SedonaOffice Release Notes

December 2023

Version 6.2.0.16

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Important Note Before Updating

In this release, there are many changes related to the SedonaOffice and central stations integration. If you are using this integration, please review the release notes before updating. It is very important to review your data in the CS_Alarm_Company table and verify that it is correct before updating. In addition, the Manitou REST integration requires SedonaWeb/SedonaAPI 2.0 version 1.46.0.

SedonaOffice business rules require that only one alarm company be assigned to any given real integration. If the same real integration is assigned to more than one alarm company, there will be errors. If an Integration Id other than the values listed below is assigned to an alarm company, there will be errors. All Integration_Id values (except 1 or NULL) must be used only once and assigned their fixed meanings.

When examining the CS_Alarm_Company table, if any of the following conditions exist, **PLEASE CONTACT SUPPORT PRIOR TO MAKING ANY CHANGES**! Manual data adjustments will be necessary before upgrading:

- If Alarm_Company_Id 1 does not have Integration_Id NULL or 1.
- If more than one alarm company has the same "real" Integration_Id (2, 4, 5, 6, 7, 8).
- If any alarm company is assigned an Integration_Id other than NULL, 1, 2, 4, 5, 6, 7, 8.

The Integration_Id has fixed meanings:

- 1 or NULL (either value can be used) = "non-real" integration. The remainder are "real" integrations.
- 2 = Manitou (original integration via Manitou's serverinterface.ocx)
- 4 = CMS
- 5 = Stages UCC*
- 6 = Stages AvantGuard*
- 7 = Stages Rapid Response*
- 8 = Manitou (REST API)

*All Stages integrations function the same in SedonaOffice.

Alarm_Company_Id	Alarm_Company_Code	Description	Inactive	Integration_Id
1	N/A	N/A	N	1
2	ManitouOCX	Manitou OCX	N	2
3	SGS UCC	Stages UCC	N	5
4	Manitou	ManitouNEO	N	8
5	Unreal	Not an actual CS Integration	N	NULL
6	Unreal 2	Another unreal integration	N	NULL
7	SGS AG	Stages AvantGuard	N	6
8	CMS	CMS	N	4
9	StagesRapid	Stages Rapid Response	N	7
10	Unreal 3	Unreal integration 3	N	NULL
11	InactiveAlarmComp	Inactive Alarm Company	Y	NULL

Real integrations will attempt to interact with the specified Alarm application. Non-real integrations are for reference only and will have no interactions with external applications.

It is vital that the alarm companies have the correct integration Ids assigned to them, so SedonaOffice functions as expected. Alarm_Company_Id 1 must always have Integration_Id NULL or 1!

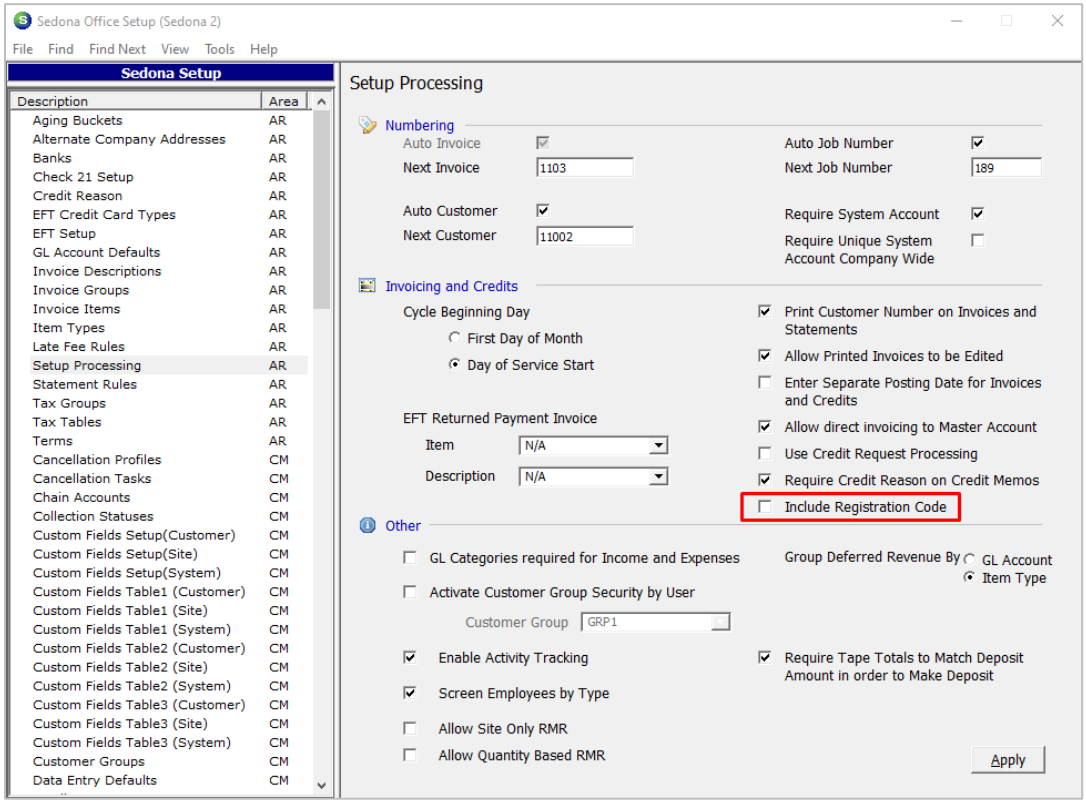
If alarm company setup is incorrect, it is possible the Alarm_Company_Id in AR_Customer_System records may not be what it should. This may cause integration functionality to not work as expected after upgrading to this version of SedonaOffice. The Alarm_Company_Id(s) may need to be manually corrected on a case-by-case basis. This updated version of SedonaOffice will be much more reliable regarding all the integrations, but only if the data is as expected.

Enhancements and New Features

New Option for not Displaying the Registration Code on Invoices

For dealers who do not want their customers to register online and access the customer portal, we added an option to hide the registration code from appearing on invoices.

This is on Sedona Setup Processing. There is a new checkbox called **Include Registration Code**. By default, this checkbox is selected, which means the registration will appear on invoices. Clear this checkbox to keep the registration code from appearing.



We changed these reports to follow the setting of the **Include Registration Code** checkbox:

- S01 (Standard Form)
- S02 (Invoice Statement)
- S03 (Standard w/Payments)
- S04 (Bridgestone Standard)

We modified the Bridgestone exporter to follow the setting of the **Include Registration Code** checkbox. If the checkbox is cleared, the registration code field will still be in the export file, but the field contents will be empty.

Updated Manitou Customer Site Link Stored Procedure

We added a stored procedure that was missing from the customer/system link/unlink changes. The changes were updating only the site. If this stored procedure is called from the SedonaWeb 2.0 API, the Manitou REST integration updates the system with the appropriate alarm company.

Application Corrections

Job Management

Timesheets in jobs are not calculating correctly

We changed the timesheet calculation so that timesheets that are not whole or half are now calculated correctly.

General Ledger

ADI integration populates the AP_Invoice.Posting_Date with time

When users create bills using the ADI integration, we populate the AP Invoice Posting Date with the current date instead of the current time.

Accounts Receivable

Master billing not exporting properly to SEBIS: only summary page displays records

To fix this, we changed the SQL query to retrieve master detail information that had the registration code in the wrong place.

Customer/Client Management

Cannot use invoice template CM46 for master accounts after upgrade to 6.2.0.12.12

To resolve this issue, we removed the Registration_Code from the sub query and put it in the main query.

Setup

CS integration issues: linking SedonaOffice is not finding the accounts

In this release, there are many changes related to the SedonaOffice and central stations integration. If you are using this integration, please review the release notes before updating. It is very important to review your data in the CS_Alarm_Company table and verify that it is correct before updating. In addition, these changes require SedonaWeb/SedonaAPI 2.0 version 1.46.0.

SedonaOffice business rules require that only one alarm company be assigned to any given real integration. If the same real integration is assigned to more than one alarm company, there will be errors. If an Integration Id other than the values listed below is assigned to an alarm company, there will be

errors. All Integration_Id values (except 1 or NULL) must be used only once and assigned their fixed meanings.

When examining the CS_Alarm_Company table, if any of the following conditions exist, **PLEASE CONTACT SUPPORT PRIOR TO MAKING ANY CHANGES**! Manual data adjustments will be necessary before upgrading:

- If Alarm_Company_Id 1 does not have Integration_Id NULL or 1.
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- If any alarm company is assigned an Integration_Id other than NULL, 1, 2, 4, 5, 6, 7, 8.

The Integration_Id has fixed meanings:

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- 2 = Manitou (original integration via Manitou's serverinterface.ocx)
- 4 = CMS
- 5 = Stages UCC*
- 6 = Stages AvantGuard*
- 7 = Stages Rapid Response*
- 8 = Manitou (REST API)

*All Stages integrations function the same in SedonaOffice.

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5	Unreal	Not an actual CS Integration	N	NULL
6	Unreal 2	Another unreal integration	N	NULL
7	SGS AG	Stages AvantGuard	N	6
8	CMS	CMS	N	4
9	StagesRapid	Stages Rapid Response	N	7
10	Unreal 3	Unreal integration 3	N	NULL
11	InactiveAlarmComp	Inactive Alarm Company	Y	NULL

Real integrations will attempt to interact with the specified Alarm application. Non-real integrations are for reference only and will have no interactions with external applications.

It is vital that the alarm companies have the correct integration Ids assigned to them, so SedonaOffice functions as expected. Alarm_Company_Id 1 must always have Integration_Id NULL or 1!

If the alarm company setup is incorrect, it is possible the Alarm_Company_Id in AR_Customer_System records may not be what it should. This may cause integration functionality to not work as expected after

upgrading to this version of SedonaOffice. The Alarm_Company_Id(s) may need to be manually corrected on a case-by-case basis. This updated version of SedonaOffice will be much more reliable regarding all the integrations, but only if the data is as expected.

In a previous release, when the Stages integration was enhanced, we attempted to enforce the proper use of the integration setup and data fields so that SedonaOffice would have a consistent flow of integration functionality. This would give users expected, consistent behavior, and provide specific information when integration data was not as expected so it could be corrected. However, when released, we discovered that integration data was inconsistent, which generated unwanted warnings and errors. We made changes to resolve many of these problems, which were primarily due to no distinction between real and non-real integrations. There had been some functionality removed because it did not fit in the rules for tighter true integration; in particular, the ability to link only a site to a Manitou customer with no validation that the link was correct or that the Manitou customer would know that it was linked to a SedonaOffice site; however, this functionality has been added back in.

These changes are meant to loosen the rules as much as possible while maintaining data integrity. This means that users must ensure the linking is as desired because there will be less validation and fewer warnings regarding integration information. Ultimately, SedonaOffice will give as few warnings and errors as possible.

The resulting functionality is explained below. Not all of this functionality is new; the intention is to provide an explanation of the complete integration functionality.

These are general changes and changes related to the central station integration:

General changes

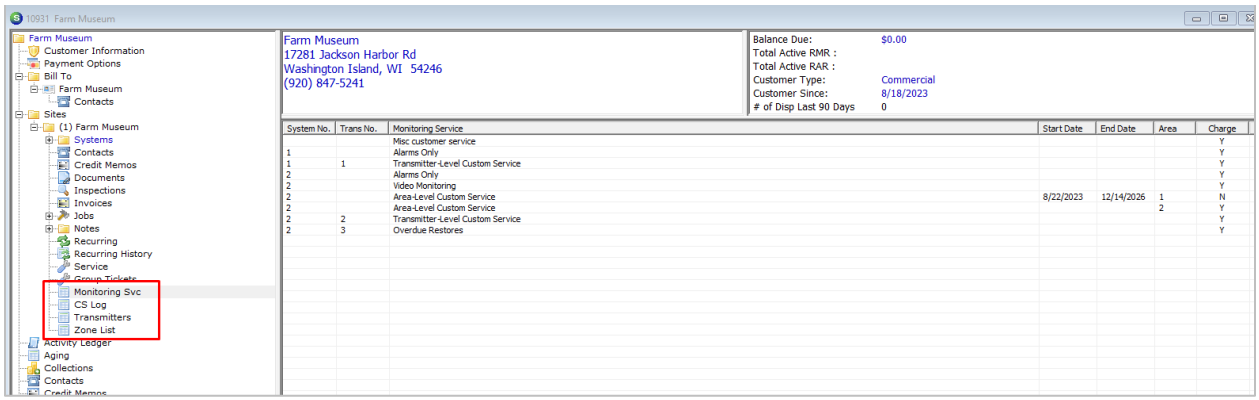
1. The **Save** button on the customer wizard form is disabled until certain criteria is met. We added tool tip text when hovering over the disabled Save button that shows the reason it is disabled.
2. Attempting to delete the last site of a customer will now display a message immediately that the last site cannot be deleted, rather than first attempting to delete the site.
3. We corrected an issue where the AR_Dealer.Dealer_Code was not getting updated properly when changing the customer number of a master account, so this now sets the dealer code to the new customer number.

All integrations

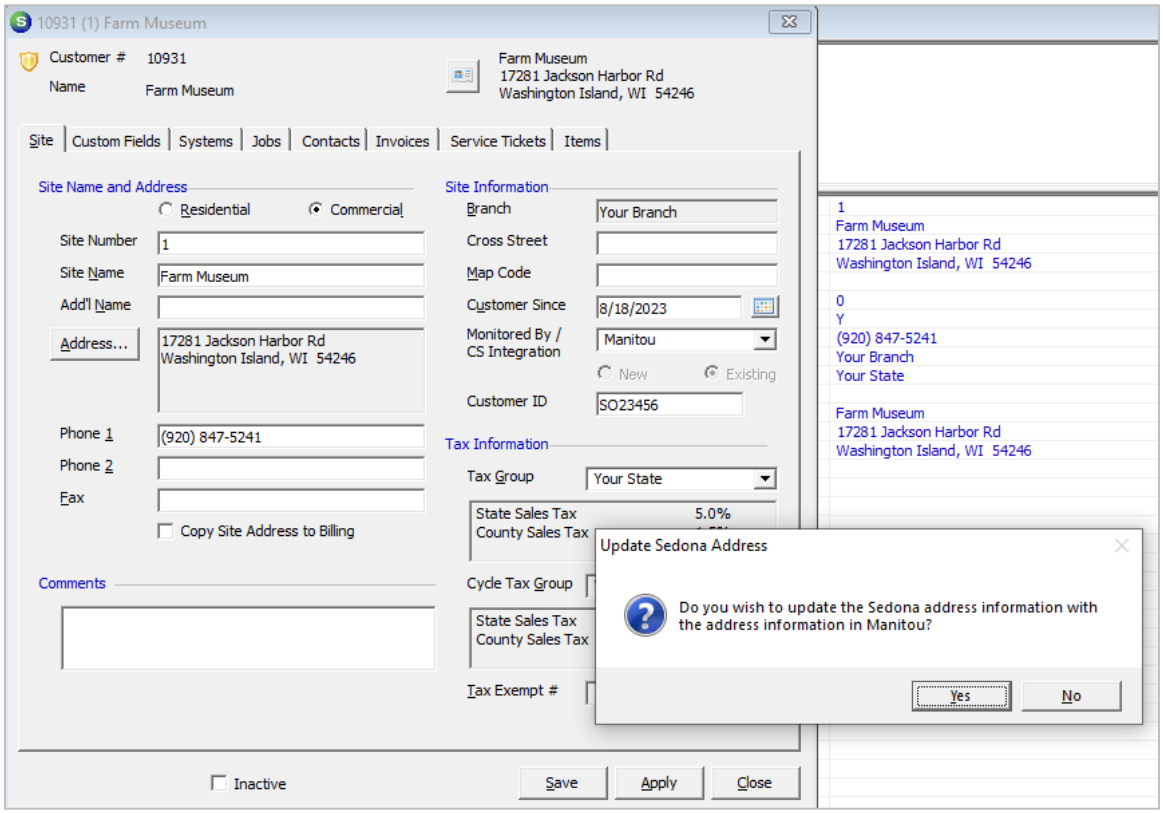
4. We improved the handling of country values in addresses from CS data.
5. We corrected problems when creating a new system from the site form (System tab list), for all integrations.

All Manitou integrations

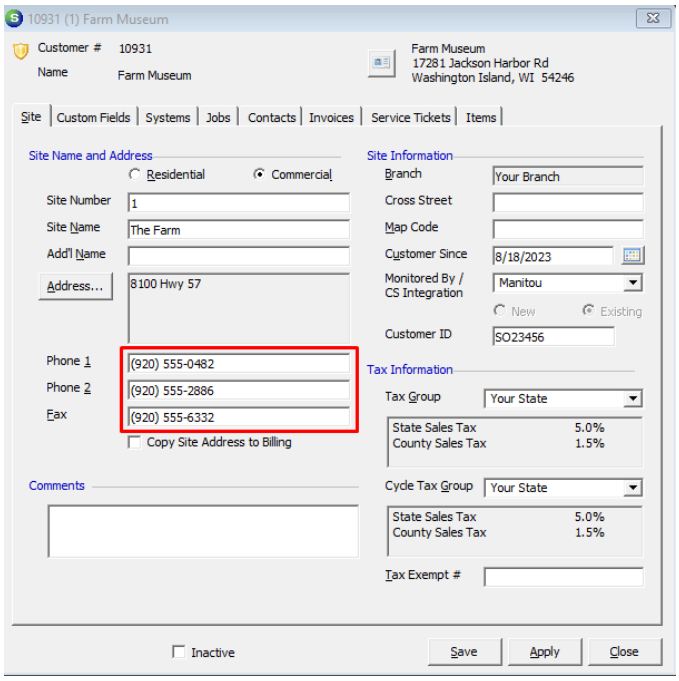
6. We made these changes to all four Manitou menu items:
   - The functions displaying this information were looking for the wrong field names for system and transmitter columns, so they were being excluded from the grids.
   - Adjusted column sizes to better display the data.



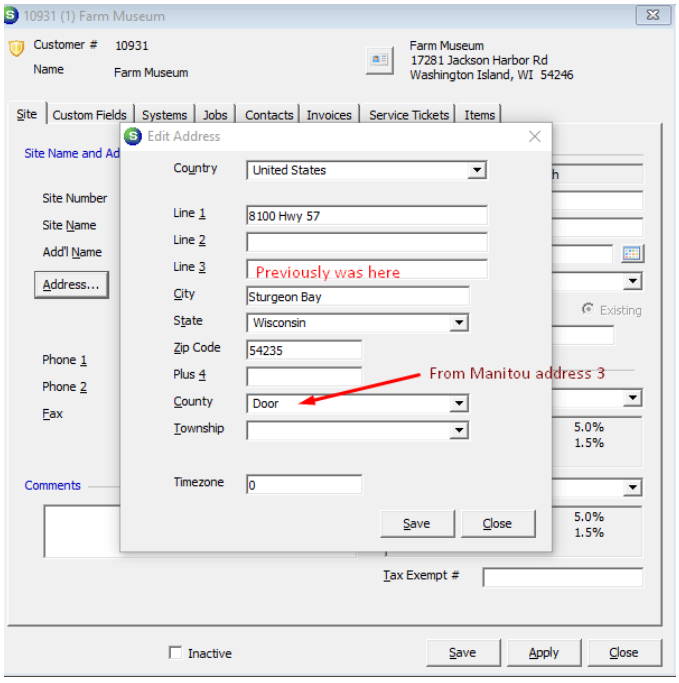
7. When first linking a Manitou customer, users will be asked if the Sedona address information should be updated from Manitou:



- This process has always pulled name, address, and phone information from Manitou. However, a bug kept the phone numbers from being pulled. This has been corrected:



- The address 3 line from Manitou is used to hold the county. This is now pulled into County (GEO 4) in SedonaOffice:



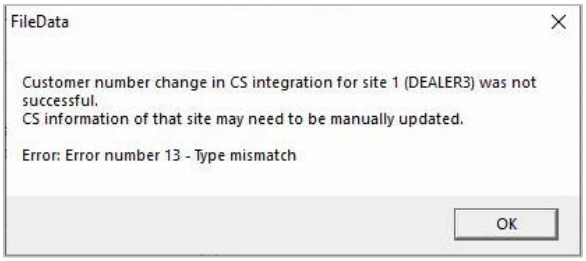
8. We corrected several problems for sites linked to a Manitou dealer. (Note that linking to a dealer cannot be accomplished in SedonaOffice; it must be done in Manitou.)
    - Viewing a site attempted to retrieve the customer's on-test status from Manitou: this does not apply to a dealer and is no longer done.
    - The Manitou nodes in the customer tree are no longer being displayed.
    - The CS Integration and CS link on the site form have been changed to read-only.
    - The system of a site linked to a dealer assigned to a Manitou integration company can now only be assigned to the same integration as the site or to a non-real integration.
    - We removed the **Manitou Info** button that was visible on the site form.
    - Changing the customer number on a site's customer did not update the Manitou dealer's A/R account number:
        - Manitou OCX (on-premises): The serverinterface.ocx does not have a function available to SedonaOffice to update dealer information, so we added an error message stating that the Manitou dealer cannot be updated by SedonaOffice.
        - Manitou REST: We added functionality to the CentralStations.NEO.dll to update the dealer's A/R account number. This will check both the dealer's regular and third-party A/R account numbers to determine which account number is linked to the site whose customer's customer number was changed and change that account number appropriately.
    - We corrected the CS_Site_Link stored procedure to not require a system when linking a dealer to a site. If there are any systems, Manitou REST will not set the alarm company on any of them.
    - We changed the CS_Site_Unlink stored procedure to not check or modify the systems' links when unlinking a dealer from a site.
    - The customer tree, site, and system forms were changed to recognize a dealer link solely by the leading "D" in the site's external serial number with the remainder of serial number being numeric. Related to Manitou REST integrations, the forms no longer expect a system to have the Manitou REST alarm company when the site is linked to a dealer.

Manitou on-premises/OCX integration

9. We made a correction to the customer form so that when the customer number is changed, the CS (central station) integrator updates the customer number if it is stored in the alarm database.

    We added the functionality to update Manitou for integration Id 2 (Manitou OCX used for on-premises). SedonaOffice now updates the customer number directly via the on-premises integration function.

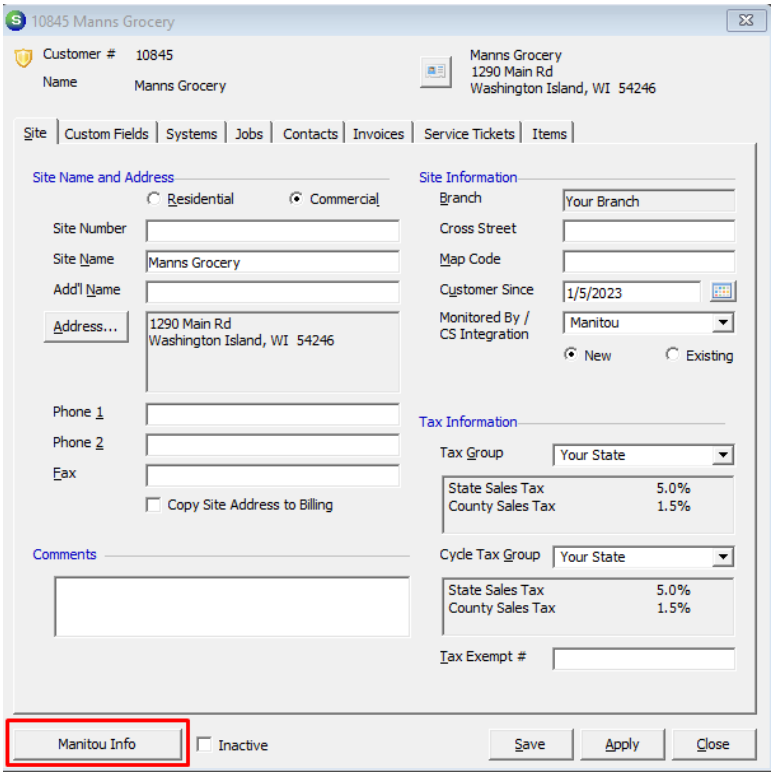
10. We fixed the query that was changing the default value of CS_TP_Setup.AutoSync, so that the default is 1. The incorrectly changed default was causing the **Copy to CS** checkbox to not be displayed on the customer site form for the Manitou OCX integration when it should have been.
11. When a customer system is linked to a Manitou system via Manitou OCX integration (the link must have been initiated in Manitou), the customer system form will now remove the system link from Manitou when the customer system is deleted in SedonaOffice.
12. Changing the customer number of a site linked to a Manitou dealer was never accommodated to update the dealer's A/R account number. The code was always assuming the site was linked to a Manitou customer and would therefore error with a 'type mismatch' when the site was linked to a dealer:



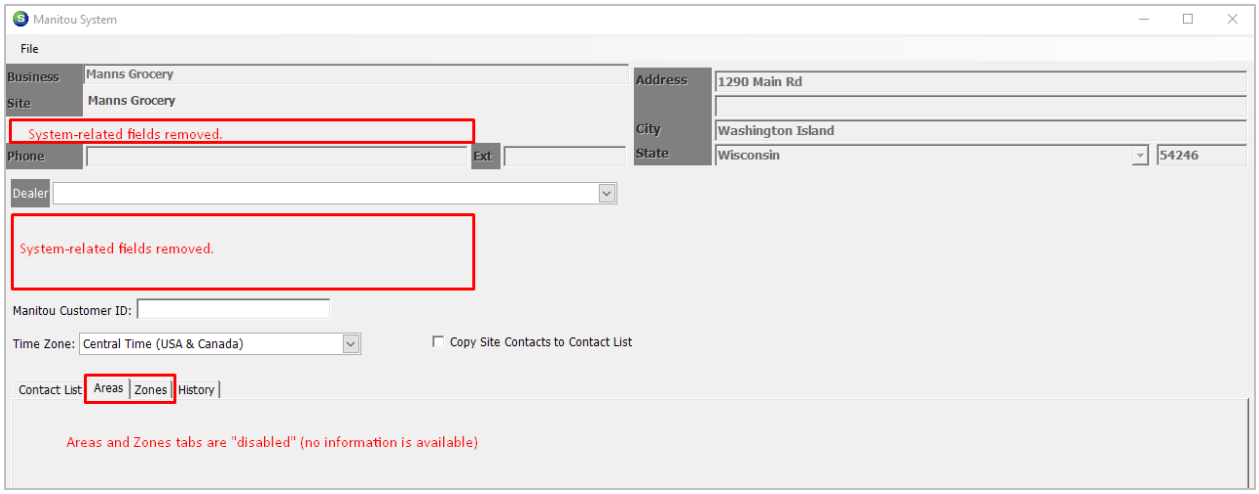
For the Manitou OCX integration, it is not possible to update the dealer information because the serverinterface.ocx functions available to SedonaOffice do not include the capability to modify dealer information. Due to this, we added an error message stating "A Manitou dealer's A/R number cannot be modified by SedonaOffice" for this scenario. This replaces the text following "Error:" in the previous screenshot showing the error.

Manitou REST (cloud) integration

13. The Manitou info form (for the Manitou REST integration) is now accessible on the SedonaOffice site form:



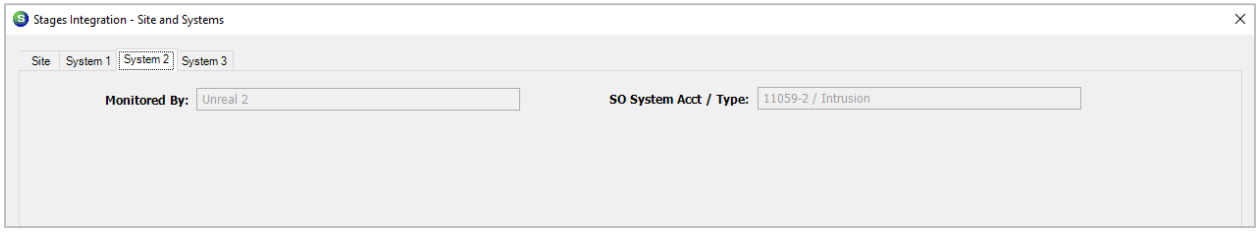
This allows a Manitou customer to be created from the SedonaOffice site without creating/linking a system. This also allows the Manitou information to be viewed for an existing site link. The system-related fields on the Manitou form are removed or disabled:



For Manitou REST, we added the functionality to update the dealer's A/R account.

Stages integration

14. We made a correction for the Stages integration where the Site and Systems form did not recognize SedonaOffice systems that had a non-real integration assigned. If a SedonaOffice system has a non-real integration, it is shown on that system's tab and that system's integration cannot be changed from this form.



15. We made a change for the Stages integration related to linking a SedonaOffice site to an existing Stages site. The integration will now link the first available SedonaOffice system to the Stages device (instead of the first SedonaOffice system, which might have already been linked).
16. We made a correction for the customer wizard also related to the Stages integration, which was not finding expected site address values when setting the SedonaOffice site address from the Stages site address. This improves finding existing entries based on the supplied Description and Short values.

CS_Site_Link stored procedure not accommodating master account linking

We made the following changes to the CS_Site_Link stored procedure:

- Sites can no longer be linked to a non-real integration.
- This accommodates linking a master account to all site-controlled real integrations (this excludes the CMS integration). Previously, only Manitou could have successfully established the link. The stored procedure had not been accommodating the fact that master accounts can have no systems, and an available system was expected to exist. Because master accounts can have no systems, CMS, which links at the system level, cannot do master linking.
- When linking a sub-account, it is now validated that the supplied integration matches the integration of the master's other sub-account(s), if any exist and are already linked.
- In the cases of Manitou and master account linking, it is validated that the site is not already linked to another external entity. Previously, the stored procedure was only checking if a system had a real integration.

We made the following changes to CS_Site_Unlink stored procedure:

- There is an error if non-real integration is supplied. Sites cannot be linked to a non-real integration, therefore attempting to unlink from a non-real integration is invalid.
- There is an error if attempting to unlink a master account while any of its sub-accounts are currently linked. All sub-accounts must be unlinked before the master can be unlinked.

Stored Procedures

Updated Stored Procedures:

- Auto_System_Edit_By_SystemId.sql
- Auto_System.sql
- CS_Site_Link.sql
- CS_Site_Unlink.sql
- CS_System_Link.sql
- CS_System_Unlink.sql

Special Upgrade/Installation Instructions

If upgrading from a SedonaOffice version prior to 6.0, the following related updates are also required:

Legacy SedonaWeb 1.0 — Be aware that if your company uses Legacy SedonaWeb 1.0 (version 2.7.80 or earlier) with SedonaOffice version 6.2.0.8 or earlier, we recommend that you transition to using SedonaWeb 2.0. (Note: Legacy SedonaWeb 1.0 version 2.7.81 is compatible with SedonaOffice 6.2.0.9 or later.)

SedonaWeb/SedonaAPI 2.0 Setup — If your company uses the SedonaWeb/SedonaAPI 2.0 in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), IT will update your SedonaWeb/SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the Sales Automation module.

Performing Update — Once you have reviewed all the above information, and followed all preparation steps, contact SedonaOffice support. We will note on your account that you have received the Release Notes and are ready for update. SedonaOffice IT will then contact you to schedule your update.

To Use TLS 1.2 — Consider the following:

- All computers running SedonaOffice client must be on Windows 10 with the October 20, 2020 build, version 17763.1554 or later; the server must be on Windows Server 2019 or later.
- TLS 1.2 must be the only TLS version enabled in the Registry. TLS 1.0 and TLS 1.1 must be disabled. Verify they are disabled and TLS 1.2 is enabled.
- The SQL Server must be set to force encryption.

Supported Environments

Minimum System Requirements

- Server is on Microsoft .NET 4.6.1
- If used, SedonaWeb/SedonaAPI 2.0 version 1.46.0 (or higher)

Central Station Setup and Integration

In a previous release, when the Stages integration was enhanced, we attempted to enforce the proper use of the integration setup and data fields so that SedonaOffice would have a consistent flow of integration functionality. This would give users expected, consistent behavior, and provide specific information when integration data was not as expected so it could be corrected. However, when released, we discovered that integration data was inconsistent, which generated unwanted warnings and errors. We made changes to resolve many of these problems, which were primarily due to no distinction between real and non-real integrations. There had been some functionality removed because it did not fit in the rules for tighter true integration; in particular, the ability to link only a site to a Manitou customer with no validation that the link was correct or that the Manitou customer would know that it was linked to a SedonaOffice site; however, this functionality has been added back in.

These changes are meant to loosen the rules as much as possible while maintaining data integrity. This means that users must ensure the linking is as desired because there will be less validation and fewer warnings regarding integration information. Ultimately, SedonaOffice will give as few warnings and errors as possible.

The resulting functionality is explained below. Not all of this functionality is new; the intention is to provide an explanation of the complete integration functionality.

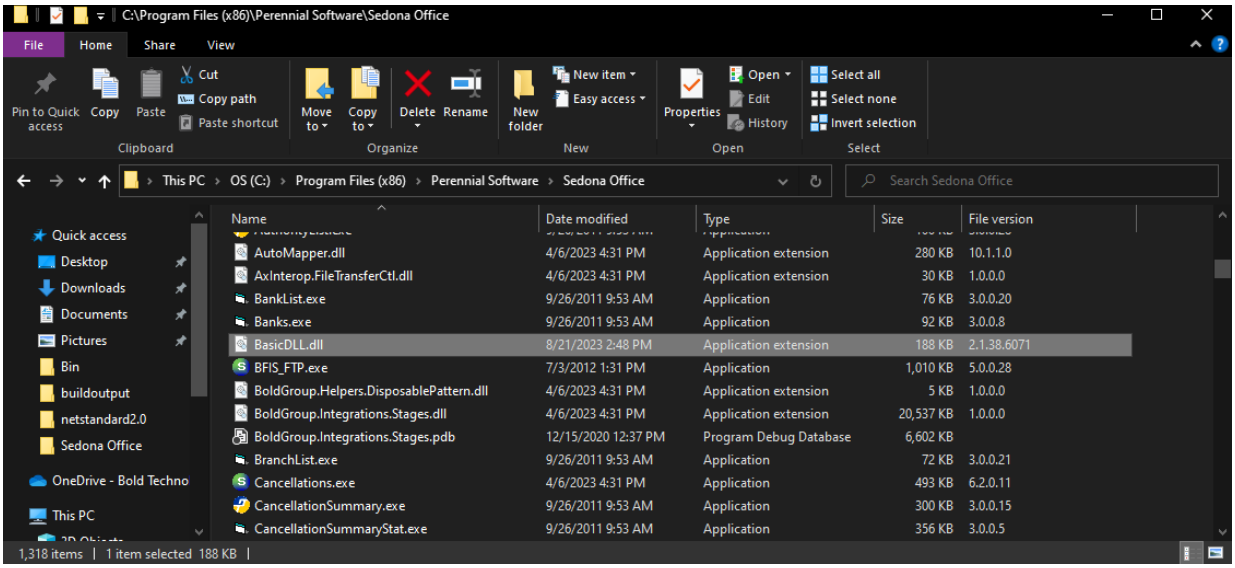
All following integration functionality assumes there is at least one alarm company defined aside from Alarm_Company_Id 1. If there are no other alarm companies defined, the integration fields are never displayed on any forms, so none of this functionality is applicable.

There are references to the **CS Info** button that is located on the bottom left of the site and system forms when applicable. Depending on the integration, the text of the button is typically replaced with the name of the alarm application. For example, Manitou integrations will show “Manitou Info”. This button is generically referred to here as “CS Info”.

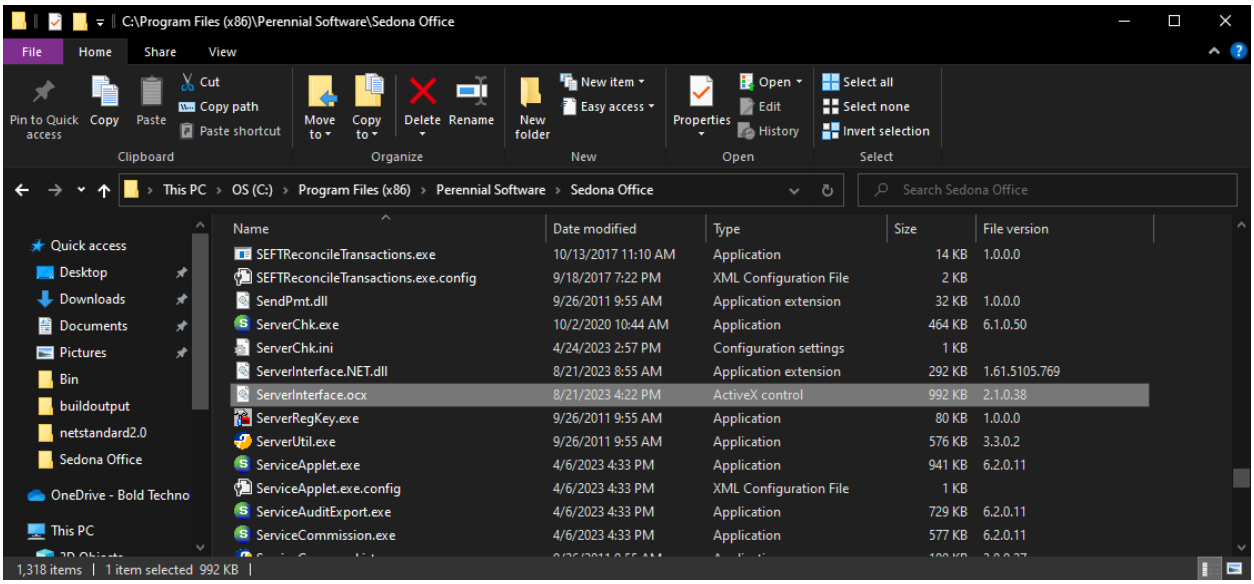
File Locations: Manitou On-premises Integration

For the integration to function, these files must exist in these directories:

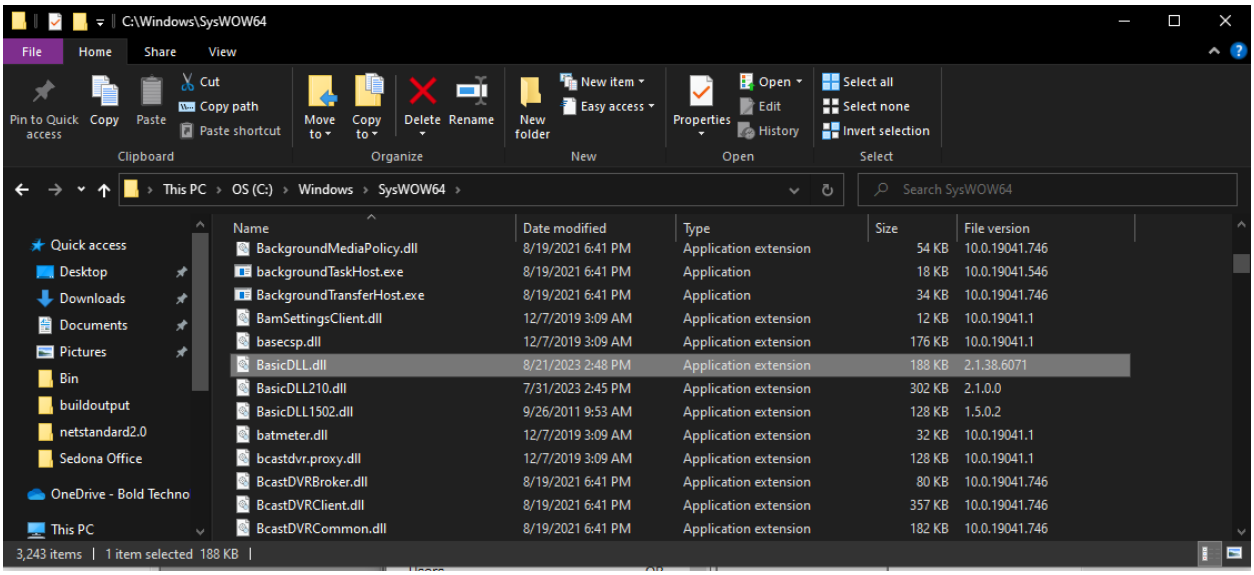
- BasicDLL.dll must be in Sedona Office program folder:



- ServerInterface.ocx must be in Sedona Office program folder:



- The same BasicDLL.dll must also be in Windows\SysWOW64:

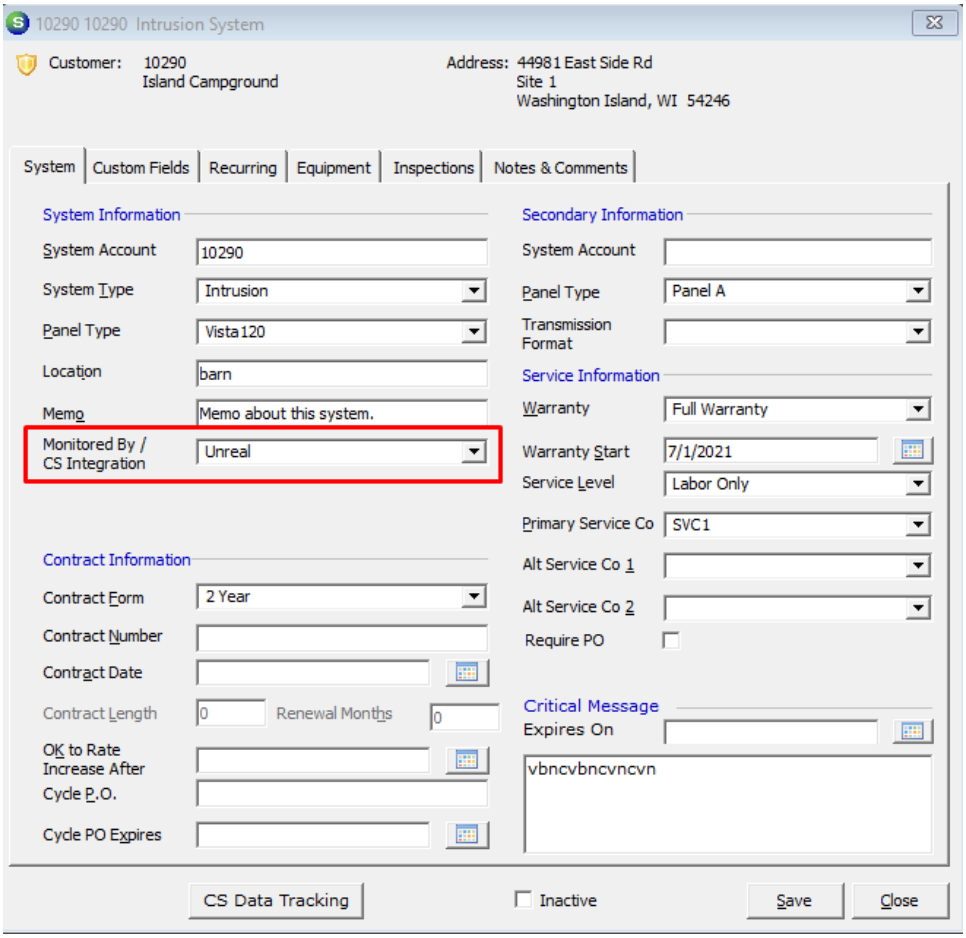


- The DLL and OCX are part of Manitou and must be version 2.1.38 or higher.

The customer system form shows the Manitou OCX company and shows when a system has been linked from Manitou (on-premises). On-premises will also now remove the SedonaOffice system link from a linked Manitou system when a linked SedonaOffice system is deleted.

Alarm Company

The alarm company is specified in the field called **Monitored By/CS Integration**:

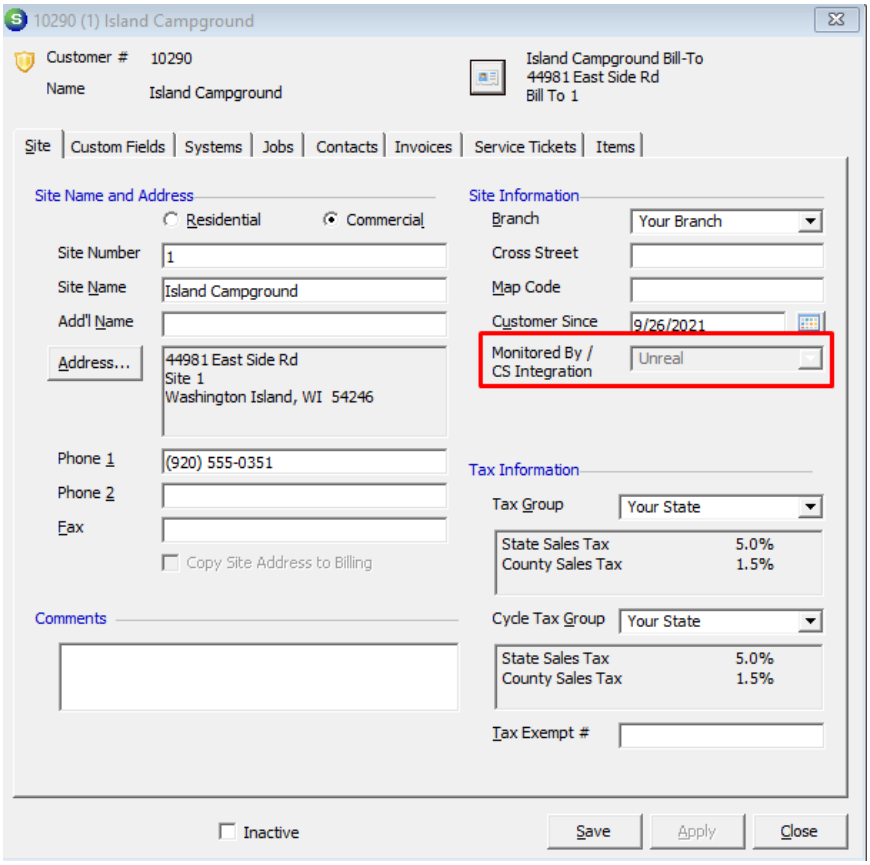


This is stored in the AR_Customer_System record in Alarm_Company_Id.

Customer_System_Id	Customer_Id	Customer_Site_Id	System_Id	Panel_Type_Id	Panel_Location	Memo	Job_Id	Contract_Form_Id	Contract_Number	Warranty_Id	Service_Level_Id	Alarm_Account	Alarm_Company_Id
110	73	83	2	1			1	3		3	2	SO10280	4

This causes difficulties when trying to show (or modify) the alarm company on the site form because there can be multiple systems attached to a site, each with their own alarm company specified. If there is more

than one alarm company assigned to the systems, it creates a problem deciding which one (if any) to show on the site.



Rules are in place to govern how the alarm company is shown on the site, and there are also rules governing how the alarm companies can be specified on the systems. These are discussed later.

Real vs. Non-real Integrations

Alarm companies can define “real” integrations or “non-real” integrations. A real integration is an integration with an actual alarm application. A non-real integration does not have an actual alarm application. This is determined by the value of the Integration_Id column in CS_Alarm_Company:

Alarm_Company_Id	Alarm_Company_Code	Description	Inactive	Integration_Id
1	N/A	N/A	N	1
2	ManitouOCX	Manitou OCX	N	2
3	SGS UCC	Stages UCC	N	5
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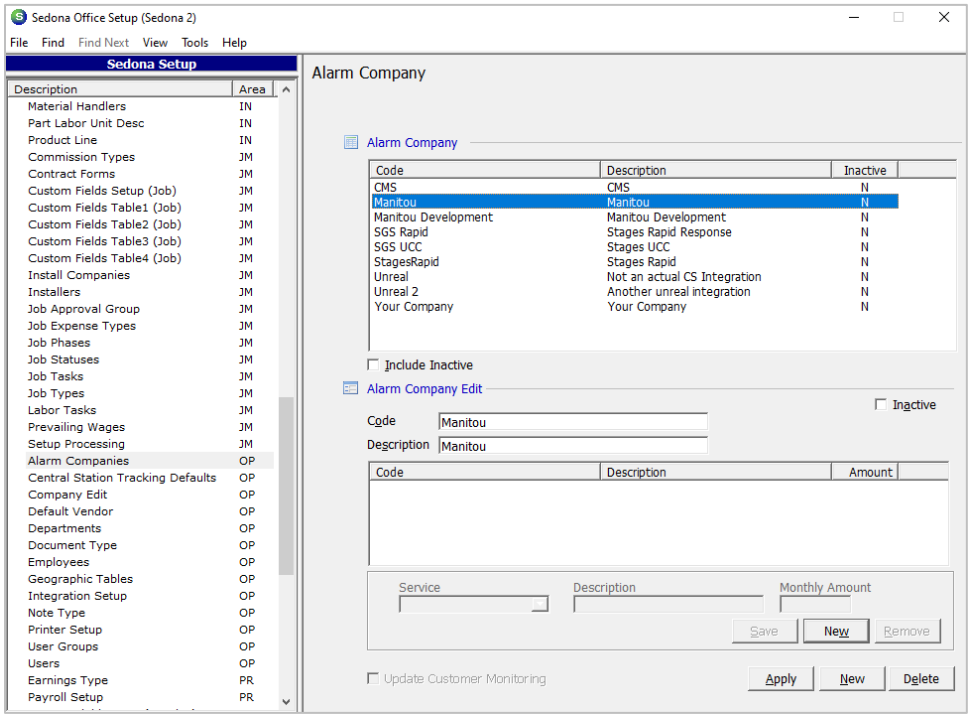
5	Unreal	Not an actual CS Integration	N	NULL
6	Unreal 2	Another unreal integration	N	NULL
7	SGS AG	Stages AvantGuard	N	6
8	CMS	CMS	N	4
9	StagesRapid	Stages Rapid Response	N	7
10	Unreal 3	Unreal integration 3	N	NULL
11	InactiveAlarmComp	Inactive Alarm Company	Y	NULL

This cannot be seen or modified in the SedonaOffice client:



It must be viewed and modified directly in SQL. This can cause problems because any alarm company can be updated to any Integration Id with no validation in place. SedonaOffice business rules require that only one alarm company can be assigned to any given real integration. **If the same real integration is**

assigned to more than one alarm company, there will be errors. If an Integration Id other than the values listed below is assigned to an alarm company, there will be errors.

The Integration_Id has fixed meanings:

- NULL or 1 (either value can be used) = "non-real" integration. (The others listed are "real" integrations.)
- 2 = Manitou (original integration via Manitou's serverinterface.ocx)
- 4 = CMS
- 5 = Stages UCC*
- 6 = Stages AvantGuard*
- 7 = Stages Rapid Response*
- 8 = Manitou (REST API)

*All Stages integrations function the same in SedonaOffice.

Real integrations will attempt to interact with the specified alarm application. Non-real integrations are for reference only and will have no interactions with external applications.

It is vital that the alarm companies have the correct Integration Ids assigned to them so SedonaOffice functions as expected. Alarm_Company_Id 1 must always have Integration_Id NULL or 1.

If integration processes are not functioning as expected the Alarm_Company_Id should be the first place to check and correct.

If the alarm company setup has been incorrect, it is possible the Alarm_Company_Id in AR_Customer_System records is not what it should be. This may cause the integration functionality to not work as expected after a customer updates SedonaOffice (version 6.2.0.16 and also applies to later versions). The Alarm_Company_Id(s) may need to be manually corrected. This updated version of SedonaOffice improves integration, but only if the data is as expected.

For the Manitou REST (Integration Id 8), the Alarm_Company_Code must be "Manitou". If it is not spelled exactly, the SedonaOffice client will not recognize the Manitou REST integration.

Site-controlled vs. System-controlled Integrations

Regarding real integrations, some must be initiated on the customer site form and some must be initiated on the customer system form. In the integration functionality discussion below, these are referred to as site-controlled and system-controlled respectively.

- CMS is system-controlled.
- Manitou on-premises is site-controlled.
    - The SedonaOffice site must point to an existing Manitou customer. There is no lookup of Manitou customers.
    - SedonaOffice does not push new customers.
    - SedonaOffice can optionally update Manitou's name/address information via the **Copy to CS** checkbox on the site form.
    - Manitou *can* point back to the SedonaOffice site, but that has to be accomplished in the Manitou application.
    - The site's systems can only be linked and unlinked from the Manitou application's systems form.
    - Information from Manitou's systems is pulled from the site's menu-tree items 'Transmitters' and 'Zone List'.
- Manitou REST is site-controlled, although linking can be initiated on the system form.
    - If the linking is initiated on the site form, only the site is linked to Manitou.
        - Linking to an existing Manitou customer will update Manitou to point back to the site.
        - A new Manitou customer can be pushed from the site form (via the Manitou Info button/form), but a Manitou system will not be created.
    - If the linking is initiated on the system form, both that system and the site (if not already) are linked to Manitou.
        - Linking to an existing Manitou customer/system will update Manitou to point back to the site and system.
        - A new Manitou customer/system can be pushed from the system form (via the Manitou Info button/form).
- Stages integrations are site-controlled.

Manitou On-premises

The Manitou on-premises integration is the only integration enabled or disabled by the SedonaOffice license, and overrides all other real integrations. If licensed:

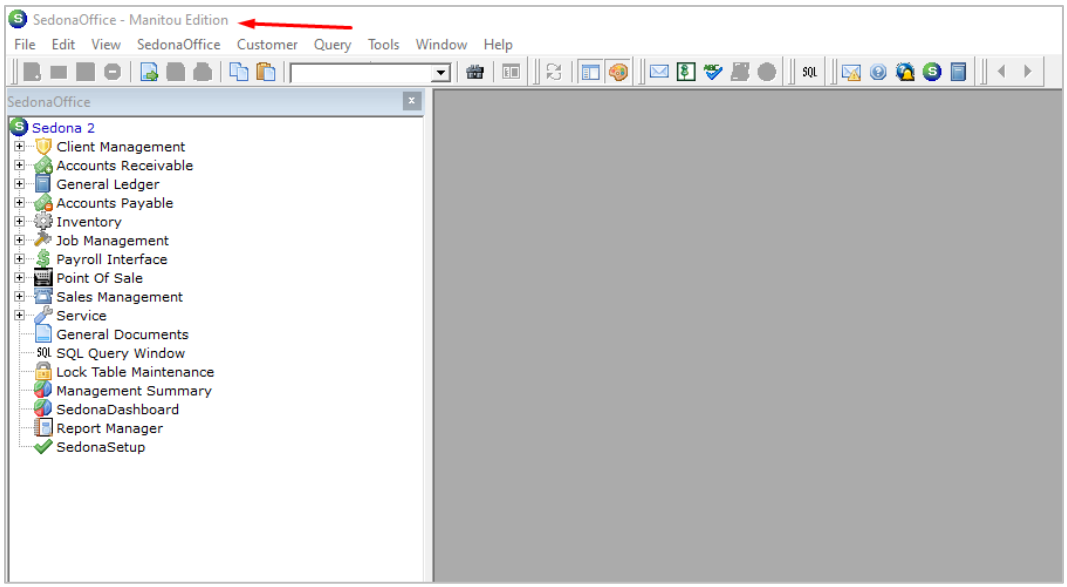
- Only the Manitou OCX alarm company is available in the site form CS Integration drop-down list.
- Linking a site does NOT set the alarm company on a system. When Manitou is licensed, a site's external link is assumed to be for the Manitou on-premises alarm company.
- Only non-real alarm companies are available in the system form CS Integration drop-down list.
- SedonaOffice systems can only be linked to Manitou systems from within Manitou.

- If a SedonaOffice system is linked to a Manitou system, the integration information cannot be changed on the SedonaOffice system form.
- If the site in SedonaOffice is unlinked from Manitou, it will update Manitou to unlink the customer and all the linked systems from SedonaOffice. It will not do Manitou any good (and may cause undesired side-effects) to point to SedonaOffice entities that do not point back.

If not licensed, the Manitou on-premises alarm company (if it exists) is not available in the CS Integration drop-down list.

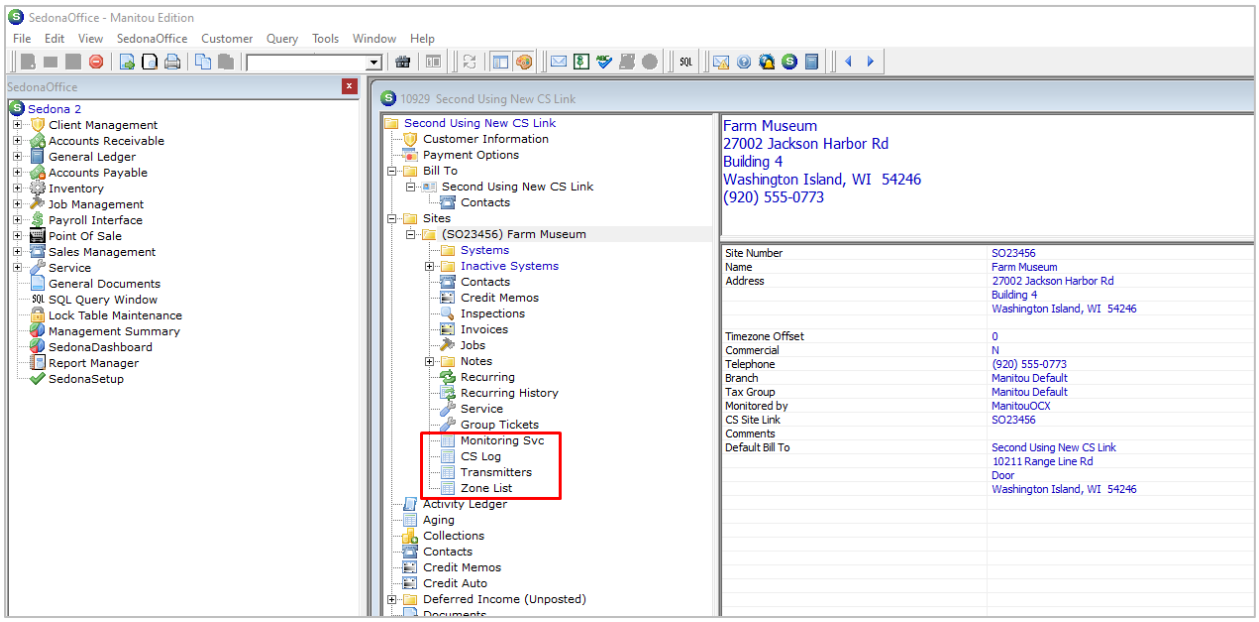
Another consideration when Manitou is licensed is that a particular session of a SedonaOffice client may have integration disabled due to environmental circumstances, such as Manitou's basicdll.dll or serverinterface.ocx not installed properly on the SedonaOffice workstation.

When Manitou is licensed and enabled, the client will have "Manitou Edition" in the title bar:

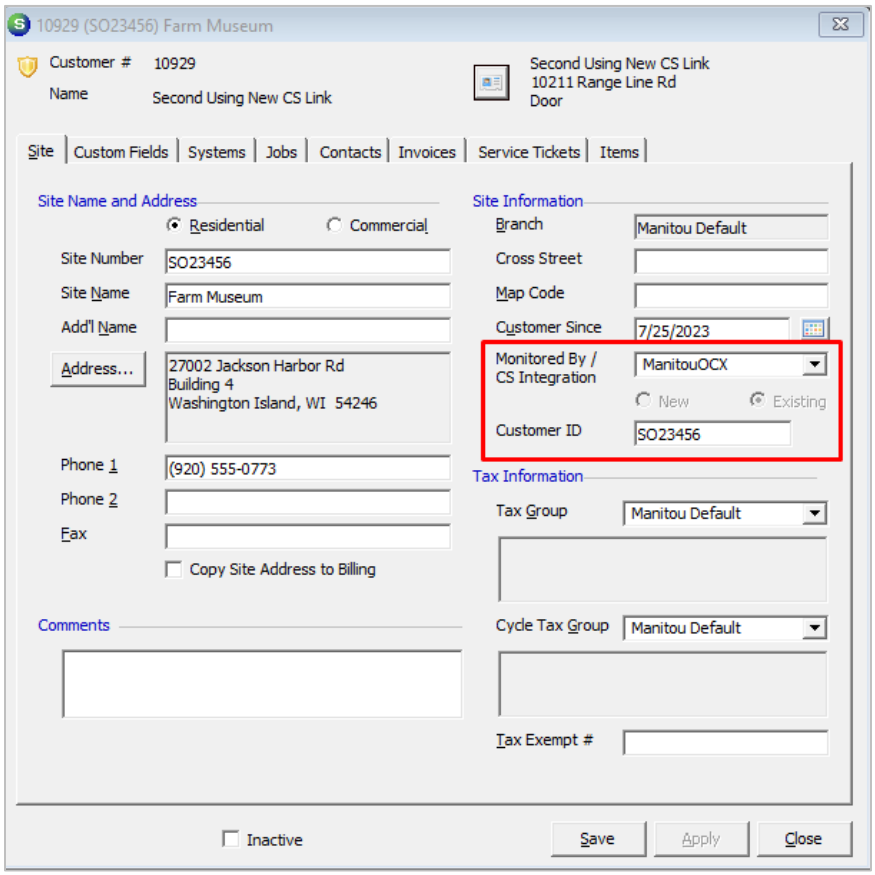


If integration is disabled for the client session, for any reason, "Manitou Edition" will not show in the title bar, even though Manitou is licensed.

When licensed and enabled, the Central Station info menus are shown in the site tree for linked sites:

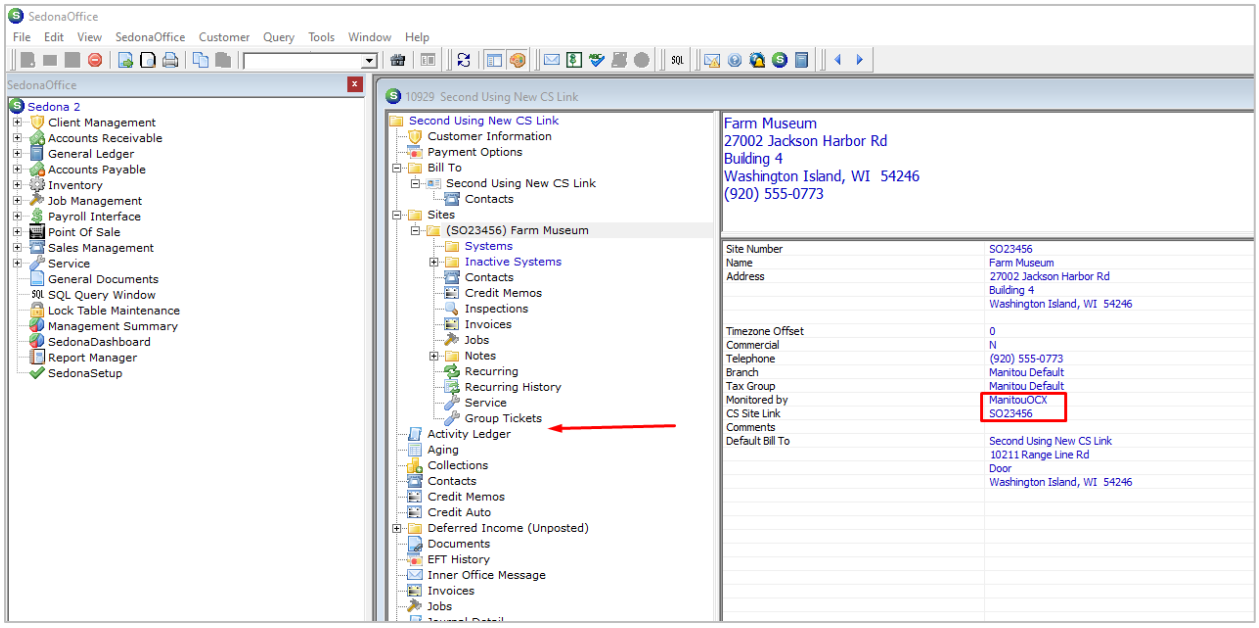


The integration/customer link fields are editable:

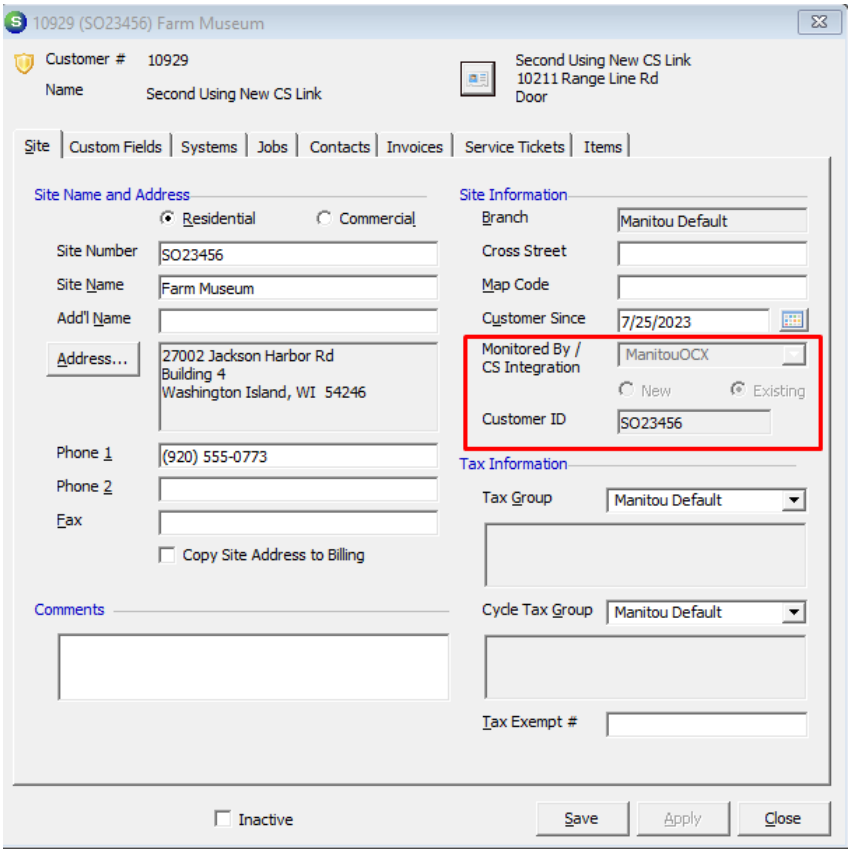


When licensed but disabled, sites that are linked will still show that they are linked in the right-side detail of site information, but the Central Station tree menus will not be there because the client's integration

environment is in a state where it cannot pull the information from Manitou. Also notice that “Manitou Edition” is missing from the title bar:



When editing the site, the integration fields are shown but are not editable:



General Functionality of All Integrations

Customer Sites

When a site is loaded for editing, the systems of that site are checked for integration. If the site does not have any systems, or all systems have a non-real integration, an alarm company cannot be specified so the integration fields are not shown.

The exception to this is if Manitou is licensed. In this case, the systems are not checked. The sole factor in determining if the site is currently linked is the existence of an external link on the site. If there is an external link, it is assumed to be for the Manitou on-premises alarm company — a real integration.

- If a real integration is found, that is the alarm company shown on the site form.
    - If the system with a real integration is linked to an alarm entity:

        - If the site is also linked, it is considered a “full link” where the alarm entity is supposed to know about the link and point back to the SedonaOffice site/system.
            - This should not happen with a CMS integration. Linking is at the system level only.
            - For a Manitou REST or Stages integration, the full link is controlled at the site level — at least one system must maintain that integration (see Customer Systems section).
        - If the site is not also linked:
            - This is normal for a CMS integration. Linking is at the system level only and is considered a “full link” when only the system is linked. Monitored By is read-only on the site form.
            - This should not happen for a Manitou or Stages integration.
    - If the system with a real integration is not linked to an alarm entity:
        - This can only happen for a Manitou REST integration when the site is linked to a Manitou customer but none of the systems are linked together.
    - Other systems may have any non-real integrations specified.
    - If there is more than one real integration is found on the site’s systems, the integration fields are not shown on the site. This is an invalid situation and should never happen under normal circumstances. If it does happen, it should be corrected as soon as possible.
- If no integrations or only non-real integrations are found:
    - Monitored By is shown on the site form and shows <Not integrated>. Applicable alarm companies are available in the drop-down list.

Functionality when Editing Customer Sites

- Site not currently integrated:
    - You can choose a real, site-controlled integration. CMS is not available in this list because it is system-controlled.
        - Link to new:
            - This is not available for a Manitou on-premises integration because it must point to an existing customer.
            - For Manitou REST integration, the Manitou Info button/form is used to enter the alarm information and push the new customer into Manitou. Only the SedonaOffice site is linked to the Manitou customer. To include a system, the SedonaOffice system form must be used to initiate the link.

        - For Stages integrations, alarm information for a site and system must be entered before changes can be saved. This includes specifying which SedonaOffice system is linked to alarm. (Stages Info button/form)
    - Link to existing:
        - For Manitou on-premises integration:
            - The desired Manitou customer Id is entered into the CS Link field (there is no lookup).
            - The Manitou customer must exist and must not be linked to another accounting entity.
            - Upon successful validation of the Manitou customer, a message box is shown asking if the Sedona address information should be updated from Manitou's address information. This includes phone numbers as well.
            - Manitou is NOT updated to point back to the SedonaOffice site. Manitou *can* point back to the SedonaOffice site, but that has to be accomplished in the Manitou application.
        - For Manitou REST integration:
            - The desired Manitou customer Id is entered into the CS Link field (there is no lookup).
            - The Manitou customer must exist and must not be linked to another accounting entity.
            - Upon successful validation of the Manitou customer, a message box is shown asking if the Sedona address information should be updated from Manitou's address information. This includes phone numbers as well.
            - Upon save, the alarm company is written to the first system of the site (lowest Customer_System_Id).
            - The Manitou customer is updated to point back to the SedonaOffice site.
        - For Stages integrations, you must choose which alarm account to link to the site and choose which SedonaOffice system is linked to alarm.
    - Non-real integrations are not available at the site level.
- Site currently integrated with a real, site-controlled integration. This means Manitou is licensed and the site has an external link, or at least one system has been found with that integration and that is the only real integration found on the systems.

    - The **Monitored By** field is editable. Changing the alarm company will update all systems with that company. An existing integration must be changed to 'not monitored' (and saved) before being changed to a different alarm company.
    - For Manitou on-premises integration:
        - The CS Link is editable.
    - For Manitou REST integration:
        - The CS Link is read-only. This can be removed only by changing the site to 'not monitored' or unlinking the Manitou customer in the Manitou application.
    - For all other integrations:
        - The CS Link is read-only and must be changed via the CS Info form when applicable.
- Site currently integrated with a real, system-controlled integration. This means at least one system has been found with that integration and that is the only real integration found on the systems. This is always a "full link" scenario.
    - For CMS integration (currently the only possibility):
        - The Monitored By field is read-only and shows the CMS alarm company, indicating at least one of the site's systems is integrated with CMS.
        - The CS Link is not shown as it is system-based.
- Integration fields are not shown on the site form when the site has no systems; all the site's systems have non-real integrations; or the site's systems have more than one real integration (invalid situation).

Customer Systems

When a system is loaded for editing, the other systems of that site are checked for integration.

- If a real integration is found, that is the only real integration to which the system can be linked.
- Any non-real integration can always be selected.

When Manitou is licensed, only a non-real integration can be selected on a system and the system CS Link is for informational purposes only — there is no validation or other functionality attached. However, if the site is linked to Manitou, in the Manitou application a Manitou system can be linked to a SedonaOffice system. In this scenario, the SedonaOffice system form will show the integration information read-only — it can only be changed in Manitou.

Functionality when Editing Customer Systems

- System is not currently integrated:
    - If any of the site's other systems have a real integration:
        - That is the only real integration that can be selected.
        - Linking to new or existing affects no other systems or the site.
    - If a real integration is selected:
        - The CS Info form is used to create a new alarm system entity and link.
        - The CS Link field is used to link the SedonaOffice system to an existing alarm system entity.
    - Any non-real integration can be selected.
        - The CS Link may be entered but is not required. This is for reference only; there is no attached functionality.
- System is currently integrated with a real, site-controlled integration:
    - Manitou REST:
        - The **CS Link** can be modified as desired.
        - If there is a valid CS Link, clicking the **Manitou Info** button saves any changes and then displays the Manitou form for the linked system.
    - All other integrations:
        - The **CS Link** is read-only and must be changed via the CS Info form when applicable.
    - If at least one other system has this integration:
        - The alarm company can be changed to 'not monitored'. This removes this system's link with alarm, updating alarm to not point back at this system.
    - If this is the last system with this integration:
        - The **Monitored By** field is read-only — changes must be made on the site.
- System is currently integrated with a real, system-controlled integration (CMS):
    - The **CS Link** is read-only.
    - The alarm company can be changed to 'not monitored'.
        - The system will be unlinked from the alarm company.
- System is currently integrated with a non-real integration:
    - The alarm company can be changed to any other non-real integration or 'not monitored'.
    - The CS Link is editable. This is for reference only. There is no attached functionality.