



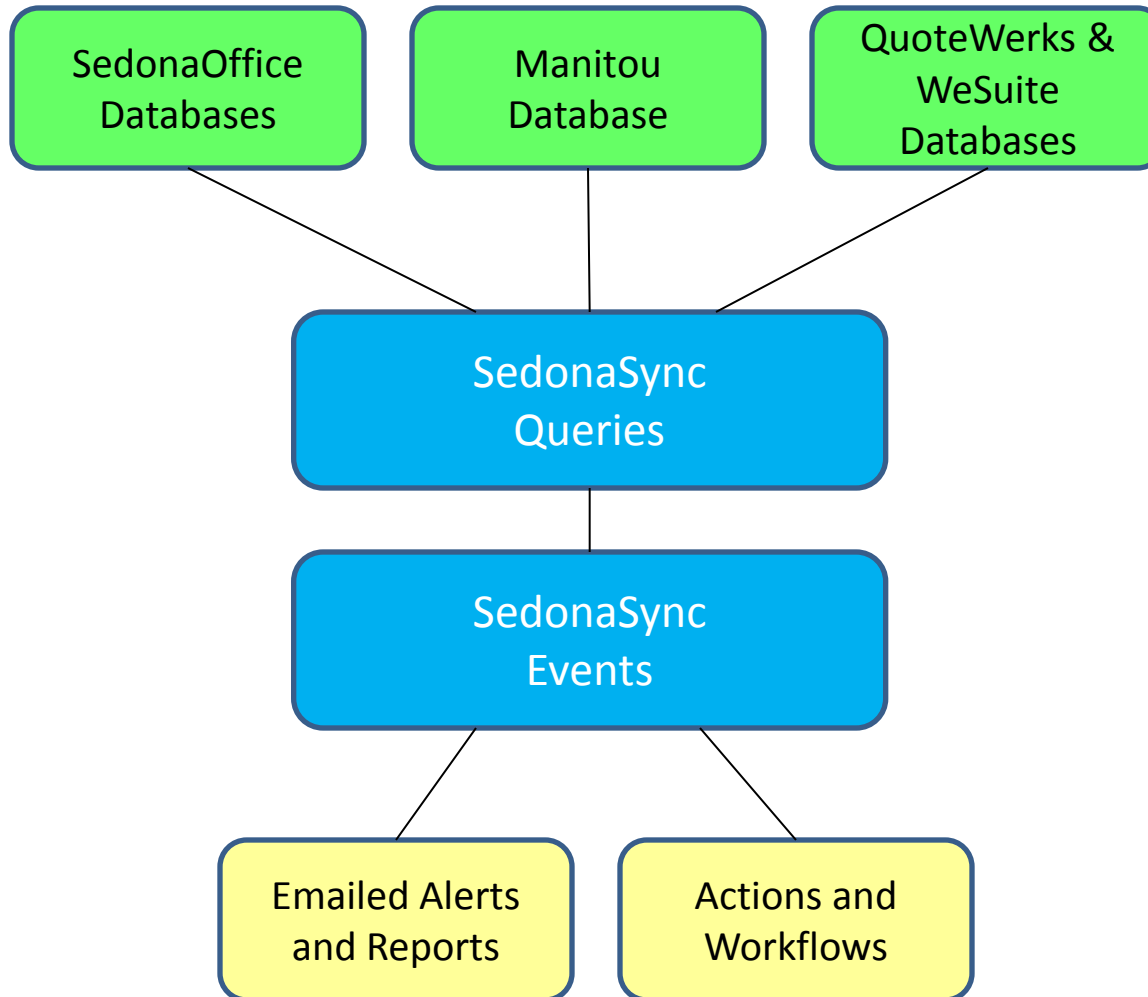
# Maximizing SedonaSync

Presented By:

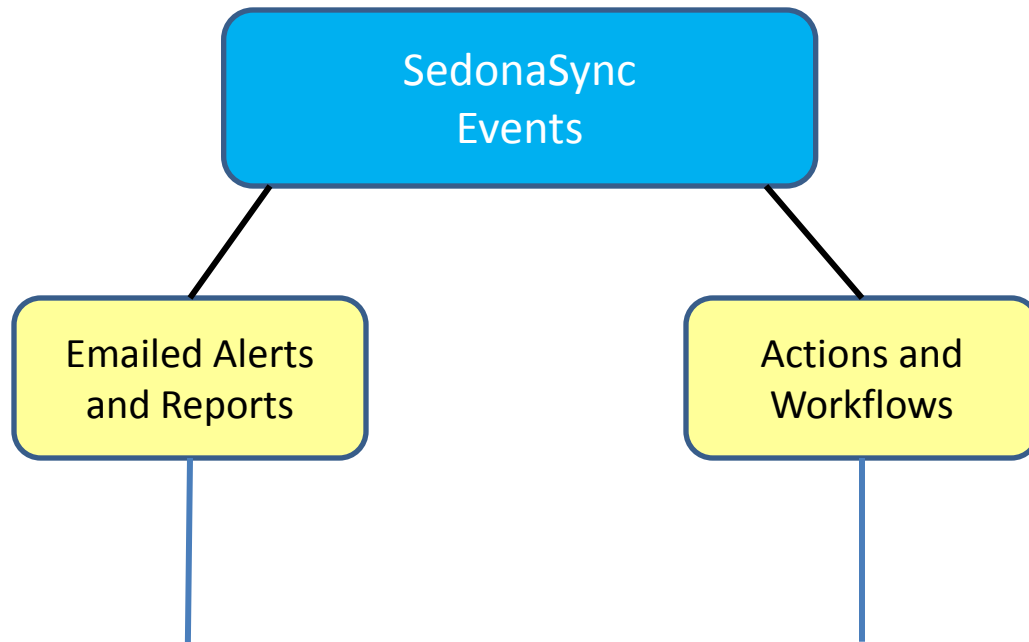
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# What is SedonaSync?



# What is SedonaSync?



Alerts takes data collected from queries and generates all the necessary reports and graphs if configured. Then attaches them and then emails the data to the end-user.

Actions uses scripting to make changes to your data based on predefined conditions within your databases. This scripting allows you to import/export data to/from [SedonaOffice](#) and to integrate to other applications.

# SedonaSync Modules

- **SedonaSync Alerts Module**
  - These licenses allow you to connect and retrieve data from your company's databases, and then email it to your recipients.
- **SedonaSync Reports Module**
  - Allows the creation and delivery of content rich reports, such as PDF Invoices and Statements.
  - Attach Simple Charts and Graphs to your events.
- **SedonaSync Actions Module**
  - Allows you to manipulate your data by scripting changes based on conditions seen by **SedonaSync**.
  - Export/Import data to/from other data sources.
  - Integrate to other applications by using scripting.

# SedonaSync Alerts

- With Alerts you can virtually create any notification based on data within **SedonaOffice**.
- Compare data within your database to monitor changes that could identify possible issues before its too late.

# SedonaSync Reports

- **SedonaSync** Reports in conjunction with Crystal Reports allows you to create complex reports and get a grip on your big data while freeing up your staff from continually compiling these reports.
- One popular example is Email Invoicing and Statements. Using reports, **SedonaSync** will build the invoice or statement and export it as a PDF.
- Now with the added “Charts and Graphs” function you can add visual elements to your sync events to help you understand your data.

# SedonaSync Actions

- Create Workflows and new functionality, by using SQL INSERT, UPDATE, DELETE commands or EXECUTE stored procedures to import data or run functions.
- Export to .csv, .txt, .xml (Excel) by using write to file.
- Create Dashboard Metrics by building KPI data and writing it to a .xml or .html file on a webserver to create a real time dashboard.
- Use VB.Script to build a REST API connector to integrate 3<sup>rd</sup> party products such as ACT-On and FormStack and Salesforce.com.

# Agenda - Appointment Reminder

- Define SedonaSync Query
  - Tables
  - Links
  - Columns
    - Unique Index
  - Sort
  - Create Filter for # Days Out to Notify



# Agenda - Appointment Reminder

- Create SedonaSync Event
  - Query Selection with Filter
  - Email Notification
  - Subscribers
  - Schedule

# Agenda – Understanding Tracking

- Understanding Unique Indexes
- Message Break and Tracking

# Agenda - Appointment Reminder

- Build SedonaSync Action
  - Create a field note when the reminder has been sent.

# Agenda – Tomorrows Appointments Dashboard

- Build SedonaSync Dashboard File.
  - HTML Begin and End Repeat

# Agenda – Tomorrows Appointments Distribution by Priority Chart

- Define Chart Query
- Create Chart – Report Definition
- Attach Chart to Dashboard