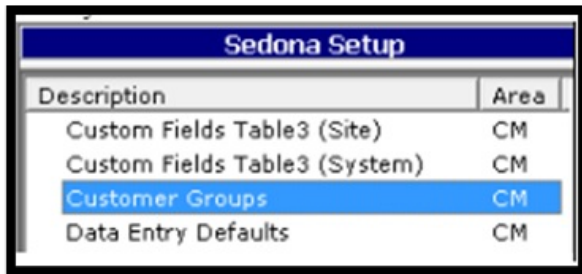


How to Activate Customer Groups in SedonaOffice

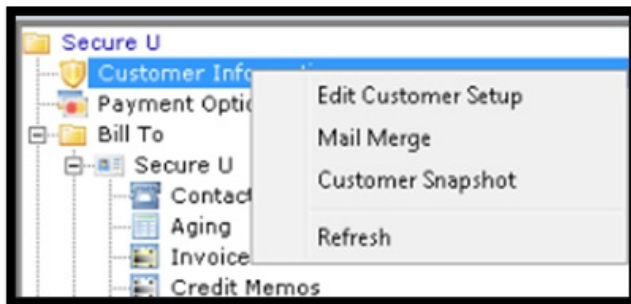
05/31/2024 8:43 am EDT

The Customer Group 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.

First you will need to create at least one Customer Group. You will find this in SedonaSetup > Customer Groups in the CM area.



Once the Customer Groups are created, I would recommend first adding your customers to the correct Customer Groups. This needs to be done by customer, so you would go into the Customer Setup by right clicking on the Customer Information and selecting Edit Customer Setup.



Once the Customer Setup window is open, locate the Customer Group field and select the Customer Group you wish to have the customer a part of.

Setup Information | New Field | Bill To | Master Account Setup | Items

Customer Status: AR
Customer Type: Commercial
Old Customer ID:
Terms: Due On Receipt
Tax Exempt #:
EIN:
OK to Increase:
Salesperson: AlphaAPICompanyUs
Registration Code: E34AD9
Master Account Information
 Is Master Account
Master Acct:
Blanket P.O.:
P.O. Expire Date:
Customer Since: 3/15/2022
Chain Account:
Customer Group: MI
Customer Group 2:
Branch: 123 test
Invoice Group: None
No Collections:
Part Pricing Level: None
Invoice Printing
 Print Statements
 Print Site Info on Invoices
 Separate Cycle Invoice for Each Site
 Charge Late Fees

Then to enable the Customer Groups option. This is found in SedonaSetup > Setup Processing in the AR area.

Sedona Setup	
Description	Area
Invoice Items	AR
Item Types	AR
Late Fee Rules	AR
Setup Processing	AR
Statement Rules	AR

In the AR Setup Processing window, in the Other section, there is a checkbox called Customer Group Security by User. You will need to check this box, then enter the default customer group.

Other

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

Activate Customer Group Security by User
Customer Group

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

Once this is enabled, you will get a message informing you that each customer without a customer group will be automatically assigned to the default you select.

i By enabling the Customer Group Security, each Customer must be set to a Customer Group in order to be accessed. You must select a default Customer Group to assign to each customer now. You can then modify the customers to the desired Customer Group.

Once Activate Customer Group Security by User is enabled, go to the Users setup table in SedonaOffice.

Sedona Setup	
Description	Area
User Groups	OP
Users	OP
Earnings Type	PR
Payroll Setup	nn

After choosing a User, you will see that a new tab has been added to the User setup called Customer Groups.

User Groups **Customer Groups**

Customer Group	Description	Read Only
<input type="checkbox"/> 01	01	
<input type="checkbox"/> 02	02	
<input type="checkbox"/> 03	03	
<input type="checkbox"/> 04	04	
<input type="checkbox"/> 05	05	
<input type="checkbox"/> A	A1 Top Customers	
<input type="checkbox"/> Frankenmuth	Frankenmuth	
<input checked="" type="checkbox"/> MT	Michigan	N

Print Apply New Delete

This is where you will assign the groups you wish your users to have access to.