

How to add a Technician to SedonaOffice

05/31/2024 8:43 am EDT

Description of Issue:

User is attempting to add a Technician User to SedonaOffice but it is not working or they are unable to.

Support note: This is a common issue. Adding a Technician User to SedonaOffice is a 3-step process.

Add User to SedonaOffice

Add Employee to SedonaOffice – tie Employee to User

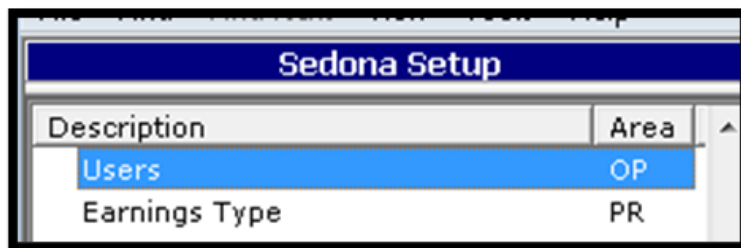
Add Technician to SedonaOffice – tie Technician to Employee

Below will go through this process.

Resolution:

Step 1: Add User

Go to SedonaSetup > Go to Users in the OP area > Open Users



Click New button at bottom right of the Users window. Enter user information into the User Edit fields.(Required fields are User Code, Password and Confirm Password, First and Last Name.)

Include Inactive

User Edit

User Code:

Password:

Confirm Password:

Description:

Last Login:

☐ Inactive

☐ Create Other Users

First:

Middle Initial:

Last:

E-Mail:

User Groups

User Group	Description
☐ Accounting Clerk	Accounting Clerk
☐ Admin	Admin
☐ Admin Assistant	Admin Assistant
☐ Administration	Administration
☐ Administrator	Administrator
☐ ALL PERMISSIONS	ALL PERMISSIONS
☐ AP QQuery Only	AP Query Only
☐ DR-Neh & Ruth	DR-Neh & Ruth

Print Apply New Delete

Click Apply to Save. (Note: If you do not want the Technician to access SedonaOffice, you do not need to grant access to User Groups) Step 2: Add Employee

Go to SedonaSetup > Go to Employees in the OP area > Open Employees

Sedona Setup	
Description	Area
Document Type	OP
Employees	OP

Click New button at bottom right of the Employees window. Enter Employee information into the Employee Edit fields. Enter Employee Code, then select the User Code that was created for the technician. Then select the Type of employee and where they are assigned to.

 **Employee Edit**

Employee Code ☐ Inactive

General Information | Payroll | Commission Setup | Documents

User Code	techtest	First Name	Mark
Type	IN	Last Name	Test
Assigned To	Installation	Middle Initial	
Supervisor		Date of Hire	
		Termination	
		Job Approval Group	

Created:
 Last Edit:

Any other tabs on the Employee Edit are optional. Click Apply to save. Step 3: Add Technician
 Go to SedonaSetup > Go to Technicians in the SV area > Open Technicians

Sedona Setup	
Description	Area
Warranty Types	SV
Technicians	SV
Setup Defaults	SV

Click New button at bottom right of the Service Technician window. Enter Technician information into the Technician Edit fields. Select the name of the Employee that was set up for the Technician from the Name field dropdown. Next, choose if this is going to be a Service Tech, an Installer, or Both.

 **Technician Edit**

Name

☒ Service Tech
☐ Installer
☐ Both

If Service Tech is chosen, the only information required to enter is in the Service tab. (Required fields are Service Company, Warehouse, and Expertise Level)

Technician Edit

Name: Mark Test

☒ Service Tech
☐ Installer
☐ Both

Service | Installation | Routes

Service Company: Anne's Service Company

Warehouse: *Main-MI

Text Message Address:

Expertise Level: 3

If Installer is chosen, the only information required to enter is in the Installation tab. (Required field is Install Company. It is strongly recommend to add the Technician's Regular Pay Rate, Overtime Pay Rate, and Holiday Pay Rate as those will

Technician Edit

Name: Mark Test

☐ Service Tech
☒ Installer
☐ Both

Service | Installation | Routes

Install Company: MI

Regular Pay Rate: 25.00

Overtime Pay Rate: 75.00

Holiday Pay Rate: 150.00

calculate when Technician is added to Jobs)

If Both is chosen, then the Service tab and Installation tab fields will need to be filled as described above. Click Apply to Save.