



**SedonaOffice
Customer Group
Security**

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About This Document

This document provides information on the Customer Group Security feature. The information contained herein is an excerpt from the SedonaOffice Online Help.

Customer Group Security Overview

Customer Group Security is used to group your Customers together so that you are able to apply security within that particular group. For example, if you have different branch offices, you may limit employees to which customer records they may access. This additional level of security is activated under the *User* setup table found in SedonaSetup in conjunction with a setting under *Setup Processing for Accounts Receivable* within SedonaSetup. A User may be assigned to one or multiple Customer Groups. **If your company activates this security functionality, every customer must be assigned to a Customer Group.** The Customer Group field is assigned to the Customer on the Customer Setup Information form.

Additionally, you may assign a User to all Customer Groups but have the ability to make certain Customer Groups read only. This would allow the User to open a customer record but would not be able to make any changes.

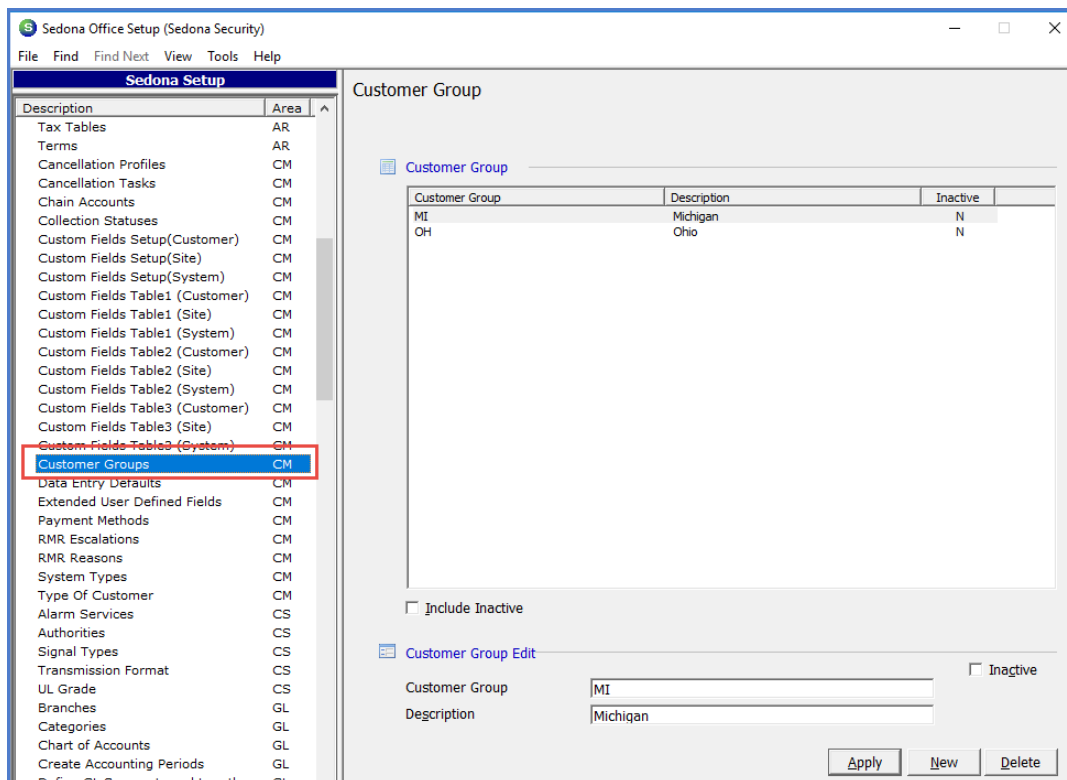
Setup

To be able to use the Customer Group Security feature, three setups need to be addressed first.

Customer Group Setup Table

You must first create the Customer Groups in SedonaSetup. A Customer Group name could be the same as a Branch name or any other nomenclature you would like to use. You may have as many Customer Groups as needed.

Note: Once you begin using Customer Group Security, if you decide to add additional Customer Groups, make certain to go to each User in the User Setup table and link the User to the new Customer Groups where applicable.



Setup Processing for AR

This setup form is where the activation of the use of Customer Groups is set. Once you check the “Activate Customer Group Security by User” checkbox, you will need to select the default Customer Group from the drop-down list. When a User creates a new customer, this default Customer Group will auto-fill into the Customer Group field on the customer setup form.



Note: If your company is actively using SedonaOffice and you decide you want to use this feature, prior to activating Customer Group Security, each Customer record must be linked to a valid Customer Group. The SedonaOffice support team can assist in doing this electronically. This is a billable service.

Sedona Office Setup (Sedona Security)

File Find Find Next View Tools Help

Description	Area
Vendors	AP
Aging Buckets	AR
Alternate Company Addresses	AR
Banks	AR
Check 21 Setup	AR
Credit Reason	AR
EFT Credit Card Types	AR
EFT Setup	AR
GL Account Defaults	AR
Invoice Descriptions	AR
Invoice Items	AR
Item Types	AR
Late Fee Rules	AR
Setup Processing	AR
Statement Rules	AR
Tax Groups	AR
Tax Tables	AR
Terms	AR
Cancellation Profiles	CM
Cancellation Tasks	CM
Chain Accounts	CM
Collection Statuses	CM
Custom Fields Setup(Customer)	CM
Custom Fields Setup(Site)	CM
Custom Fields Setup(System)	CM
Custom Fields Table1 (Customer)	CM
Custom Fields Table1 (Site)	CM
Custom Fields Table1 (System)	CM
Custom Fields Table2 (Customer)	CM
Custom Fields Table2 (Site)	CM
Custom Fields Table2 (System)	CM
Custom Fields Table3 (Customer)	CM
Custom Fields Table3 (Site)	CM
Custom Fields Table3 (System)	CM
Customer Groups	CM
Data Entry Defaults	CM

Setup Processing

Numbering

Auto Invoice Auto Job Number
Next Invoice 1014546 Next Job Number 1621

Auto Customer Require System Account
Next Customer 41385 Require Unique System Account Company Wide

Invoicing and Credits

Cycle Beginning Day
 First Day of Month Day of Service Start

Print Customer Number on Invoices and Statements
 Allow Printed Invoices to be Edited
 Enter Separate Posting Date for Invoices and Credits
 Allow direct invoicing to Master Account
 Use Credit Request Processing
 Require Credit Reason on Credit Memos

Other

GL Categories required for Income and Expenses Group Deferred Revenue By GL Account Item Type

Activate Customer Group Security by User
Customer Group MI

Enable Activity Tracking Require Tape Totals to Match Deposit Amount in order to Make Deposit

Screen Employees by Type

Allow Site Only RMR

Allow Quantity Based RMR

Apply

User Setup

Once you have activated Customer Group Security on the Setup Processing for AR form, a new tab (Customer Groups) will be displayed on the User setup form. For each User, you will need to check the box to the left of each Customer Group to which the User will have access.

Once all Customer Groups are selected for the User, click the Apply button to save. Repeat the process for all Users that will need to have access to Customer information.

Note: Once you begin using Customer Group Security, if you decide to add additional Customer Groups, make certain to go to each User in the User Setup table and link the User to the new Customer Groups where applicable.

The screenshot shows the 'Users' management interface. At the top, there is a 'Users List' table with columns for User Code, Name, Description, and Inactive status. Below this is a 'User Edit' section with various input fields for user details. At the bottom, there is a 'Customer Groups' table with columns for Customer Group, Description, and Read Only status. The 'Customer Groups' table has a red box around the selection checkboxes, and several groups are checked.

User Code	Name	Description	Inact...
Administrator	Master, Sedona A	MasterUser	N
carolyn	Johnson, Carolyn	Admin	N
Danielle	Davis, Danielle		N
Joe	Dispatcher, Joe		N
Kemp	Knapman, Kemp		N
Nadine	Nolan, Nadine		N
sam	Spade, Sam		N
sarah	Ashley, Sarah		N
victoria	Rose, Victoria		N

Include Inactive

User Edit

Locked Inactive

Create Other Users

User Code: carolyn
Password:
Confirm Password:
Description: Admin
Last Login: 1/17/2020 11:18:23 AM
First: Carolyn
Middle Initial:
Last: Johnson
E-Mail:

User Groups: **Customer Groups**

Customer Group	Description	Read Only
<input checked="" type="checkbox"/> CA	California	N
<input checked="" type="checkbox"/> CN	Canada	N
<input checked="" type="checkbox"/> GA	Georgia	N
<input checked="" type="checkbox"/> IL	Illinois	N
<input checked="" type="checkbox"/> IN	Indiana	N
<input checked="" type="checkbox"/> KS	Kansas	N
<input checked="" type="checkbox"/> MA	Massachusetts	N
<input checked="" type="checkbox"/> MD	Maryland	N

Print Apply New Delete

If there is a Customer Group that you want to make read only for the User, check the box to the left of the Customer Group, then right-click and select the Read-Only option.



Functionality

When creating new Customers, the Customer Group field is required. You will not be able to save a new customer without selecting a Customer Group from the drop-down list.

The Customer Group 2 field is no longer used in the software.

The screenshot shows a software window titled "Customer Setup 50255". At the top, there are fields for "Customer #", "Customer Name", and "Additional Name". The "Customer # 50255" field is highlighted with a shield icon. To the right, the customer's name and address are displayed: "Schiff, Emily", "1025 Kenrich Ct", and "Hollywood, FL 33021". Below these fields are several tabs: "Setup Information", "Custom Fields", "Bill To", "Master Account Setup", and "Items". The "Setup Information" tab is active, showing a grid of fields. The "Customer Group" field is highlighted with a red box and contains the value "MI". Other fields include "Customer Status" (AR), "Customer Type" (Residential), "Old Customer ID", "Terms" (DOR), "Tax Exempt #", "EIN", "OK to Increase" (12/31/2021), "Salesperson" (Laurie.Salinger), "Blanket P.O.", "P.O. Expire Date", "Customer Since" (9/6/2019), "Chain Account", "Branch" (CSS), "No Collections" (checkbox), and "Part Pricing Level" (None). Below the main grid are sections for "Master Account Information" (with "Is Master Account" checkbox and "Master Acct" dropdown) and "Invoice Printing" (with checkboxes for "Print Cycle Invoices", "Print Statements", "Print Site Info on Invoices", "Separate Cycle Invoice for Each Site", and "Charge Late Fees"). At the bottom, there is a "Critical Message" section with an "Expires On" date field.