SedonaSetup Overview and Topics

SedonaSetup is an application within SedonaOffice which assists your company in setting up your system prior to enabling the SedonaOffice software application.

The manner in which the software operates is mainly dependent on the values you input or choices you make with each setup menu task.

Depending on which modules your company will implement will determine the number of task items that will appear on your list to be accomplished.

SedonaOffice is a robust product and you are able to customize the setup tables to your particular company's needs to produce the desired results.

As you go through the various data entry forms for each setup table, you will notice a check box labeled Inactive. If at some point in time you no longer want to use this setup value, you may check this box and the record will no longer be available for selection by your users.

Before entering any values into SedonaSetup, please read this article entirely.

SedonaSetup Views

There are two views of the SedonaSetup application; the Standard view and the Dependency Order view.

- The Standard view lists all setup options in alphabetical order within each module group.
- The Dependency Order view lists the setup options in the order in which they must be completed.

Since some setup options are dependent on other options being completed first, new SedonaOffice customers who are setting up their company for the first time will be working with the Dependency Order view.

Standard View

The Standard view lists all setup options in alphabetical order within each module group. You may re-sort the list of setup tables and option by clicking on the Description Header or the Area Header.

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Dependency View

The Dependency Order view lists the setup options in the order in which they must be completed. Since some setup options are dependent on other options being completed first, new SedonaOffice customers who are setting up their company for the first time will be working with the Dependency Order view.
To change the view to Dependency order, on the menu click View, then select the In Dependency Order option.

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When you first login to the SedonaSetup application in Dependency View, the task item, Setup Instructions, will explain the steps needed to implement the various modules and setup tables associated with each module. The task list is comprised of setup tables, and system default values where you will need to make decisions on how to use particular elements of the various modules.
There are three status choices to select from as you work on each task:

- 1) Finish Later
- 2) Approve Task
- 3) Un-approve Task

As each setup table or task item is completed, right-click on that task item and select Approve Task. Once the task item is approved, the box to the left of the task will display a check mark to indicate this task has been completed. All tasks must be completed before you may begin using the software.

On tasks that require more thought prior to entering values, these should be marked as Finish Later as a reminder to re-visit this item. This task list is comprised of setup tables, and system default values where you will need to make decisions on how to use particular elements of the various modules.

For the most-part, the majority of the tasks have samples already entered on the list. You may use these existing values, change the name to something else, and enter new values of your own that best suit the manner in which your company operates. There are some setup table which contain values controlled by SedonaOffice. These will be noted where these rules apply.

Each task item form displayed will have three buttons located on the bottom right labeled Apply, New and Delete.

- Apply Button - The Apply button is used to save information entered on the form.
- New Button - The New button is clicked when you want to create a new record for the table; click Apply after entering new records or you will lose whatever information you have entered.
- Delete Button - If you have entered a value and change your mind, highlight the record in the upper portion of the form to bring it down into the data entry area, then click the Delete button to remove the record.

Some of the tasks are displayed with a bold font; these are considered key tables that need your attention. If you attempt to move on to another task item, a message will be displayed asking you if you want to exit this form. Click the Yes button, and the system will save any changes that were made to the form.

On the left side of the SedonaSetup form is a list of the tasks or setup tables which need to be completed. To the right of each item is a column labeled Area; these areas indicate the module in which the task item is used. Below is a listing of the Areas and their definition.

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Common Table Features

Various Setup Tables allow you to mark a record as 'Inactive'. A record is considered active unless the Inactive box is checked. An inactive record will not display in a table look-up nor can a user manually enter it. Use this method to retire obsolete values instead of deleting them.

- SedonaOffice recommends using upper and lower case letters for all descriptions. Using all capital letters will limit the number of characters that will display in drop-down lists.

Accessing Setup Tables

Once you have completed the SedonaSetup Process, you may access the setup tables to create new records or make modifications to existing records by selecting SedonaSetup from the main menu tree of the application.

After you complete a table or category of tables, you may print each table to check your entries. This is an important step to insure that the tables you have created are correct before transaction processing begins.

How to Print a Setup Table

To print all of the information that has been entered for a particular setup table, navigate to the SedonaSetup Main Menu, click File then select the report to print. You have the option of Print Preview, or Printing the table.

Sedona Modules

The Sedona Modules setup form is the first data entry form that must be completed. To access this form you must login to the SedonaOffice application using the Administrator user name.

This setup form contains two main areas; Sedona Processing and Use Sedona Modules. Each of these will be described below.

Sedona Processing Options

This option allows your company to select from one of three Processing Levels that set rules for how frequently a User must change their password and may control the formatting of the password. This Processing Level affects all companies within your SedonaOffice database. If the number of days to change the password has expired, a User will be prompted when attempting to login to change their password. The password must be changed to be able to login. At login attempt, Users will also receive a message 2 days prior to their password expiration date; the User may change the password at this time.

Passwords may also be changed by the User logged into the application from an option (Change Password) located on the Tools menu on the main application toolbar. Below each Processing Level will be described in detail. Please read the rules for each processing level carefully prior to setting this level for your company.

- **Processing Level 1**

  This Processing Level described as Low – Basic Sedona Processing is the least restrictive of all three processing levels. If this Processing Level is selected your company has the option to require the User to change their password every X number of days. If selecting a number of days the password must be changed by the User, the new password entered by the User cannot be the same as the current or last four passwords used. If your company does not want to require Users to change their password every certain number of days, set the Change Password Every field to 0; User passwords will never expire. If the Change Password Every is set to 0, the User may change their password anytime desired from an option (Change Password) located on the Tools menu on the main application toolbar.

- **Processing Level 2**

  This Processing Level described as Medium – Some Processing Controls employs strict rules as to the format of User passwords. User passwords must be at least 8 characters long, contain at least 1 number, at least one uppercase character and at least 1 lowercase character. Example of a valid password using this processing level is 9JoeSmith. If this Processing Level is selected your company must set the Change Password Every days field to a value between 0 and 365. If your company does not want to require Users to change their password every certain number of days, set the Change Password Every field to 0; User passwords will never expire. The new password entered by the User cannot be the same as the current or last four passwords used. Users may change their

password anytime desired from an option (Change Password) located on the Tools menu on the main application toolbar.

- **Processing Level 3**

  This Processing Level described as High - Strict Processing Controls employs the same strict rules as to the format of User passwords as used in Processing Level 2. This Processing Level also employs a function to lock-out a User after three failed attempts to login to the application. If the User becomes locked out, the System Administrator will have to access the User table within SedonaSetup and manually change the User's password. User passwords must be at least 8 characters long, contain at least 1 number, at least one uppercase character and at least 1 lowercase character. Example of a valid password using this processing level is 9JoeSmith.   If this Processing Level is selected your company must set the Change Password Every days field to a value between 1 and 365. The new password entered by the User cannot be the same as the current or last four passwords used. Users may change their password anytime desired from an option (Change Password) located on the Tools menu on the main application toolbar.
  Using Processing Level 3 also enforces restrictions on certain types of data manipulation:

  - You may not Delete an Invoice or Credit Memo
  - You may not export Invoices or Credit Memos to an electronic file

Use Sedona Modules
Depending on which modules your company will use, a longer or shorter list of tasks items will display on the task list to complete. The Client Management, Accounts Receivable and General Ledger modules are checked on by default. At a minimum to enable the application to be used, these three modules must be implemented.

Your company has the choice of implementing any or all of the other SedonaOffice Modules. We encourage all companies to take advantage of all modules offered in this software application. Check the box to the left of each module your company will implement.

- Accounts Payable – Full accounts payable functions are available including Entering Bills, Paying Bills, Writing checks, Purchase orders, Bank Account Reconciliation.
- Central Station Tracking – Will enable your company to track important system information such as zones, call lists, access card tracking etc. (this option is not available to SedonaOffice customers who are integrating with the Bold Manitou or Stages application).
- Job Management – This module includes functionality to track your installations including job costing.
- Sales Management – This module provides the functionality to track your sales leads and quotes to prospective customers. Companies integrating with QuoteWerks must activate this module.
- Stock Tracking – This module enables your company to maintain a perpetual inventory.
- Service – This module provides full functionality to run your service department including generating service and inspection tickets.

Company Setup

The Company Setup form is the second setup form that must be completed, and is only accessible if you have logged into the SedonaOffice application using the Administrator user name.

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Enter the name of your company, address, phone and fax number; the Phone 1 field is your main company phone number and Phone 2 is considered your company fax number. The city, state and zip code is entered in the Address 3 field. Click the Apply button to save the information. If the address or phone numbers of your company changes in the future, you may modify this setup form at any time.

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The SedonaSetup articles are grouped by the major modules within the setup applicion. Click on the links below to jump to a particular area of SedonaSetup.

Accounts Payable Setup

Accounts Receivable Setup

Client Management Setup

Central Station Tracking Setup

General Ledger Setup

Inventory Setup

Job Management Setup

Operations Setup

Payroll Setup

Sales Management Setup

Service Setup