How to Add or Remove Critical Messages in SedonaOffice

Last Modified on 09/13/2024 3:41 pm EDT

This document goes over how to add or remove critical messages about a customer's account that other users need to know. The process can be done in any version of SedonaOffice 6.2.x.

Overview

The same steps will be done for either adding or removing the critical messages, since both are done in the same area. Critical messages can only be added to either the Customer or the System record.

The customer critical message will pop up when the account is first opened or on a service ticket.

☐

The system critical message will ONLY show on a service ticket along with any customer critical messages.

☐

Customer Critical Messages: Add or Remove

Steps:

1.In the customer account, right click on Customer Information – Click on Edit Customer Setup

☐

2.In the Setup Information Tab – Critical Message area at the bottom – Add Date when expires and the Critical Message to be displayed – Click on Save when done to Add the Critical Message

☐

** *If no date is added the message will never expire*

3.To remove the Customer Critical Message either add an Expiration Date, if none, and/or remove any message in the field. Then Save the record.

System Critical Messages: Add or Remove

Steps:

1.In the Customer – click on Site – right click on System – click on Edit System

☐

2.In the System Tab – Critical Messages are at the bottom right corner – Fill in the Expires On date and message – click on Save once finished

☐

** *If no date is added the message will never expire*

3.To remove the System Critical Message either add an Expiration Date, if none, and/or remove any message in

the field. Then Save the record.