Sedona Sync Training

02/13/2024 9:25 am EST

LiveAssist to shared screen for training w/ access to SedonaSync (remote desktop).

Cloud: to cloud portal, don't launch app, Got to remote desktop and connect.

Over view training of SedonaSync. Will look at main areas of the app we use and note other areas we don't typically use. OPT does Advanced training.

Service-driven application. Look at IT side for a second: open services and look at Sync service. If the service isn't running, the application won't run, send emails, check events, etc. Common reason for Sync problem is the service is Stopped or Starting... Cloud customers - generally we would look into this if you report a Sync issue, but useful to know.

Let's look at SedonaSync now. If you go to Start->All Programs->SedonaOffice->SedonaSync, you'll see the different modules of SedonaSync. Sync is actually several modules rather than one single app. We'll overview each of these before going into detail on the main ones you'll use.

Administrator module - you can call this the core of the app. It is where you can set up email settings and view error logs/information.

Desktop Service - Probably won't be used, but it's a useful tool for diagnosing problems with the Sync service. Will run a local instance of the Sync service

Event Manager - Where you create and manage events that send the actual emails.

Migrate Database to SQL Server - Probably won't be used, because we set up Sync to connect to your database with an ODBC connection. Cloud - won't be used because we host them

Monitor - List of queues and logs. A troubleshooting tool

Navigator - Used for looking at database structure. For purposes of using SedonaSync that we'll get into a bit later, our Database Explorer tool does this better

Launch Administrator module. Default password is Admin no pw. Suggest making their own administrator account and letting us lock down the Admin account if they want to secure this login.

Left side: picture/graphical tree, then text tree, then data pane showing what's selected.

There are no right-click context menus in the app; instead the top menu options change based on what is selected.

Server status - idle if doing nothing, processing if in use, shutdown if not active. If you need pager/fax activated, we'll need to get a license for those.

Current users -see current logins, which module(s) they're in, and computer name for SedonaSync. Good to note here that Sync is entirely separate from the main app. We did not make Sync, it's just branded to us by a third party. It only touches your database through the ODBC connection.

Corrective Actions - this is the error logs. You might not understand some of the errors recorded here, but we can always look at this for you. Errors will clear out of the logs if the issue gets resolved. Ex: email error because there's a customer with just their first name in their email field, not the actual email address; if this gets fixed in the database and the event trying to use that email runs again, it will succeed and clear the error out.

Hardware Setup - Not used. Only for printers/fax/etc.

Software Setup - Where you tell Sync what email to use for sending emails.

Holiday schedule - where you set up holidays for events not to run on. Say something is scheduled every Monday, but New Years is a Monday and set as a holiday, that event won't run even though its schedule normally would say to.

Others not often used.

Logins - To create/manage logins. General tab has name, description, pw change. History - Common thing throughout Sync is the history tab. Gives a little bit of history info.

Access Rights.

To create new user login, Select Logins->New User button at top.

Note the active checkbox. You'll see this a lot throughout Sync. If you're going to use that user, query, event, email account, etc. the box needs to be checked.

Monitor - Same basic UI you'll see in most modules. Activity is the same as server status in Admin.

Scheduler - shows the schedules being used for events.

Application Events - Shows status of events in "real time". It doesn't auto-refresh but whatever events are current in say pending will show up in the pending list whenever you click on pending. You can refresh the list by clicking on pending again. The logs for SedonaSync clear out after 7 days to keep the size down, so that's something to keep in mind.

Reports ties to vivid

Emails - same as with application events, you'll see emails waiting to be sent, errors, and sent emails. Cloud users are set up with our SMTP settings, but you can have us configure Sync to use your own.

Email Response - can send emails to support for example based on subject in replies to automated Sync emails. There's an easier way to handle reply emails in Sync though that we'll see in Event Manager.

Event Manager - Events usually split up by what different database they go to in KnowledgeSync (the third party software we have branded as SedonaSync). Our event pack however splits up events for organizational purposes, so AR events are separate from AP or SY events. In each event group, there are query definitions - the actual configuration for the SQL being ran against the database, and events - the events themselves that take the results from the query and present the data, usually via email.

Subscribers - bunch of empty default groups at first. We'll go over this really quick now and it'll click the rest of the way in a few minutes when we get into the events. Create a new subscriber for one of the trainees in appropriate group.

Active. Name. Email. Far right tab of subscriber is the subscriptions, which is useful for finding what events are using this subscriber to email to.

SO AR Group -> CC expiring in X months. Let's go over this event as an example as it's pretty simple. First we'll look at the query. Double-click. Note: you can't resize the windows in this application. If you need more space to see everything you've typed out at once, copy to/from notepad works.

Description Tab.

Note: The event names from our event pack are named with the intended recipient in the beginning. Ex. Customer* = emails meant to go to customers. User* or Manager* = email for internal reports. If there's no label in front, it's likely a shared query, which we'll cover in a minute.

Tables tab - shows the tables SQL data is pulled from. For custom events, this is where you would select the tables to pull from. You can see for this one the AR_Customer_Bill and …_CC tables are selected.

Links - this is where you tell Sync what columns to link the tables together on. This requires some familiarity with the database structure and SQL, but the Database Explorer tool we offer helps you look through the database structure and aides with Linking better than the Sync Navigator because it has a "linked to" column in the pane where you get information on all the columns in a table. To create a link, hit the add table link button, pick tables, link the like columns. Don't have duplicates of the same link for the same query or you'll get errors. To remove a link, select it and click Remove Link! DON'T CLICK DELETE! Delete deletes the entire query.

Columns - select any columns here that you'll be using for filtering, tracking, or plugging data into the email. CC ID is used in this example for tracking instead of customer ID because the customer might have multiple credit cards, so you'd want to get the information pulled back for each credit card that will be expiring soon, not just whichever one it grabs first for that customer.

Sorting - not likely to be used much in the query because it's not what you're seeing, just the data that will be fed into the event that actually sets up the email/report you see.

Filters - this is what is going to make the event trigger. There are Sync variables that will be fed as their actual value into the SQL query. Variable filters for queries that will be shared by multiple events will use a ? Rather than a set value. That ? Later gets set in the event to the event-specific value. Explain individual filters and what they're looking for. If all pass, it goes to the event and gets put into the email.

Sub-filters - can filter the filtered results. Have not seen a use for this.

SQL tab - the raw SQL that the event(s) using the query will use. If you edit this, neither we nor Sync's developer VineyardSoft can support that query.

Preview - will show you a table of all selected columns for each object that passed the filter, for queries using ?s, it will prompt you for a value before previewing.

Event - General tab is similar, but has a check box for repeating something already sent.

Query tab - selects which query the event uses and what values the event uses for ?s.

Email tab - shows the email body, anything meant as html should go between the html tags. Also where you select the email to send from, important for event to work of course. Also the reply to email here is an easier way to have the correct people contacted if someone replies to a Sync email.

Subscribers - this is where you specify who to send the emails to. So email is from, subscribers is to whom. add static subscribers. Can add email from a field pulled from the query's tables for sending emails to customers.

Schedule - this is where you assign the event a schedule to run on. You can edit the default schedules.

Track - this shows what items the event has been triggered on previously.

Can show a test if data was pulled back.

Email training link and OPT information in case they want advanced training, OPT's user interface for Sync that makes it easier to understand, or to create complex events. OPT services are billable, but we do not have specific information on that. We can also assist with making simpler events, this is billable at $150/hour.

http://www.sedonaoffice.com/resources/downloads/

If needs to know

What Sync can do,

Find an event,

Explain what it does