

How to Install Sales Automation and eForms

Call out: Users must be on SedonaOffice 6.1 or 5.7 with the appropriate patch

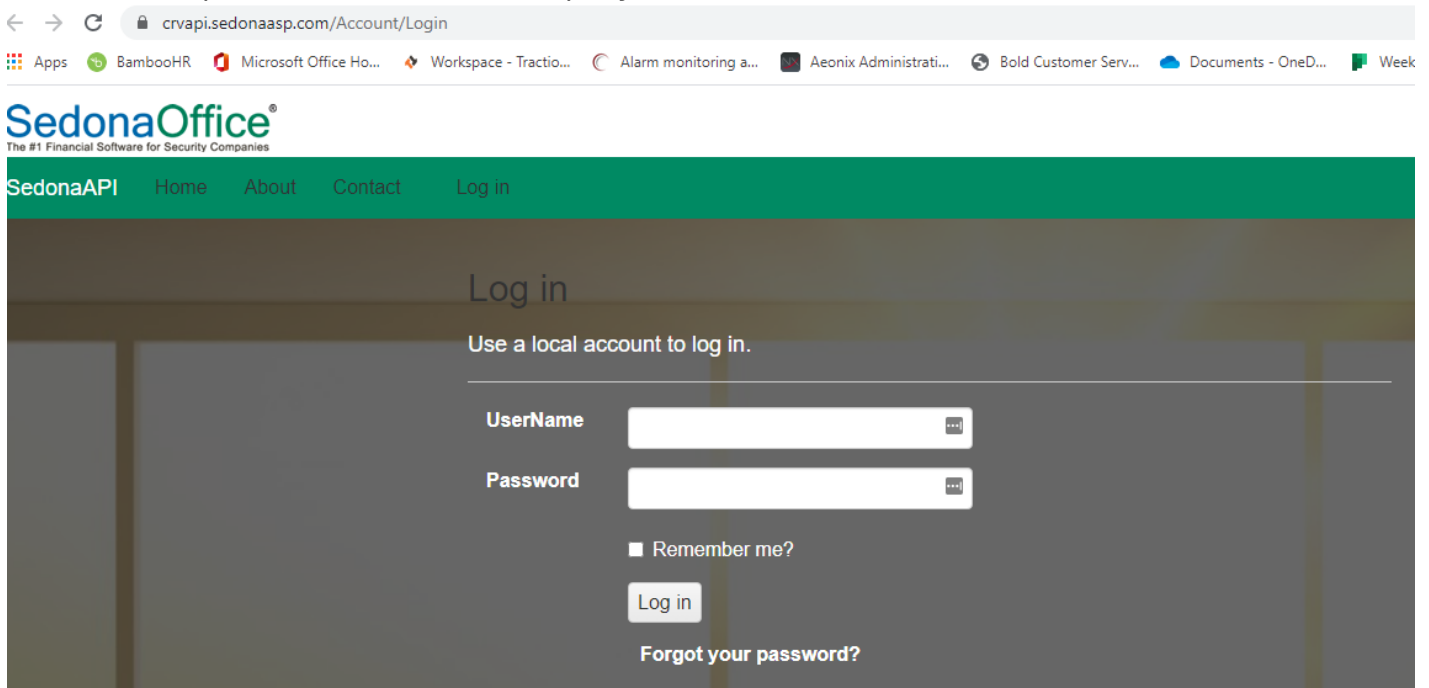
Step 1: Receive Endpoint from IT/Octopus

Log on as Hostadmin with the endpoint given by IT or Octopus

Example Endpoint: <https://sedonaapi.apialarm.com/Account/Login>

Step 2: Set up Company

a. Select Companies and then Add Company



crvapi.sedonaasp.com/Account/Login

Apps BambooHR Microsoft Office Ho... Workspace - Tractio... Alarm monitoring a... Aeonix Administrati... Bold Customer Serv... Documents - OneD... Week

SedonaOffice
The #1 Financial Software for Security Companies

SedonaAPI Home About Contact Log in

Log in

Use a local account to log in.

UserName

Password

Remember me?

Log in

[Forgot your password?](#)

b. Select Company on the top ribbon and then add the company

Home

Add Company

Id	Company Name	Url Prefix	DbVersion	Status
No items to display				

Step 3: Set up Database

a. Set up Production and/or Production Database as the customer what databases to select; you can only set up one database at a time

Add Company

Company

Edit Connection String

Connection String

Software License

CRV Surveillance S...
--Select--
CRV Surveillance
Setup Conversion 2.0
CRV Surveillance
Setup Conversion 2.1
CRV Surveillance
Setup

al
Setup_Co
urity
=N8383P

<License> <Id>4df69155-2553-

b. After selecting the proper database fill out the following highlighted fields. The other fields will autofill.

Add Company

Company	CRV Surveillance S...	Address1	100 Oxmoor Road
Edit Connection String	<input type="checkbox"/>	Address2	Suite 100
Connection String	Data Source=CRVSQL;Initial Catalog=CRVSurveillance_Setup_Conversion_2.1.1;Persist Security Info=False;UserID=SedonaUser;Password=N8383P	Address3	
Software License	<License> <Id>4df69155-2553-4523-9504-86a4a9463d53</Id><Type>Standard</Type><Expiration>Fri, 30 Jul 9999 04:00:00 GMT</Expiration><Quantity>100</Quantity><ProductFeatures> <Feature name="SedonaWeb">true</Feature> </ProductFeatures>	City	Birmingham
UriPrefix	crvapi	State	Alabama
Status	Active	ZipCode	35209
Company Email	ncalamas@crvsurveillance.com	User Name	CRVsandbox
Phone	205-278-4250	First Name	Nicole
		Last Name	Calamas
		User Email	ncalamas@crvsurveillance.com
		Password	*****
		Confirm password	*****
		SiteTheme	Default

- 1. Username:** ensure it includes sandbox/production in the name
- 2. Company Email:** ask the company what email to use
- 3. URL Prefix:** ensure it includes sandbox/production in the name no spaces or special characters
- 4. User Name:** ensure it includes sandbox/production in the name
- 5. First Name:** ask the company what to use- must be different from production and sandbox
- 6. Last Name:** ask the company what to use- must be different from production and sandbox
- 7. User email:** ask the company what to use- must be different from production and sandbox
- 8. Password:** default is Admin123\$

c. Submit and Verify

If the DbVersion does not fill you can not move on to the next step

Id	Company Name	Uri Prefix	DbVersion	Status	
1	CRV Surveillance Setup Conversion 2.1	crvapi		Active	✎

10 items per page 1 - 1 of 1 items

Step 4 Link SedonaOffice with AlarmBiller

a. Log into Host AlarmBiller

b. Log into Dealer

c. Turn On SedonaCloud Services

1. Select Services

2. Turn on SedonaCloud Service (from Green to Red)

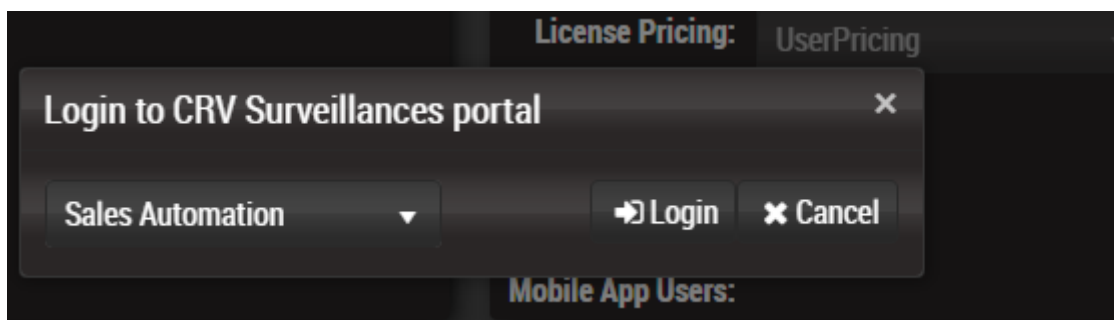
Red Bar with Green Check mark indicates service is on

Step 5 Set up SalesAutomation/eForms in AlarmBiller

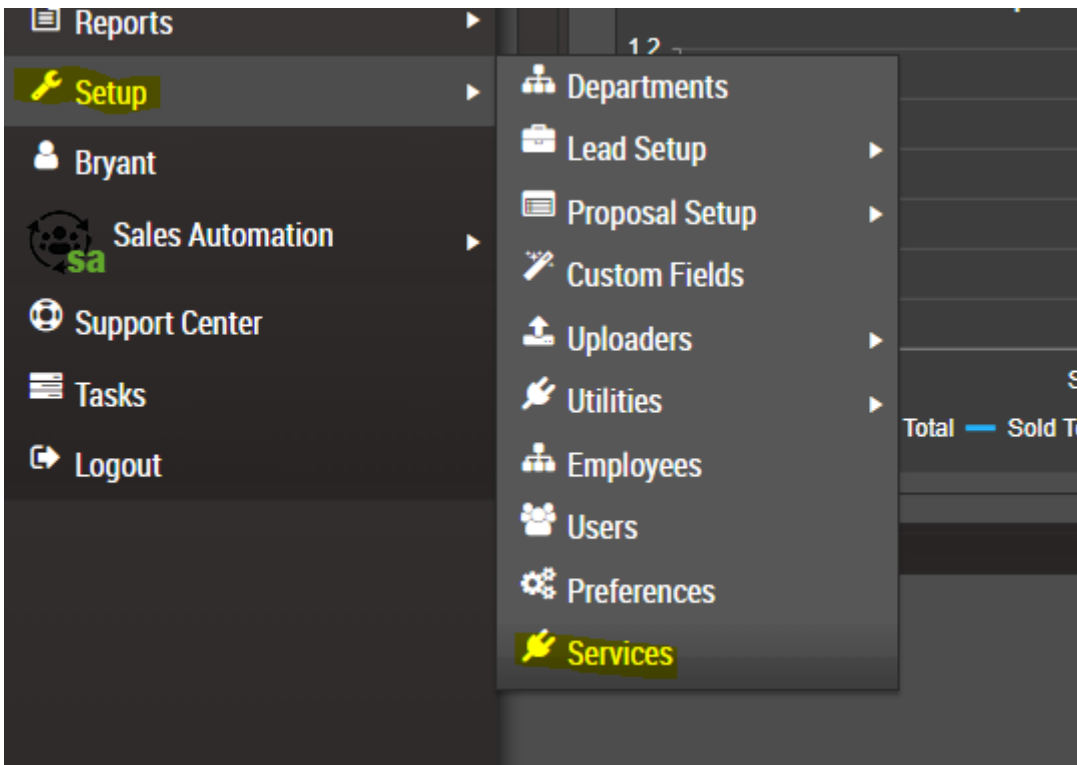
Customer must have an AlarmBiller instance- if they do not sales will set this up

Ensure the Customer has at least 1 user set up

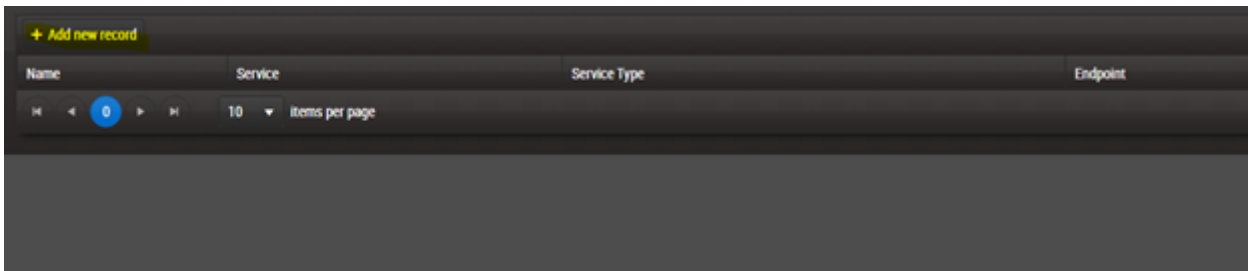
a. Log in to Service and Select SalesAutomation



b. Select Set Up then Services



c. Add new record



Step 6 Set up End Point

Edit

Name
SedonaCloud - 1.0

Third Party Service
SedonaCloud - 1.0

Endpoint
https://crvapi.sedonaasp.com/crvapi

Username
CRVsandbox

Password
.....

API Login Id

API Key
.....

Update Cancel

- a. Select: SedonaCloud 1.0
- b. Enter in endpoint with url prefix (from Step 3.B.3)
- c. Type in user name and password that was created in SedonaWeb portal (from Step 3.B.7 &8)
- d. API Key will auto fill

Step 7 Test Services

- a. Click Test Services

Name	Service	Service Type	Endpoint	
SedonaCloud - 1.0	SedonaCloud - 1.0	SedonaCloud	https://crvapi.sedonaapp.com/crvapi	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Test Service"/>

10 items per page 1 - 1 of 1 items

If successful you will see the following pop up

Service Integration
The Service is Ready!

Name	Service	Service Type	Endpoint	
SedonaCloud - 1.0	SedonaCloud - 1.0	SedonaCloud	https://crvapi.sedonaapp.com/crvapi	<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Success!"/>

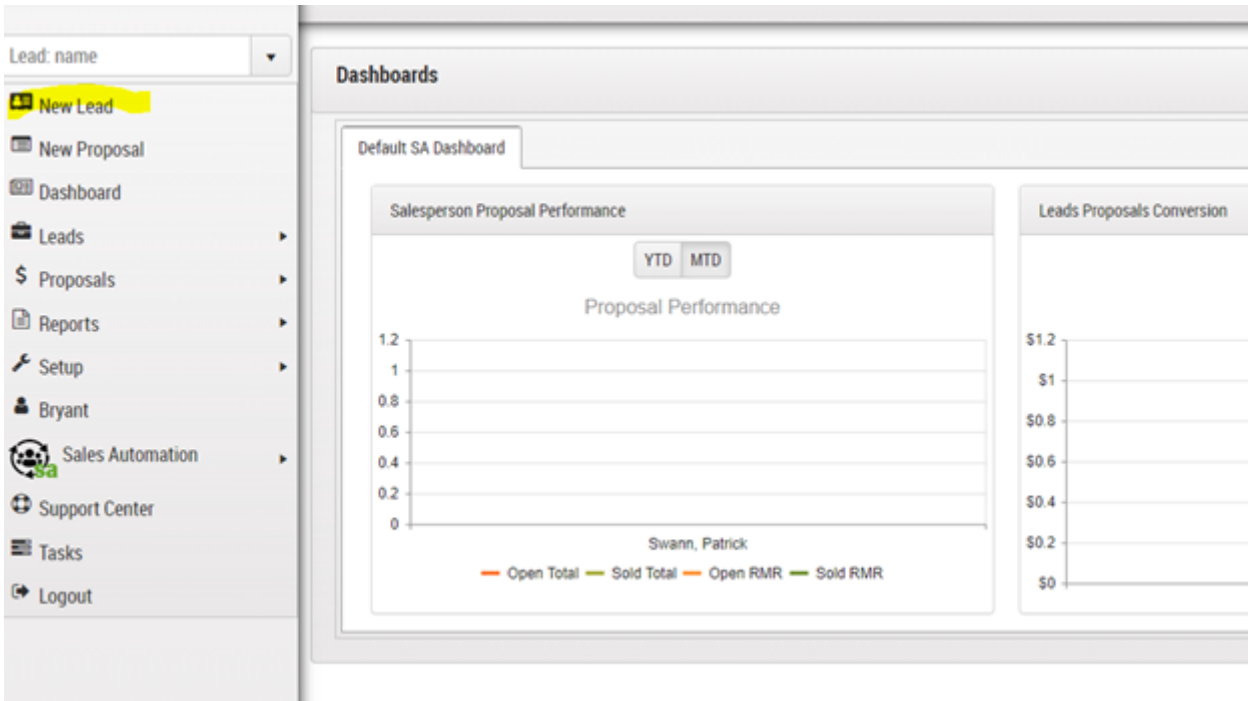
10 items per page 1 - 1 of 1 items

b. Test a Lead

1. Log out of AlarmBiller Account
2. Log back into the same AlarmBiller Account
3. Select Sales Automation

The screenshot shows the AlarmBiller interface for dealer 'CRV Surveillance #10976'. The dealer's address is 232 Oxmoor Circle, Suite 1012, Homewood, AL 35209, United States. Contact information includes Phone 1: (205) 278-4250, Phone 2: (205) 278-4250, and Email Address: office@crvsurveillance.com. Dealer details include Dealer Type: SedonaOffice, Status: Active, Dealer Prefix: crvsurveillance, Reseller: (blank), Trial Expiration: 8/29/2018, Go Live: 10/1/2020, and License Pricing: UserPricing. A modal window titled 'Login to CRV Surveillances portal' is open, showing a dropdown menu with 'Sales Automation' selected and 'Login' and 'Cancel' buttons.

4. Select New Lead



5. Click the Sedona Customer dropdown and ensure that it loads with no errors or pop ups

The screenshot shows the 'New Lead' form. On the left, there is a 'Choose Master Customer' section with a 'Select Sedona Customer' dropdown menu. The dropdown is open, showing a list of customers with their names and addresses. The 'Name' field is set to 'First Name'. Below the dropdown are fields for 'Business', 'Email', 'Phone', and 'Cell'. The 'Address' field is also present. On the right, the 'Pipeline & Assignments' section includes a 'Heat' dropdown (set to 'Warm'), a 'Stage' dropdown (set to 'New Opportunity'), a 'Follow Up Date' field, a 'Tag' field, and several dropdowns for 'Primary Source', 'Secondary Source', 'Department', 'Primary Salesperson', and 'Secondary Salesperson'. A 'Comments' field is at the bottom right.

Step 8 Send Information to Customer

If everything set up was success full send the following to the customer

- Alarmbiller URL (example: <https://crvsurveillance.alarmbiller.com/>)
- Send the SedonaWeb 2.0 URL and Log in and Password encourage the customer to change password. Remind the customer if they change their password they will have to change it in the set up of AlarmBiller as well as seen in step 6

Example:

<https://sedonaapi.apialarm.com/crvapi>

User Name: CRVsandbox

Password:Admin123\$

Revision #8

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Updated Mon, Aug 2, 2021 7:33 PM