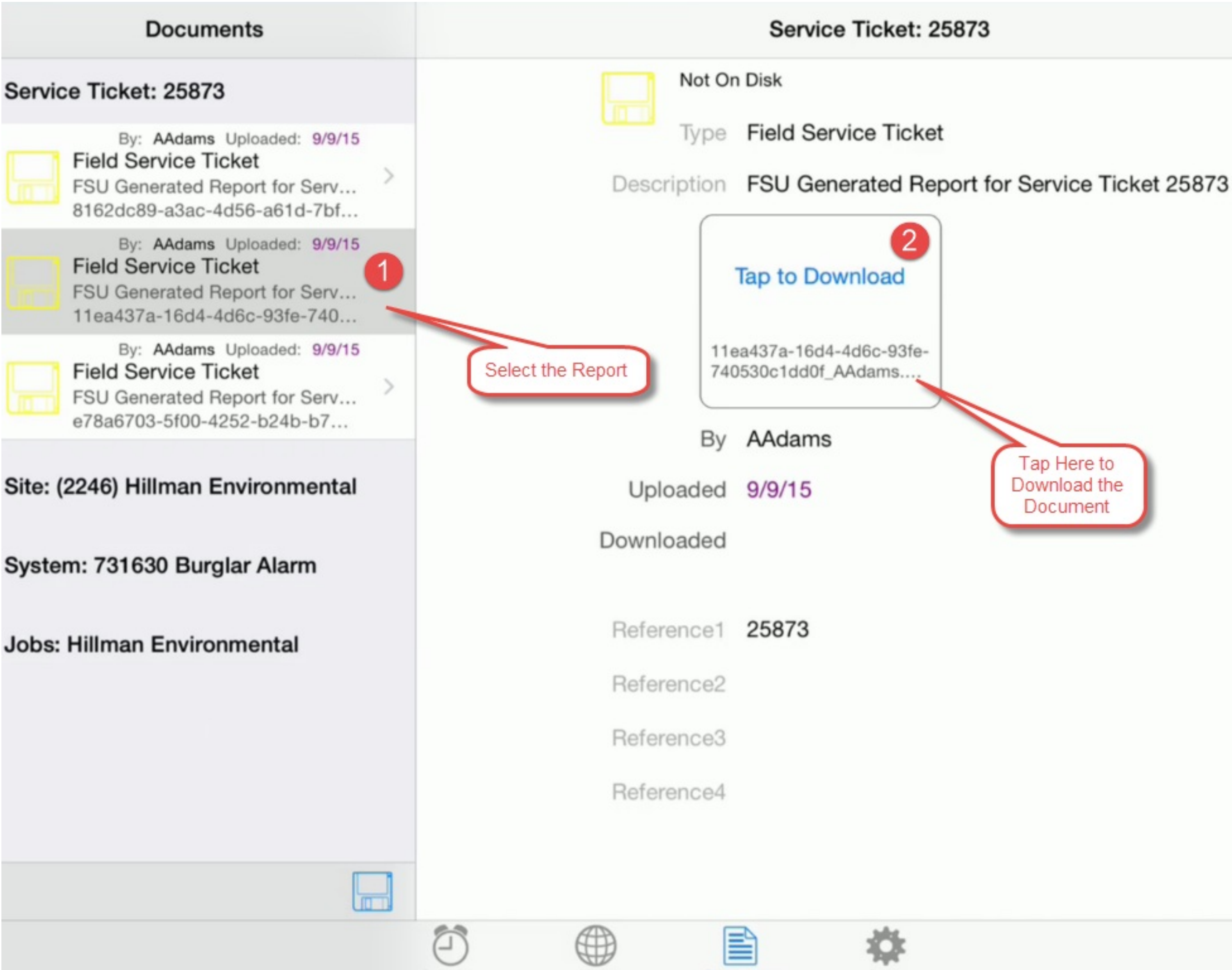
You can also save other documents, such as pictures and pdfs from your device to SedonaOffice documents, from the FSU.

New Photos

To upload a new photo to your ticket/job, select the appointment the photo is for and then select the Documents option at the very bottom of the FSU. A camera icon appears to the right of each header in the document list section. Select the camera icon next to the header where you would like the new photo to save. For example, if you want to save the document to the ticket, select the camera icon to the right of the Service Ticket header.



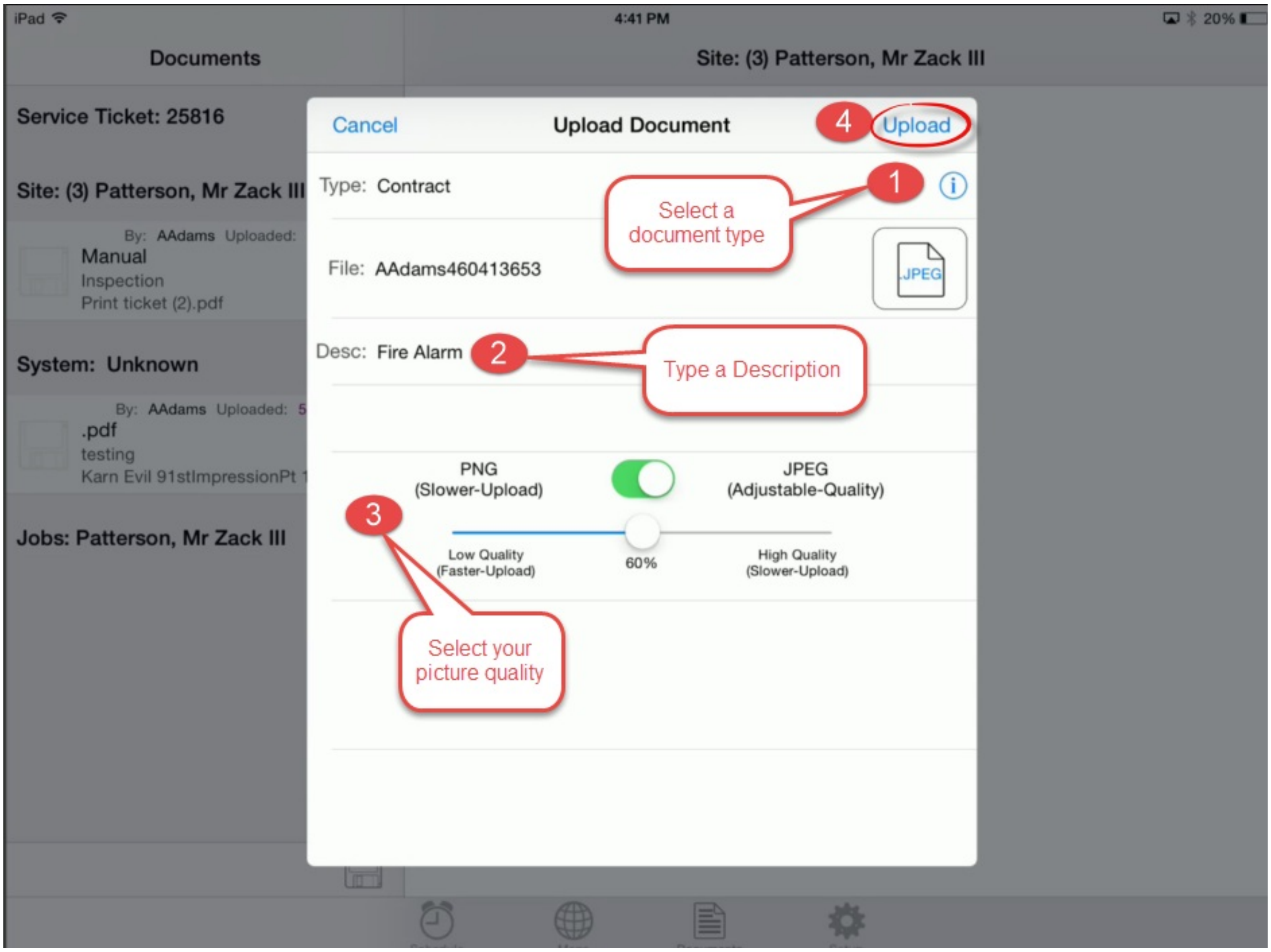
new screenshot



new screenshot

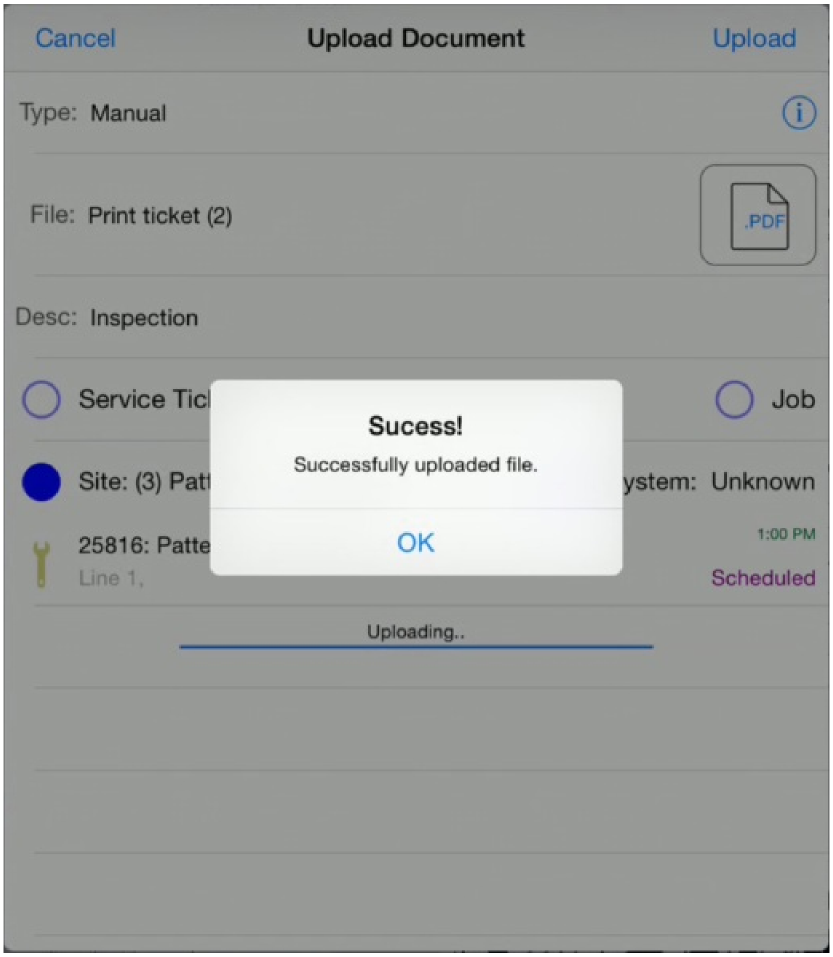
The FSU will access the camera for your device. If the camera does not appear this means you have not given the FSU app permission to access it. Navigate to your settings to allow the FSU to use your camera. Once the device camera appears, take your picture as normal. Select Use Photo from the bottom right of the screen (you can also select Retake on the left if you need to retake the picture).

The Upload Document window will appear. AND I NEED NEW SCREENSHOTS FOR THIS AND PROBS NEED TO BRAKE IT OUT BY NUMBERS BUT NEED THE SCREENSHOT TO DO THAT. The upload button in the top right corner is initially greyed out, and will only highlight after all required fields have been completed.

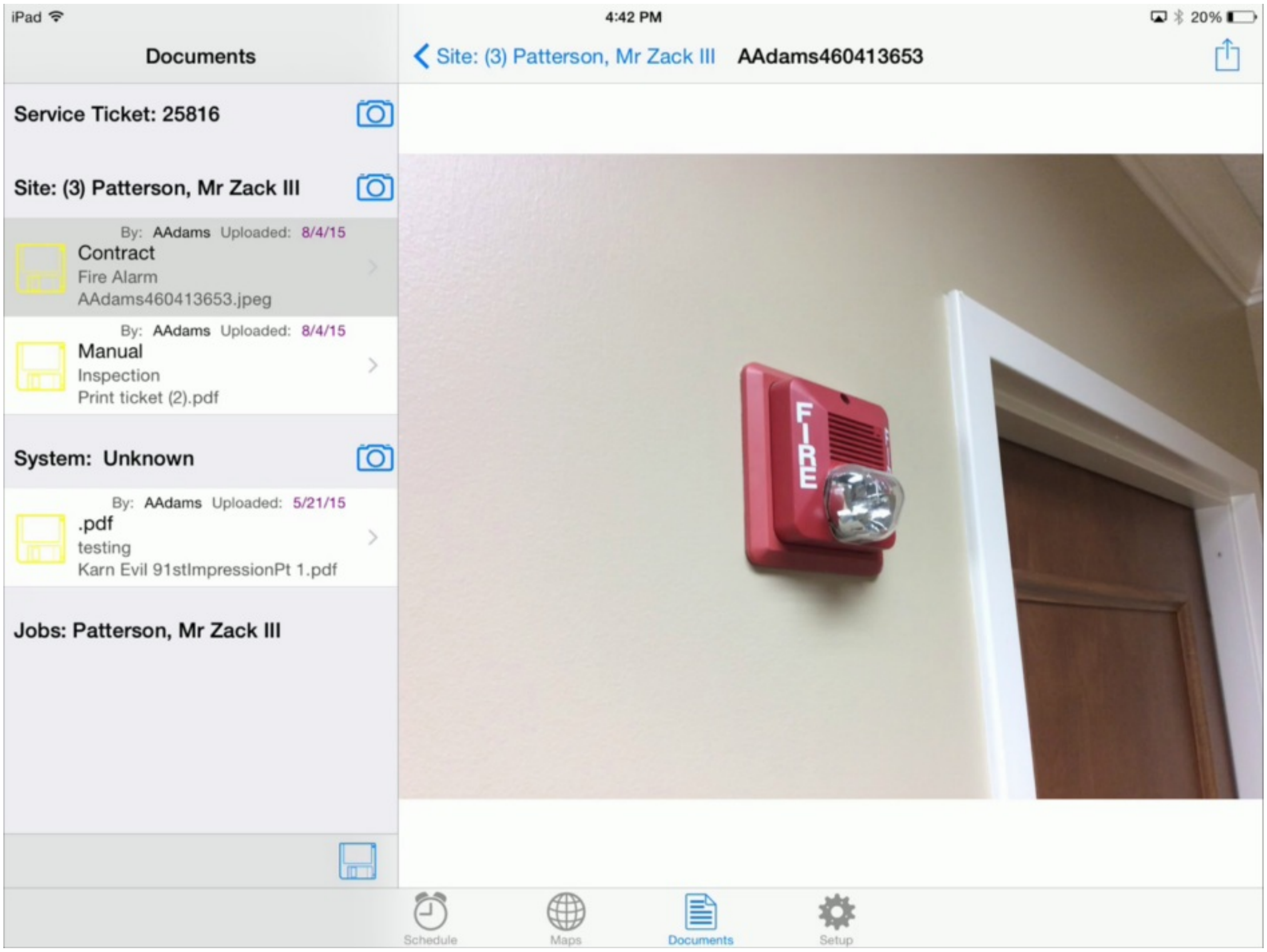


new screenshot

Tap the blue (i) to the right of Type to select the type of document you are uploading. The file name and extension should default in below this based on the file you selected, in this case a photo. Tap in the description field and type a name for the document. Select what quality you would like to upload your photo to be. A high quality photo may not be necessary and may slow down upload time. A medium or low quality picture may work just as well, and make uploading much easier. When all information has been entered select upload in the top right. Pull down on the documents list to refresh it, and the picture you just uploaded will appear.

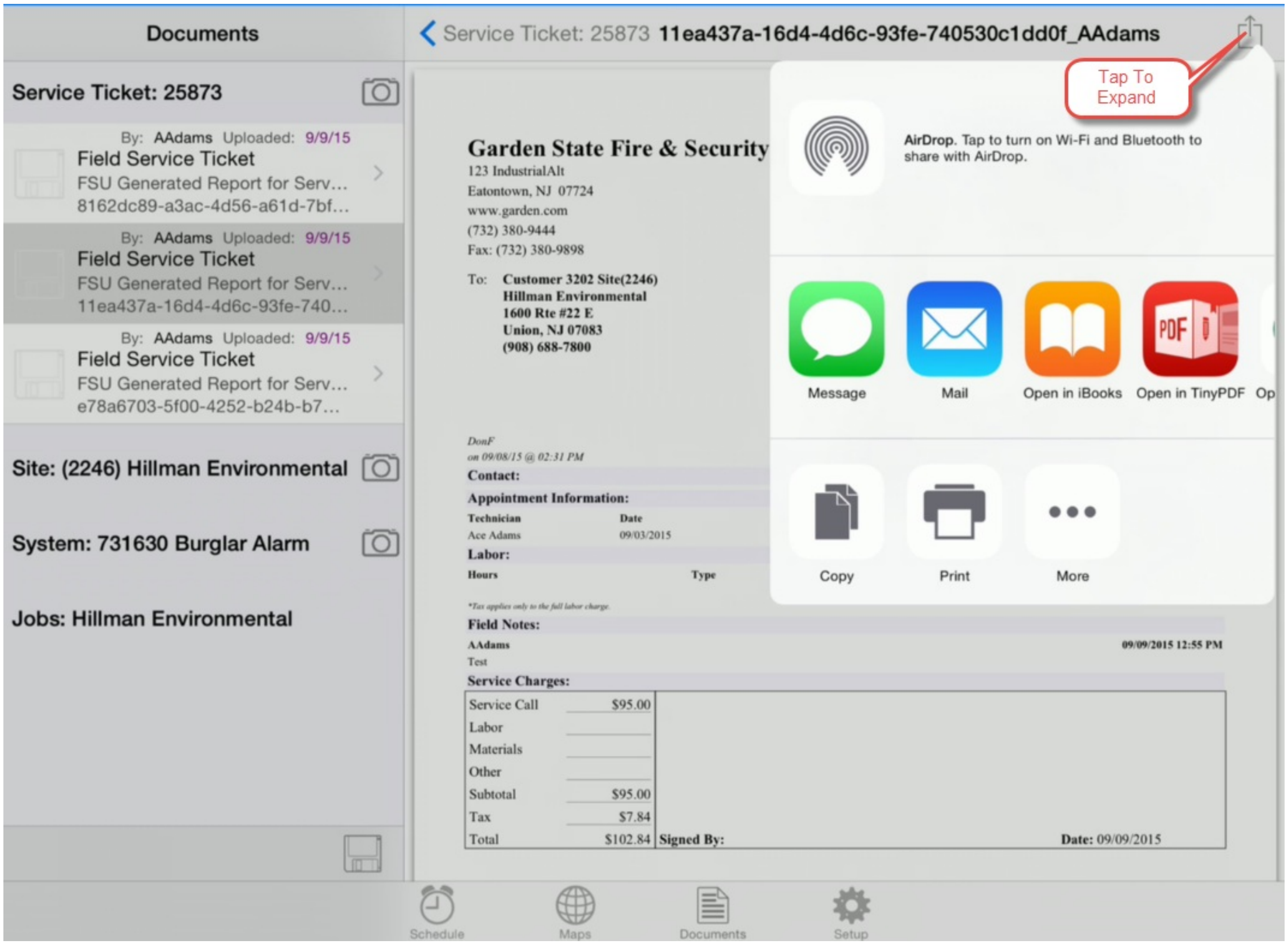


new screenshot

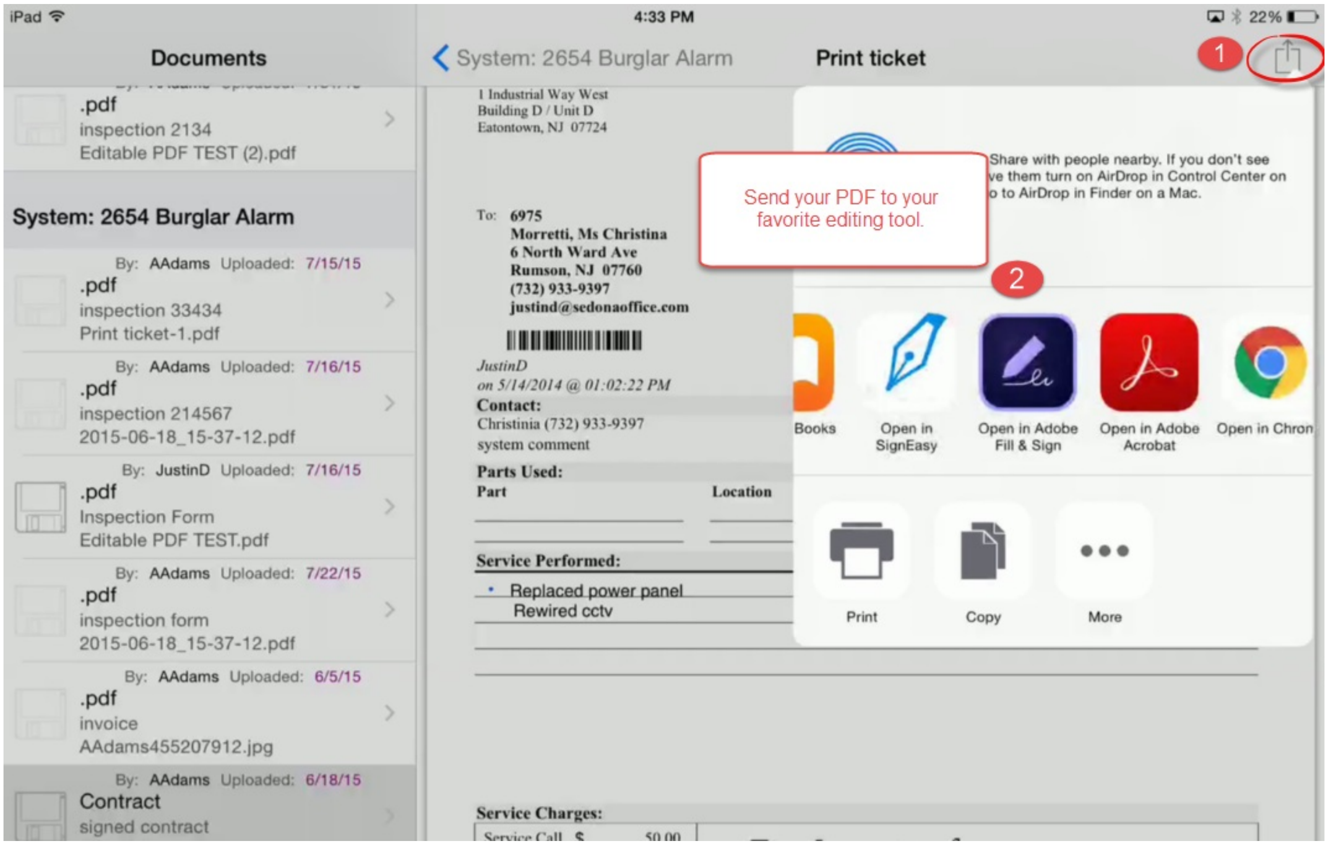


Files

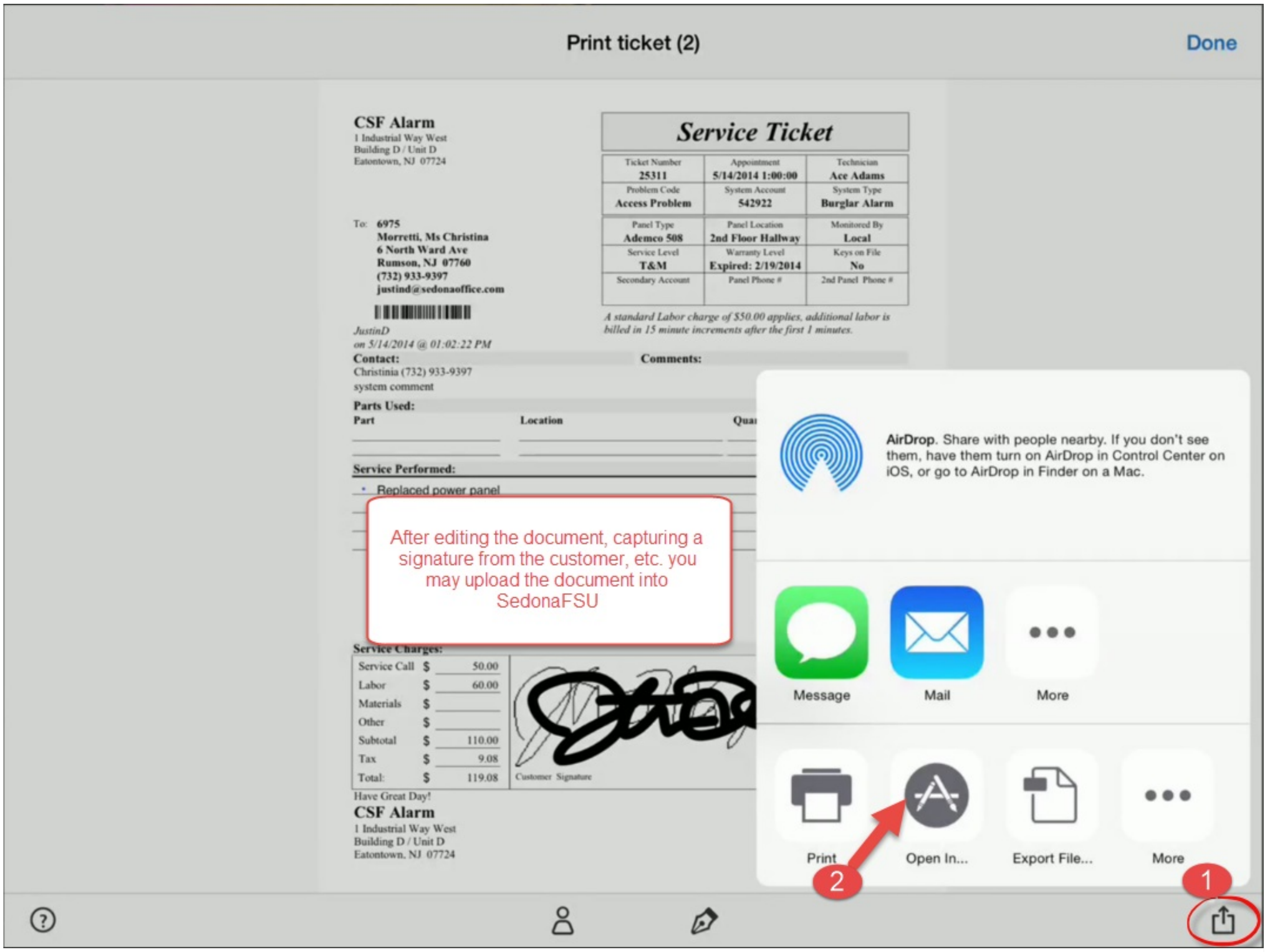
To upload an existing file from your device to the FSU, open the file on your device and then select the blue ios share icon (PICTURE). A window will pop up listing all the possible apps you could send the document to. Scroll through this list until you find the FSU icon and select it. The upload window for the FSU will appear, similar to the window for uploading a photo. BU tin this case you will need to indicate which site, system, ticket, or job you are saving the file to. Select the correct location to save the file and then fill in the remaining fields as normal. This method can be used to upload pdfs, and photos which were already saved to your device prior to opening the FSU.



new screenshot



new screenshot



new screenshot

Sending Documents to Customers

Many companies choose to email the Service Report to their customers at the end of their service calls. To send this report, or any other, to a customer:

1. Generate the document from the Accept tab of the ticket
2. Go to the documents for that ticket and select the report you just generated.
3. Download the report to your device.
4. Tap the report to view it.
5. Select the blue iOS share button from the top right corner of the screen.
6. Scroll through the apps on your device and select your email. Your device will auto attach the document to a new email, which you can then send as normal.

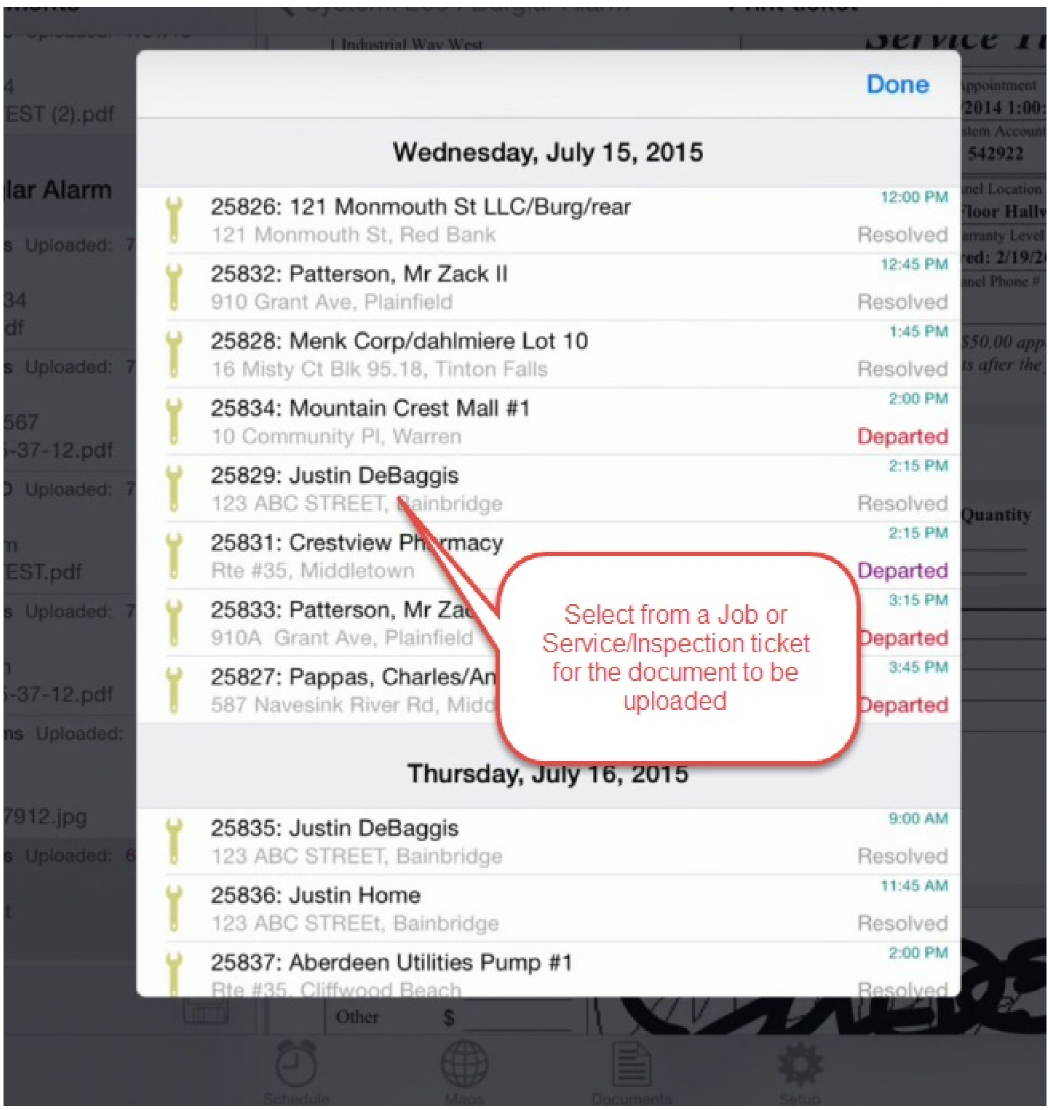
Editing Documents

The most commonly edited documents on the FSU are inspection reports. To edit these, or any other document, you must download the document to your device and then send it to a third party application for editing. When all the necessary changes have been made the document can then be re-uploaded to the FSU. The document you upload will save as a new document, so that the original is protected and not overwritten. Steps:

1. Navigate to your documents and download the document you need to edit to your device.
2. Select to view the document.
3. Select the blue iOS share button from the top right corner of the screen.
4. Scroll through the apps on your device and select your pdf editing app, or whichever app you normal use to edit documents.
5. Your device will open the document in the new application, allowing you to make changes there.
6. When the changes are complete, select the blue share icon again, and send the document back to the FSU.

- Note that for some editing applications you may have to select Share/Copy to send the document from the third party app back to the FSU.

7. The upload document window will appear. Fill out the information there as though you are saving the document for the first time. This is so that the document can save as a new attachment, and not override the original document on the ticket.



WHAT THE HECK IS THIS OLD SCREENSHOT FROM

iCALENDAR

You can sync your appointments from SedonaOffice to the iCalendar on your iPad/iPhone. The FSU schedule displays only your ticket/job appointments, the iCalendar can show both your ticket/job appointments and your miscellaneous appointments, such as office meetings. Appointments appear on your calendar listing the ticket/job number, problem code, and customer name. I TYPED THAT FROM MEMORY, IS IT RIGHT? To sync your appointments to your iCalendar:

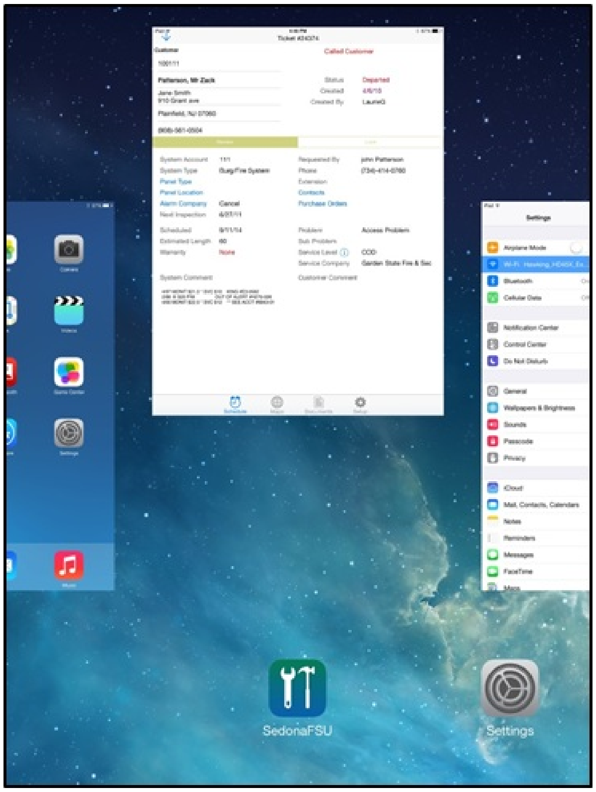
1. Navigate to the Setup tab at the bottom of the FSU.
2. From the far left column, select Downloads. Your Service/Job Appointments, and your Miscellaneous Appointments both appear available for download.
3. Tap the appointment type on this screen to sync, and or refresh the information for these items on your iCalendar.
4. Leave the FSU app and open your iCalendar app to view the appointments.

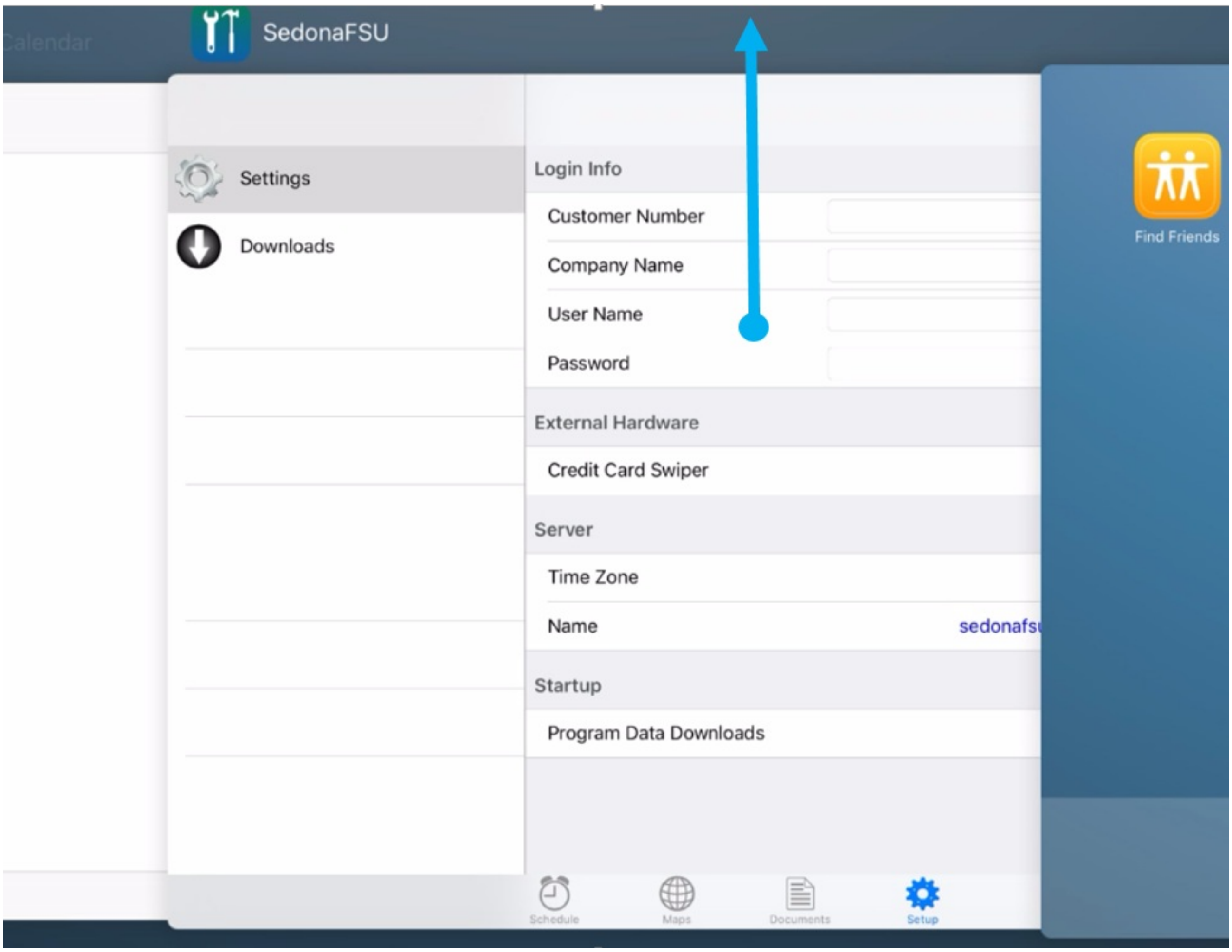
NEED PIC OF THIS SCREEN AND THE iCALENDAR

Closing the FSU Application

The FSU requires internet connection to your SedonaOffice server to upload data in real time. As such, your connection to the server may timeout if the FSU is left idle for 15 minutes or more, or connection may be lost if wifi coverage is poor or being blocked. If connection to the SedonaOffice server is lost the FSU may become unresponsive. Should this happen simply close and re-open the app to reestablish connection. To do this:

- Double click the devices Home button.
- Swipe left or right to locate the FSU app.
- Tap and swipe up on the FSU app to close it.
- Tap on the FSU icon again to reopen the app.


SedonaFSU
Settings


Calendar
SedonaFSU
Settings
Downloads
Login Info
Customer Number
Company Name
User Name
Password
External Hardware
Credit Card Swiper
Server
Time Zone
Name
sedonafs
Startup
Program Data Downloads
Schedule
Maps
Documents
Setup
Find Friends