



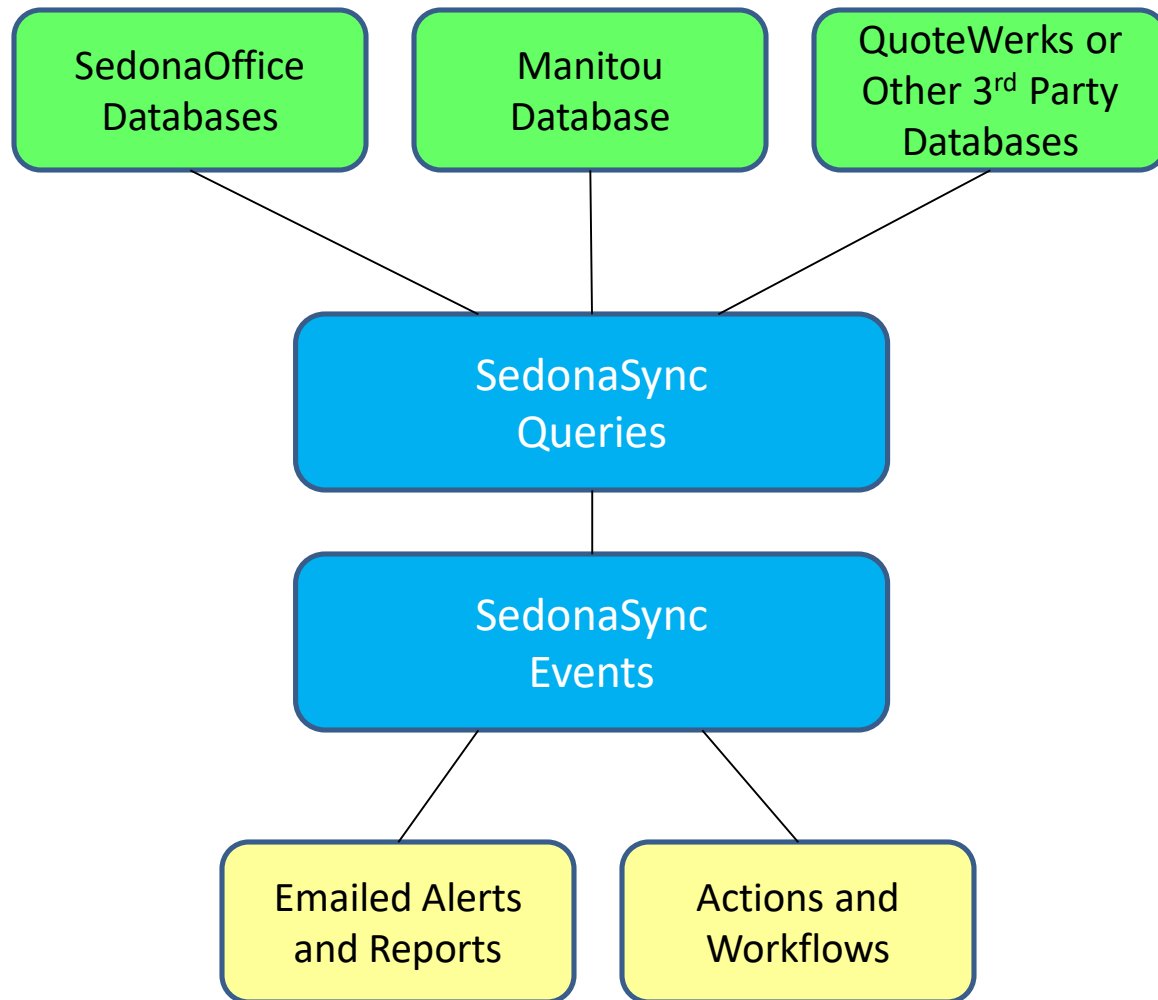
SedonaSync in Action

Presented By:

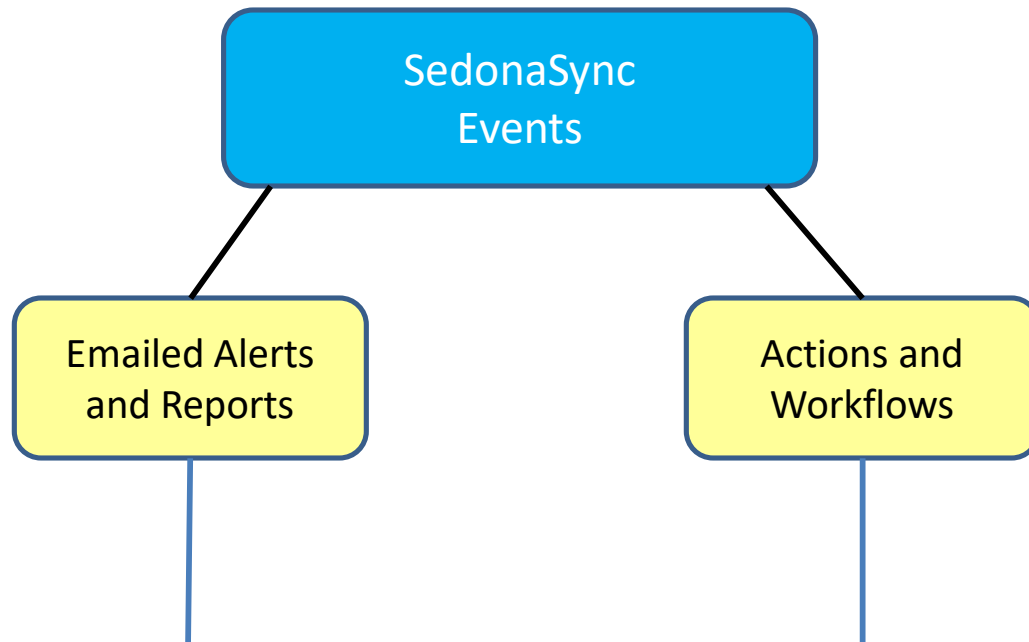
OPT Business Services

OPT Business Services, Inc.

What is SedonaSync?



What is SedonaSync?



Alerts and Reports takes data collected from queries and compiles all of your information with optional attachments or graphs, and then emails the finished product to the end-user.

Actions uses scripting to make changes to your data, or insert new data, based on predefined conditions within your databases. This scripting allows you to create, import, or even export data to or from SedonaOffice and to integrate to other applications.

SedonaSync Modules

- SedonaSync Alerts Module
 - This module allows you to connect and retrieve data from your company's databases, and then email it to your recipients.
- SedonaSync Reports Module
 - Reports affords the creation and delivery of content rich reports, such as PDF Service Tickets, Invoices, and Statements.
 - Create and attach Simple Charts and Graphs to your events.
- SedonaSync Actions Module
 - Actions allows you to manipulate your data by scripting changes based on conditions defined in SedonaSync.
 - Export and Import data to or from SedonaOffice and other data sources as well.
 - Integrate to other applications by using database scripting.

SedonaSync Alerts

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

Parts with less than their required quantities.

Williamsport

1/9/2015 5:00:28 PM



Warehouse	Part #	Description	On Hand	Min. Qty	Order to Min.	Max. Qty	Order to Max.	Pending Out	Pending In	On Order	Vendor
Williamsport	270R	HOLD-UP, LATCHING	3	4	1	5	2	0	0	0	ADI
Williamsport	270R	HOLD-UP, LATCHING	3	4	1	5	2	0	0	0	ADI
Williamsport	5816WMWH	TRANSMITTER, DOOR/WINDOW, WHITE, W/MAG	-2	8	10	10	12	0	0	0	ADI
Williamsport	5816WMWH	TRANSMITTER, DOOR/WINDOW, WHITE, W/MAG	-2	8	10	10	12	0	0	0	ADI
Williamsport	AC-AM3305	PLATE, MOUNTING, MAG LOCK 600S, 5/8"	0	1	1	1	1	0	0	0	ADI
Williamsport	AC-AM3305	PLATE, MOUNTING, MAG LOCK 600S, 5/8"	0	1	1	1	1	0	0	0	ADI
Williamsport	AC-AM6305	PLATE, SPACER, MAG LOCK, 5/8"	0	1	1	1	1	0	0	0	ADI
Williamsport	AC-AM6305	PLATE, SPACER, MAG LOCK, 5/8"	0	1	1	1	1	0	0	0	ADI

**SO
UC**

SedonaSync Reports

- SedonaSync Reports in conjunction with Crystal Reports allows you to create complex reporting and get a grip on your big data while freeing up your staff from continually compiling information as it changes.
- One popular example is Email Invoicing and Statements. Using reports, SedonaSync can 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.

The following is your daily financial flash report for 1/9/2015

TOTAL OF TODAY'S DEPOSITS: Cash - BOA* \$0.00

* DEPOSITS WEEK TO DATE: \$0.00
* DEPOSITS MONTH TO DATE: \$75,874.43
* DEPOSITS YEAR TO DATE: \$75,874.43

THERE IS CURRENTLY \$246,453.33 IN UNDEPOSITED FUNDS

TOTAL OF TODAY'S PAYMENTS: Cash - BOA* \$0.00

* PAYMENTS WEEK TO DATE: (\$305.32)
* PAYMENTS MONTH TO DATE: (\$236.33)
* PAYMENTS YEAR TO DATE: (\$236.33)

THE CURRENT VALUE OF INVENTORY IS: \$1,642,087.16 WHICH IS UP \$4,096.16 FROM YESTERDAY'S \$1,637,991.00

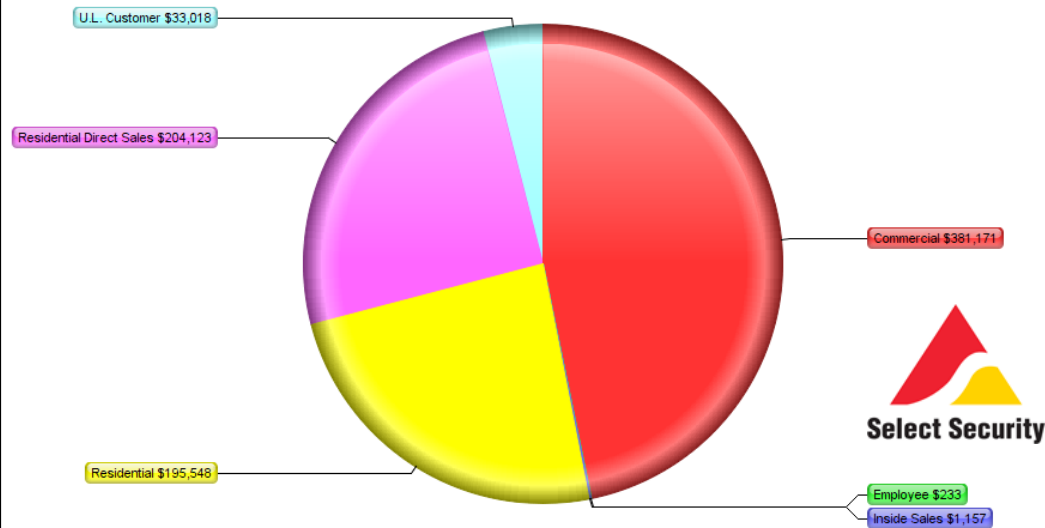
ACCOUNTS TO BE CANCELED THIS MONTH: 27

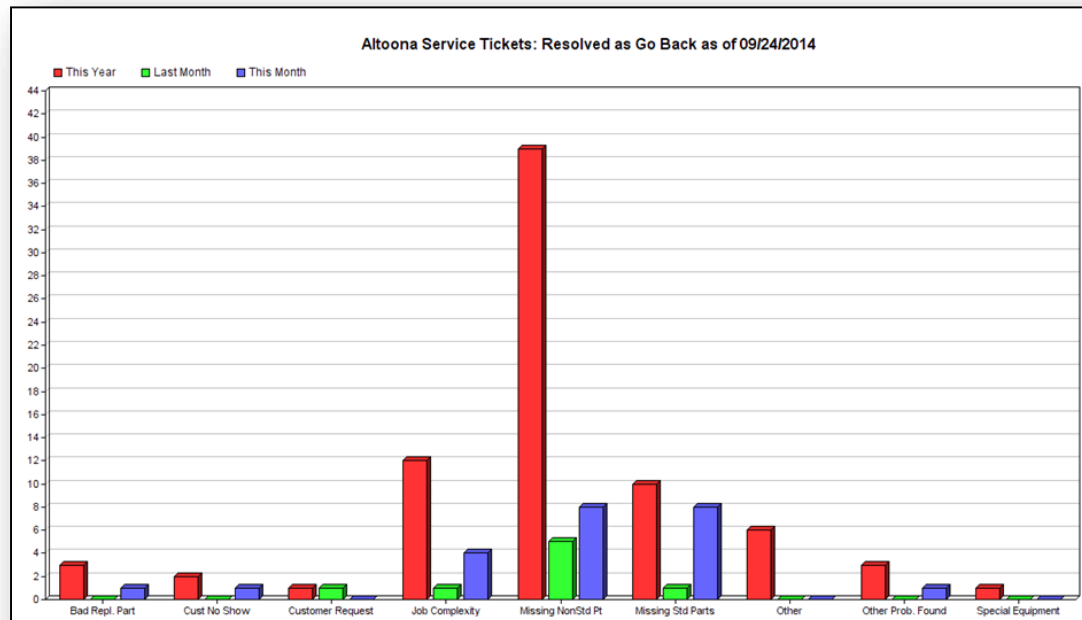
* REDUCTION IN RECURRING FROM CANCELED ACCOUNTS: \$1,020.28
* BALANCE OF CONTRACT DUE FROM CANCELED ACCOUNTS: \$11,415.91

NEW SITES ADDED THIS MONTH: 44

* ACCOUNTS ALREADY BEING BILLED RMR: 25
* ADDITIONAL RMR FROM THOSE ACCOUNTS: \$419.42

RMR Totals by Customer Type as of 1/9/2015 7:00:22 PM





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 an .xml or .html file on a webserver to create a real time dashboard.
- Use VB.Script to build a REST API connector to integrate 3rd party products such as FormStack and Salesforce.com.



Select Security

Late To Test Customers - Select Security

(Advanced Excel Worksheet Attached)

1/9/2015 5:47:57 AM

Manitou #	Sedona #	Panel	INTVL	LTT Since	Customer	Site Name	Site Address	Town, State	Zip	Branch
2153 792	2153-0792	Honeywell Vista 15	24 Hours	01/09/2015	8060	ABC Plumbing	123 Main Street	Lancaster, PA	17602	Lancaster
2167 7198	2167-7198		720 Hours	01/09/2015	19977	M/M Smith	1 Back Road	Bardstown, KY	40004	Bardstown, KY
2153 730	2153-0730	Honeywell Vista 15								
1235 999	1235-0999	FA168CPS								
2153 2048	2153-2048	Honeywell Vista 128FB								
2153 345	2153-0345	Honeywell Vista 128FBP								
2157 3163	2157-3163	DMP XR20 Panel								
2096 150	2096-0150									
2157 14	2157-0014	RADIONICS, UNKNOWN								
2153 1525	2153-1525	Morse/Optex 824 Panel								
2153 8043	2153-8043	Edwards STI Scantronic								
1	Panel	ASET	INTVL	LTT Since	Custom	Site Town	Customer Email	Over 90	Over 120	Branch
2	Honeywell Vista 15P	Y	168	01/08/2015	16857	Radcliff		\$238.32	\$0.00	Bardstown, KY
3	Alarm.Com IP (Surguard)	Y	720	01/06/2015	6617	Harrisburg	yokoth@aol.com	\$49.99	\$99.98	Lancaster
4		N	24	01/05/2015	18096	Bowling Green		\$0.00	\$595.87	Bowling Green, KY
5	Alarm.Com IP (Surguard)	Y	720	01/03/2015	8736	Dallas		\$0.00	\$48.71	Dallas
6	Honeywell Vista 15P	N	168	01/02/2015	16949	Elizabethtown		\$29.95	\$29.95	Bardstown, KY
7		Y	720	01/01/2015	18115	Bowling Green		\$0.00	\$7.30	Bowling Green, KY
8	DSC 1832	Y	720	12/30/2014	10760	Towanda		\$0.00	\$239.48	Williamsport
9	Pers with Voice Comm	Y	720	12/27/2014	11876	Meadville		\$0.00	\$6.09	Franklin
10	Honeywell Vista 20P	Y	720	12/25/2014	3922	Manheim		\$0.00	\$225.00	Lancaster
11	DMP XR20	Y	168	12/23/2014	12706	Valley City		\$0.00	\$24,698.2	Medina
12	Unknown Panel Type	Y	720	12/05/2014	8399	Cleveland Heights		\$97.04	\$0.00	Medina
13	DS 7400Xi Pnl	Y	24	12/02/2014	8603	Port Clinton		\$96.74	\$0.00	Medina
14	Moose ZX400 Panel	Y	720	11/29/2014	11766	Effort		\$237.60	\$0.00	Stroudsburg
15		Y	720	11/29/2014	18216	Smiths Grove		\$84.31	\$0.00	Bowling Green, KY
16	2 Gig IP	Y	720	11/28/2014	15046	Wilkes Barre		\$0.00	\$44.99	Stroudsburg
17	Honeywell Vista 20	Y	720	11/06/2014	17474	Steelton		\$60.00	\$0.00	Lancaster
18	First Alert 110C	Y	168	10/23/2014	12908	Medina		\$92.36	\$92.36	Medina
19	FA168CPS	Y	720	10/22/2014	6378	East Stroudsburg		\$30.97	\$0.00	Stroudsburg
20	Alarm.Com IP (Surguard)	Y	720	10/06/2014	8713	Dallas		\$54.12	\$54.12	Dallas
21	DSC 832 Version 1.0	N	720	10/04/2014	9800	Oil City		\$80.25	\$0.00	Franklin
22	Pers with Voice Comm	Y	720	10/02/2014	4579	Oil City		\$32.25	\$0.00	Franklin
23	DMP XR200 Panel	Y	168	09/16/2014	12706	Valley City		\$0.00	\$24,698.2	Medina
24	DMP XR20 Panel	Y	168	09/15/2014	12910	Medina		\$0.00	\$133.48	Medina
25	DSC 832 Version 2	Y	170	09/11/2014	10196	Oil City		\$75.00	\$0.00	Franklin
26	2 Gig IP	Y	720	08/24/2014	13895	Frankfort		\$39.99	\$39.99	Louisville
27	DMP XR200 Panel	Y	168	09/16/2014	12706	Valley City		\$0.00	\$24,698.2	Medina

SedonaSync Demo

- Step 1 – Create Application
 - Select Connection Method
- Step 2 – Create Query
 - Select Tables
 - Link Tables
 - Select Columns
 - Grouping
 - Custom Columns
 - Select Sorting
 - Message Break
 - Select Filters
 - Define Parameters
 - SQL Tab
 - SedonaOffice Query Builder Import
 - Preview

SedonaSync Demo - Query

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments X' Days Out

Description | Tables | Links | Columns | Sorting | Filters | Sub Filters | SQL | Preview

Internal ID number: 38

Query Description: Appointments X' Days Out

Display Description: Appointments X' Days Out

☒ Active

History:

Item created by: KnowledgeSync Event Manager

Item created on: 1/20/2018 4:22:35 AM

Item last changed by: OPT-DEMO:Administrator

Item last changed on: 1/20/2018 4:41:52 AM

Notes:

<< Back Next >> Cancel

SedonaSync Demo - Tables

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description **Tables** Links Columns Sorting Filters Sub Filters SQL Preview

Available Tables:

- dbo.Account_Period_Summary
- dbo.Account_Reconciliation_Log
- dbo.AlarmFF
- dbo.alarmff1
- dbo.alarmff2
- dbo.AllCredits
- dbo.ALMailTo
- dbo.ALNameAddress
- dbo.ALUserDef
- dbo.AP_ADI_Invoice_Data
- dbo.AP_Check
- dbo.AP_Check_Expense
- dbo.AP_Check_Invoices
- dbo.AP_Check_Parts

Add Table ->

Selected Tables:

- dbo.AR_Customer_Site
- dbo.AR_Customer_System
- dbo.SS_Priority
- dbo.SV_Problem
- dbo.SV_Service_Tech
- dbo.SV_Service_Ticket
- dbo.SV_Service_Ticket_Dispatch

<- Remove Table

<< Back Next >> Cancel

SedonaSync Demo - Links

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables **Links** Columns Sorting Filters Sub Filters SQL Preview

Add Table Link...

Tables Linked Together				
Table Name	Linked to Table Name	Column Name	Linked to Column Name	
▶ dbo.SV_Service_Ticket_C	dbo.SV_Service_Tech	dbo.SV_Service_Ticket_Dispr	dbo.SV_Service_Tech.Servi	L
dbo.SV_Service_Ticket_C	dbo.SV_Service_Ticket	dbo.SV_Service_Ticket_Dispr	dbo.SV_Service_Ticket.Seri	L
dbo.SV_Service_Ticket	dbo.SV_Problem	dbo.SV_Service_Ticket.Proble	dbo.SV_Problem.Problem_Id	L
dbo.SV_Service_Ticket	dbo.SS_Priority	dbo.SV_Service_Ticket.Priorit	dbo.SS_Priority.Priority_Id	L
dbo.SV_Service_Ticket	dbo.AR_Customer_Syst	dbo.SV_Service_Ticket.Custo	dbo.AR_Customer_System.C	L
dbo.AR_Customer_System	dbo.AR_Customer_Site	dbo.AR_Customer_System.Cu	dbo.AR_Customer_Site.Cust	L
dbo.SV_Service_Tech	dbo.SY_Employee	dbo.SV_Service_Tech.Employ	dbo.SY_Employee.Employee	L

☐ I would like to manually input the table linking.

<< Remove Link << Remove All Links

<< Back Next >> Cancel

SedonaSync Demo - Columns

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables Links **Columns** Sorting Filters Sub Filters SQL Preview

Available Columns to Query:

dbo.AR_Customer_Site.Address_1
dbo.AR_Customer_Site.Address_2
dbo.AR_Customer_Site.Address_3
dbo.AR_Customer_Site.Branch_Id
dbo.AR_Customer_Site.Business_Name

Add Column to Query->
Add All Columns to Query->>
Add Calculated Column to Query...

Query Columns Selected

Column Name Selected	Column Type	Customized Name	Unique
dbo.SS_Priority.Description	Normal	Description	<input type="checkbox"/>
dbo.SV_Service_Ticket.CustomerComments	Normal	CustomerComments	<input type="checkbox"/>
dbo.SY_Employee.First_Name + ' ' + dbo.SY_	Normal	Tech	<input type="checkbox"/>
dbo.SV_Service_Ticket.Auto_Notify	Normal	Auto_Notify	<input type="checkbox"/>
dbo.SV_Service_Ticket_Dispatch.Schedule_	Normal	Schedule_Time	<input type="checkbox"/>
dbo.SV_Service_Ticket_Dispatch.Dispatch_	Normal	Dispatch_Id	<input checked="" type="checkbox"/>
DATEDIFF(DAY, '%Current Date Time%', dbx...	Normal	DaysOut	<input type="checkbox"/>
dbo.SV_Service_Ticket.Service_Ticket_Id	Normal	Service_Ticket_Id	<input type="checkbox"/>

< Remove Column from Query << Remove All Columns from Query

☐ Return DISTINCT Rows of Data Only

<< Back Next >> Cancel

SedonaSync Demo - Columns

SedonaSync - Calculated Column Editor

Double-Click on available columns and/or calculations to select or edit Workbox manually:

Calculations to perform (sqlserver):

- CHARINDEX - Return the location of a string in a database column
- CONVERT - Change date/time column to date only
- CONVERT - Change date/time column to time only
- CONVERT - Change date/time column to time only (Military)
- CONVERT - Change string column to a number
- CONVERT - Change number column to a string
- CONVERT - Change currency column to a string
- DATEADD - Add 1 hour to today's date
- DATEADD - Add 30 minutes to today's date

Database Columns to use in calculation:

- dbo.AR_Customer_Site.Address_1
- dbo.AR_Customer_Site.Address_2
- dbo.AR_Customer_Site.Address_3
- dbo.AR_Customer_Site.Branch_Id
- dbo.AR_Customer_Site.Business_Name
- dbo.AR_Customer_Site.Business_Name_2
- dbo.AR_Customer_Site.Commercial
- dbo.AR_Customer_Site.Country_Id
- dbo.AR_Customer_Site.Cross_Street
- dbo.AR_Customer_Site.Customer_Bill_Id

Variables to use in calculation:

- %Current Year%
- %Last Year%
- %Next Year%
- %Current Date%
- %Current Date YYYY/MM/DD%
- %Current Date Time%
- %Current Time Military%
- %Current Time Military Max%
- %Current Time%
- %Current Hour%

Calculated Column Workbox:

DATEDIFF(DAY,'%Current Date Time%',dbo.SV_Service_Ticket_Dispatch.Schedule_Time)

OK Cancel

SedonaSync Demo - Sorting

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables Links Columns **Sorting** Filters Sub Filters SQL Preview

Available Columns for Sorting:

DATEDIFF(DAY, '{%Current Date Time%}', dbo.SV_Service_Ticket_...
dbo.AR_Customer_Site.Business_Name
dbo.AR_Customer_System.Alarm_Account
dbo.SS_Priority.Description
dbo.SV_Problem.Problem_Code

Add Column for Sorting->
Add All Columns for Sorting->

Columns Selected for Sorting

Column Name	Sort Direction
▶ dbo.SV_Service_Ticket.Ticket_Number	Ascending
dbo.SV_Service_Ticket_Dispatch.Schedule_Time	Ascending

<-Remove Column from Sorting <<-Remove All Columns from Sorting

<< Back Next >> Cancel

SedonaSync Demo - Filters

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables Links Columns Sorting **Filters** Sub Filters SQL Preview

Available Columns to Filter:

dbo.AR_Customer_Site.Address_1
dbo.AR_Customer_Site.Address_2
dbo.AR_Customer_Site.Address_3
dbo.AR_Customer_Site.Branch_Id
dbo.AR_Customer_Site.Business_Name

Add Column to Filter->
Add All Columns to Filter->>
Add Calculated Column to Filter...

Columns Selected for Filtering						
	Column Name	Is or Is	Operator	Compare Value	Type	And
▶	dbo.SV_Service_Ticket_Dispatch	is	less than	1/1/1900	Date	And
	DATEDIFF(DAY, '%Current Date 1	is	less than or equal to	?	Number	And
	dbo.SV_Service_Ticket_Dispatch	is	greater than or equal to	{%Current Date t	Date	And
	dbo.SV_Service_Ticket.Auto_Not	is	like	%@%.	Char	And

<-Remove Column from Filter <<-Remove All Columns from Filtering If Column Values Have Changed...

<< Back Next >> Cancel

SedonaSync Demo - SQL

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables Links Columns Sorting Filters Sub Filters SQL Preview

```
SELECT dbo.SV_Service_Ticket.Ticket_Number AS "Ticket_Number", dbo.SV_Service_Ticket.Ticket_Status AS "Ticket_Status", dbo.AR_Customer_Site.Business_Name AS "Business_Name",  
dbo.AR_Customer_System.Alarm_Account AS "Alarm_Account", dbo.SV_Problem.Problem_Code AS  
"Problem_Code", dbo.SS_Priority.Description AS "Description", dbo.SV_Service_Ticket.CustomerComments AS  
"CustomerComments", dbo.SY_Employee.First_Name + ' ' + dbo.SY_Employee.Last_Name AS "Tech",  
dbo.SV_Service_Ticket.Auto_Notify AS "Auto_Notify", dbo.SV_Service_Ticket_Dispatch.Schedule_Time AS  
"Schedule_Time", dbo.SV_Service_Ticket_Dispatch.Dispatch_Id AS "Dispatch_Id", DATEDIFF(DAY, (%Current  
Date Time%), dbo.SV_Service_Ticket_Dispatch.Schedule_Time) AS "DaysOut",  
dbo.SV_Service_Ticket.Service_Ticket_Id AS "Service_Ticket_Id" FROM ((((((dbo.SV_Service_Ticket_Dispatch  
LEFT OUTER JOIN dbo.SV_Service_Tech ON dbo.SV_Service_Ticket_Dispatch.Service_Tech_Id =  
dbo.SV_Service_Tech.Service_Tech_Id) LEFT OUTER JOIN dbo.SV_Service_Ticket ON  
dbo.SV_Service_Ticket_Dispatch.Service_Ticket_Id = dbo.SV_Service_Ticket.Service_Ticket_Id) LEFT OUTER  
JOIN dbo.SV_Problem ON dbo.SV_Service_Ticket.Problem_Id = dbo.SV_Problem.Problem_Id) LEFT OUTER JOIN  
dbo.SS_Priority ON dbo.SV_Service_Ticket.Priority_Id = dbo.SS_Priority.Priority_Id) LEFT OUTER JOIN  
dbo.AR_Customer_System ON dbo.SV_Service_Ticket.Customer_System_Id =  
dbo.AR_Customer_System.Customer_System_Id) LEFT OUTER JOIN dbo.AR_Customer_Site ON  
dbo.AR_Customer_System.Customer_Site_Id = dbo.AR_Customer_Site.Customer_Site_Id) LEFT OUTER JOIN  
dbo.SY_Employee ON dbo.SV_Service_Tech.Employee_Id = dbo.SY_Employee.Employee_Id) WHERE  
dbo.SV_Service_Ticket_Dispatch.Arrival_Time < '1/1/1900' AND DATEDIFF(DAY, (%Current Date Time  
%), dbo.SV_Service_Ticket_Dispatch.Schedule_Time) <= !!DATEDIFF(DAY, (%Current Date Time  
%), dbo.SV_Service_Ticket_Dispatch.Schedule_Time)!!! AND dbo.SV_Service_Ticket_Dispatch.Schedule_Time  
>= '{%Current Date MM/DD/YYYY%}' ORDER BY dbo.SV_Service_Ticket.Ticket_Number ASC,  
dbo.SV_Service_Ticket_Dispatch.Schedule_Time ASC
```

☐ I would like to manually edit the SQL for this query.

<< Back Next >> Cancel

SedonaSync Demo - Preview

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Quer...

File Edit Help

Save and Close Save and New Delete Previous Next

Query Description: Appointments 'X' Days Out

Description Tables Links Columns Sorting Filters Sub Filters SQL **Preview**

Appointments 'X' Days Out						
	Ticket_Number	Ticket_Status	Business_Name	Alarm_Account	Problem_Code	Description
▶	731627	SC	Atlantic Point-Residence Servic	000E2551	IBFQ	Medium
	731627	SC	Atlantic Point-Residence Servic	000E2551	IBFQ	Medium
	731985	SC	ADD-Site 14 Horseshoe Drive	000E2879	INFQ	High
	731992	SC	ADD-Site 21 Randall Road	000E2884	INFQ	High
	732225	SC	Quiah, Milton	C0203205	RI	Low
	732514	SC	ADD-Site 19 Lakeview	000E2882	IBFQ	Medium
	732741	SC	ADD-Site 1 Northville	000E2870	INFQ	High
	733102	SC	Lapatine, Ellen	C0200840	RI	Low

<< >>

<< Back Next >> Cancel

SedonaSync Demo

- Step 3 – Create Report
 - Select Crystal Report File
 - Or
 - Define Chart Report
- Step 4 – Scheduled Reports

SedonaSync Demo - Chart

KnowledgeSync - Report Definitions (Chart) [X]

File Edit Help

Save and Close Delete Previous Next

Chart Name: Tomorrows Appointments

Description History

Internal ID number: 1 Chart Name: Tomorrows Appointments

Chart Type: Pie Chart Style: 3D

Chart Format: Circular Labels ☒ Multi-Color

Display this chart's numeric data point values formatted as: Numbers: n,nnn and Percent: nn%

Query to use for this chart (only one query is allowed for this chart type) Parameters...

1-SedonaOffice 2018 Users Conference: Tomorrows Appointments by Priority, Parameters=Yes

Add Query... Edit Query... Remove Query Move Up Move Down

Variables (Use Double-click to insert into field):

- {!DATEDIFF(DAY, '{%Current Date Time%}', dbo.SV
- >{%Current Date MM/DD/YYYY%}
- >{%Current Date Time%}
- >{%Current Date YYYY/MM/DD%}

Chart Title (Optional):

SedonaOffice 2018 Users Conference: Tomorrows Appointments by Priority as of {%Current Date Time%}

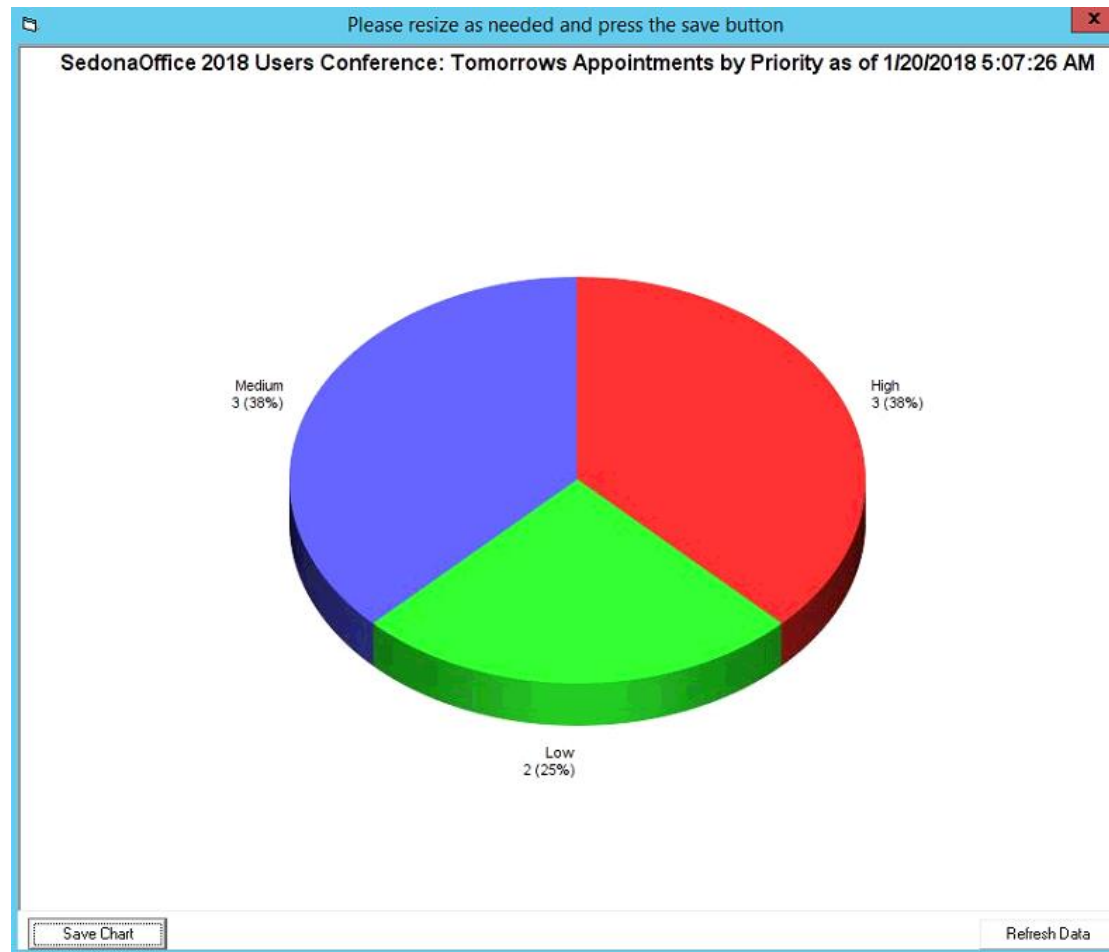
Y-Axis Title (left vertical): Tomorrows Appointments by Priority

X-Axis Title (bottom horizontal):

Output Filename (optional): chart

Verify/Size Chart...

SedonaSync Demo - Chart



SedonaSync Demo

- Step 5 – Create Event
 - Using Tracking
 - Select Queries
 - Select Reports
 - Select Files
 - {attachment_files}
 - Build Email
 - Write Actions
 - Create File, Submit SQL, Run Program
 - Define Subscribers
 - Standard vs Advanced (Dynamic)
 - Message Break, Subscriber Groups
 - Select Schedule
 - Test Event

SedonaSync Demo - Event

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track

Internal ID number: 34

Event Description: Appointment Reminder

Lookup Key (Optional):

Priority (0=Highest): 5

☒ Active

☐ Repeat notification for triggered items.

☒ Keep only last checked record in Monitor.

History:

Item created by: KnowledgeSync Event Manager

Item created on: 1/20/2018 4:22:35 AM

Item last changed by: OPT-DEMO\Administrator

Item last changed on: 1/20/2018 4:33:01 AM

Notes:

<< Back Next >> Cancel Help

SedonaSync Demo - Queries

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description **Queries** Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track

Add Query...

Queries Selected For Content	
Application	Query Description
▶ SedonaOffice 2018	Appointments 'X' Days Out

☐ Use Script instead of Query Script: Select Script...

<-Remove Query <<-Remove All Queries

Event Trigger Parameters	
Question	Answer
▶ Days Out?	1

<< Back Next >> Cancel Help

SedonaSync Demo - Reports

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries **Reports** Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track

Add Report...

Reports Selected For Content		
Application	Report Description	Output Type/Style
SedonaOffice 2018	Tomorrows Appointments - SedonaOffice	PNG (Chart Only)

<-Remove Report <<-Remove All Reports

Report Parameters		
Report Name	Question	Answer
Tomorrows Appointments - SedonaOffice	Days Out?	(DaysOut)

<< Back Next >> Cancel Help

SedonaSync Demo - Files

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports **Files** Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track

Add File...

Files Selected For Content			
	File Specification	Description	Ascii Text
▶	C:\KnowledgeSync\Attachments\Service_Contract_	Service Contact Promotion	<input type="checkbox"/>
*			<input type="checkbox"/>

<-Remove File <<-Remove All Files

<< Back Next >> Cancel Help

SedonaSync Demo - Email

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule Track

Available values for use in message content:

{Alarm_Account}	^
{Auto_Notify}	
{Business_Name}	
{CustomerComments}	
{DaysOut}	v

Use selected value in Text

Email Account to Send From: Local Test

Email Reply Address (Optional):

Message Subject:

Your Upcomming Service Call

Message Text:

{%Current Date MM/DD/YYYY%}

Dear {Business_Name},

We would like remind you of our upcoming service appointment. Please make sure someone over the age of 18 is present. If for any reason you cannot make the

☒ Include reports as email attachments. ☒ Include files as email attachments.

☒ Email notifications should wait until reports are completed.

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SedonaSync Demo - Actions

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM **Actions** Subscribers Schedule Track

Create File **Submit SQL** Run Program Run Basic Script Twitter Tweet

Available values for use in the SQL statement:

{Alarm_Account}
{Auto_Notify}
{Business_Name}
{CustomerComments}
{DaysOut}

Use selected value

Enter the connection information and SQL Statment below to submit

	Connection Information	SQL Statement to submit to the connection	Wait for
▶	SedonaOffice ...	INSERT INTO [SV_Service_Ticket_Notes] ([Service_T	
*			

< >

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SedonaSync Demo – Action SQL

KnowledgeSync - SQL Statement Editor

SQL Tables/Columns to use in SQL:

Click to select a table or view to retrieve it's columns

Variables to use in the SQL:

- {Alarm_Account}
- {Auto_Notify}
- {Business_Name}
- {CustomerComments}
- {DaysOut}
- {Description}
- {Dispatch_Id}
- {Problem_Code}

Sample SQL Statements/Functions/Calculations to use in SQL:

- Sample INSERT INTO SQL Statement - Method 1
- Sample INSERT INTO SQL Statement - Method 2
- Sample UPDATE SQL Statement - Update one or records
- CHARINDEX - Return the location of a string in a database column
- CONVERT - Change date/time column to date only

SQL Statement Editor. Double-click on objects above to insert at current mouse position.

```
INSERT INTO [SV_Service_Ticket_Notes]
([Service_Ticket_Id]
,[Notes]
,[Access_Level]
,[UserCode]
,[Entered_Date]
,[Edit_UserCode]
,[Edit_Date]
,[Is_Resolution])
VALUES
({Service_Ticket_Id},
'SedonaSync has emailed the appointment reminder alert to this customer'
,1
,'SedonaSync'
,getdate())
```

OK Cancel

SedonaSync Demo - Subscribers

KnowledgeSync - Application Events\SedonaOffice 2015 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions **Subscribers** Schedule Track

Standard Advanced

Add Subscriber...

Users Targeted For Delivery								
Subscriber	Type	Email	Fax	Copy	Page	WebCast	IM	
▶ OPT, Test	User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Computers Targeted For Delivery			
Subscriber	Type	Copy	IM

< Remove Subscriber << Remove All Subscribers

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SedonaSync Demo - Subscribers

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions **Subscribers** Schedule Track

Standard **Advanced**

Message Break Field / Database Lookup Value						
Database Field	Type	Email	Fax	Copy	Page	WebCast
▶ Dispatch_Id	User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	User Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

◀ ▶

Deliver to a specific email, pager, fax or webcast Name using database value	
Database Field	Contains this value
▶ Auto_Notify	Contains Email Address to send to
	Contains Email CC Address to send to
	Contains Email BCC Address to send to
	Contains Fax Number to dial
	Contains Paging Vendor Station Phone Number to dial
	Contains Pager PIN to page
	Contains WebCasting Name for web delivery

◀ ▶

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SedonaSync Demo – Schedule

KnowledgeSync - Application Events\SedonaOffice 2015 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers **Schedule** Track

Choose a schedule to use: Daily at 5pm

Edit This Schedule... Create New Schedule...

Scheduling Information:

Frequency: Daily, Daily time to run 5:00 pm
Allowed Days: Monday Tuesday Wednesday Thursday Friday
Allowed Months: January February March April May June July August September October November December

☒ Should this run on a holiday

Add Dependency...

The current event will be triggered if the following event(s) are triggered:

Application	Event Description
-------------	-------------------

<-Remove Dependency <<-Remove All Dependencies

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SedonaSync Demo - Tracking

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Reminder

Description Queries Reports Files Copy Email Fax Page WebCast IM Actions Subscribers Schedule **Track**

Items/Records are Tracked Only if:

- 1) This Event Uses a Query with a Unique Column Selected; and:
- 2) 'Repeat Notification for Triggered Items' is unchecked on the Description Tab.

Unique Values of Items/Records Tracked By This Event as of Last Run Date/Time

Dispatch_Id	Triggered Date/Time	Last Checked Date/Time
▶ 139356	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
139366	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
139470	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
139483	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
140022	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
139656	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
140246	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM
140005	1/20/2018 5:00:04 AM	1/20/2018 5:00:04 AM

<-Remove Tracked Item <<-Remove All Tracked Items

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SedonaSync Demo - Dashboards

KnowledgeSync - Application Events\SedonaOffice 2018 Users Conference\Events

File Edit Help

Save and Close Save and New Delete Previous Next

Event Description: Appointment Dashboard

Description Queries Reports Files Copy Email Fax Page WebCast IM **Actions** Subscribers Schedule Track

Create File Submit SQL Run Program Run Basic Script Twitter Tweet

Available values for use as file content:

{Alarm_Account}	^
{Auto_Notify}	
{Business_Name}	
{CustomerComments}	
{DaysOut}	v

Use selected value

File Specification: C:/inetpub/wwwroot/tickets.html

☐ Append content to file specification if it already exists ☒ Overwrite file specification if it already exists

Contents of the file that will be created:

```
<html><body><center><h1>Tomorrow's Service Calls</h1><table>
<tr><th>Ticket Number</th><th>Ticket Status</th><th>Alarm Account</th><th>Prob
{BEGIN*REPEAT}
<tr><td>{Ticket_Number}</td><td>{Ticket_Status}</td><td>{Alarm_Account}</td><t
{END*REPEAT}</table>
<br><hr><br>
</center></body></html>
```

< ||| >

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Open Discussion – Q&A

- Where do you think implementing [SedonaSync](#) automation will save you time and money?
- What other goals are you looking to achieve by using [SedonaSync](#)?
- Do I have the staff in place to achieve these goals?
- What kind of insights are you hoping to draw with the data you gather and report?
- How do you feel [SedonaSync](#) events will work into your daily routines?
- How can [SedonaSync](#) help your marketing goals?

For those already using [SedonaSync](#):

- What is your most impactful event or action?
- How has your [SedonaSync](#) events been accepted by your clients?
- What features would you like to see from [SedonaSync](#)?
- What's next for your teams?