

FSU to Sedona-X Mobile Transition FAQ

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Sedona-X Mobile is the integrated business and field service management mobile app for SedonaOffice. Here are some questions you may have as you transition from FSU to Sedona-X Mobile.

Q: How similar is Sedona-X Mobile to the FSU?

A: Sedona-X Mobile is very similar to the FSU in day-to-day usage. Technicians familiar with the FSU should find Sedona-X Mobile easy to learn.

Q: What are the biggest differences between FSU and Sedona-X Mobile?

A: Sedona-X Mobile adds customer visibility, customer/job/ticket creation, material management, expanded permissions, and Android support.

Q: Does Sedona-X Mobile support Android devices?

A: Yes. Unlike the FSU, Sedona-X Mobile works on both Apple and Android devices.

Q: Can technicians see customer information in Sedona-X Mobile?

A: Yes. Depending on permissions, technicians can view customers, sites, systems, jobs, notes, documents, and service history.

Q: Can technicians create jobs in Sedona-X Mobile?

A: Certain roles, such as Project Managers and Managers and a Company Admin can create jobs. Senior Technicians and Junior Technicians are not able to create jobs within Sedona-X Mobile.

Q: Can technicians create service tickets?

A: Yes, if granted the necessary permissions.

Q: Can technicians add materials or parts?

A: Yes, this feature allows searching, adding, and issuing inventory parts.

Q: How do warehouse transactions work?

A: Parts can only be issued from the warehouse assigned to the technician.

Q: Can technicians reschedule appointments?

A: Yes, with the necessary permissions that are setup at the User level, the reschedule permission allows adding and modifying appointments.

Q: How are dispatch, arrival, and departure times entered?

A: From the home screen or directly within a job or ticket.

Q: Is ticket locking/unlocking still required?

A: No. Multiple technicians can work in the same ticket simultaneously without locking.

Q: Can technicians take payments?

A: Yes, if permissions are granted. They are able to take credit card or bank account payment methods.

Q: Can technicians capture signatures?

A: Yes. Electronic signatures can be collected and attached to ticket records when a ticket is resolved.

Q: Can technicians update contacts?

A: Yes, with the proper permissions.

Q: Can technicians view service history?

A: Yes. Historical ticket information is available.

Q: Can technicians see purchase orders?

A: Yes. Purchase order information is viewable for a reference within Jobs.

Q: Are custom fields supported?

A: Yes. Ticket custom fields configured in SedonaOffice are available.

Q: Can users stay logged in?

A: There is a Stay Logged In option, but biometric login is recommended.

Q: How can users report errors?

A: The View Logs feature allows error review and direct submission to Bold Group Support.

Q: What permissions should be reviewed before go-live?

A: Role groups, administrator rights, payment permissions, appointment permissions, and notes/document access.

Q: What should technicians expect during the transition?

A: A straightforward transition with familiar workflows and additional functionality.
