Systems

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When highlighting the Systems menu option from the customer tree, the Active Pane will display a list of all System records that exist for the Customer. When expanding the customer tree for the System record, several tree options are listed. As each of these menu options is highlighted, the Active Pane will display any information linked to this System record. If your company is using the Central Station Tracking feature, expanding this tree will display the following options: Access Cards, Call Lists, Instructions, Monitoring, Schedule, Test and Zones. As each menu option is highlighted, the Active Pane will display any information entered into these forms. Each of these menu options are described below.

Right-clicking on the word Systems from the customer tree will display a list of the following options:

- New System – Selecting this option will open the New System from for creating a new System record for the Site.
- Refresh – Selecting this option will update the System information in the Active Pane.

Several of the system menu options have right-click options available.

Central Station Tracking

The Central Station Tracking menu option will only be displayed if this option has been activated in SedonaSetup. When the Central Station Tracking menu option is expanded a list of additional options is displayed, each option is described below. When highlighting one of these menu options, the Active Pane will display any information entered for the selected option.

For instructions on how to use any of the Central Station Tracking option, click on the link below:

Central Station TrackingCentral Station Tracking

Note: Central Station Tracking is not available to SedonaOffice customers integrating with Bold Manitou or Stages Monitoring software.

Access Cards – This option is used to track information about access cards sold to and issued to the customer for the System.

Call Lists – This option is used to enter a list of individuals who could be called if an alarm signal is received by the central station.

Instructions – This option is used to enter information to be used by central station operators. Instructions may be marked as Permanent or considered Temporary if the Date Range option is selected. Instructions may be set up for some or all zones or for a specific signal type.

Monitoring – This option is used to track services for which your company is paying an outside central station for monitoring the system. Each service entered is linked to a recurring item for which your customer is being invoiced for this service. Using this option provides a good check and balance to make certain recurring lines have been set up to invoice your customer for the services being provided by the central station.

Schedule – This option is used to setup and maintain Open/Close Schedules for the System.

Test – This option is used to setup and maintain Test Schedules for the System.

Zones – This option is used to enter and maintain Zone information for a monitored System.

To be able to enter or edit existing central station tracking data, you must first open the System record in edit mode, then click on the C/S Info button which is located at the bottom of the form.

Documents

When highlighting the Documents menu option, the Active Pane will display a list of all Documents attached to the System. Double-clicking on a document in the Active Pane will open the document for viewing. Viewing and editing of documents is controlled by User Group Security.

Right-clicking on the Documents menu option will display a list of the following options: Add Existing Document and Scan New Document. The SedonaDocs add-on module must be purchased to use the Documents options.

Equipment

When highlighting the Equipment menu option, the Active Pane will display a list of all equipment installed for the System. Double-clicking on one of the Equipment Items in the Active Pane will open the Equipment Edit form where information may be added or edited.

Right-clicking on the Equipment menu option will display a list of the following options:

- New Equipment – Selecting this option will open the Equipment Edit data entry form. Once information is entered and saved, a new Equipment item will appear in the System Equipment list.
- Equipment Detail – Selecting this option will display every part in the equipment list, i.e. if there is more than a quantity of 1 of a particular part, this will list each individual part.
- Equipment Summary – Selecting this option will roll up the equipment list where the is more than a quantity of 1

for a particular part.

- Refresh – Selecting this option will refresh the Equipment List displayed in the Active Pane.

Equipment History

When highlighting the Equipment History menu option, the Active Pane will display a list of all equipment installed or removed for the System.

Inspections

When highlighting the Inspections menu option, the Active Pane will display a list of all Inspection records setup for the System. Double-clicking on an Inspection record in the Active Pane will open the record for viewing or editing.

Right-clicking on the Inspections menu option will display one option; New Inspection. Selecting the New Inspection option will open the System Inspections data entry form.

Notes

When highlighting the Notes menu option, the Active Pane will display a list of all Notes entered at the System level. Double-clicking on a Note record in the Active Pane will open the record for viewing or editing. Editing or deleting of Notes is controlled by User Group permissions. Clicking on the "+" sign to the left of the Notes option will expand the Notes tree into two folders; General and Service. Notes manually entered from the Customer Explorer within the System tree will display in the General folder. Notes entered on Service or Inspection Tickets for the System will appear in the Service folder.

Right-clicking on the Notes menu option will display one option; Add Note. Selecting the Add Note option will open the Customer Notes data entry form.

Recurring

When highlighting the Recurring menu option, the Active Pane will display a list of all active Recurring Lines setup for the System. Double-clicking on a Recurring Line record in the Active Pane will open the record for viewing or editing. Viewing and/or editing of recurring is controlled by User Group Security.

Right-clicking on the Recurring menu option will display a list of the following options: New Recurring, Create Cycle Invoice Now, Refresh and Include Past Canceled.

- New Recurring – Selecting this option will open a blank New Recurring form. Typically, Recurring Lines are set up at the System level; if the services to the customer do not involve a System or if it is your company policy to set up recurring at the Site level, this is allowable if the Site Level Recurring option is enabled in SedonaSetup/AR Setup Processing. User permissions are required to create new recurring lines; if the User does not have permission to use this function, this option will be grayed-out.
- Create Cycle Invoice Now – This option allows the User to generate a Cycle Invoice batch for this one customer. User permissions are required for this option; if the User does not have permission to use this function, this option will be grayed-out.
- Refresh – Selecting this option will refresh the Recurring Lines list displayed in the Active Pane.
- Include Past Canceled – Selecting this option will display all active and previously canceled Recurring Lines in the Active Pane.

Recurring History

When highlighting the Recurring History menu option, the Active Pane will display a list of all Recurring Line activity for the System. This includes increases, decreases and deletion of Recurring Lines. Double-clicking on a Recurring Line History record in the Active Pane will open the record for viewing or editing.

Recurring Master Items

Recurring Master Items allows a User to enter a detailed Memo and/or a customer Purchase Order Number and Expiration Date for Sub Items Of that are selected on recurring lines. The information entered into the form, Recurring Master Items, is currently for informational purposes only for most SedonaOffice customers. This information will only print on cycle invoices when selecting invoice forms Custom Form CS01 and CS07.

When a Recurring Line is created and saved with a Sub Item Of selection, the Sub Item Of will appear under a new Customer Explorer tree option labeled Recurring Master Items. The User may open the Master Recurring Item record to enter the desired information into this new form.

When highlighting the Recurring Master Items menu option, the Active Pane will display a list of all Sub Items Of setup for the System. Double-clicking on a Recurring Master Item record in the Active Pane will open the record for viewing or editing.

Service

When highlighting the Service menu option, the Active Pane will display a list of all open and closed Service and Inspection Tickets for the System. Double-clicking on one of the Tickets in the Active Pane will open the Service or Inspection ticket for viewing.

Right-clicking on the Service menu option will display a list of the following options: New Service Ticket, and Refresh.

- New Service Ticket – Selecting this option will open a blank Service Ticket form. Once information is entered and saved, the new Service Ticket will appear in the Active Pane for the System.
- Refresh – Selecting this option will refresh the Service Ticket List displayed in the Active Pane.