

Document Overview

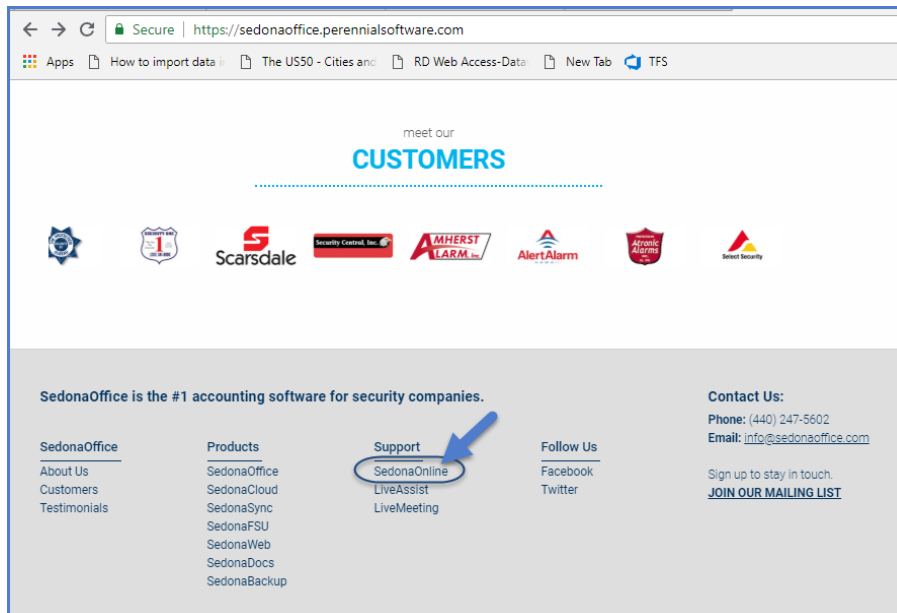
This document is being provided to explain how to set up a SedonaOnline account, and how to use SedonaOnline to submit and view Support Tickets.

Our company utilizes the SedonaOffice Service module to track all support issues reported to us by our customers. This includes any requests for enhancements to the software. All telephone calls and email received from our customers are logged into our support system by creating a service ticket. Our recommended method of requesting support for the SedonaOffice application is for the customer to enter a support request using SedonaOnline. Once a support request has been entered, the requestor will receive a return email with the ticket number assigned to the request. These requests are automatically routed to the appropriate support representative to address the question or item. SedonaOffice customers with access to SedonaOnline may login and view support tickets and read notes entered by your company and our support staff members.

Requesting a Login Name

SedonaOffice customers may request a Login Name for SedonaOnline by access the SedonaOffice website:
www.sedonaoffice.com.

Once you have reached our main web page, scroll to the bottom and click on the SedonaOnline option under the Support heading.



Once the Support Portal login form is displayed, click on the Setup New Account link.

SedonaOffice
The #1 Financial Software for Security Companies

Support Portal

Welcome
Please login with your information below, or create a new account.

Email Address

Password

[Forgot Password](#) [Convert Account](#)

[Setup New Account](#)

Notice: On-line payments have moved to: <https://billing.sedonaoffice.com:6328>

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Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4
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The Create a new account form will be displayed. All fields on this form followed by an asterisk must be filled in. The Customer Number is your company's SedonaOffice customer number; this number is printed on invoices our company has sent to your company. If you do not know your Customer Number, please check with your company's system administrator. When finished completing the form, click the Create Account button.

The requesting User will be sent an email to the address entered on the form to confirm this is a valid email address. Within that email will be a link to click on to login to SedonaOnline support for the first time.

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Support Portal

Create a new account
Welcome to the Account Setup process. Please fill in each required field below.

Customer Number*
Used to identify you

First Name*

Last Name*

Billing Zip Code*
Your billing zip

Email Address*
Used as username

Confirm Email*
Emails must match

Password*
Between 5 and 15 letters or numbers

Confirm Password*
Passwords must match

Phone
Ex: 248-123-4567

Extension
Valid numeric digits

Mobile
Your mobile number

Fax
Your fax number

* Required Field

Create Account

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Using SedonaOnline

Creating a Support Ticket


Login to SedonaOnline using the email address and password that was entered when creating a new account
<http://www.sedonasupport.com/online/>.

The screenshot shows the SedonaOffice Support Portal login interface. At the top left is the SedonaOffice logo with the tagline 'The #1 Financial Software for Security Companies'. To the right is the text 'Support Portal'. Below the logo is a 'Welcome' message: 'Please login with your information below, or create a new account.' The login form consists of two input fields: 'Email Address' and 'Password', both highlighted with yellow boxes. Below these fields is a 'Login' button. Underneath the login fields are three links: 'Setup New Account', 'Forgot Password', and 'Convert Account'. A green notice states: 'Notice: On-line payments have moved to: <https://billing.sedonaoffice.com:6328>'. At the bottom, contact information for SedonaOffice is provided: '549 East Washington Street, Chagrin Falls, OH 44022', 'Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4', and 'Copyright 2014, Perennial Software, Inc.'

A page will open displaying your company information. Click on the Service Tickets tab.

The screenshot shows the user dashboard after logging in. At the top left is the SedonaOffice logo. To the right is the text 'Support Portal'. Below the logo, the user is greeted with 'Welcome: Carol Johnson' and 'Customer #: 10049'. To the right of this, the customer information is displayed: 'Customer: Perennial Software, Inc.', '8401 Chagrin Rd Ste 15b', 'Chagrin Falls, OH 44023'. A 'Logout' link is in the top right corner. Below the welcome message is a navigation bar with two tabs: 'Home' (with a house icon) and 'Service Tickets' (with a ticket icon). A blue arrow points to the 'Service Tickets' tab. Below the navigation bar is a row of links: 'Change Password', 'Link New Customer Account', 'Manage Customer Accounts', 'Logout', and 'Enhancements'. Below this row is a 'Welcome to SedonaWeb' message. At the bottom, the same contact information for SedonaOffice is provided: '549 East Washington Street, Chagrin Falls, OH 44022', 'Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4', and 'Copyright 2014, Perennial Software, Inc.'

If any support tickets are currently open for your company, they will be displayed on this page. To create a new ticket, click on the Add Service Ticket option.



SedonaOffice
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Welcome: Carol Johnson
Customer #: 10049

Customer: Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
Chagrin Falls, OH 44023

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[Add Service Ticket](#)

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Open Tickets

Ticket #	Site	Account #	System	Created	Problem	Status	Last Note	Docs
138093	Perennial Software, Inc.	10049	SedonaOffice 5.x	9/17/2018	IT Services	Open		0
136758	Perennial Software, Inc.	10049	SedonaOffice 5.x	8/17/2018	Defect-SedonaSetup	Resolved		0
134092	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/27/2018	Enhancement-Application	Open		0
133607	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/15/2018	Question	Open		1
133586	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/14/2018	Defect-Jobs	Resolved		1
133559	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/14/2018	Defect-Inventory	Open		0
133558	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/14/2018	Defect-CM	Open	6/14/2018	0
132520	Perennial Software, Inc.	10049	SedonaOffice 5.x	5/23/2018	Defect-AR	Open		0
132296	Perennial Software, Inc.	10049	SedonaOffice 5.x	5/18/2018	Enhancement-Application	Open	5/18/2018	0
132130	Perennial Software, Inc.	10049	SedonaOffice 5.x	5/16/2018	QB	Open		0

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77 items in 8 pages

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The new Ticket form will be displayed. The Phone Number will default to the phone number our company has on file for the logged in User. If there is a different phone number you would like our support team to use to contact you, enter that number.

Site and System

The first two fields are the Site and System. If your company has more than one location, select the correct one from the drop-down list. In the System field, select the product for which you are submitting this ticket. Most of the time, you will select SedonaOffice.

Problem

In the Problem field, select from the drop-down list the option that best describes your request for support.

Priority

The priority will automatically default, however you may change this according to your perception of the urgency of your support request.

Comments

In the comments field, enter a brief note describing the need for support. You may enter up to 255 characters into this field. If you need more space, enter additional information into the Full Description field, which will accommodate an additional 1,024 characters. Please begin your comment with the version of SedonaOffice currently installed at your company; i.e.: 5.7.99.

If you have screen shots which are related to the support request, you may attach up to three files in the Upload area of the new Ticket form.

When finished completing the form, click the Submit button located at the bottom of the form.

You will receive an email indicating the ticket number assigned to your support request.

If you have questions related to an open support ticket or would like to provide more information, do not create a new ticket for this purpose; you may enter a comment on the existing ticket – see the topic, Entering Ticket Comments.

New Ticket Form

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Support Portal

Welcome: Carol Johnson
Customer #: 10049

Customer: Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
Chagrin Falls, OH 44023

Logout

Home

Service Tickets

[View Open Tickets](#) [View Closed Tickets](#) [Add Service Ticket](#) [Enhancements](#)

Site and System:

Perennial Software, Inc. - Perennial Software

SedonaOffice 5.x (10049)

Requested By:

Carol Johnson

Phone Number:

(440)247-5602

Problem:

Web FollowUp Training

Priority:

Low

Comments:
Chars left - 170

We have a new employee in our stockroom and need to schedule Inventory training.

Full Description:

Steps to Recreate:

Upload files:

File 1: Choose File No file chosen (File should not be over 1 megabyte)

Description 1: Web File 1

File 2: Choose File No file chosen (File should not be over 1 megabyte)

Description 2: Web File 2

File 3: Choose File No file chosen (File should not be over 1 megabyte)

Description 3: Web File 3

Submit

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Entering a Comment on an Existing Support Ticket

To enter a comment on an open ticket, click on the desired ticket number within the list of open tickets.

Note: Comments may be entered on closed tickets as well as open tickets.

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Support Portal

Welcome: Carol Johnson
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Customer: Perennial Software, Inc.
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[Enhancements](#)

Open Tickets

Ticket #	Site	Account #	System	Created	Problem	Status	Last Note	Docs
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136758	Perennial Software, Inc.	10049	SedonaOffice 5.x	8/17/2018	Defect-SedonaSetup	Resolved		0
134092	Perennial Software, Inc.	10049	SedonaOffice 5.x	6/27/2018	Enhancement-Application	Open		0
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132296	Perennial Software, Inc.	10049	SedonaOffice 5.x	5/18/2018	Enhancement-Application	Open	5/18/2018	0
132130	Perennial Software, Inc.	10049	SedonaOffice 5.x	5/16/2018	QB	Open		0

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8

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The Ticket Details form will be displayed. At the lower left of the form, click the Add Comment button.

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Support Portal

Welcome: Carol Johnson
Customer #: 10049

Customer: Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
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[View Open Tickets](#) [View Closed Tickets](#) [Add Service Ticket](#) [+ Enhancements](#)

Customer:
Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
Chagrin Falls OH, 44023

Site:
Perennial Software, Inc.
Perennial Software
45185 Joy Road
Canton MI, 48187

System: 10049
Type: SedonaOffice 5.x
Panel: N/A
Location: 5.7.0.43

Warranty: One Year Parts and Labor
Expires: 8/15/2002
Service Level: Premier Level Support
Next Inspection: 1/1/2014

Ticket Number: 136758
Status: Resolved
Problem: Defect-SedonaSetup
Priority: High
Contact: Carolyn Johnson
Phone: (734) 414-0760
Technician: * CorrectedNeedsTesting
Scheduled For:
Last Dispatched:
Created On: 8/17/2018
Created By:
Resolution: CBR -- Passed QA
Invoice:
Next Action:

Comments Entered:

Customer Comments:
8/17/2018 Customer Custom Fields: When checking date 1 as required and saving, when you return to this form, it shows Date 2 also marked as required. When querying the ar_setup_userdef table, it shows that date_2_required is being set to Y.

Field Comments:
8/17/2018 CarolynJ

No Parts

[Add Comment](#)

[Hide Comments](#)

[Upload Document](#)

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An empty Comment box will be displayed. You may enter up to 1,024 characters of information into the text box. When finished, click the Submit button located below the Comment box.

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Support Portal

Welcome: Carol Johnson
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8401 Chagrin Rd Ste 15b
Chagrin Falls, OH 44023

Home

Service Tickets

[View Open Tickets](#) [View Closed Tickets](#) [Add Service Ticket](#) [+ Enhancements](#)

Customer:
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Chagrin Falls OH, 44023

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Perennial Software
45185 Joy Road
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Type: SedonaOffice 5.x
Panel: N/A
Location: 5.7.0.43

Warranty: One Year Parts and Labor
Expires: 8/15/2002
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Next Inspection: 1/1/2014

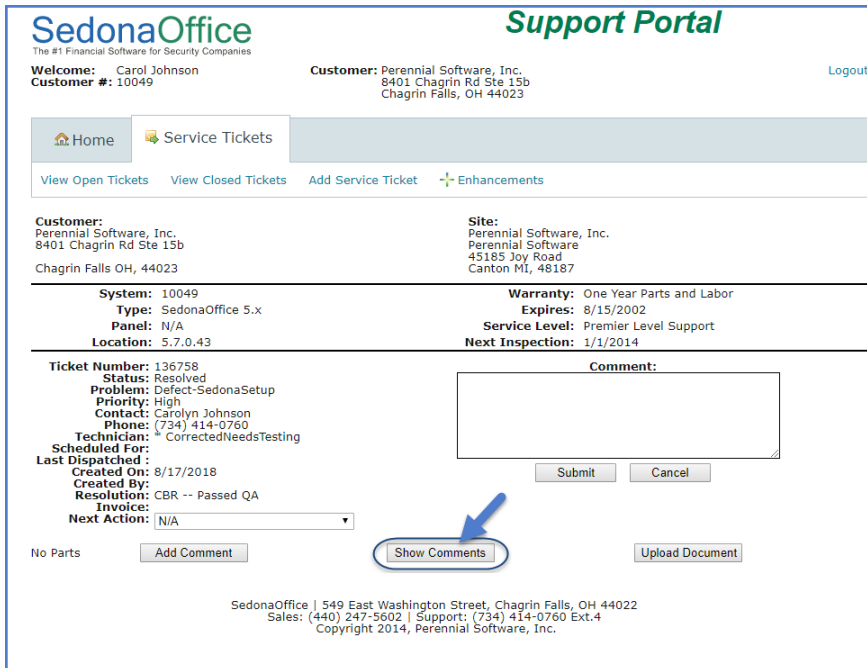
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Priority: High
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Phone: (734) 414-0760
Technician: * CorrectedNeedsTesting
Scheduled For:
Last Dispatched:
Created On: 8/17/2018
Created By:
Resolution: CBR -- Passed QA
Invoice:
Next Action:

Comment:

No Parts

Viewing Comments on an Existing Support Ticket

To view all previously entered ticket comments, open the desired ticket from the list of open tickets. . At the lower left of the form, press the Show Field Comments link.



SedonaOffice
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Perennial Software
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Canton MI, 48187

System: 10049
Type: SedonaOffice 5.x
Panel: N/A
Location: 5.7.0.43

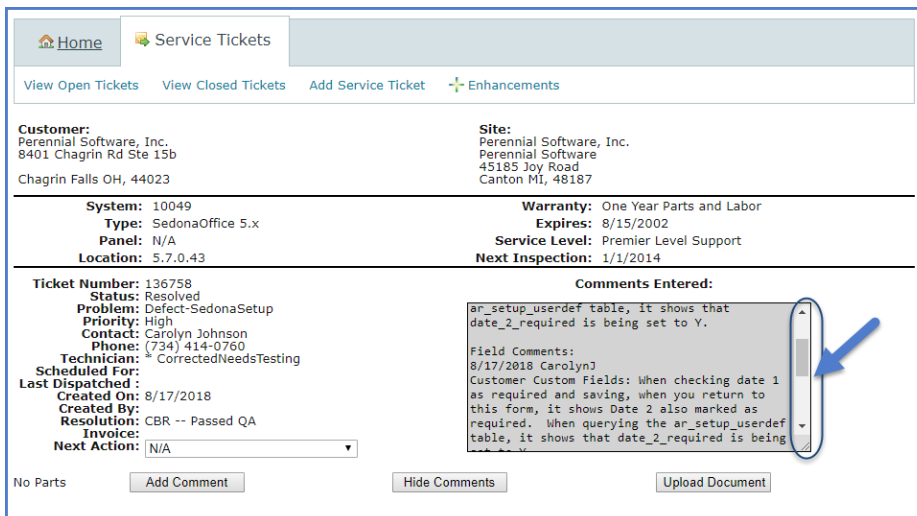
Warranty: One Year Parts and Labor
Expires: 8/15/2002
Service Level: Premier Level Support
Next Inspection: 1/1/2014

Ticket Number: 136758
Status: Resolved
Problem: Defect-SedonaSetup
Priority: High
Contact: Carolyn Johnson
Phone: (734) 414-0760
Technician: CorrectedNeedsTesting
Scheduled For:
Last Dispatched: 8/17/2018
Created On: 8/17/2018
Created By:
Resolution: CBR -- Passed QA
Invoice:
Next Action: N/A

Comment:

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To the right side of the ticket, a gray box labeled Comments Entered, will be displayed. Use the arrows to the right of this box to scroll up and down to see a previously entered comments.



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Created On: 8/17/2018
Created By:
Resolution: CBR -- Passed QA
Invoice:
Next Action: N/A

Comments Entered:

ar_setup_userdef table, it shows that date_2_required is being set to Y.

Field Comments:
8/17/2018 CarolynJ
Customer Custom Fields: When checking date 1 as required and saving, when you return to this form, it shows Date 2 also marked as required. When querying the ar_setup_userdef table, it shows that date_2_required is being

Uploading Documents on an Existing Support Ticket

To attach documents such as screen captures or any other electronic document that will help our support team in assisting on your request, click on the Upload Document button located at the lower right.

SedonaOffice
The #1 Financial Software for Security Companies

Support Portal

Welcome: Carol Johnson
Customer #: 10049

Customer: Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
Chagrin Falls, OH 44023

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Perennial Software
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Canton MI, 48187

System: 10049
Type: SedonaOffice 5.x
Panel: N/A
Location: 5.7.0.43

Warranty: One Year Parts and Labor
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Resolution: CBR -- Passed QA
Invoice:
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No Parts [Add Comment](#) [Hide Comments](#) [Upload Document](#)

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On the right side of the ticket, an area will be displayed labeled Upload Documents:.

Enter a Description, then click on the Choose File button to locate the document to be uploaded to the ticket. Once you have selected the file, click on the Upload button. You may repeat this same process to upload additional documents.

Note: Each document may not be larger than 1 megabyte.

The screenshot displays the SedonaOffice Support Portal interface. At the top, the SedonaOffice logo and 'Support Portal' title are visible. The user is logged in as Carol Johnson (Customer #10049). The page shows details for a ticket (136758) related to a 'Defect-SedonaSetup' problem. A blue arrow points to the 'Upload Documents' section, which includes a 'Description' field, a 'Choose File' button, and an 'Upload' button. The 'Choose File' button is currently disabled, and the text 'No file chosen' is displayed. A note indicates that the file should not be over 1 megabyte. The bottom of the page contains contact information for SedonaOffice and copyright details for Perennial Software, Inc.

SedonaOffice
The #1 Financial Software for Security Companies

Support Portal

Welcome: Carol Johnson
Customer #: 10049

Customer: Perennial Software, Inc.
8401 Chagrin Rd Ste 15b
Chagrin Falls, OH 44023

Logout

Home Service Tickets

View Open Tickets View Closed Tickets Add Service Ticket Enhancements

Customer:
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Site:
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Technician: * CorrectedNeedsTesting
Scheduled For:
Last Dispatched:
Created On: 8/17/2018
Created By:
Resolution: CBR -- Passed QA
Invoice:
Next Action: N/A

Upload Documents:
Description
Choose File No file chosen (File should not be over 1 megabyte)
Upload

No Parts Add Comment Show Comments Upload Document

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