SedonaOffice

13TH ANNUAL USERS CONFERENCE

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SedonaOffice 101
Sedona Basics

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Application Components

SedonaOffice is built on a SQL Server relational database that stores data entered by Users. Users are able to access data stored within the SQL database by means of three main User components:

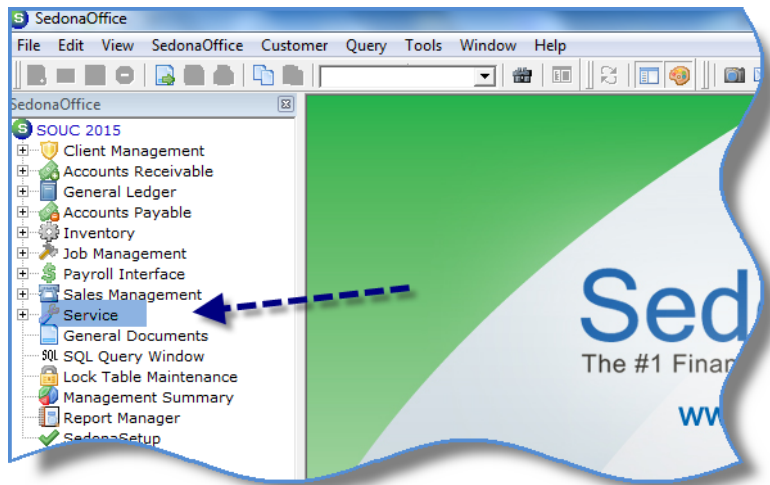- SedonaOffice Main Application
- SedonaSchedule
- SedonaSetup

SedonaOffice Main Application

The main SedonaOffice application is what is viewed when first logging into the application by a User. Most User functions are performed within the main SedonaOffice application. The main application is divided into modules which are made available to individuals based on permissions assigned to their User Group within SedonaSetup. Within each Module are various options available depending upon the User's permissions.
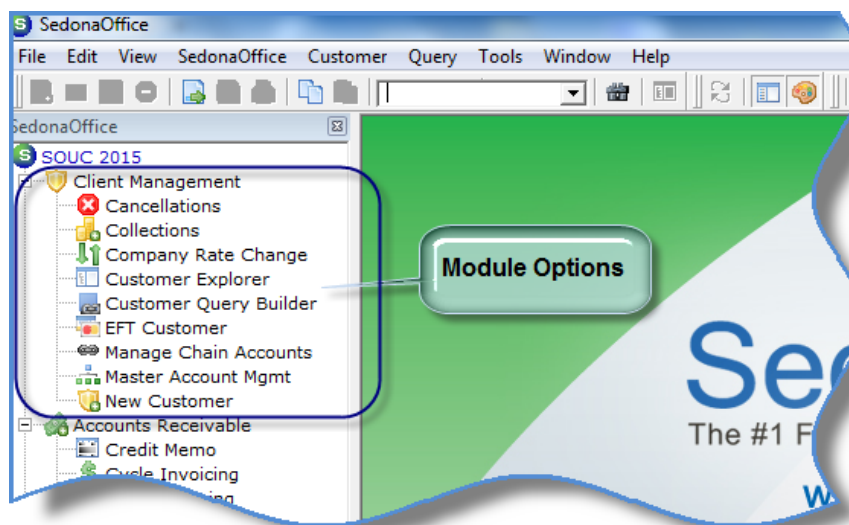
SedonaSchedule

SedonaSchedule is accessed by clicking on the Service Module from the SedonaOffice main menu. SedonaSchedule is a separate program that runs independently from the main application.


SedonaSchedule is used for:

- Ticket Processing (Service, Inspections, Customer Service)
- Scheduling/dispatching/Managing Job appointments
- Inspection Ticket Creation
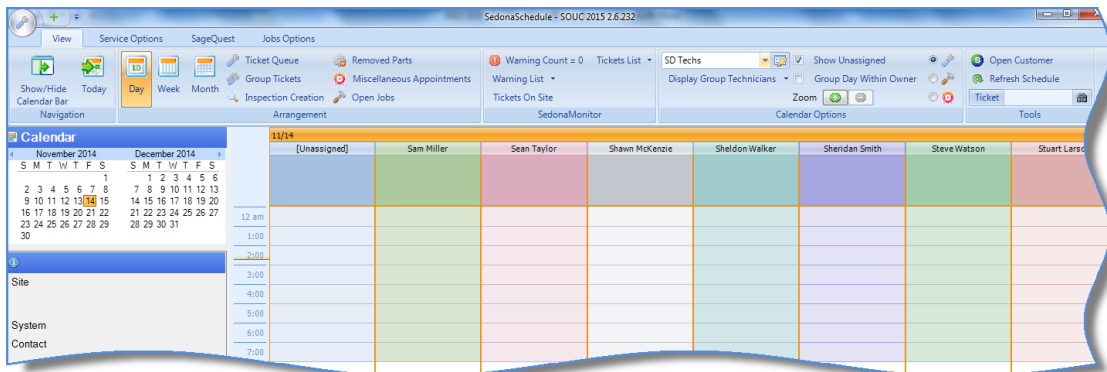
SedonaSetup

SedonaSetup is an application within the main SedonaOffice application. All business rules and setup options are stored and maintained within SedonaSetup. Accessing SedonaSetup is based upon User permissions; clicking on SedonaSetup from the main application menu will launch the SedonaSetup application.

SedonaOffice®
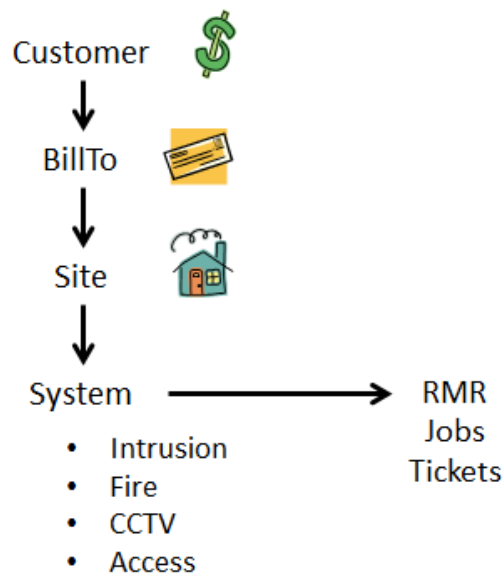The #1 Financial Software for Security Companies
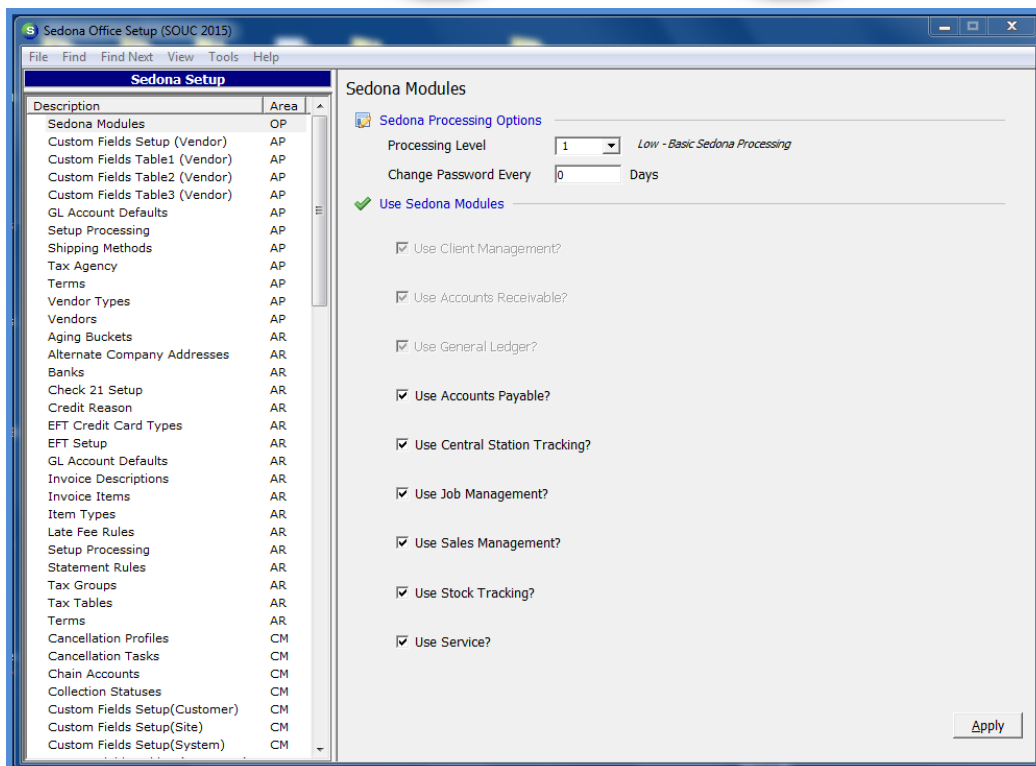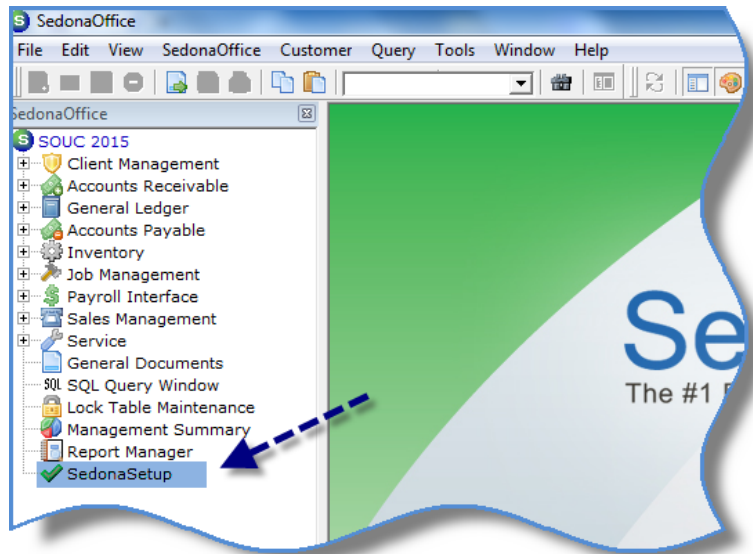
Customer Structure

There are two types of Customers within SedonaOffice; Regular Customers and Master Accounts.

- Regular Customer - This structure is typically used for residential and small commercial accounts where there are no more than 10 sites associated with the customer.
- Master Account – This structure is used for large customers that have more than 10 associated sites.

   Note: A Regular Customer may be converted into a Master Account.

Regular Customer Structure

Customer 💲

↓

BillTo

↓

Site

↓

System ───────→ RMR
                   Jobs
   - Intrusion   Tickets
   - Fire
   - CCTV
   - Access

Notes

Regular Customer

Notes

Master Account Structure

Notes

Master Account

Notes

G/L Structure

Even if you are not an accounting type person, it is important to understand some of the key elements of the general ledger. Since most of the transactions performed by Users will affect the general ledger, it is essential to know the impact of how transactions are posted.

What Affects the G/L?

Nearly every action performed by a User will record a transaction to the General Ledger. Most transactions recorded to the general ledger consist of three basic elements:

- Branch
- Category
- G/L Number

These three elements record in separate fields within the general ledger when a transaction is saved. The manner in which Financial reports are grouped and displayed is determined by each of the elements.

Branch

When saving transactions, for the most part, the Branch is defaulted based on the setup within a Customer, a Site, a Vendor, a Warehouse or somewhere within SedonaSetup.

Category

A Category is defined as a department within the general ledger. A category is only used on transactions that will affect the Income Statement. When a transaction is created, most of the time the category will default from a setup option within SedonaSetup; other times the category is manually selected by the User. To achieve good financial reporting, it is important that staff members understand when and how to select the appropriate category.

Notes

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The #1 Financial Software for Security Companies

A/R Transactions

Branch

Each Customer record and Site record is linked to a Branch. When Invoices and Credits are created, the Branch of the Site is used.

Category

The Category will default into Invoices and Credits, however the User has the ability to change the Category if desired.

A/P Transactions

Branch

Each Vendor record is linked to a default Branch. When Bills and Credits are manually created, the Branch of the Vendor is used, however the User has the ability to change the Branch if desired.

Category

The Category will default into manually created invoices and credits to the default Category assigned to the Vendor, however the User has the ability to change the Category if desired.

Inventory Transactions

Branch

Each Warehouse record is linked to a Branch. When a Purchase Order is created for parts that will be received into a Warehouse; the Warehouse Branch is used for the transaction posting. A Purchase Order Branch may only be manually selected when the PO is marked as a Direct Expense.

Category

For some Inventory transactions, the Category will automatically fill in if the transaction was related to a Ticket or a Job. For other transaction types, the User selects the appropriate Category.

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Notes



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Application Navigation

The main SedonaOffice Application is comprised of three main components:

- Main Menu Tree
- Function Buttons
- Application Menu

Main Menu Tree

The Main Menu Tree provides access to performing various functions and transactions within the various modules of the application.

Notes

Function Buttons

The Function Buttons displayed horizontally across the top of the application activate various functions, options and shortcuts to the User. Depending on which form is currently displayed, some of the Function buttons may be dimmed and unavailable for use. When hovering the mouse over a function button, the label for that button will be displayed below the button.

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Application Menu

The Application Menu has several options; when hovering the mouse over each menu option, a pull-down list of options is displayed for that menu option.
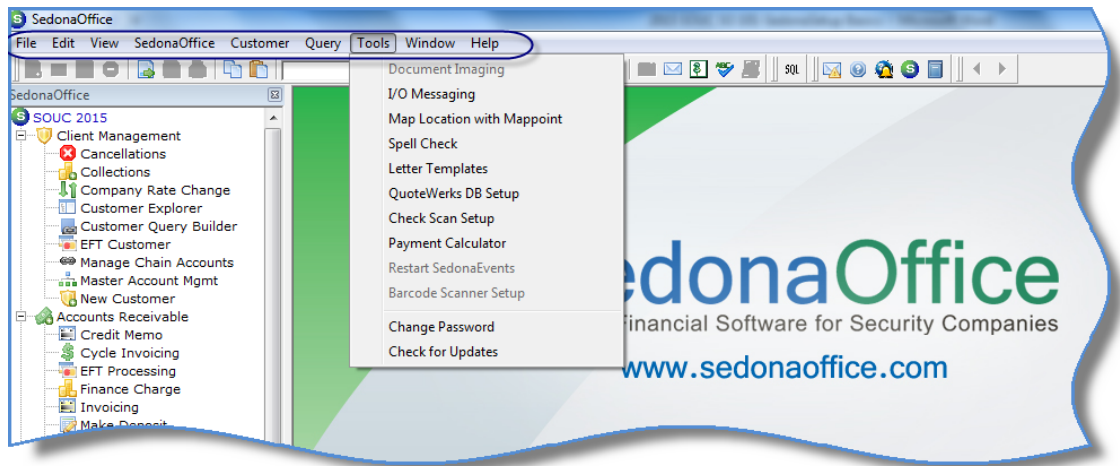
Notes

Query Builders

The Query Builder is a tool that enables Users to create custom reports based on stored in the database. A report design builds a SQL query behind the scenes to be able to display selected data. This tool is used to produce a list of information based upon the criteria selected by the User when designing the query for the report. The Query Builders do not perform any mathematical calculations. Report query results may be exported to and opened with a spreadsheet type application such as Microsoft Excel, where totals, subtotals or calculations may be added.

Once a report is completed and the User is satisfied with the report query design, it may be saved for future use if needed. Report query designs may be saved to a local hard drive or in a public folder on a file server. If other Users will be allowed to generate the report whenever needed, it will typically be saved on a file server in a folder to which the intended Users have access. Just keep in mind if another User is granted access to generate a report they are also able to modify the report query design. If the report query design needs to be preserved, a Master copy of the report query should be saved in a secure location.

All Query Builders are secured by User Group Permissions; a User may have access to design report queries but may not have the permissions to export or print the report results. The Security for this tool is designed to keep your data safe. System Administrators should think very carefully about possible repercussions prior to granting export and printing permissions to any User.

Below is a list of the available Query Builders.
- Customer Query
- GL Query
- AP Query
- Sales Tax Query
- Part Query
- Job Query

Notes

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FAQ

- Zip code or City not found?
- Grant access to some but not all Setup Tables
- Function Keys
    - o   F1 – Opens Online Help
    - o   F2 & F3 – Opens drop-down list
- Accelerator Keys