

Site Copy

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This option is used when a Customer moves from a Site where your company has equipment installed and another Customer moves into the same Site and your company will be monitoring and/or servicing the system(s) for the new Customer. This function will copy the site and system information from one customer to another. This function only makes a copy of this information.

When performing a Site Copy, the User has the option of moving Service/Inspection Ticket History from the old customer to the new customer.

If your company is using SedonaDocs, and documents are attached to the original Customer's Site(s) and/or System(s), the User will have the option to move all or selected documents to the new Customer.

Important Notes:

- 1) Before performing a Site Copy, make certain the original Customer's Site(s) and System(s) that are to be copied are not Inactive. If the original Customer has previously been canceled, you will need to reactivate the account first. Once the Site Copy has been performed, you will go back and inactivate/cancel the Customer manually.
- 2) Before using this function, make certain that all Tickets on the canceled customer record have been closed; otherwise any open tickets will be moved to the new customer.
- 3) Financial information is not copied to the new customer including invoices/payment history or recurring lines.
- 4) When a Site copy is performed and the User selects to copy the canceled customer's System information, the contract information from the previous customer is copied into the new customer and will need to be edited to be pertinent to the new customer.

Continue on for step by step instructions on how to perform a Site Copy.

Before performing a Site Copy, the User will first create a new Customer record for the customer moving into the Site. When creating the new customer, do not select the option of creating a new system; the system information will be created during the Site Copy process. When creating the new customer, a site record is required; do not enter or change any information on the Site form; this Site record will be deleted after the Site Copy is completed. It is highly recommend to type in the previous customer number into the Old Customer Number field when creating the new customer record for cross-reference purposes.

1. Once the new Customer record has been created, open the Customer Explorer and highlight the Sites menu option from the customer tree; right-click and select the option Copy Site from Another Customer.
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2. The Copy Site form will be displayed. In the Source Customer# field the User may type in the customer number and click the binoculars icon or click the binoculars icon to lookup the customer number from which Site and System information will be copied.

In the Copy Options section, select the desired options; when finished click the Transfer button located at the lower right of the Copy Site form.

A confirmation message will be displayed; click the Yes button to complete the process.

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3. If the User selected to Move selected Documents, the Sedona Document Selection form will be displayed to select which documents to move.

Check the box to the left of each document that is to be moved from the original Customer. Click on the Save button when finished making the document selections.

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4. Once the Site Copy has been performed, there will be two Sites listed in the Active Pane when highlighting the Sites option on the customer tree. The Site that was copied from the previous customer will be modified with information relevant to the new owner and the Site that was created during the customer creation will be deleted.

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5. To delete the unneeded Site, open the Site record which was created for the new customer, then click the Delete button located on the main application toolbar. The User will be presented with a confirmation message for the deletion of the Site; click the Yes button to proceed with the deletion of the Site record.

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6. Lastly, the Site and System information that was transferred from the previous customer will need to be modified with information pertinent to the new customer. Open each Site and System record; edit to make the pertinent changes and Save when finished.

Note: When editing the System record, In the Critical Message field, the User may type in a note indicating the System was taken over from a previous customer. This critical message will be displayed when creating new Tickets.

Recurring Lines will need to be set up for any services provided to this new customer. If using the Central Station Tracking option, the Call List and other information will need to be modified.