

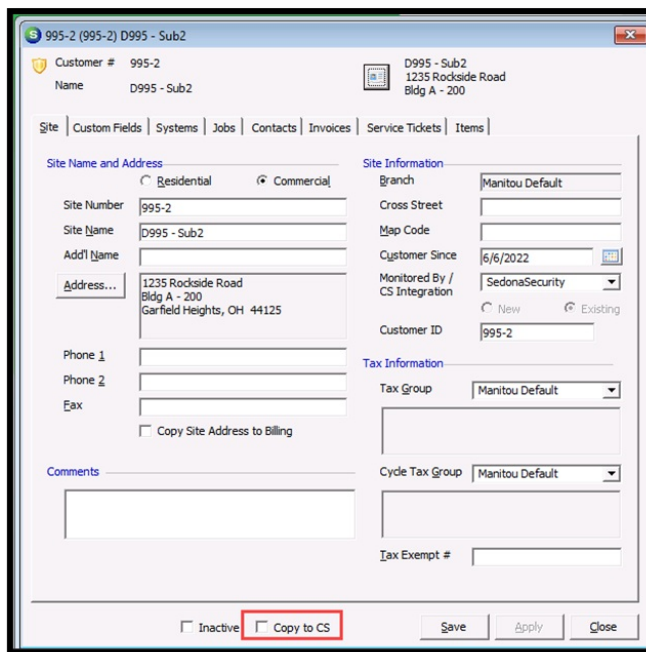
How to Control Automatically Copying Fields from SedonaOffice to Manitou

09/13/2024 6:23 pm EDT

This document will go over how to control what is copied from SedonaOffice to Manitou automatically using the Legacy/OCX version of the integration. The version these steps cover is for SedonaOffice 6.2.0.16.

Overview

These steps cover the option from the SedonaOffice side of the setup and assume the user has the proper permissions to access these tables in the SedonaSetup. The option controls the Copy to CS option located in Site Edit. When checked it will automatically copy the common fields if the site is integrated to Manitou.

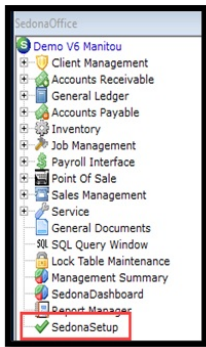


The screenshot shows the 'Site Edit' window for Customer # 995-2. The window is titled '995-2 (995-2) D995 - Sub2'. It contains several sections: 'Site Name and Address' with fields for Site Number (995-2), Site Name (D995 - Sub2), Address (1235 Rockside Road, Bldg A - 200, Garfield Heights, OH 44125), Phone 1, Phone 2, Fax, and a checkbox for 'Copy Site Address to Billing'. 'Site Information' includes Branch (Manitou Default), Cross Street, Map Code, Customer Since (6/6/2022), Monitored By / CS Integration (SedonaSecurity), and Customer ID (995-2). 'Tax Information' includes Tax Group (Manitou Default), Cycle Tax Group (Manitou Default), and Tax Exempt #. At the bottom, there are checkboxes for 'Inactive' and 'Copy to CS' (highlighted with a red box), and buttons for 'Save', 'Apply', and 'Close'.

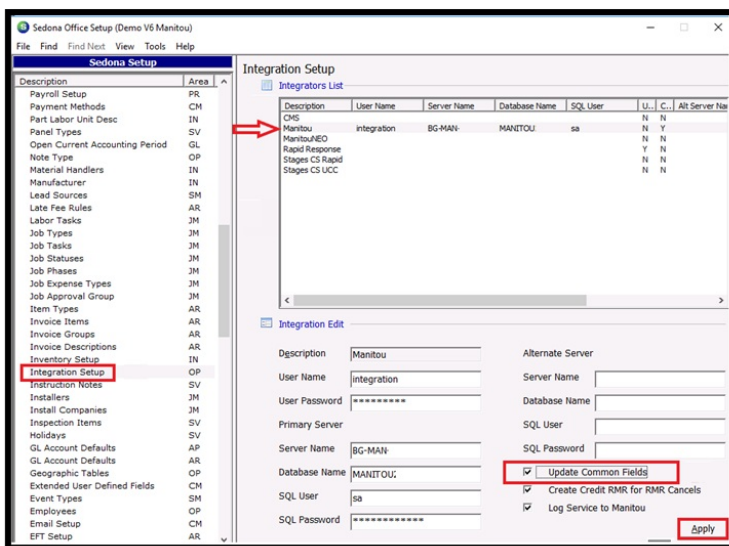
If option is Unchecked, then data will not be automatically pushed over to Manitou. If option is Checked, then data will be automatically pushed.

Steps:

1. In the Sedona Office Tree – Select Sedona Setup



1. Click on Integration Setup
2. Select the Manitou Description in the top portion of the window
3. In the Integration Edit at the bottom - Uncheck the option Update Common Fields



1. Click Apply

1. After change is either, turning off or on, go back into a site edit and verify the **Copy to CS** option is either Unchecked or Checked, depending on how the option was changed in Integration Setup.