

SedonaWeb Settings

Last Modified on 07/10/2023 3:05 pm EDT

Settings Tab

When clicking on the Settings Tab, three options are available:

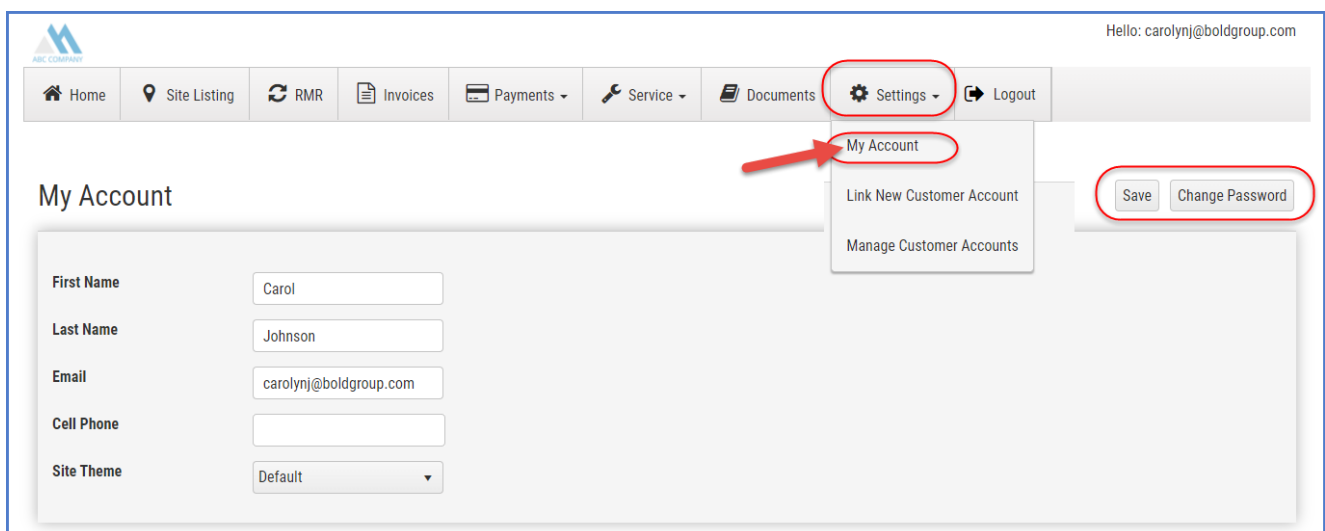
- My Account
- Link New Customer Account
- Manage Customer Accounts

My Account

When clicking on the My Account option from the Settings Tab, the customer is able to do the following:

On the My Account page, change or update any of the following information listed below.

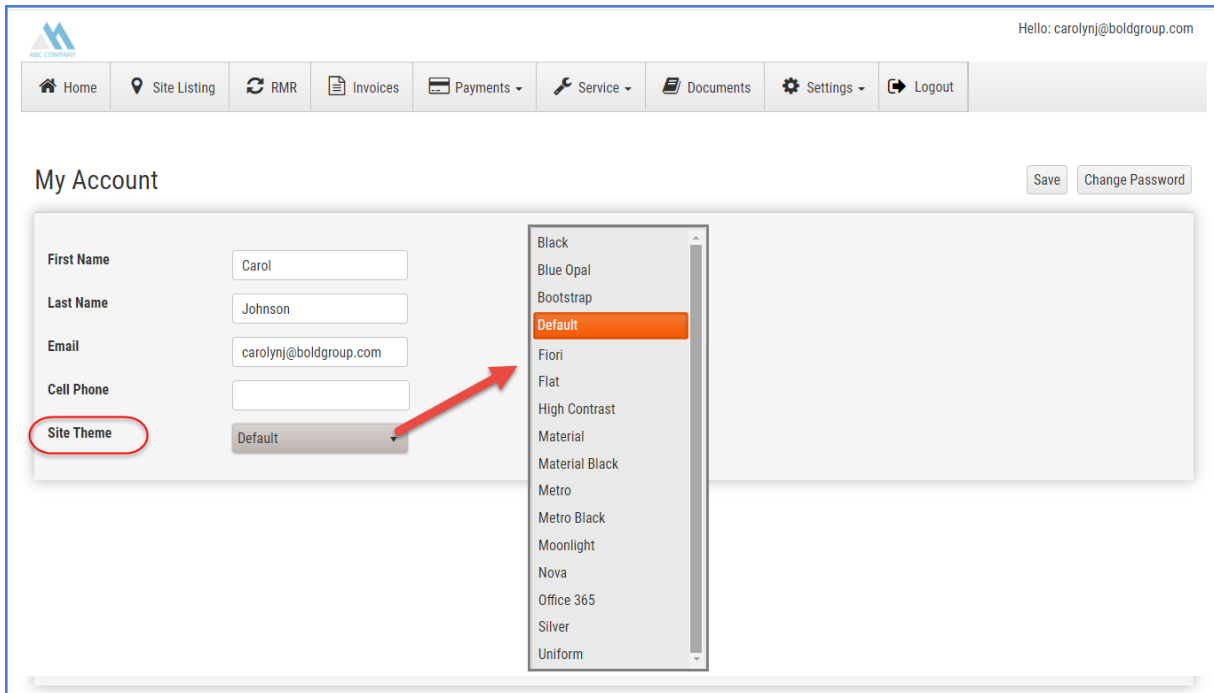
- First Name
- Last Name
- Email
- Cell Phone
- Site Theme
- Change Password



The screenshot displays the SedonaWeb user interface. At the top right, the user is logged in as 'carolynj@boldgroup.com'. The navigation bar includes links for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The 'Settings' dropdown menu is open, showing three options: 'My Account', 'Link New Customer Account', and 'Manage Customer Accounts'. A red arrow points to the 'My Account' option. Below the navigation bar, the 'My Account' page is visible, featuring a form with the following fields: First Name (Carol), Last Name (Johnson), Email (carolynj@boldgroup.com), Cell Phone (empty), and Site Theme (Default). To the right of the form, there are 'Save' and 'Change Password' buttons.

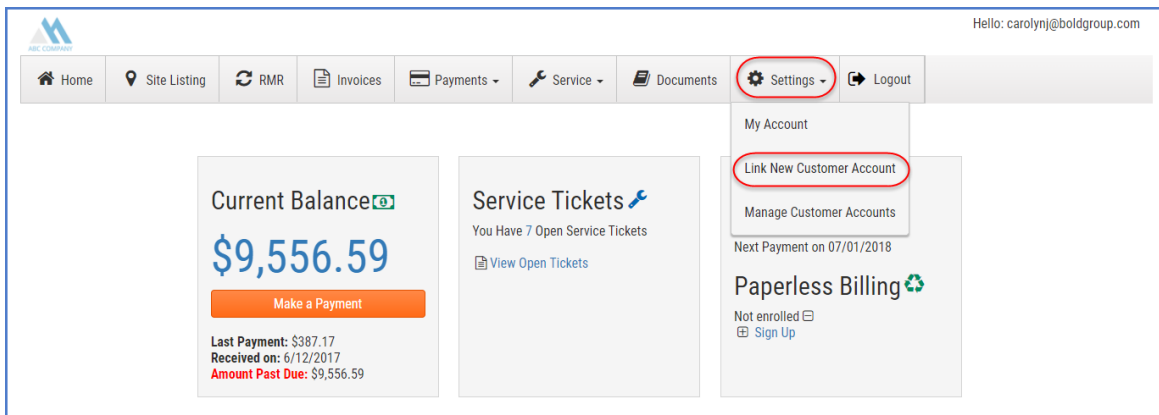
Site Theme

The Site Theme option allows the customer to change the color scheme used in SedonaWeb.



Link New Customer Account

If a customer has more than one customer account, when clicking on the Link New Customer Account option from the Settings Tab, they are able to add additional customers to which they will have access when logging into their SedonaWeb account.



After clicking on the Link New Customer Account from the Settings tab, the Link New Customer form will be displayed. There are four required fields on this form: Customer Number, First Name, Last Name and Billing Zip Code. The telephone number fields are optional. Once these fields have been populated, click on the Create Link button.

Link New Customer

Enter the information of the customer you want to link to this account Create Link

Customer Number *	<input type="text" value="306"/>
First Name *	<input type="text" value="Ashley"/>
Last Name *	<input type="text" value="Optical"/>
Billing Zip Code *	<input type="text" value="48187"/>
Phone	<input type="text"/>
Extension	<input type="text"/>
Mobile	<input type="text"/>
Fax	<input type="text"/>

If valid information was entered for the customer to be linked, a listing of all customers linked will be displayed in the listing. To work with one of the linked customers, click on the View Customer button on the customer row desired.

In the example below, the registered customer is linked to six different customer accounts.

Hello: carolynj@boldgroup.com

Home
Site Listing
RMR
Invoices
Payments
Service
Documents
Settings
Logout

Account Name carolynj@boldgroup.com

Contact Name Ashley, Victoria

Last Login -

Assets

Customer Number	Customer Name	Selected	
105	Ashley, Victoria	Yes	<input type="button" value="View Customer"/>
194	Ashley, Vicky	No	<input type="button" value="View Customer"/>
10040	Har-Conn Chrome Co.	No	<input type="button" value="View Customer"/>
10400	Lyons, Francesca	No	<input type="button" value="View Customer"/>
31705	Plymouth Plantation	No	<input type="button" value="View Customer"/>
306	Ashley Optical	No	<input type="button" value="View Customer"/>

Manage Customer Accounts

When clicking on the Manage Customer Accounts option from the Settings Tab, the customer's email address and contact name are displayed in the first panel of the page. In the next panel below, under the header of Assets, will be a list of all customer accounts linked to this customer login. When clicking on the View Customer button, the main dashboard will be displayed for the customer.

Account Name: carolynj@boldgroup.com
Contact Name: Ashley, Victoria
Last Login: -

Customer Number	Customer Name	Selected	
105	Ashley, Victoria	Yes	View Customer

Current Balance **\$9,433.25**
Last Payment: \$387.17
Received on: 6/12/2017
Amount Past Due: \$9,433.25

Service Tickets
You Have 8 Open Service Tickets
[View Open Tickets](#)

Auto Bill Pay
Not enrolled
Next Payment on 07/01/2018

Paperless Billing
Not enrolled
[Sign Up](#)

Change Password

After clicking on the Change Password button from the My Account page, the customer is able to change their login password at any time. It is highly recommended that customers change their password on a periodic basis for security purposes.

My Account [Save](#) [Change Password](#)

First Name
Last Name
Email
Cell Phone
Site Theme

Change Password

Old Password
New Password
Confirm Password

[Save](#)

