

12TH ANNUAL

# SedonaOffice® USERS CONFERENCE

MARCO ISLAND, FLORIDA  
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NETWORK



ACHIEVE

## SedonaSync – Where to Find Answers

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## Working within SedonaSync

### How to check on the status of an Event

You can use the SedonaSync Monitor to check on the status of an event.

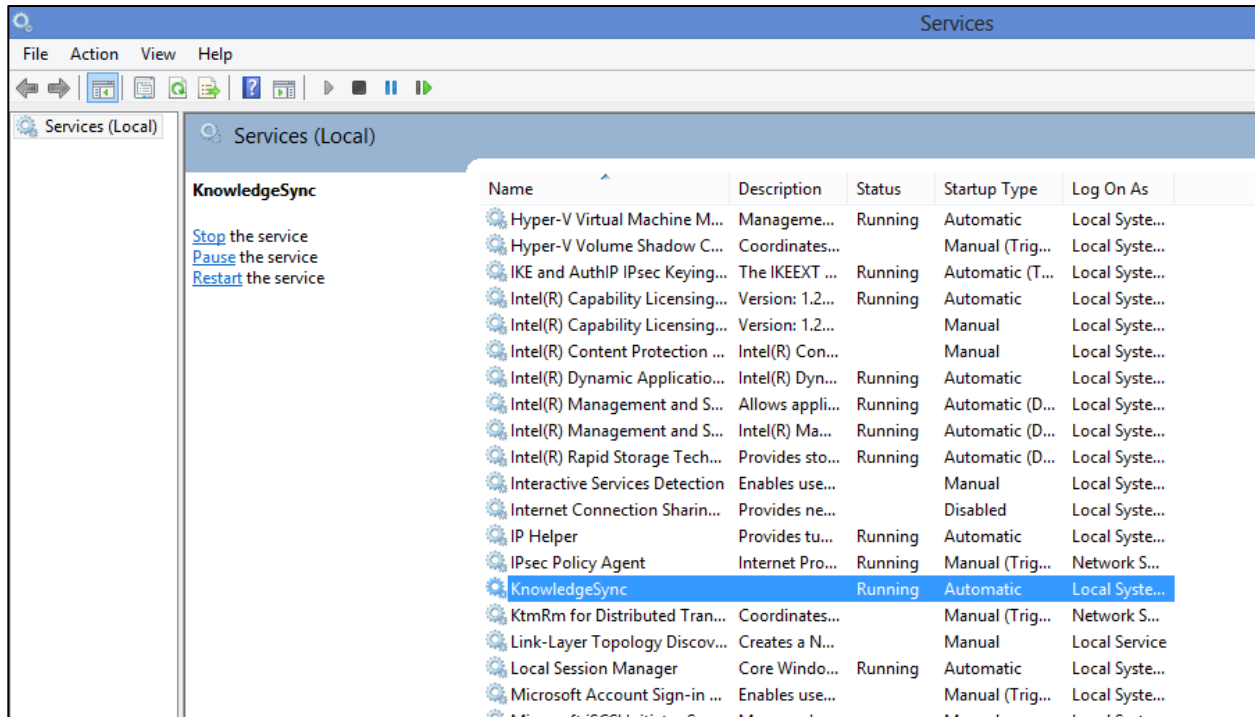
Server Status		
Server	Status	Error Message
KnowledgeSync	Idle	
Scheduler	Idle	
Application Event	Idle	
Email Server	Idle	
Page Server	Shutdown	Shutdown
Fax Server	Shutdown	Shutdown
Copy Server	Idle	
Report Server	Idle	
Webcaster Server	Idle	
Action Server	Idle	
IM Server	Idle	

## Stopping SedonaSync from sending out emails

### Step 1. Stop the SedonaSync Service

On the server where SedonaSync is installed, go to Control Panel > Administrative Tools > Services >

Depending on your installation, look for KnowledgeSync or SedonaSync

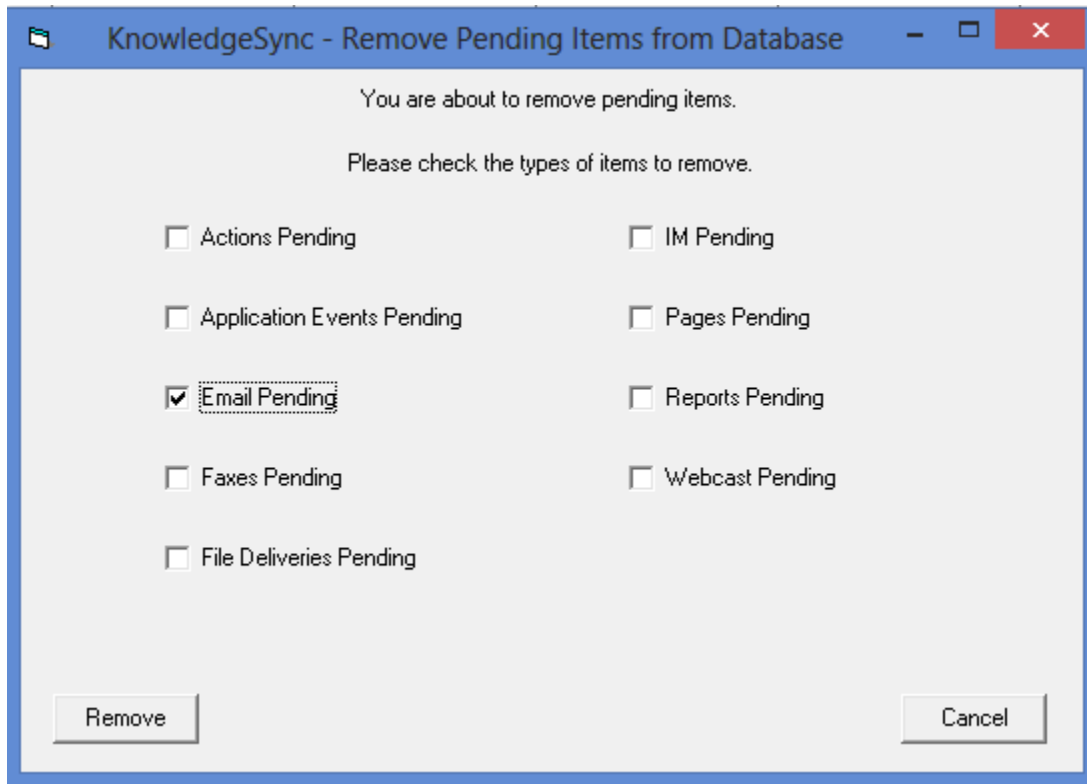


Right click on it and select Stop. This will stop SedonaSync from processing any events or emails until it is restarted. Keep this screen open as you will have to come back here in a future step.

Step 2. Review the list of pending emails in the Monitor. Make sure there are not any emails that should be sent. If there are, you might need to run the event again so they get processed.

### Step 3. Remove pending items

In SedonaSync Administrator, go to File > Database Tools > Remove Pending Items. Select Email Pending and click Remove. This will delete all pending emails.



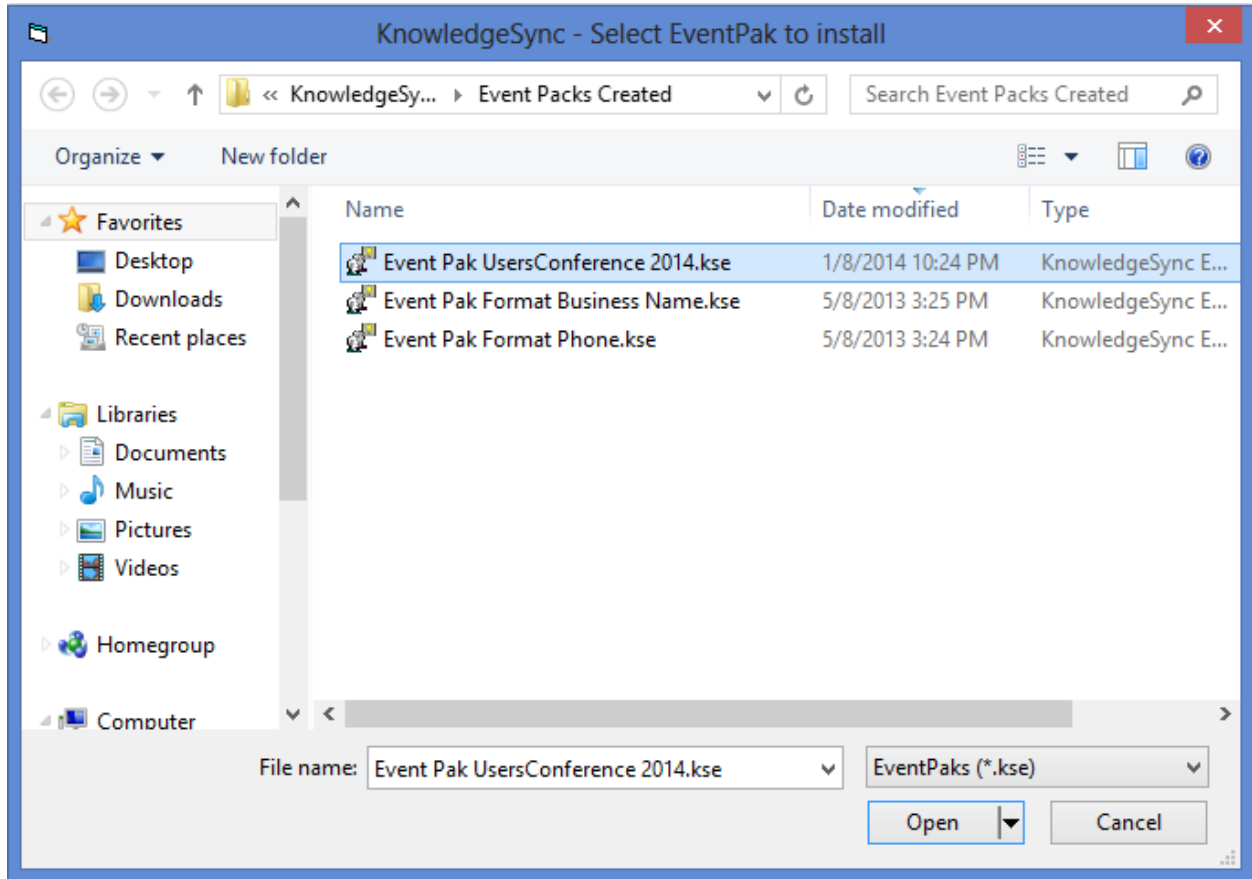
A message will display asking if you are sure you want to do this. If you select yes, a second message will display how many pending items were removed.

Step 4. Restart the service

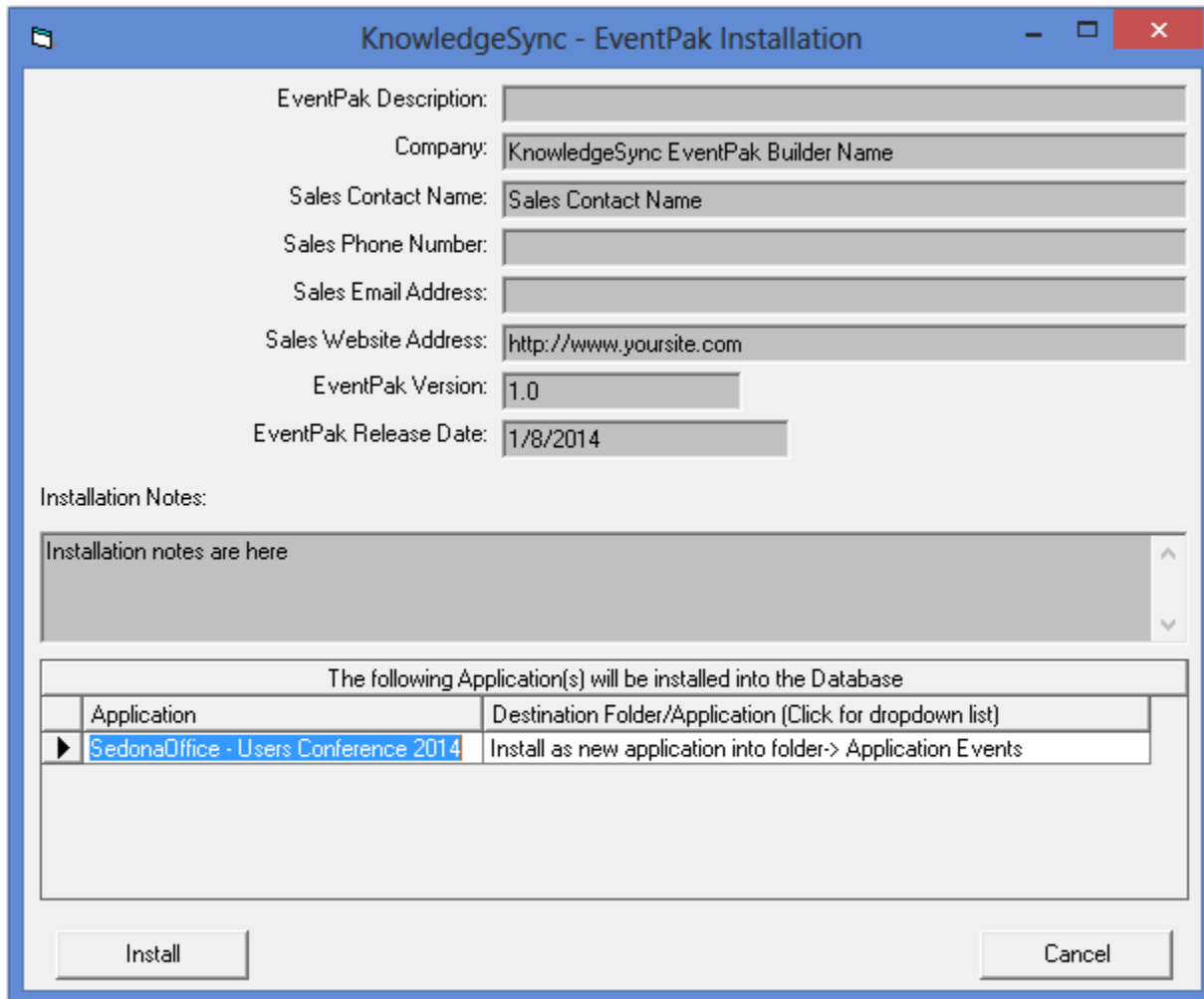
Go back to the Services screen. Right click on KnowledgeSync or SedonaSync. Select Start.

### Install an EventPak

To install an Event Pak open KnowledgeSync Event Manager. Go to File > EventPak > Install. Select to the EventPak you wish to install and click Open.



The KnowledgeSync – EventPak Installation will tell you what applications will be created by installing this EventPak.



Click Install. The installation takes seconds. When it is complete, Finished! will appear next to the Install button.

KnowledgeSync - EventPak Installation

EventPak Description:

Company: KnowledgeSync EventPak Builder Name

Sales Contact Name: Sales Contact Name

Sales Phone Number:

Sales Email Address:

Sales Website Address: http://www.yoursite.com

EventPak Version: 1.0

EventPak Release Date: 1/8/2014

Installation Notes:

Installation notes are here

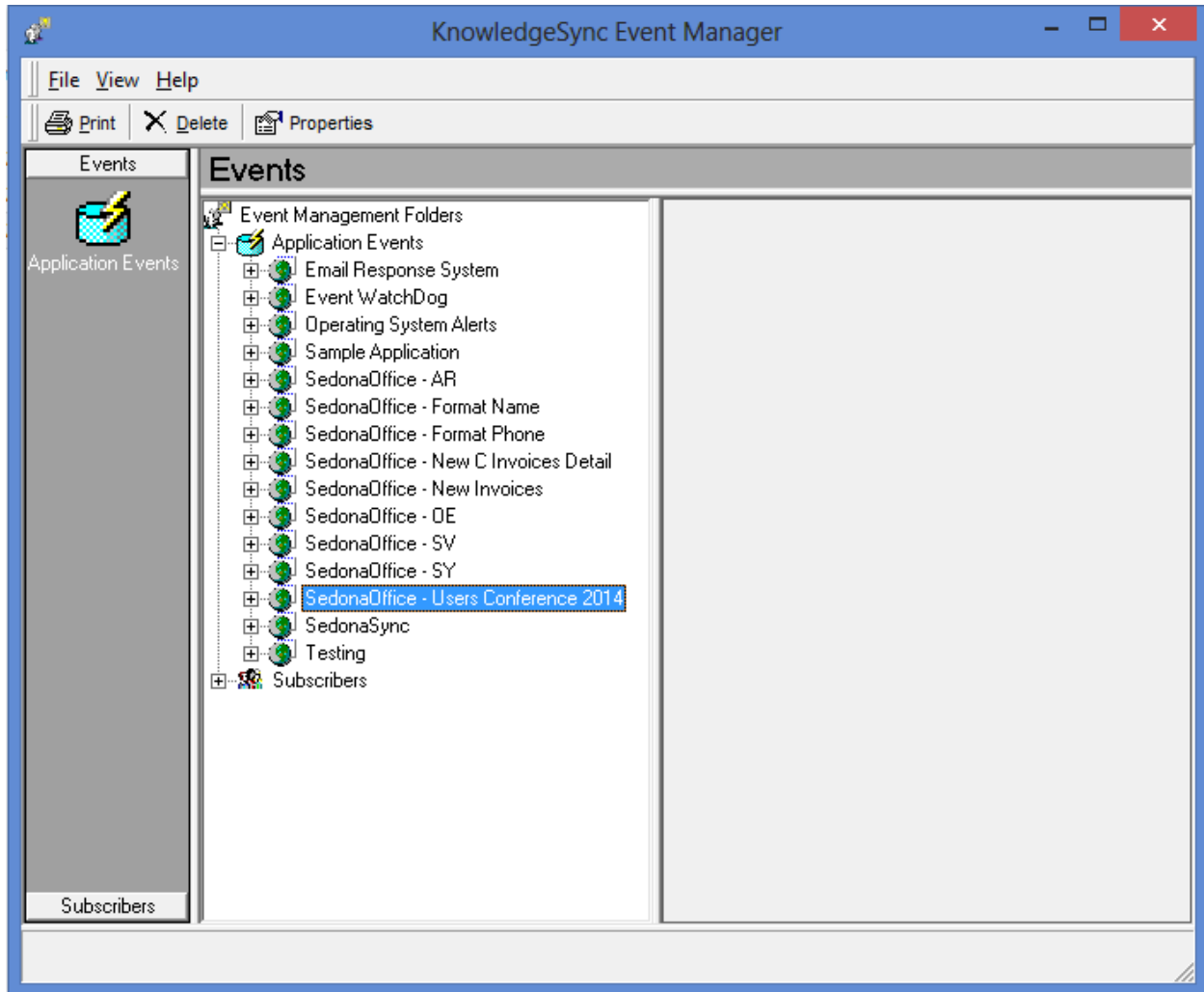
The following Application(s) will be installed into the Database

Application	Destination Folder/Application (Click for dropdown list)
▶ SedonaOffice - Users Conference 2014	Install as new application into folder-> Application Events

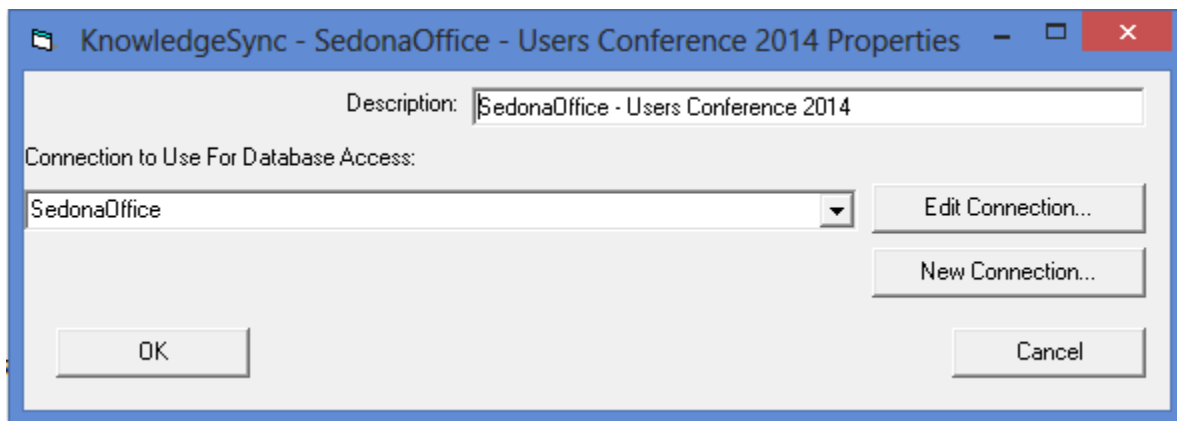
Install Finished! Close

Click the Close button. Event Manager will need to refresh the list of applications. Once the Event Manager reopens, your new application will be added to the tree structure on the left. You will need to select the application name and click the Properties button on the top of the screen.





You will have to complete all of the connection information for the new application. This will also have to be done anytime you create a new application. Select the correct Connection to Use For Database Access and click Edit Connections...



Select an ODBC if one is not already selected and enter the Username of SedonaReports. Password will be left blank for this user. Click the Save and Close button.

KnowledgeSync - Edit Connection...

File Edit Help

Save and Close Delete

Connection Description: SedonaOffice

General History

Internal ID number: 30 SedonaSandbox

Connection Description: SedonaOffice

ODBC Data Source Name (DSN): SedonaSandbox

Username: SedonaReports

Password:

Date Separation Character: ' Use Coordinated Universal Time (UTC) for Date/Times

Long Tablename LEFT Character: Link/Join prefix (Optional):

Long Tablename RIGHT Character: Link/Join suffix (Optional):

Column Alias Character: "

Retrieve Database Owner with objects if available.

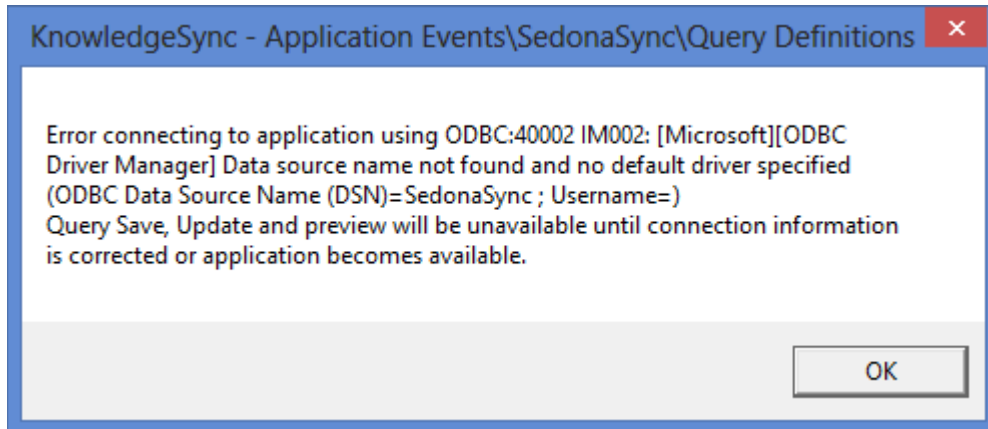
Remove parentheses from Link/Joins

Script API Name:

Script API Username:

Script API Password:

If you do not update the connection information you will receive an error message similar to the following when you try to edit a query.



## SedonaOffice Data Structure

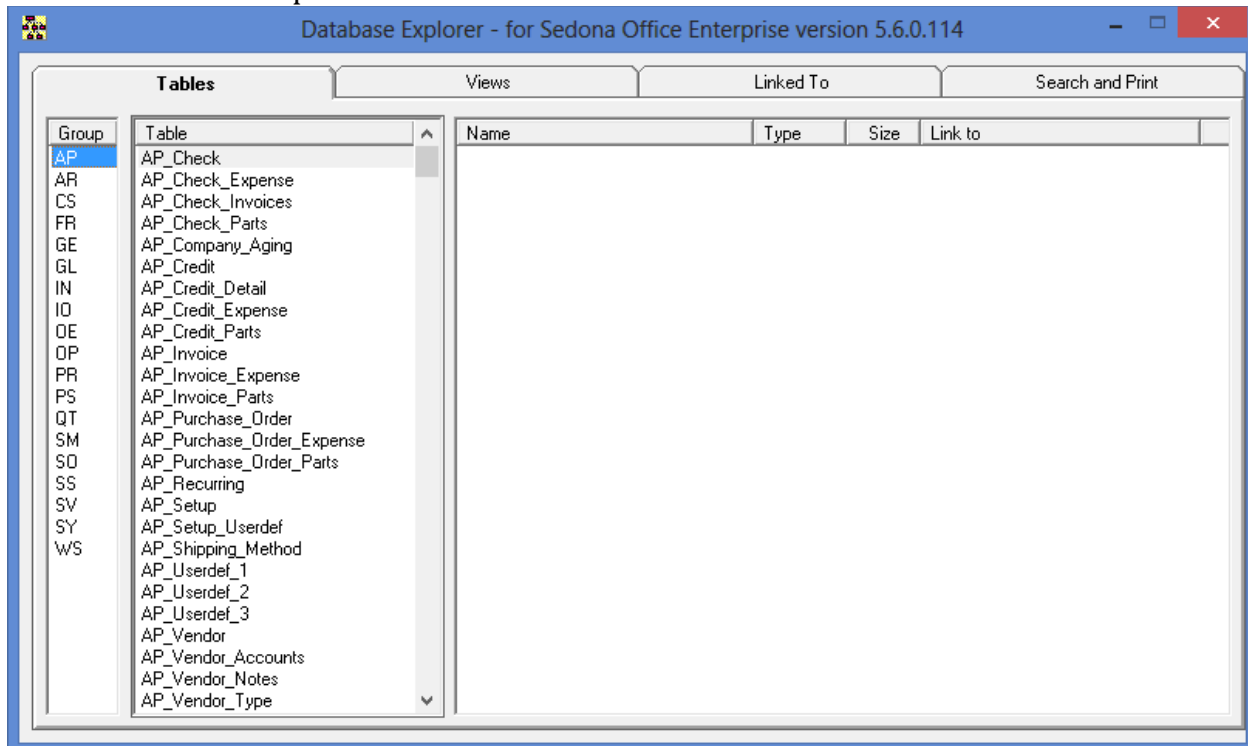
### Database Explorer

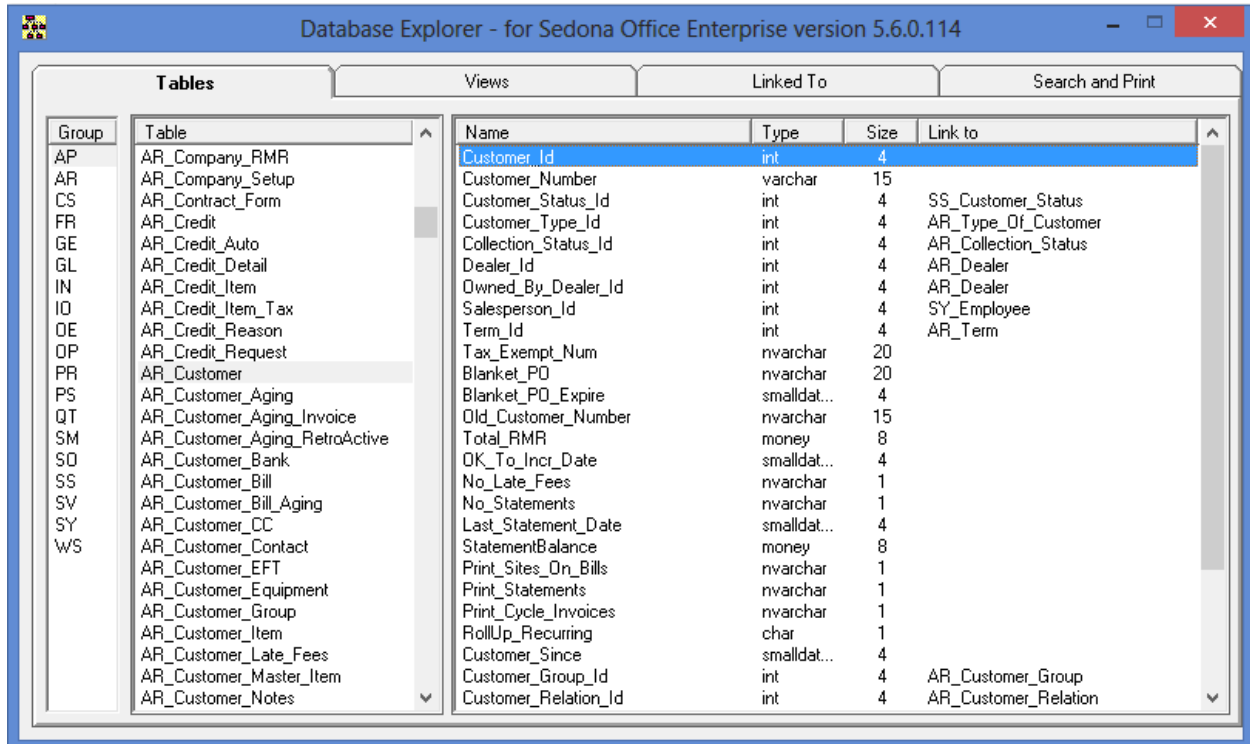
On our website under downloads is the database explorer. This is a tool to help you with our table structure. It can be found under the following link as 5.6 Database Explorer.

<http://www.sedonaoffice.com/resources/downloads/>

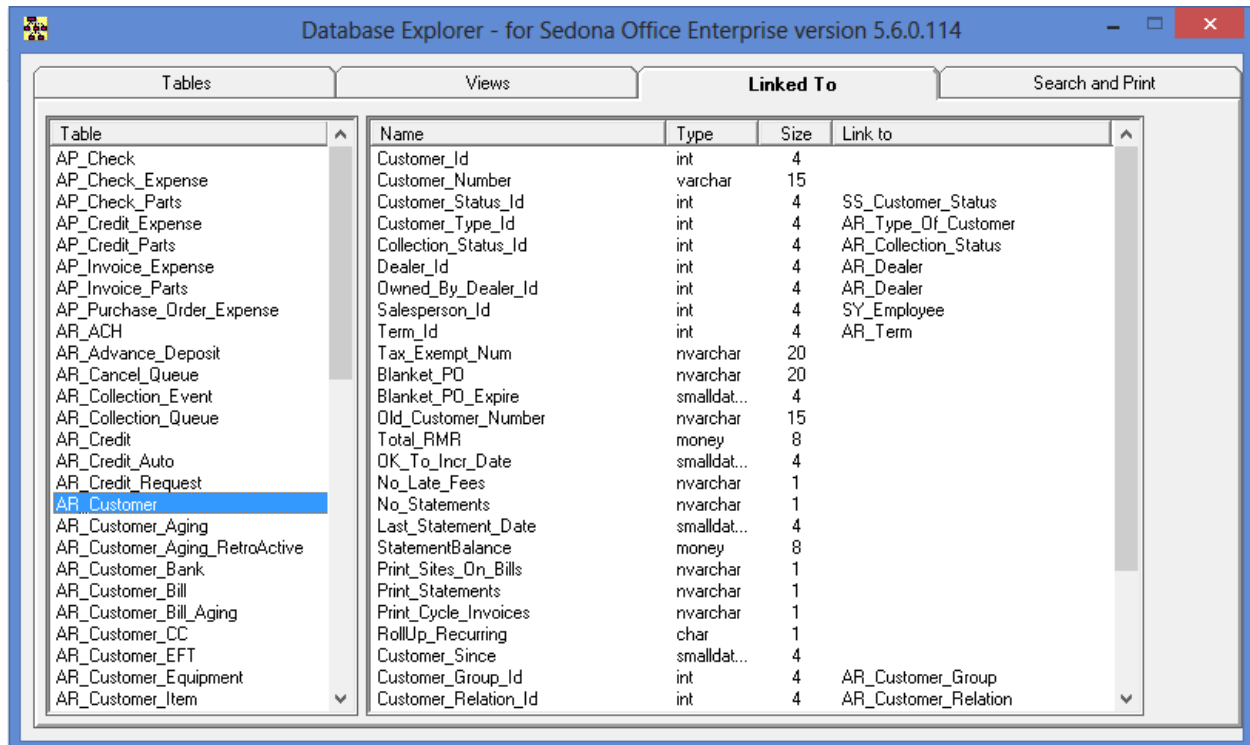
Download 5.6 Database Explorer. You will have to extract the files on a computer that has SedonaOffice installed on it.

Double click on dbExplorer.exe.



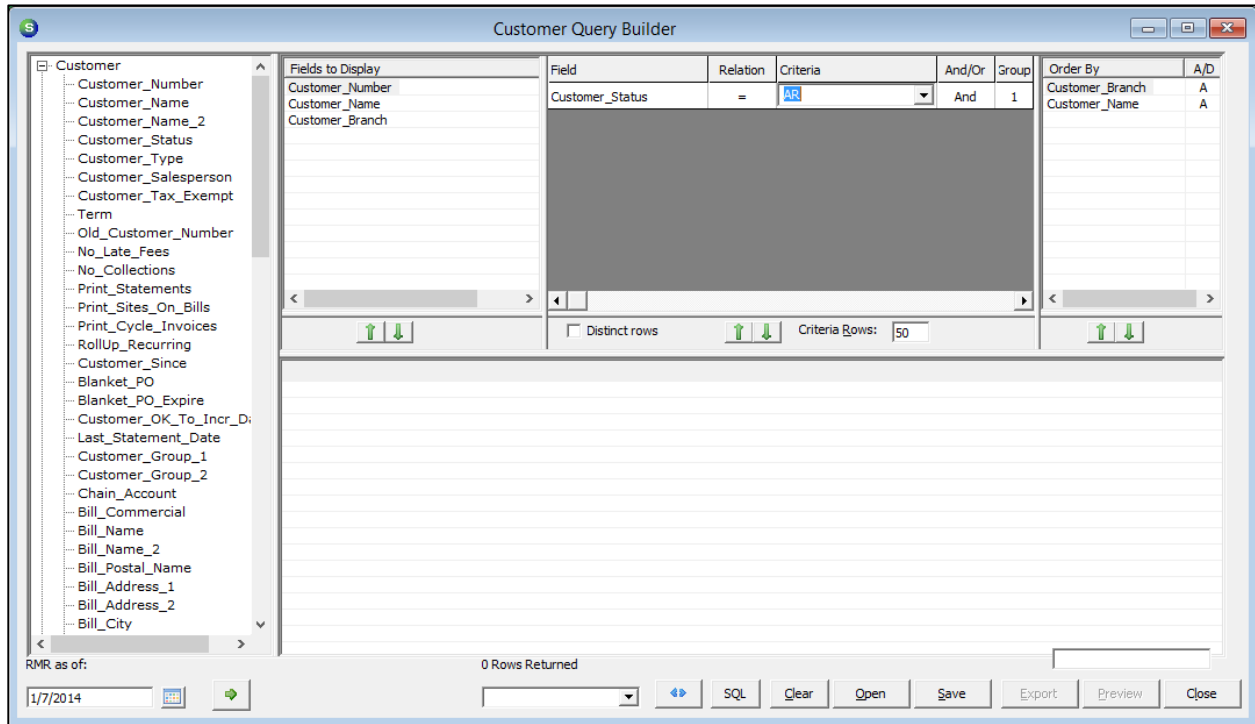


Double click on any field and it will show you a list of tables that also contain that field.

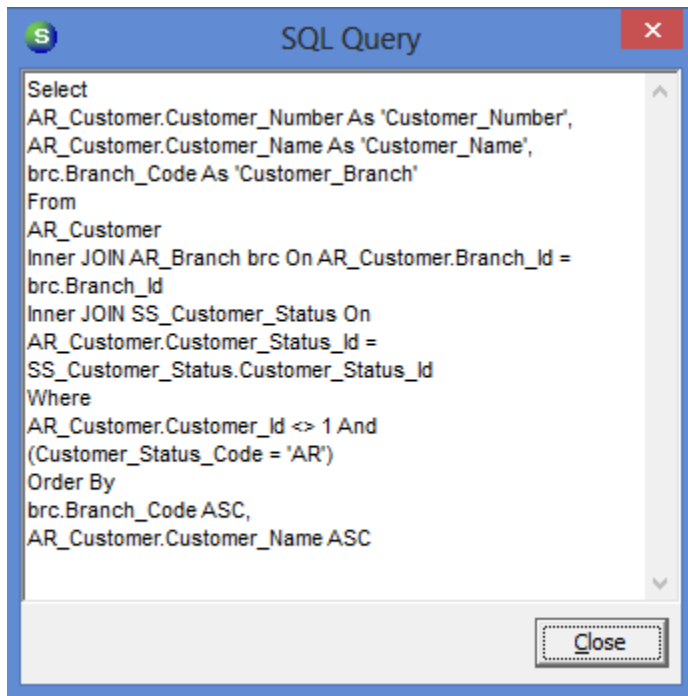


## Customer Query Builder

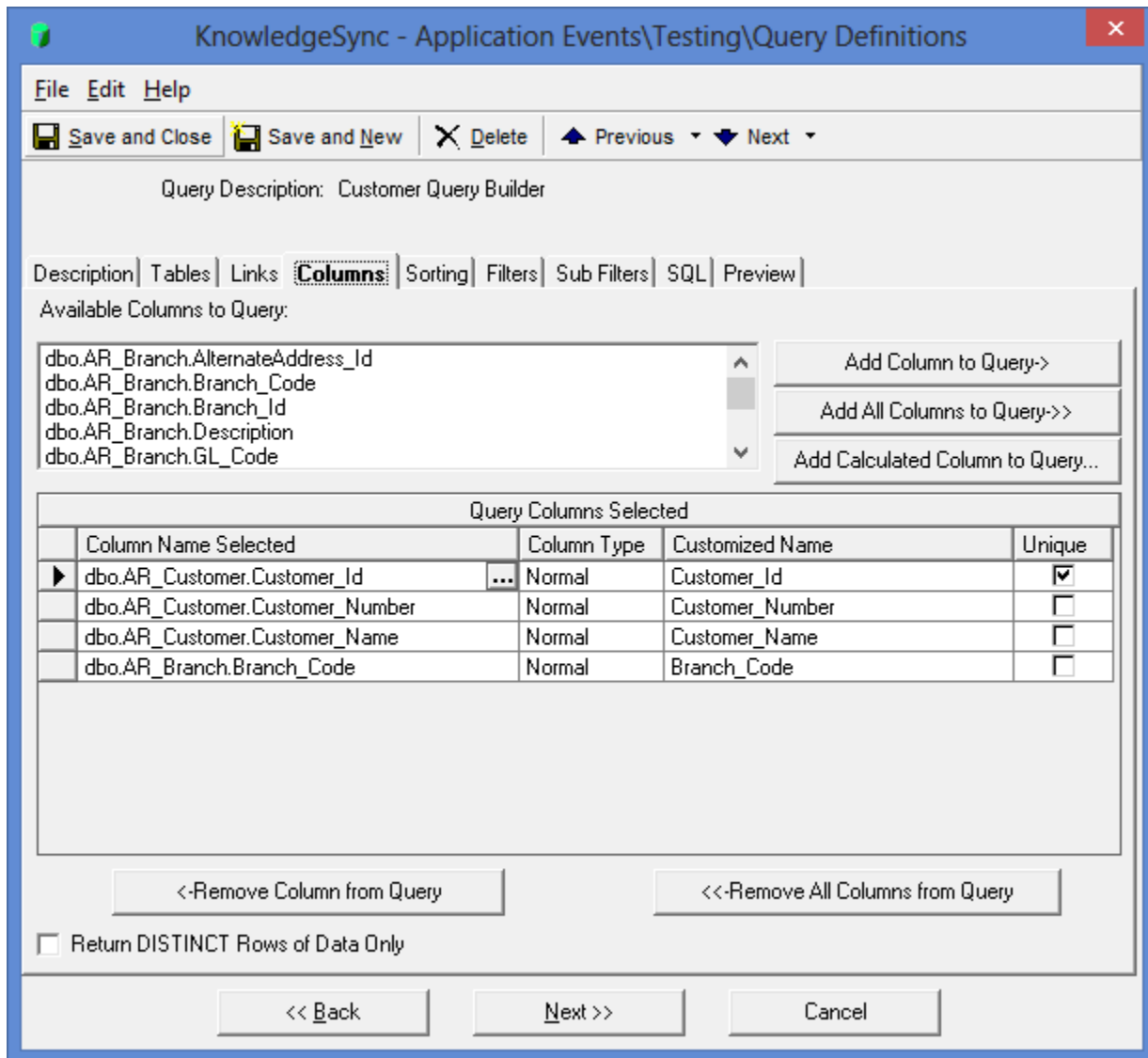
Build your query in the Customer Query Builder.



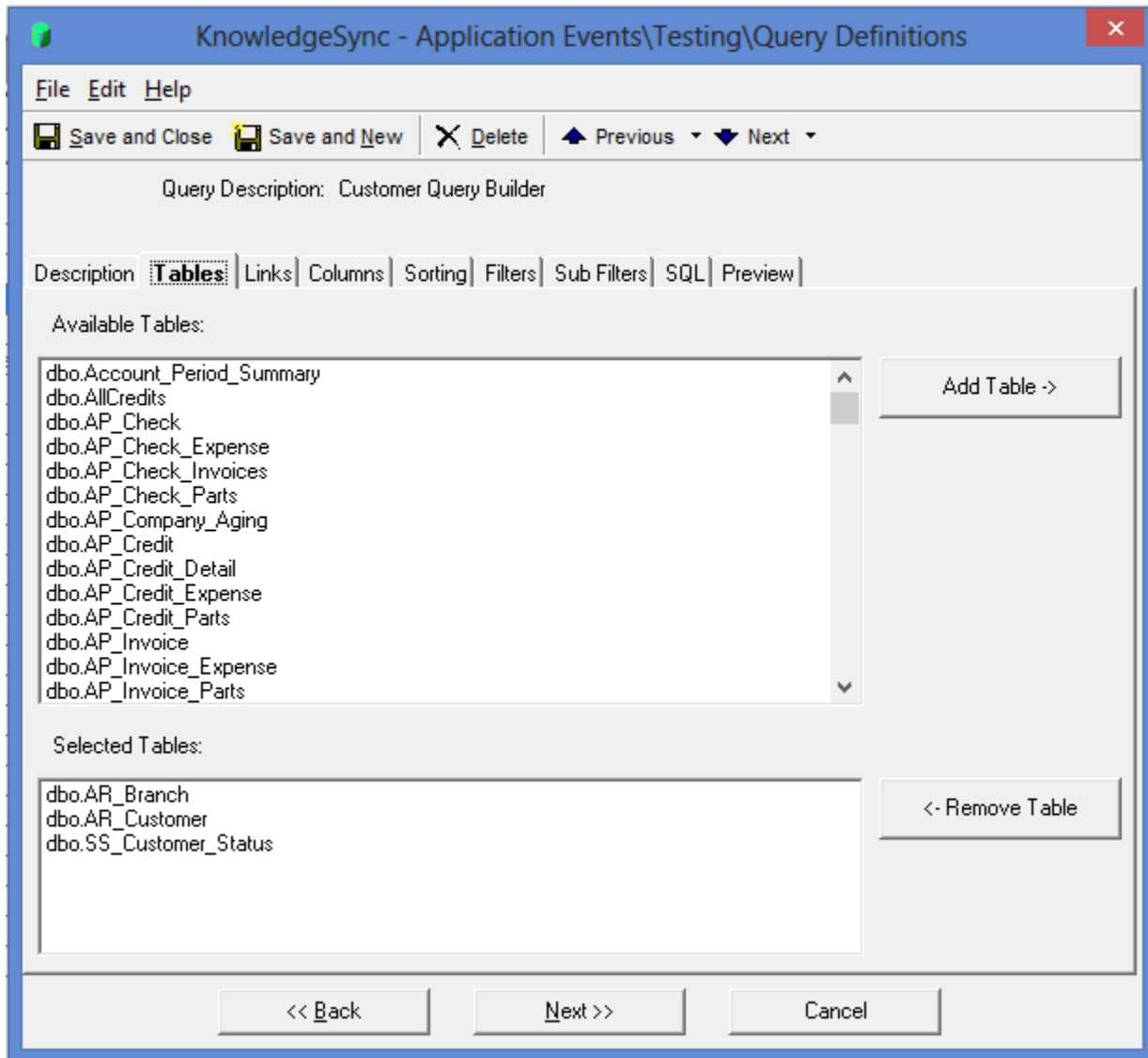
Click the SQL button at the bottom of the screen to see the fields and tables used.

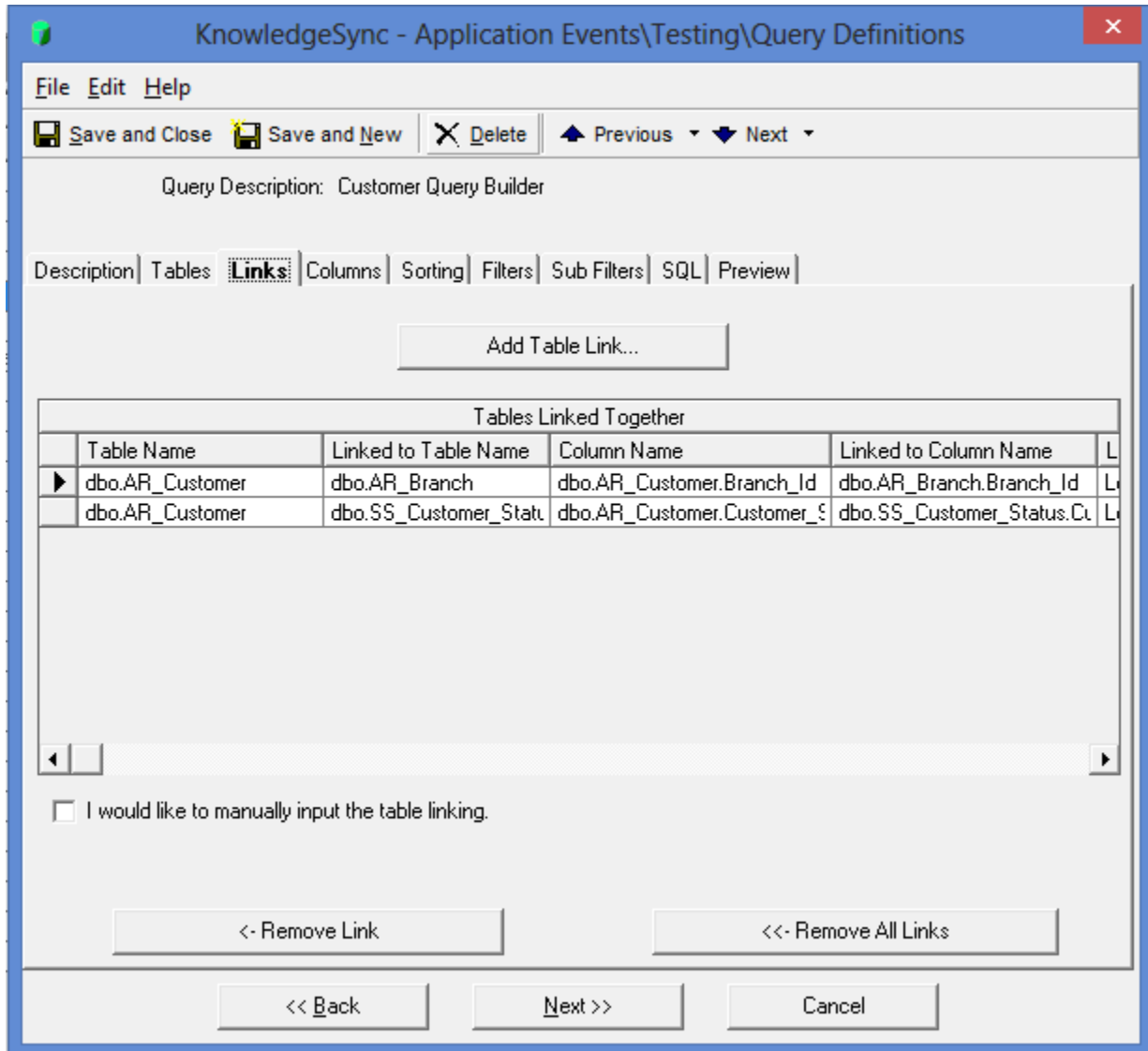


The part between Select and From is the Columns tab.



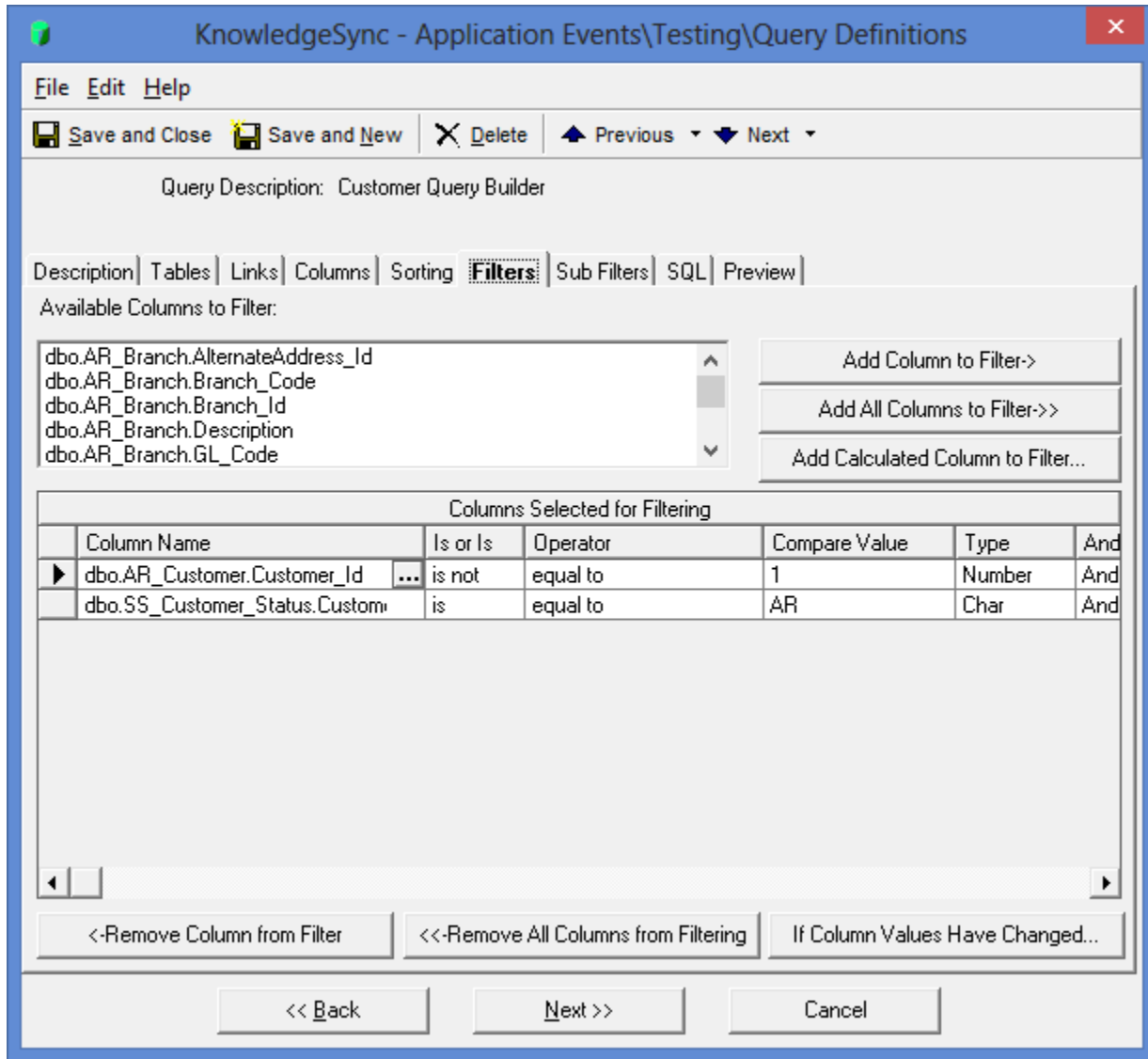
Between From and Where will be your Tables and Links tabs.



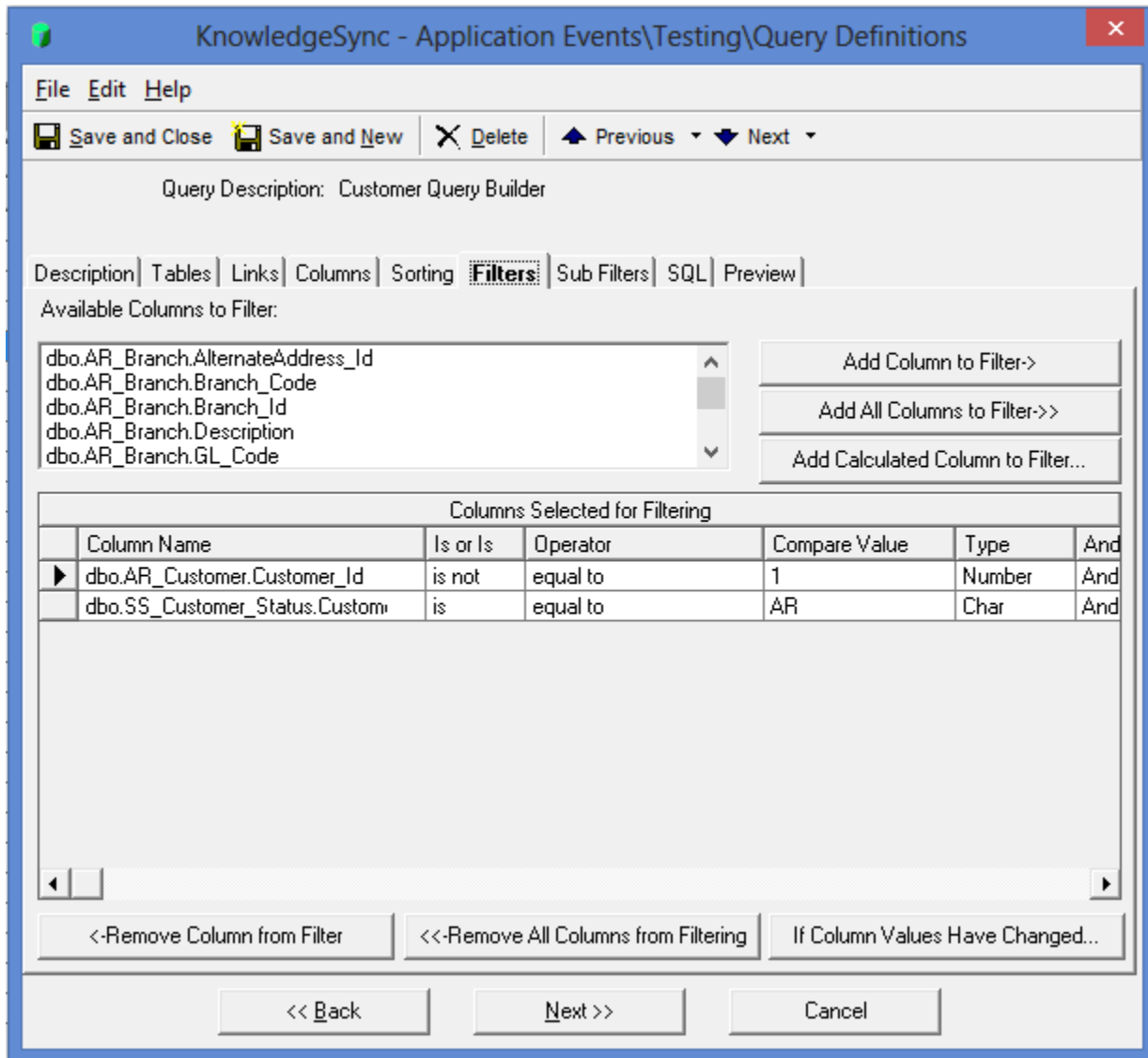


Between Where and Order By is the Filters tab.





After Order By is the Sort tab.



## Subscribers

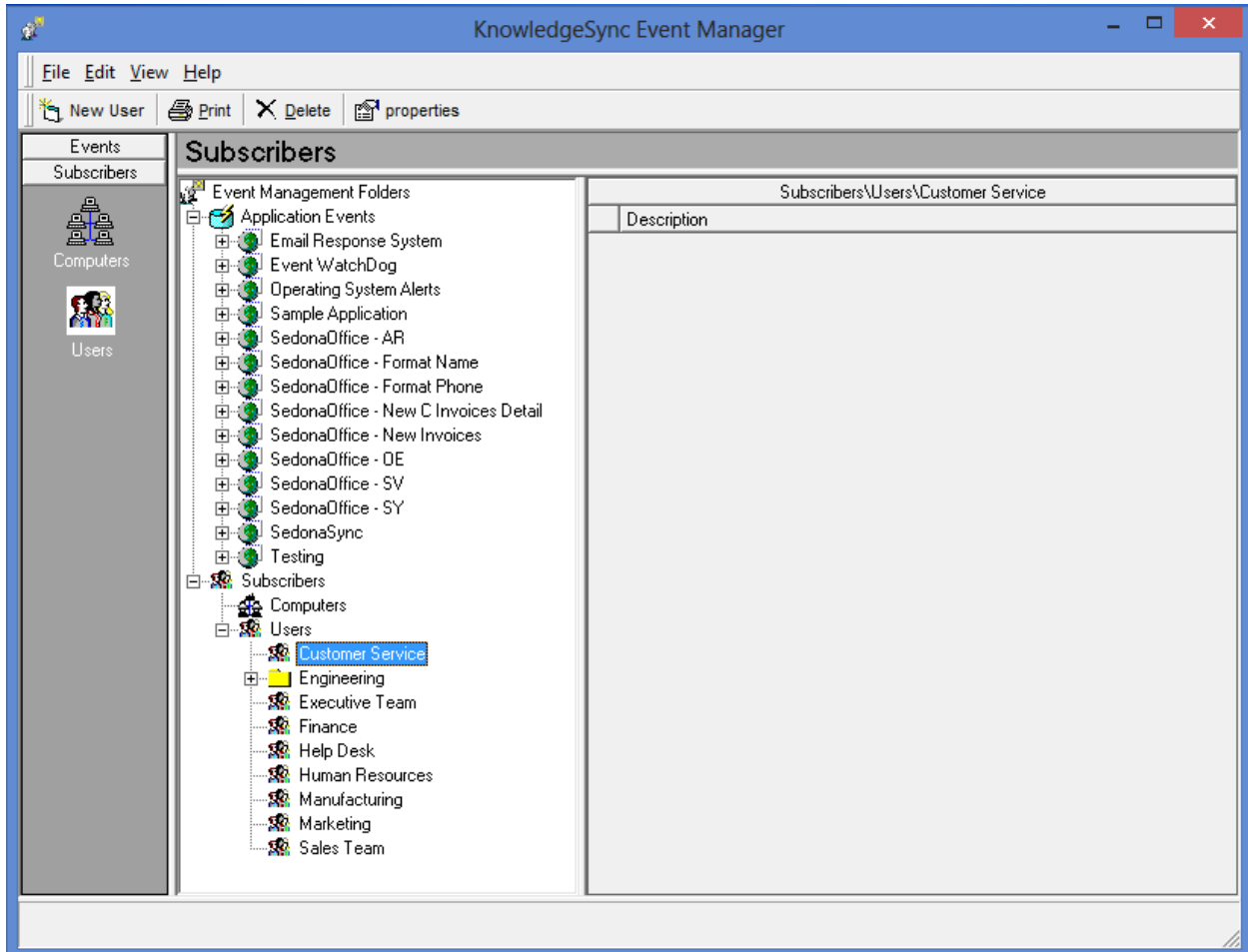
There are two types of subscribers within SedonaSync.

Standard Subscriber – is one that you setup in SedonaSync. This subscriber has a static email address that receives all records returned by the query.

Advanced Subscriber is one where the email address is returned as part of the data in your query. The subscriber will only receive an email regarding records that the email address is part of. An example would be the email address of the contact on a service ticket.

### Setting up a Standard Subscriber

In the Event Manager, expand Subscribers > Users. Users are categorized by Groups. Select the appropriate Group and click Add User.



Enter a Last Name and First Name. The Full Name and User Lookup Key will automatically populate. Make sure Active is checked.

KnowledgeSync - Subscribers\Users\Help Desk

File Edit Help

Save and Close Save and New Delete Previous Next

Subscriber Name:

Description Copy Email Fax Page WebCast Instant Message Subscriptions

Internal ID number:

Last Name:

First Name:

Full Name:

Job Title:

Company Name:

Phone Number:

IP Address:

Computer Name:

User Lookup Key:

Active

History:

Item created by:

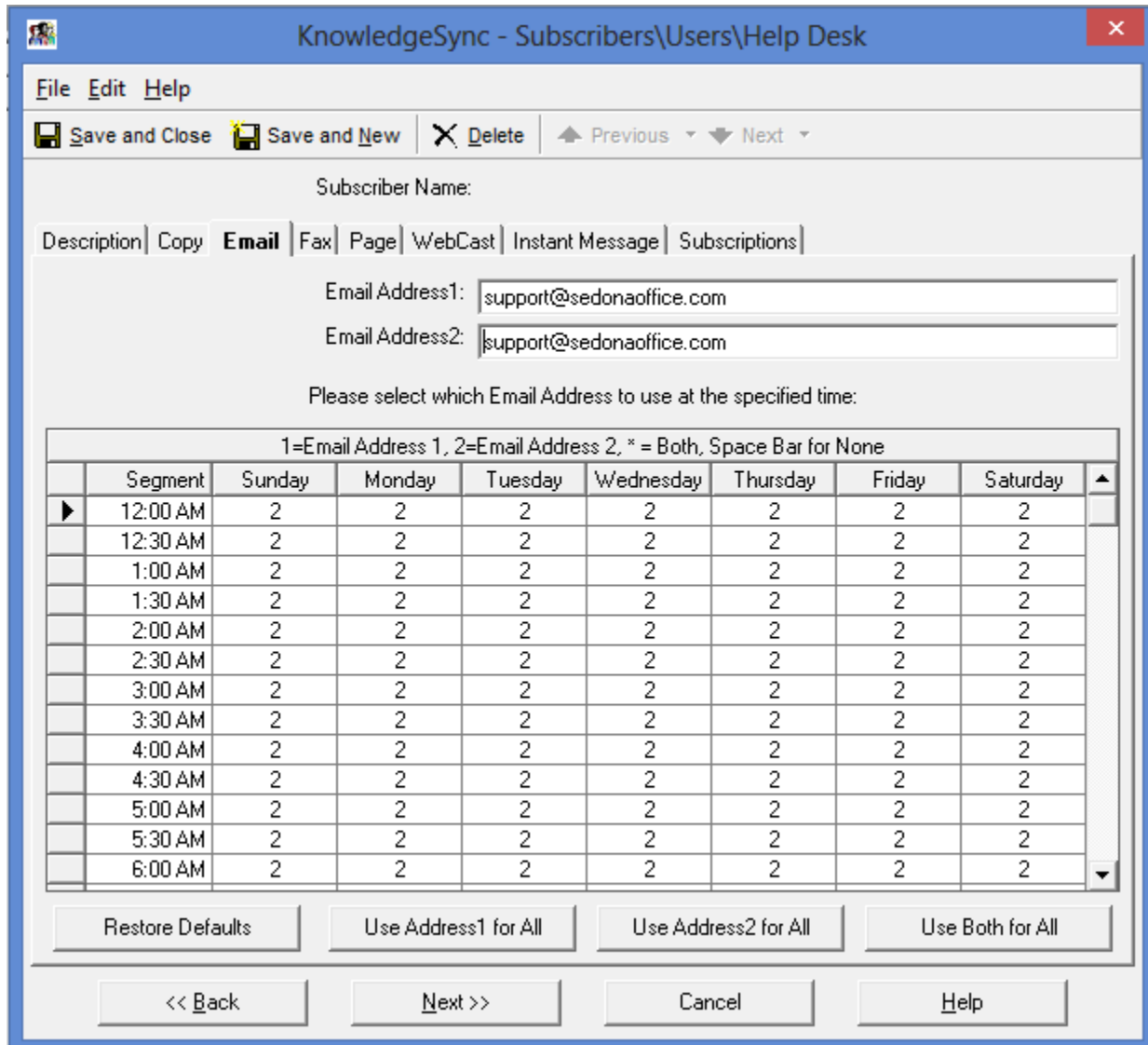
Item created on:

Item last changed by:

Item last changed on:

<< Back Next >> Cancel Help

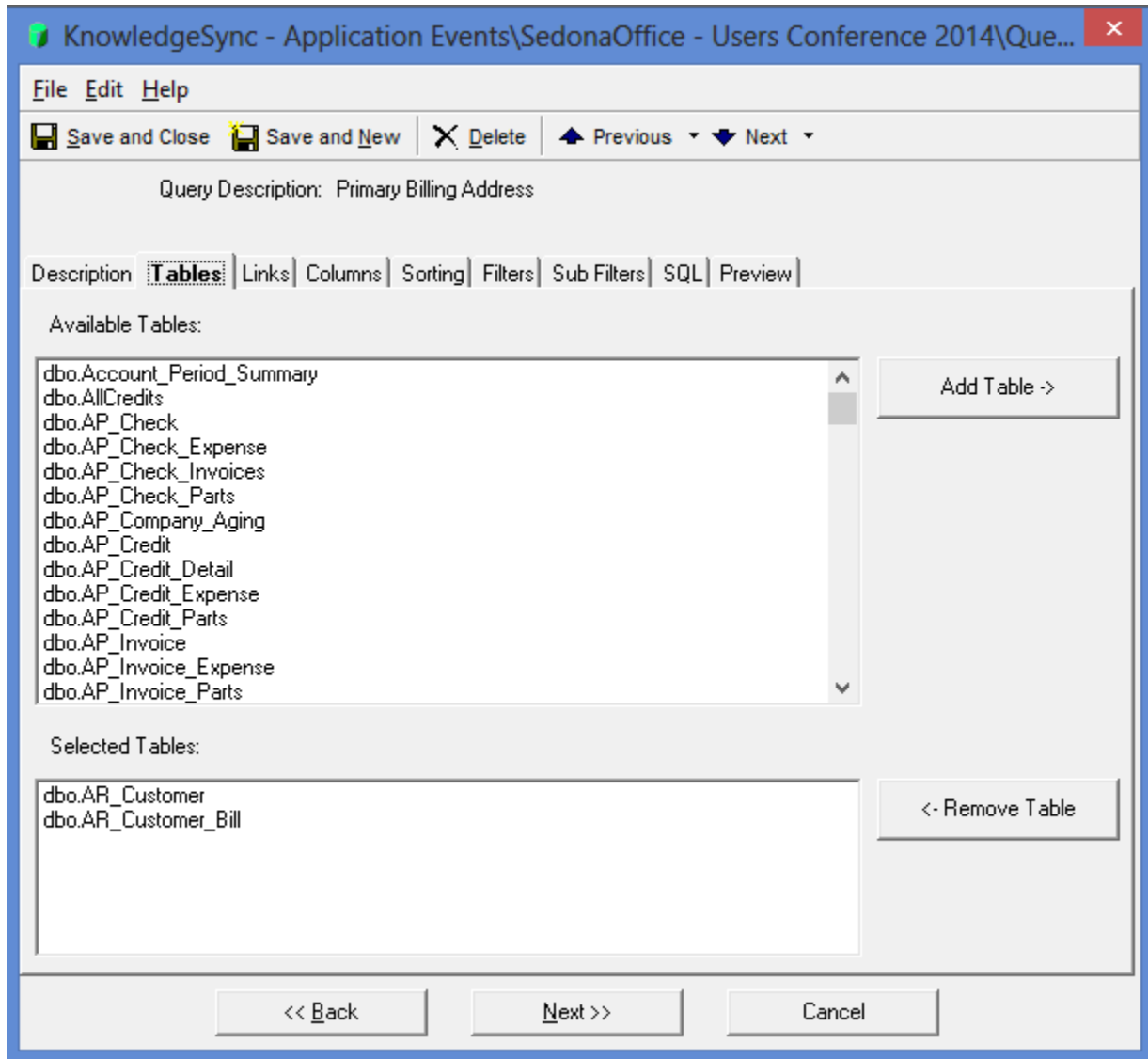
SedonaSync allows you to have more than one email address per Subscriber on the Email tab. You can set up a schedule for which email address you want to use for specific times and specific days of the week. As a best practice, I recommend entering Email Address1 and Email Address2. Even if they are both the same address. I also click the Use Address1 for All button. This will ensure that the first email address is always used. If both addresses are the same, do not click Use Both for All. This will cause two emails to be sent to the same address every time this Subscriber is on an Event.

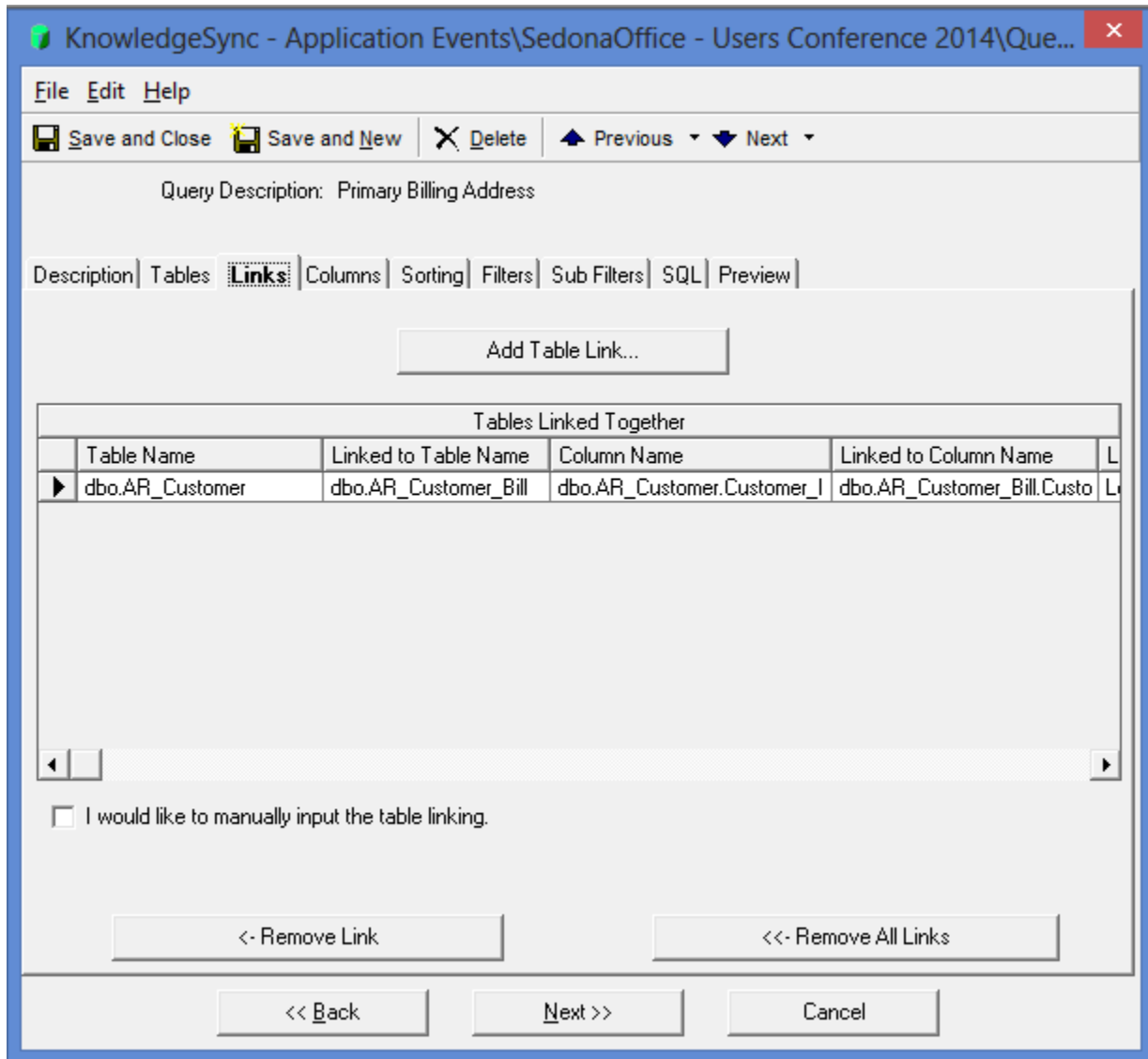


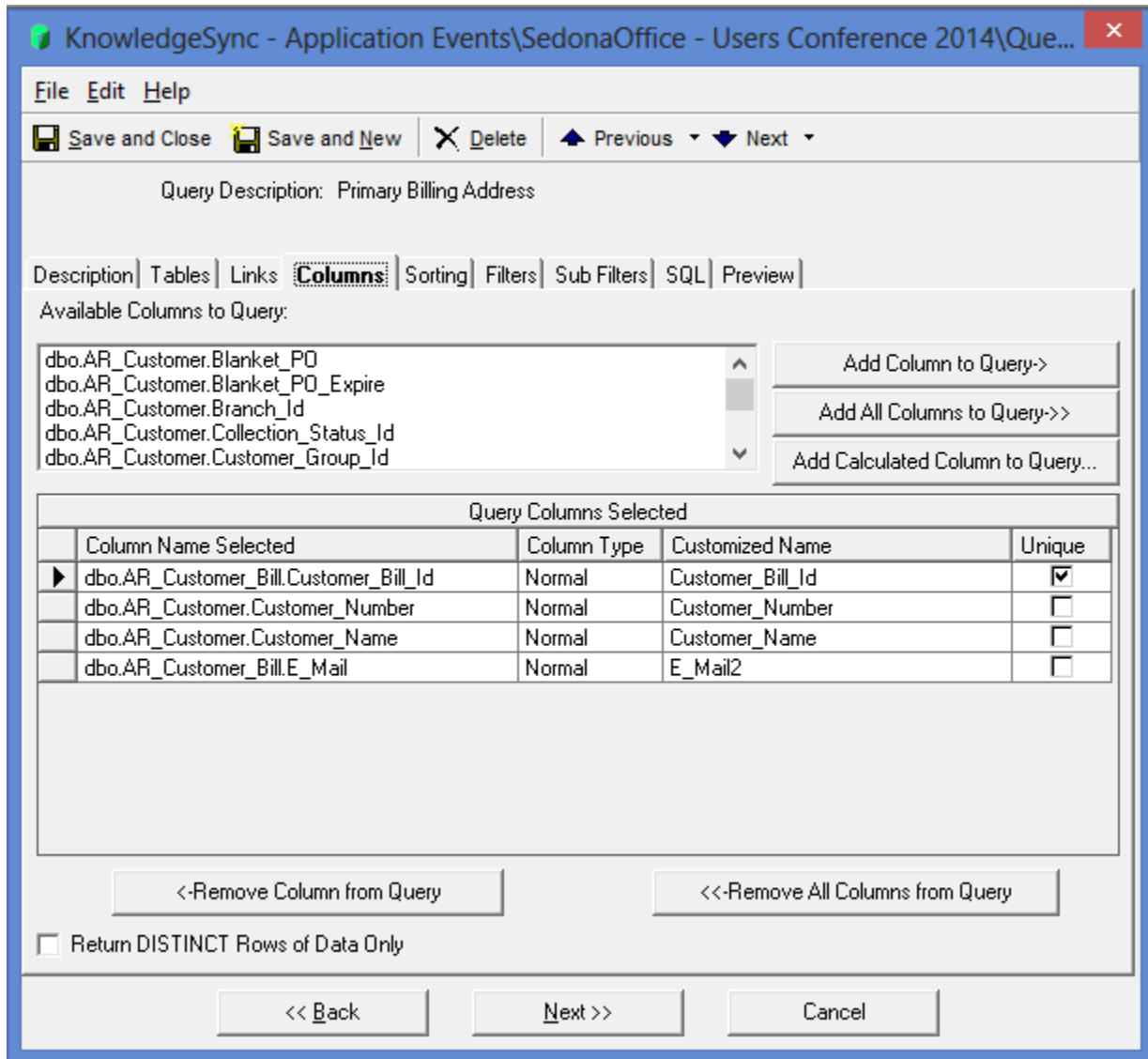
### Including Advanced Subscriber from SedonaOffice

#### Customer's primary bill to:

```
SELECT dbo.AR_Customer_Bill.Customer_Bill_Id AS "Customer_Bill_Id",
    dbo.AR_Customer.Customer_Number AS "Customer_Number",
    dbo.AR_Customer.Customer_Name AS "Customer_Name",
    dbo.AR_Customer_Bill.E_Mail AS "E_Mail2" FROM (dbo.AR_Customer LEFT OUTER
    JOIN dbo.AR_Customer_Bill ON dbo.AR_Customer.Customer_Id =
    dbo.AR_Customer_Bill.Customer_Id) WHERE dbo.AR_Customer_Bill.E_Mail LIKE
    '%@%.%' AND dbo.AR_Customer_Bill.Is_Primary = 'Y' ORDER BY
    dbo.AR_Customer_Bill.E_Mail ASC, dbo.AR_Customer.Customer_Number ASC
```









KnowledgeSync - Application Events\SedonaOffice - Users Conference 2014\Que...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Primary Billing Address

Description Tables Links Columns **Sorting** Filters Sub Filters SQL Preview

Available Columns for Sorting:

- dbo.AR\_Customer.Customer\_Name
- dbo.AR\_Customer.Customer\_Number
- dbo.AR\_Customer\_Bill.Customer\_Bill\_Id
- dbo.AR\_Customer\_Bill.E\_Mail

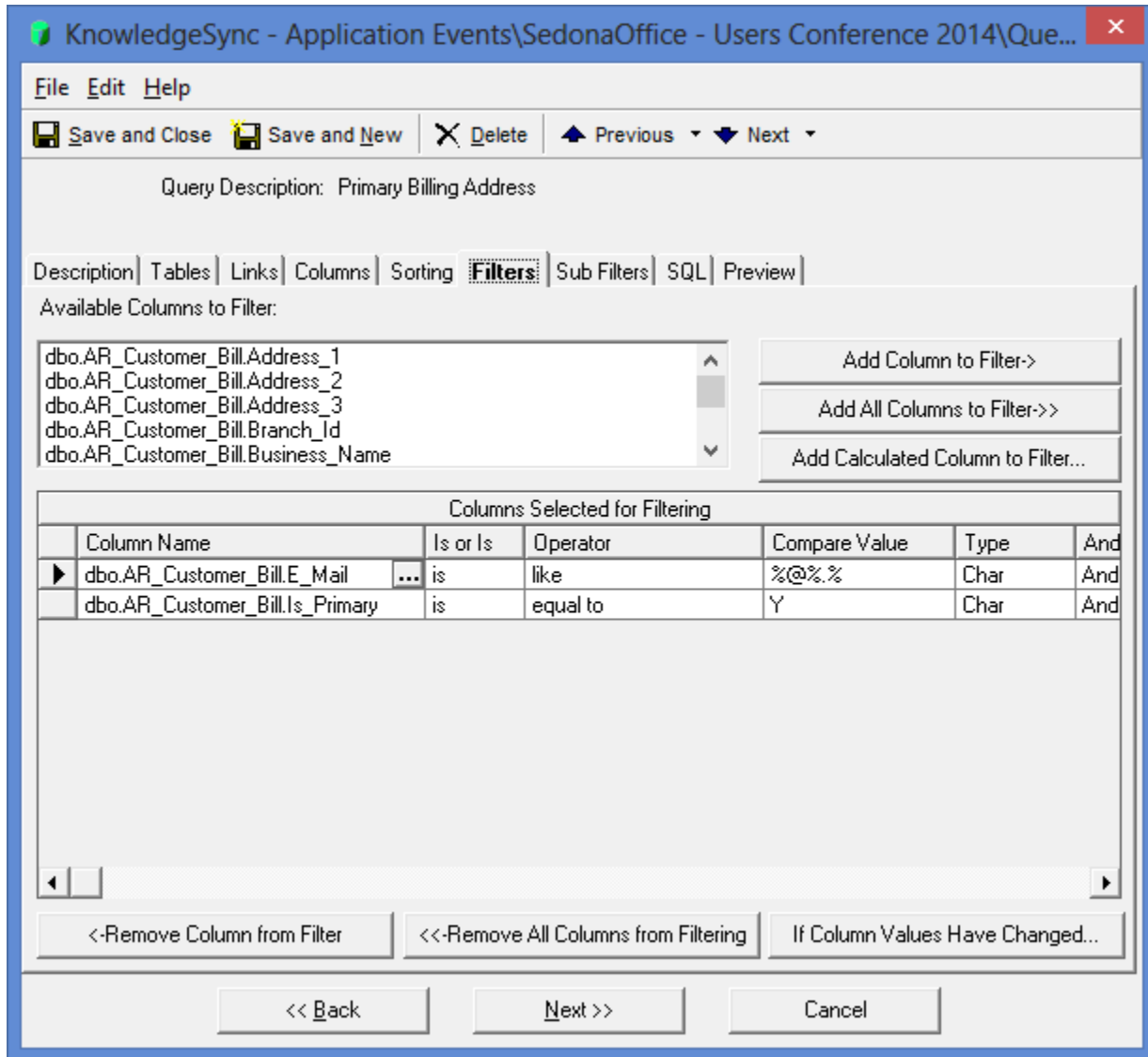
Add Column for Sorting->

Add All Columns for Sorting->>

Columns Selected for Sorting	
Column Name	Sort Direction
▶ dbo.AR_Customer_Bill.E_Mail	Ascending
dbo.AR_Customer.Customer_Number	Ascending

<-Remove Column from Sorting <<-Remove All Columns from Sorting

<< Back Next >> Cancel



### Bill to for a specific invoice

```
SELECT dbo.AR_Customer_Bill.E_Mail AS "E_Mail", dbo.AR_Invoice.Invoice_Id AS  
"Invoice_Id", dbo.AR_Invoice.Invoice_Number AS "Invoice_Number" FROM  
(dbo.AR_Invoice LEFT OUTER JOIN dbo.AR_Customer_Bill ON  
dbo.AR_Invoice.Customer_Bill_Id = dbo.AR_Customer_Bill.Customer_Bill_Id)  
WHERE dbo.AR_Customer_Bill.E_Mail LIKE '%@%.%'
```

### Salesperson for a customer

```
SELECT dbo.AR_Customer.Customer_Id AS "Customer_Id",
       dbo.AR_Customer.Customer_Number AS "Customer_Number",
       dbo.AR_Customer.Customer_Name AS "Customer_Name",
       dbo.SY_Employee.UserCode AS "UserCode", dbo.SY_Users.Email_Address AS
       "Email_Address" FROM ((dbo.AR_Customer LEFT OUTER JOIN dbo.SY_Employee ON
       dbo.AR_Customer.Salesperson_Id = dbo.SY_Employee.Employee_Id) LEFT OUTER
       JOIN dbo.SY_Users ON dbo.SY_Employee.User_Id = dbo.SY_Users.User_Id) ORDER
       BY dbo.SY_Users.Email_Address ASC, dbo.SY_Employee.UserCode ASC,
       dbo.AR_Customer.Customer_Number ASC
```

### Salesperson for a job

```
SELECT dbo.OE_Job.Job_Id AS "Job_Id", dbo.OE_Job.Job_Code AS "Job_Code",
       dbo.OE_Job.Salesperson_Id AS "Salesperson_Id", dbo.SY_Employee.Employee_Code
       AS "Employee_Code", dbo.SY_Users.Email_Address AS "Email_Address" FROM
       ((dbo.OE_Job LEFT OUTER JOIN dbo.SY_Employee ON dbo.OE_Job.Salesperson_Id =
       dbo.SY_Employee.Employee_Id) LEFT OUTER JOIN dbo.SY_Users ON
       dbo.SY_Employee.User_Id = dbo.SY_Users.User_Id) WHERE
       dbo.OE_Job.Salesperson_Id <> 1 ORDER BY dbo.SY_Users.Email_Address ASC,
       dbo.SY_Employee.Employee_Code ASC, dbo.OE_Job.Job_Code ASC
```

### Project Manager for a job

```
SELECT dbo.OE_Job.Job_Id AS "Job_Id", dbo.OE_Job.Job_Code AS "Job_Code",
       dbo.OE_Job.Proj_Mgr_Id AS "Proj_Mgr_Id", dbo.SY_Employee.Employee_Code AS
       "Employee_Code", dbo.SY_Users.Email_Address AS "Email_Address" FROM
       ((dbo.OE_Job LEFT OUTER JOIN dbo.SY_Employee ON dbo.OE_Job.Proj_Mgr_Id =
       dbo.SY_Employee.Employee_Id) LEFT OUTER JOIN dbo.SY_Users ON
       dbo.SY_Employee.User_Id = dbo.SY_Users.User_Id) WHERE
       dbo.OE_Job.Proj_Mgr_Id <> 1 ORDER BY dbo.SY_Users.Email_Address ASC,
       dbo.SY_Employee.Employee_Code ASC, dbo.OE_Job.Job_Code ASC
```

### Technician for an appointment on a service ticket

Assuming tech is an employee and not a vendor

```
SELECT dbo.SV_Service_Ticket.Service_Ticket_Id AS "Service_Ticket_Id",
       dbo.SV_Service_Ticket.Ticket_Number AS "Ticket_Number",
       dbo.SY_Employee.Employee_Code AS "Employee_Code",
       dbo.SY_Users.Email_Address AS "Email_Address" FROM
       (((dbo.SV_Service_Ticket_Dispatch LEFT OUTER JOIN dbo.SV_Service_Tech ON
```

```
dbo.SV_Service_Ticket_Dispatch.Service_Tech_Id =  
dbo.SV_Service_Tech.Service_Tech_Id) LEFT OUTER JOIN dbo.SY_Employee ON  
dbo.SV_Service_Tech.Employee_Id = dbo.SY_Employee.Employee_Id) LEFT OUTER  
JOIN dbo.SV_Service_Ticket ON dbo.SV_Service_Ticket_Dispatch.Service_Ticket_Id =  
dbo.SV_Service_Ticket.Service_Ticket_Id) LEFT OUTER JOIN dbo.SY_Users ON  
dbo.SY_Employee.User_Id = dbo.SY_Users.User_Id) ORDER BY  
dbo.SY_Users.EMail_Address ASC, dbo.SV_Service_Tech.Service_Tech_Id ASC,  
dbo.SV_Service_Ticket_Dispatch.Schedule_Time ASC,  
dbo.SV_Service_Ticket.Ticket_Number ASC
```

### Last technician on a service ticket

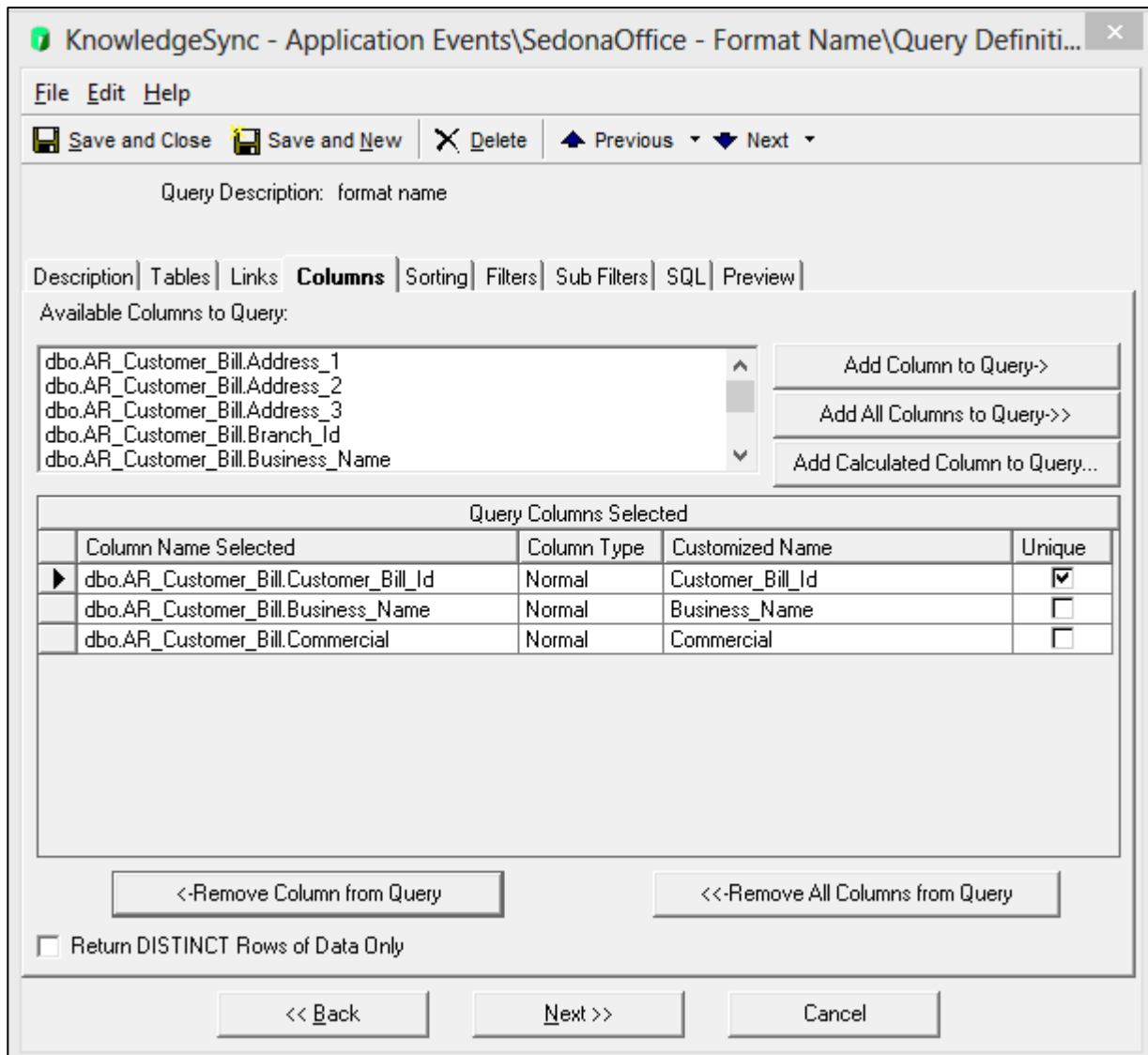
```
SELECT dbo.SV_Service_Ticket.Service_Ticket_Id AS "Service_Ticket_Id",  
dbo.SV_Service_Ticket.Ticket_Number AS "Ticket_Number",  
dbo.SY_Employee.Employee_Code AS "Employee_Code",  
dbo.SY_Users.EMail_Address AS "EMail_Address" FROM (((dbo.SV_Service_Ticket  
LEFT OUTER JOIN dbo.SV_Service_Tech ON  
dbo.SV_Service_Ticket.Last_Service_Tech_Id = dbo.SV_Service_Tech.Service_Tech_Id)  
LEFT OUTER JOIN dbo.SY_Employee ON dbo.SV_Service_Tech.Employee_Id =  
dbo.SY_Employee.Employee_Id) LEFT OUTER JOIN dbo.SY_Users ON  
dbo.SY_Employee.User_Id = dbo.SY_Users.User_Id) ORDER BY  
dbo.SY_Users.EMail_Address ASC, dbo.SV_Service_Tech.Service_Tech_Id ASC,  
dbo.SV_Service_Ticket.Ticket_Number ASC
```

## Formatting Results

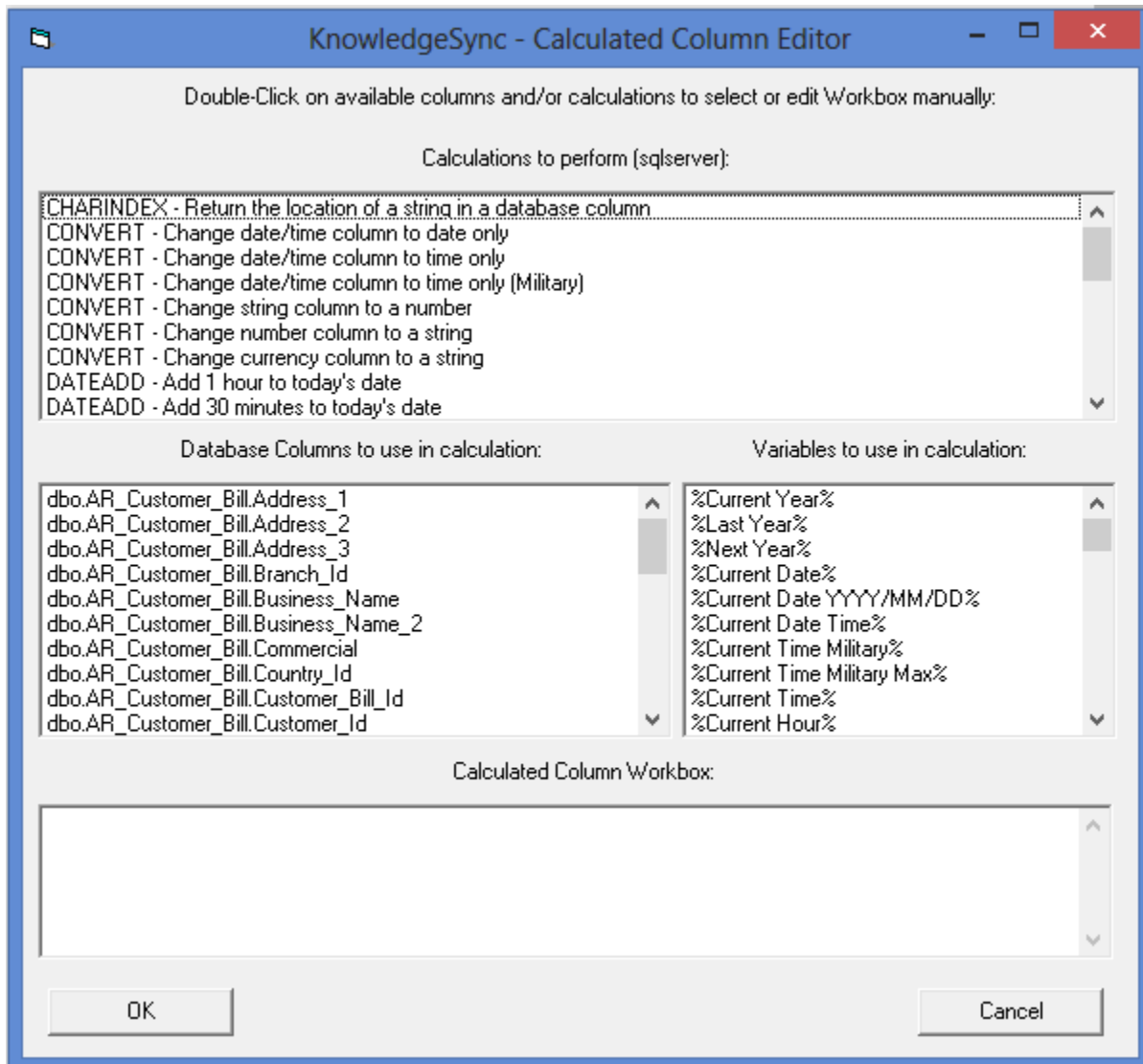
### Query – Calculated Columns

Within a query you can add conditional formatting to a field. In SedonaSync terms, this is a Calculated Column. As an example, I am going to show you how to switch a customer's billing address name so it is first name last name instead of last name, first name.

On the Columns tab click the 'Add Calculated Column to Query...' button to add a new field.



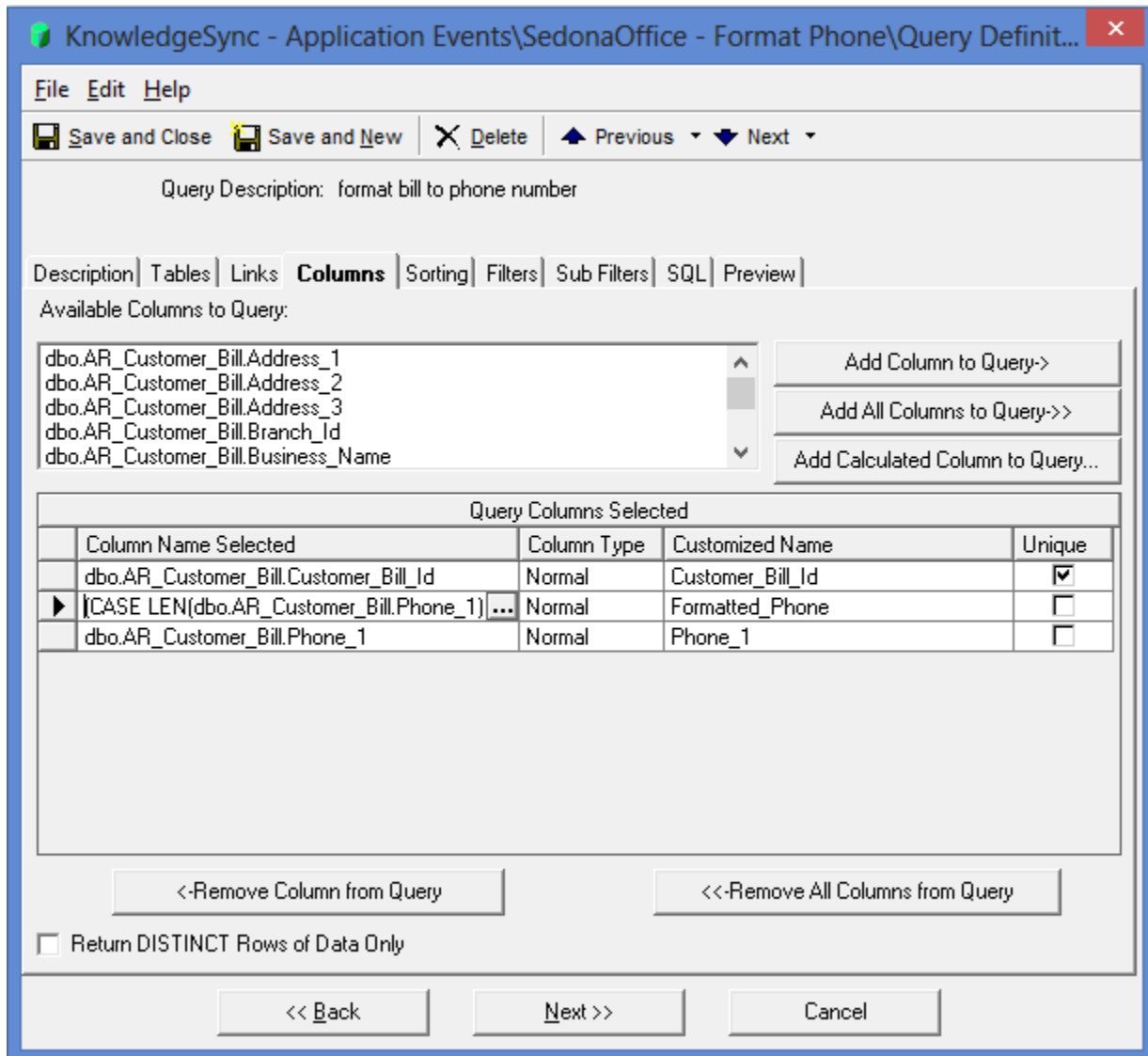
You can add any valid SQL statement to the Calculated Column Workbox.



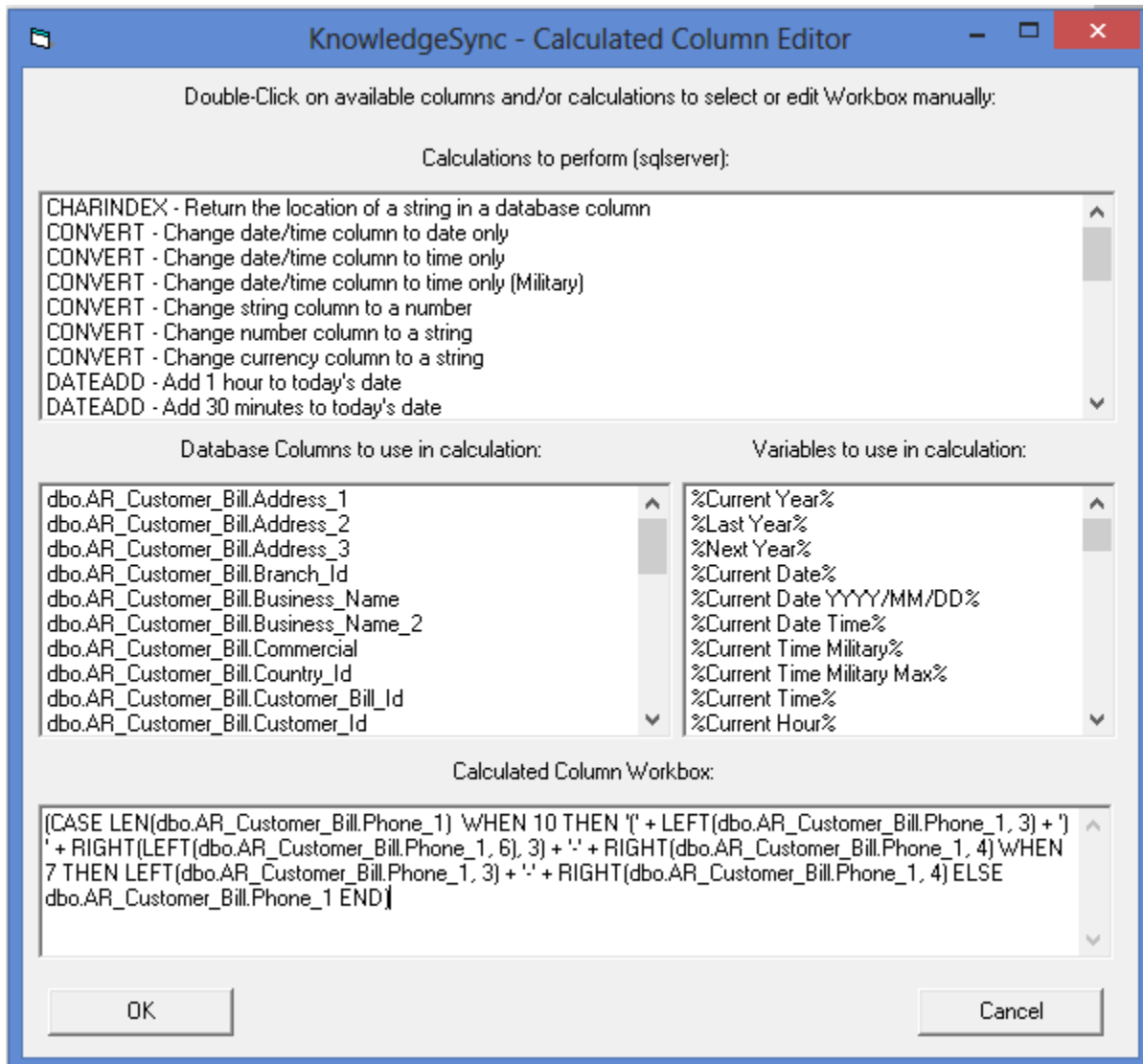
For this example I am adding the following code:

```
CASE dbo.AR_Customer_Bill.Commercial when 'Y' then  
dbo.AR_Customer_Bill.Business_Name  
else (CASE CHARINDEX(',', dbo.AR_Customer_Bill.Business_Name) WHEN 0 THEN  
dbo.AR_Customer_Bill.Business_Name ELSE  
LTRIM(RTRIM(RIGHT(dbo.AR_Customer_Bill.Business_Name,  
LEN(dbo.AR_Customer_Bill.Business_Name) - CHARINDEX(',',  
dbo.AR_Customer_Bill.Business_Name))))+ ' ' +  
LTRIM(LEFT(dbo.AR_Customer_Bill.Business_Name, CHARINDEX(',',  
dbo.AR_Customer_Bill.Business_Name)-1)) END) END
```

To edit an existing field click on the field name under Column Name Selected and then the ellipse button that appears next to it.



This example shows you how to format phone numbers.



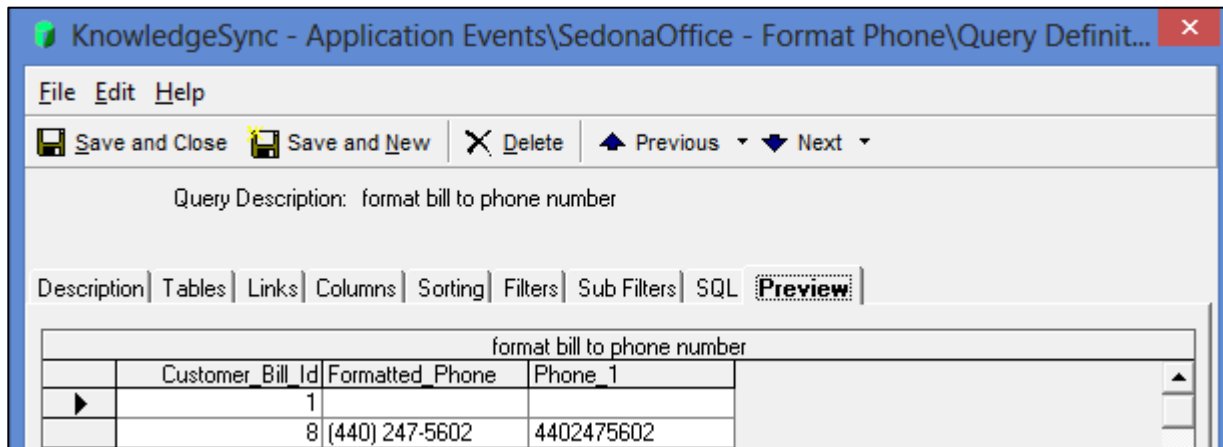
It uses the following code to format phone number of 7 or 10 digits.

```
(CASE LEN(dbo.AR_Customer_Bill.Phone_1) WHEN 10 THEN '(' + LEFT(dbo.AR_Customer_Bill.Phone_1, 3) + ') ' + RIGHT(LEFT(dbo.AR_Customer_Bill.Phone_1, 6), 3) + '-' + RIGHT(dbo.AR_Customer_Bill.Phone_1, 4) WHEN 7 THEN LEFT(dbo.AR_Customer_Bill.Phone_1, 3) + '-' + RIGHT(dbo.AR_Customer_Bill.Phone_1, 4) ELSE dbo.AR_Customer_Bill.Phone_1 END)
```

When you are done with the code, click OK and Save and Close the query.



As a best practice I keep the original field and my formatted field in the query. I can then preview the query to see if I get the desired results.



## Event – Email

### Inserting a table into the body of an email

```
{BEGIN*HTML}
```

<p>This would be a paragraph briefly explaining what data is in the email. This email includes a table with four columns. When you see th – that is the table header. Column1, Column2, Column3 and Column4 represent the names of each column that will display in your email exactly as you type them. When you see td – that is the table detail. {Field1}, {Field2}, {Field3}, and {Field4} represent fields from your query that you will insert into each row. </p>

<p>If you want your table to contain multiple records for your query, you will need to include {BEGIN\*REPEAT} and {END\*REPEAT} within your email. Any text that appears between those two tags will be repeated once for each record in your query. </p>

```
<table width="100%">
  <thead>
    <tr>
      <th width="40%" align="left">Column1</th>
      <th width="20%" align="left">Column2</th>
      <th width="20%" align="left">Column3</th>
      <th width="20%" align="left">Column4</th>
    </tr>
  </thead>
  <tbody>
    {BEGIN*REPEAT}
    <tr>
      <td>{Field1}</td>
      <td>{Field2}</td>
      <td>{Field3}</td>
      <td>{Field4}</td>
    </tr>
    {END*REPEAT}
  </tbody>
</table>
{END*HTML}
```

### Inserting a link for SedonaWeb

In Event Manager, open an event and go to the Email tab. In the Message Text you will add

```
<a href="www.SampleCompany.com">MyWebsite</a>
```

The first portion in quotes “www.SampleCompany.com” is the actual website you want the person to be directed to. The portion between the tags, “MyWebsite”, is the wording for the link to click on.

### Inserting a logo

In Event Manager, open an event and go to the Email tab. In the Message Text you will add:

```

```

The first portion in quotes after img src= is the path and name of the file that exists on the Internet. The portion after alt= is the alternate text for an image if it cannot be displayed.