

Training emails

02/13/2024 9:27 am EST

Customer,

I have completed the install and testing of SedonaSync on your VM. I'm following up to schedule the initial SedonaSync training with you.

This is a very basic overview training of the application. This means we will open each module application up and walkthrough the different important areas that our pre-built events utilize. This typically runs a full hour, sometimes a little longer depending on questions.

I'm available this week for training on Thursday the 30th at 11:00AM EST. Please let me know if this works or if you have a different date & time in mind.

Below is a list of what you will need on your end so that we will be able to access and walkthrough the SedonaSync modules together on the initial training call for SedonaSync.

1. You will need to establish a Live Assist connection on a local computer that everyone on the training call will be able to see.
2. You will need to establish a Remote Desktop connection from your computer to your SedonaSync server so we have access to open and walk through each of the important modules of SedonaSync.

Note: SedonaSync is a separate application from SedonaOffice. It is actually is a collection of several different module applications.

Only users that will be accessing the application directly to build/modify/test queries and events need to be on the training call. For most of our customers, this is one or two users.

Users who will be using SedonaSync to build events should have a basic understanding of our SedonaOffice database structure and how different tables relate to each other and be familiar with basic functions in SQL. The learning curve for the software, basic SQL, and our database structure can be a bit overwhelming. For this reason, many customers opt to reach out to OPT Business Services (3rd party company) to handle their SedonaSync events for them.

If you are not interested in this initial overview training and will be using OPT Business Services' assistance with SedonaSync or training, please let me know.

Customer,

Here are some helpful links for getting started with using SedonaSync.

There are some areas of the manual we feel are important and that you may want to review:

-Query Design

-Current Date Compared with a Date Time Field

-Linked Queries

-Event Design

-Formatting Fields

-Begin Repeat & End Repeat

-Possible reasons your event is not triggering

You have full access to Vineyardsoft's (The Developers) training videos
here: <http://www.vineyardsoft.com/downloads-documentation.php>

These videos cover the entire application in depth, but are not specifically relating to SedonaOffice.

We discussed the Database Explorer tool to help identify table columns in order to link tables, that tool can be downloaded from here: http://www.sedonaoffice.com/wp-content/uploads/dbExplorer_setup.zip

Additionally, you may want to look into the event's offered by OPT Business Services. Below is their contact information.

Web: <http://www.optbusinessservices.com/>

Phone: (727) 258-7229

Email: Sales@OPTBusinessServices.com

```
USE [master]
SET DEADLOCK_PRIORITY HIGH
ALTER DATABASE [PerMar_Final] SET MULTI_USER WITH NO_WAIT
ALTER DATABASE [PerMar_Final] SET MULTI_USER WITH ROLLBACK IMMEDIATE
```

To give an idea of what all Sync can do, here are the prebuilt events already loaded during the install that just need to be configured and scheduled if needed:

AR:

Description
* ACH Payments after 12/31/2011
* Customer: CC Expiring within 3 months
* Customer: New Invoice
* Customer: New Payments
* Manager: CC Expiring within 3 months
* Past Due Dashboard
* User: Customers Past Due > 25000
* User: Invoices 30 Days Past Due

New Invoices:

Description
Customer: New Cycle Invoice Bank
Customer: New Cycle Invoice CC
Customer: New Cycle Invoice Not AutoPay

OE:

Description
* Job Status-Internal-Changed to Closed
Job Status: Ready To Close

SV:

Description
* Ticket Count > x to Employee: within y days
* Ticket to Customer: New Ticket
* Tickets to Customer: New Appointment
Inspections Due without Ticket
Tickets to Customer: New Dispatch