

Sedona-X Mobile: User Permissions

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User Permissions

Prior to assigning user permission, ensure your User Setup is completed. Find the article here [Sedona-X Mobile: User Setup](#)

In the Password field, click on the question mark icon for the formatting rules for passwords.

The last field on the page is the Enable SedonaX Mobile button. Click on this button to switch to “Enabled”. This must be done for the User to be able to use the application.

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

Add User

Submit Cancel

Company Name: Demo V6 Manitou

User Name:

First Name:

Last Name:

Email:

Password: ⓘ

Confirm password:

Site Theme: Default

Enable Sedona-X Mobile: DISABLED

Token | Permissions

Company Admin ⓘ Role Group ⓘ

After clicking the Enable button, additional options will be displayed. Each of these options will be described below and on the following pages.

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

- **Employee** - Select the SedonaOffice employee from the drop-down list.
- **Lock Sliding Window** - While a Technician is in the Dispatch window, this option controls whether the Technician is able to modify previously entered dispatch times. If this option is selected, once the Technician enters and saves a dispatch time, they will not be able to modify that time. If this option is not selected, the Technician will be able to modify dispatch times.
- **Days Back** - Set the number of days the Technician is able to see appointments on their schedule. For example, if you want the Technician to see appointments for the previous seven days, you would enter -7. You must put (-) before the number in Days Back.
- **Days Forward** - Set the number of days the Technician is able to see appointments on their schedule, beyond the current date.
- **Max Dispatch Minutes, Maximum Arrive Minutes, and Maximum Departure Minutes** - The maximum minutes feature has seen a significant improvement towards a "real time" environment. You now have the ability to specify a true window (in minutes) around any of the dispatched, arrived, or departed times. The current time is used as the window center point during the initial adjustment (Dispatch Now, Arrive Now, or Depart Now buttons). The window can be locked with the first change, or sliding using the current value of the respective time. The default for each of the windows is 2880 (-24 hours + 24 hours) which allows the Technician to adjust the date control by one (1) day backward or forward. Another example may be that you want to tighten this to as much as

20 minutes on either side. In this case, you would put 40 into these fields (20 minutes forward and 20 minutes back equaling 40.)

- **Bold Group | SedonaX Mobile – User Setup 8**
- **Access Level** - This controls the Technician's access level to view and add notes and documents. There are three Access Levels available: 1, 2 and 3.
- **Access Level 3** is the highest level. If the Technician is assigned to Level 3, they will be able to see all notes and documents saved with a level 1, 2, and 3.
- **Access Level 2** is the medium level, and is typically used on internal company notes and documents; items you do not want your customer to see. A Technician assigned to Level 2 will be able to see all notes and documents saved with a level 2 or 1.
- **Access Level 1** is the lowest level. If a Technician is assigned to Level 1, they will only be able to see notes and documents saved with a level 1.

Note: Documents are only available if your company has purchased the add-on module, SedonaDocs.

Note: If your company has purchased the add-on module, SedonaWeb, all notes saved with a Level 1 access, will be available for your customers the read via SedonaWeb.

- **Appt Reschedule** - Check to allow a Technician to reschedule an appointment. Selecting this option will not allow the Technician to create a new appointment.
- **Manual Labor** - Check to allow a Technician to override charges in the Labor tab using Manual Labor button.
- **System Updates** - Check to allow a Technician to update fields on the System record linked to the ticket or job. Editable fields include Panel Type, Panel Location, and Alarm Company. Selecting this option will also allow the Technician to add/edit Contacts in the Review screen.
- **Sub Charges** - Check to allow a Technician to view sub charge amounts for Parts, Labor, Job Units, Materials, Install charges, Purchase Orders, and Miscellaneous Charges. If this option is not selected, no dollar values are shown in any screens before the Acceptance tab in a ticket.
- **Final Charges** - Select this option if the Technician will be allowed to see final charges (in the acceptance tab). If unchecked, the Technician and customer will not be able to view total amounts for parts, labor, other, taxes, and the grand total.
- **Remove Contacts** - Check to allow Technicians to delete a contact.
- **Access CC Or Bank** - Permission to allow Technicians to have access to CC or Bank information. When unchecked, in the Technician setup tool, there is no ability to view or select any existing credit card or bank accounts (on file for the customer) for service ticket billing. Further, adding credit cards is not allowed nor can the iDynamo card reader product be used.
- **Closed Tickets** - Selecting this option provides the Technician the ability to view closed Tickets.
- **Time and Attendance** - This is a separate module that is for time keeping purposes (needs to be purchased separately) that integrates with SedonaX Mobile App.

- Change Orders - Gives the Technician the ability to create a change order for a Job in the app.

Assigning Permissions

After making all option selections on the Add User form, you will assign the Technician to a Role Group. The application provides five pre-configured Role Groups. The Role Group defines what a Technician may or may not do within the SedonaX Mobile application.

Please refer to the matrix on the following page, which describes the permissions for each Role Group.

Click on the Role Group radio button.

The screenshot shows the 'Employee' configuration page. At the top, there is a dropdown menu set to 'None' and a red warning message: 'Once user is created, employee can be assigned.' Below this is a 'Lock Sliding Window' toggle set to 'ENABLED'. There are several input fields for 'Days Back' (-7), 'Days Forward' (7), 'Max Disp Mins' (2880), 'Max Arrive Mins' (2880), and 'Max Dep Mins' (2880). An 'Access Level' field is set to '3'. A grid of checkboxes includes 'Reschedule Appts' (unchecked), 'Manual Labor' (unchecked), 'System Updates' (checked), 'Sub Charges' (checked), 'Final Charges' (checked), 'Remove Contacts' (checked), 'Access CC/Bank' (checked), 'Closed Tickets' (checked), and 'Time & Attend' (checked). 'Change Orders' is also checked. At the bottom, there are two radio buttons: 'Company Admin' (selected) and 'Role Group' (unselected). A red arrow points to the 'Role Group' radio button.

Click on the drop-down arrow to select the appropriate Role Group for the Technician.

This image shows a close-up of the 'Role Group' selection process. On the left, the 'Role Group' radio button is selected, and a dropdown menu is open showing '--Custom--' with a downward arrow. A red arrow points from this dropdown to a larger view on the right. The larger view shows the dropdown menu expanded, listing options: '--Custom--' (highlighted in orange), 'Jr. Tech', 'Subcontractor', 'Sr. Tech', 'Project Manager', and 'Manager'. Below the list is a 'Search Permissions' button and a '{COMPANPREFIX}' label.

Role Group Matrix

Page	Junior Tech	Sub-contractor	Sr. Tech	Project Manager	Manager
Job					
Create				X	X
Read	X	X	X	X	X
Update			X	X	X
View Materials	X	X	X	X	X
Add Material			X	X	X
View Appointments	X	X	X	X	X
Update Appointments	X	X	X	X	X
View notes	X	X	X	X	X
View Installs	X		X	X	X
View POs			X	X	X
View Docs	X	X	X	X	X
Add Documents	X	X	X	X	X
Delete Documents					X
View Customer Notes	X	X	X	X	X
Service Tickets					
Create			X	X	X
Read	X	X	X	X	X
Update	X	X	X	X	X
View Notes	X	X	X	X	X
View Service Parts	X	X	X	X	X
View System Parts	X	X	X	X	X
Add Parts	X	X	X	X	X
Update Parts	X	X	X	X	X
View Customer Notes	X		X	X	X
View Site Notes	X		X	X	X
View Custom Fields	X	X	X	X	X
Update Custom Fields	X	X	X	X	X
View Documents	X	X	X	X	X
Add Documents	X	X	X	X	X
Appointments					
All (Tickets & Jobs Any Assigned to)				X	X
Assigned to only	X	X	X		
Create			X	X	X
Read	X	X	X	X	X
Update	X	X	X	X	X
Customer					
Read			X	X	X
Site Info			X	X	X
System Info			X	X	X
Make Payments	X	X	X	X	X

Once all fields have been populated and options selected on the Add User form, and the Technician has been assigned to a Role Group, click the Submit button at the upper right of the page to save the new User record.

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Add User

Submit Cancel

Company Name: Demo V6 Manitou

User Name:

First Name:

Last Name:

Email:

Password:

Finding Users

Your browser does not support HTML5 video.

Additional Resources

For information on how the Technician will log into the SedonaX Mobile app, please refer to the training course posted on BoldU, called Sedona-X Mobile App (Level 1). The specific video titled Sedona-X Mobile App: App Setup (Part 1) will be the first video you will want to begin with.

<https://youtu.be/qL7nGvhuaV4>

<https://youtu.be/gfzj7492XnE>