

# Sedona-X Mobile: User Setup

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## What is a User?

A User in Sedona-X Mobile is most likely a Technician, however, may also be a Manager, Subcontractor, or another type of resource.

Note: Before creating a new User, you must first create an Employee record in the SedonaOffice SedonaSetup Employee setup table.

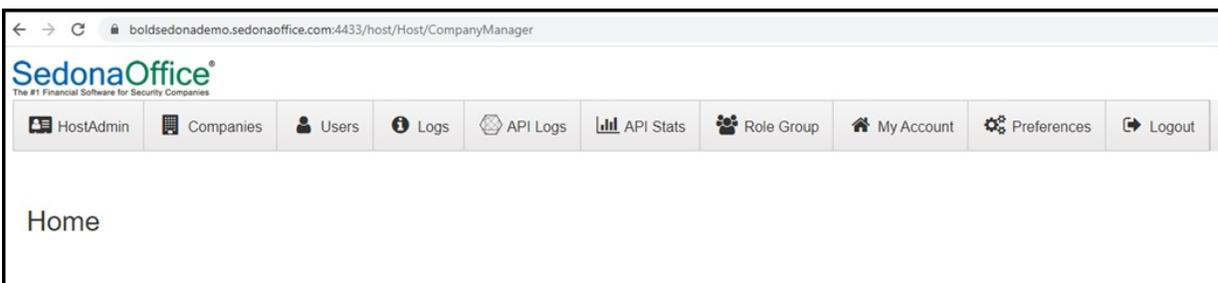
## New User Setup

Your browser does not support HTML5 video.

To set up a new Sedona-X Mobile User, follow the instructions below and on the following pages.

Log in to your SedonaAPI URL. This would have been provided to your company when a Bold Group representative installed your API. If you are unable to locate your API URL, please contact Bold Group Support or your designated project manager.

Once logged into the API, you will be presented with your Home page as shown in the illustration below.



Click on the **Users** tab from the top menu bar. A list of default Users will be displayed – do not make any changes to these Users. In order to access your Users, select the Company Users option, which is highlighted in the illustration below.

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HostAdmin Companies **Users** Logs API Logs API Stats Role Group My Account Preferences Logout

### Users

Add New User  Add New Host User  Company Users  Customer Users  Inactive Users

User Name	First Name	LastName	Email	Company	
Perennial	default	default	itsupport@perennialsoftware.com		
AutomatedJob	automation	automation	supportautomation@perennialsoftware.com		
HostAdmin	HostUser	HostUser	support@perennialsoftware.com		

1 - 3 of 3 items

To create a new User, click the **Add New User** button.

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### Users

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User Name	First Name	LastName	Email	Company	
Perennial	default	default	itsupport@perennialsoftware.com		
AutomatedJob	automation	automation	supportautomation@perennialsoftware.com		
HostAdmin	HostUser	HostUser	support@perennialsoftware.com		

1 - 3 of 3 items

The Add User data entry form will be displayed.

1. In the first field, Company Name, select the company from the drop-down list to which the User will be connecting with Sedona-X Mobile. Fill in the data entry fields.
2. In the Password field, click on the question mark icon for the formatting rules for passwords.
3. The last field on the page is the Enable Sedona-X Mobile button. Click on this button to switch to “Enabled”. This must be done for the User to be able to use the application.

### Add User

Submit Cancel

Company Name	<input type="text" value="Demo V6 Manitou"/>
User Name	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Password	<input type="password"/>
Confirm password	<input type="password"/>
Site Theme	<input type="text" value="Default"/>
Enable Sedona-X Mobile	<input type="checkbox" value="DISABLED"/>

Token	Permissions
<input checked="" type="radio"/> Company Admin	<input type="radio"/> Role Group

After clicking the Enable button, additional options will be displayed.

Email

Password

Confirm password

Site Theme

Enable Sedona-X Mobile

**Employee** Once user is created, employee can be assigned.

Lock Sliding Window

Days Back  Days Forward

Max Disp Mins  Max Arrive Mins  Max Dep Mins

Access Level

Reschedule Appts  Manual Labor  System Updates

Sub Charges  Final Charges  Remove Contacts

Access CC/Bank  Closed Tickets  Time & Attend

Change Orders

Token Permissions

Company Admin  Role Group

Want to see this information in a video?

<https://youtu.be/gfzj7492XnE>