

How to Setup Customer Groups by Branch

07/16/2025 11:43 am EDT

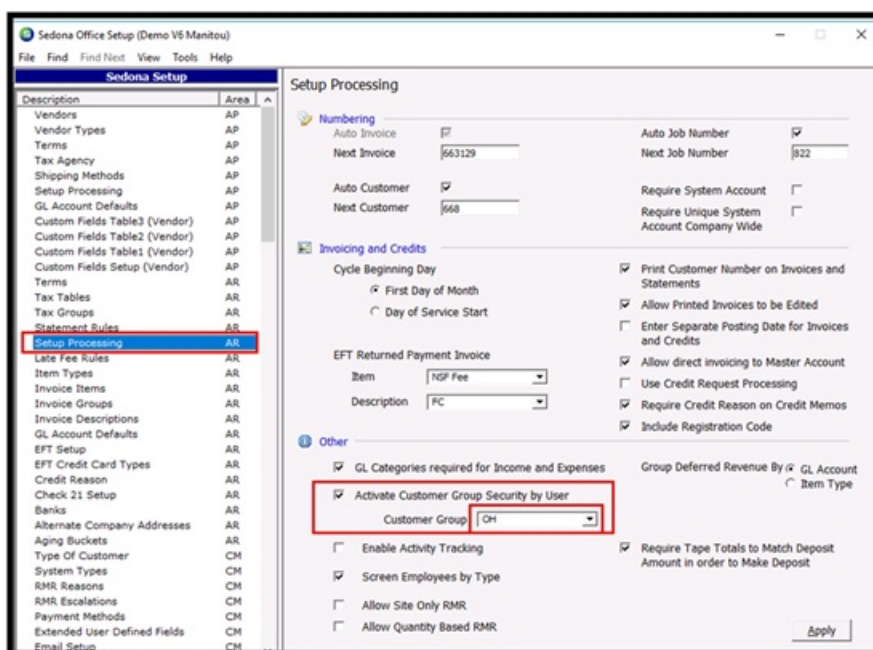
There is no way to link the customer group to the branch. But a customer group can have the same name as a branch. Then, verify that the customers in the database have chosen the customer group that matches the branch name to which they have been assigned.

Overview

These steps assume the user doing them will have the proper permissions to complete them.

Steps:

1. Log into SedonaOffice > Click on SedonaSetup > Click on Setup Processing/AR > Check the Activate Customer Group Security by User > Select a "Default" branch to be used when entering accounts.



2. Once the options have been activated, Click Users (*this step will need to be done for all users*) > Click on one of the users > Click on the Customer Groups Tab > Select all the customer groups that the user is allowed access.

Sedona Office Setup (Demo V6 Manitou)

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Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
Type Of Customer	CM
Terms	AP
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM
Sales Departments	SM
Sales Department Maintenance	SM

Users

Users List

User Code	Name	Description	Inact...
Administrator	Master, Sedona A	MasterUser	N
AEB	B, Amy		N
AP	Accounts, Payable	Accounts Payable	N
AR	Accounts, Receivable	Accounts Receivable	N
BLUF	Fox, Bill		N
BOLDTECH	FoxA, Bill		N
Integration	Logn, Manitou		N
JessilynL	Lupo, Jessilyn	Jessilyn Login	N
MiguelG	Gutierrez, Miguel	Miguel Gutierrez	N
MiguelG	Alfaro, Miguel	Accounting Clerk	N
RASGALES	Sales, Renee	Renee Sales	N
RASTECH	Tech, Renee	ReneeTech	N
SHAWLEY	Shawley, Renee	Admin User	N
WHITMORE	Whitmore, Sarah	Manitou	N

User Edit

☐ Locked ☐ Inactive

☐ Create Other Users

User Code: RSHAWLEY First: Renee

Password: Confirm Password: Middle Initial:

Description: Admin User Last: Shawley

Last Login: 1/8/2025 10:32:12 AM E-Mail: ReneeS@boldgroup.com

User Groups **Customer Groups**

Customer Group	Description	Read Only
☒ 01	01	N
☒ 02	02	N
☒ 03	03	N
☒ 04	04	N
☒ 05	05	N
☒ HI	Michigan	N
☒ OH	Ohio	N

Print Apply New Delete

3. These groups should be paired with the Branch. Like the example below, only users who have Customer Group OH will be able to view the information on this customer.

Customer Setup 562

Customer # 562

Customer Name: Smokey Treats BBQ

Additional Name:

Bill & Renee Shawley
15000 Rockside Road
Garfield Heights, OH 44125

Setup Information | Miguel Testing | Bill To | Master Account Setup | Items

Customer Status: AR Blanket P.O.:

Customer Type: Commercial P.O. Expire Date:

Old Customer ID: Customer Since: 2/26/2021

Terms: Net 10 Chain Account:

Tax Exempt #: Customer Group: OH

EIN: Customer Group 2:

OK to Increase: Branch: OH

Salesperson: Jane.Doe Invoice Group: None

Registration Code: 924585 No Collections:

Part Pricing Level: Level 4

Master Account Information Invoice Printing