



SedonaOffice and Stages Integration

User Guide

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Welcome to the SedonaOffice Stages Integration. This integration ensures greater continuity between linked databases with two-way sync functionality, reduces data entry as much as possible on both ends of the integration, and includes a smooth user experience that creates ease of use when transferring, linking, and syncing accounts.

Integration Setup Requirements

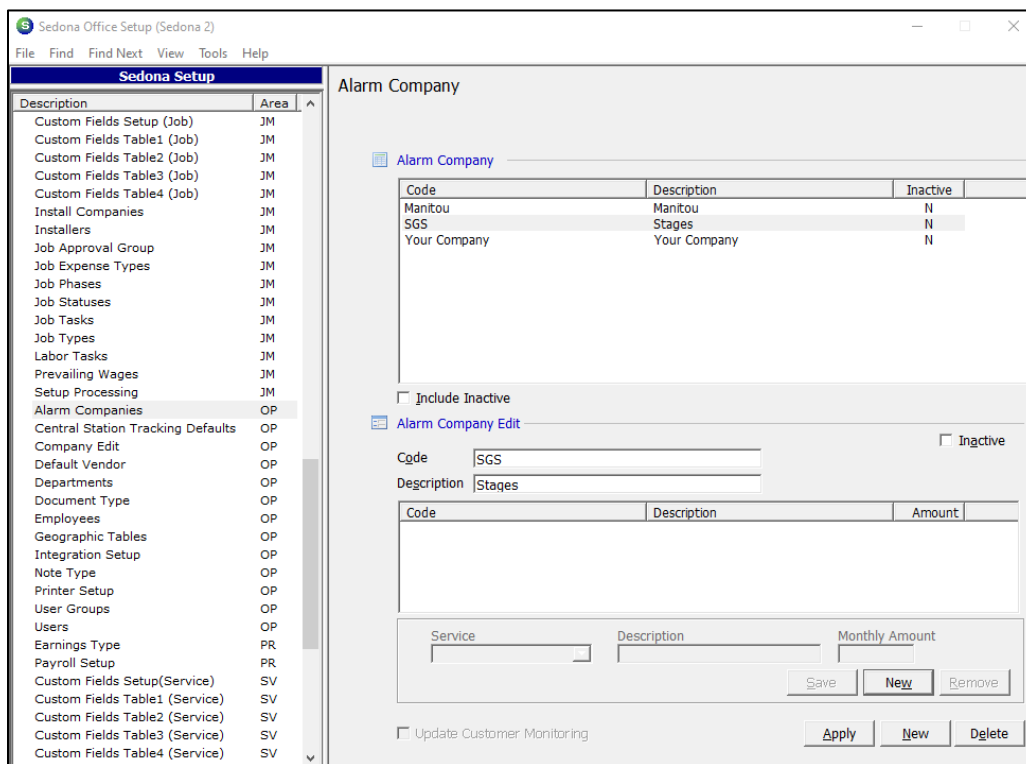
The SedonaOffice Stages integration is available for all users who can access A/R customers, sites, and systems. To set up the integration, the following information/tasks will need to be known/performed:

- The StagesGateway endpoint URL to use for the Stages integration.
- The username and password to use for the Stages integration.
- Contact Stages to have a task setup with the appropriate task type and task parameters in Stages. This task setup information will be used to define the credentials for the Stages Site Group.

SedonaOffice Setup

It is not currently possible to complete the entire integration setup via the SedonaOffice client. Some configurations must be manually performed via SQL.

1. The first step is to add an alarm company via the client:



This Code and Description are used to populate the CS Integration drop-down for selecting the integrator, so appropriate values should be entered:

After the alarm company has been added, the integration ID must be manually set in the CS_Alarm_Company table:

Alarm_Company_Id	Alarm_Company_Code	Description	Inactive	Integration_Id
1	N/A	N/A	N	1
2	ManitouOCX	Manitou OCX	N	2
3	SGS UCC	Stages UCC	N	5
4	Manitou	ManitouNEO	N	8

NOTE: Stages CS UCC (Central Station Universal Central Connector) = 5

The above table shows an example of a Stages integration (Integration_Id 5).

2. The next step is to manually add a row in the SS_Integration table if one does not already exist:

Please note that the Integration_Id and Description in the SS_Integration table must exactly match the below values for the integration to work properly.

Integration_Id	Description	User_Name	User_Password	Server_Name	DatabaseName	SQL_User	SQL_Password	Copy_To_Manitou	CS_User	CS_Password	CS_UH	CS_System_Label	Auto_Create_Credit	Alt_Server_Name	Alt_DatabaseName	Alt_SQL_User	Alt_SQL_Password	Service_To_Manitou	
1	5	Stages CS UCC						Y				Xmit#	N						N

- Integration_Id **must** = 5.
- Description **must** = Stages CS UCC
- Copy_To_Manitou = 'N'
- Auto_Create_Credit = 'N'
- Service_To_Manitou = 'N'
- CS_System_Label should be the appropriate text for the Central Station system identifier. This is used to identify the Stages device number on the SedonaOffice System form:

The screenshot shows a web form with several tabs: System, Custom Fields, Recurring, Equipment, Inspections, and No. The 'System' tab is active. Under 'System Information', the following fields are visible:

- System Account: 10245
- System Type: Intrusion
- Panel Type: (empty dropdown)
- Location: (empty text box)
- Memg: (empty text box)
- CS Integration: SGS
- Radio buttons: New, Existing
- Xmit#: SO10240

A red arrow points to the 'Xmit#' field.

- The remaining fields must be empty strings (not null, and not single or multiple spaces).

3. The next step is to manually add a row in the CS_TP_Setup table:

Please note that the Integration_Id and Description in the CS_TP_Setup table must exactly match the values below for the integration to work properly.

Id	IntegrationId	Description	UseUserLevelSecurity	UserName	Password	ServiceUrl	ApiKey1	ApiKey2	ApiKey3	CSSystemLabel	DefaultAccountingCompany
1	5	Stages CS UCC	0	abdealer201	abdealer201	https://stages.seoglobe.net/externalgateway/Open...				Xmit#	

- IntegrationId **must** = 5.
- Description **must** = Stages CS UCC
- UseUserLevelSecurity must be 0.

- CSSystemLabel should match CS_System_Label in SS_Integration table.
- The remaining fields must be empty strings (not null, and not single or multiple spaces). The URL and credentials are entered in the client, so no need to populate them here.

Back in SedonaOffice, navigate to SedonaSetup > Integration Setup.

Select the appropriate integrator (in this example, Stages). Click CS Setup.

The screenshot shows the 'Integration Setup' window. At the top, there is a tab labeled 'Integrators List'. Below this is a table with the following data:

Description	User Name	Server Name	Database Name	SQL User	Update Common Fields	Create ...
CMS					N	N
Manitou	BOLD	SERVERNAME			Y	N
ManitouNEO					N	N
Stages					Y	N

Below the table is a horizontal scrollbar. Underneath is another tab labeled 'Integration Edit'. This section contains several fields and a checkbox:

- Description:
- Alternate Server:
- User Name:
- Server Name:
- User Password:
- Database Name:
- Primary Server:
- SQL User:
- SQL Password:
- Update Common Fields

At the bottom right of the window are two buttons: 'CS Setup' and 'Apply'.

Enter the username, password, and URL provided by Stages, then click Test to check if the entered information is correct. If all is well, a happy face will confirm that the credentials are valid. Click Save.

Stages Central Station Integration Setup

Enter the user name, password, and service URL issued to you by your Stages Central Station in the boxes below.

To use user-level security, check the Use User Level Security check box, select the User Level Credentials tab, and enter individual user's user names and passwords. (The user name and password on the Company Settings tab will be ignored.)

Company Settings | **User-Level Credentials**

Use User Level Security

User Name: abdealer201

Password: ●●●●●●●●

Service URL: https://stages.secglobe.net/externalgateway/OpenAPI/method

Test

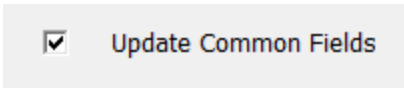
The entered credentials have been validated.

Save Cancel

If the credentials do not work after ensuring all information has been entered correctly, it may be necessary to work with IT and/or Stages to resolve the issue.

As of this writing, it is unknown if user-level security would ever be necessary in SedonaOffice.

4. Back on the main Integration Setup form, the "Update Common Fields" option is available:



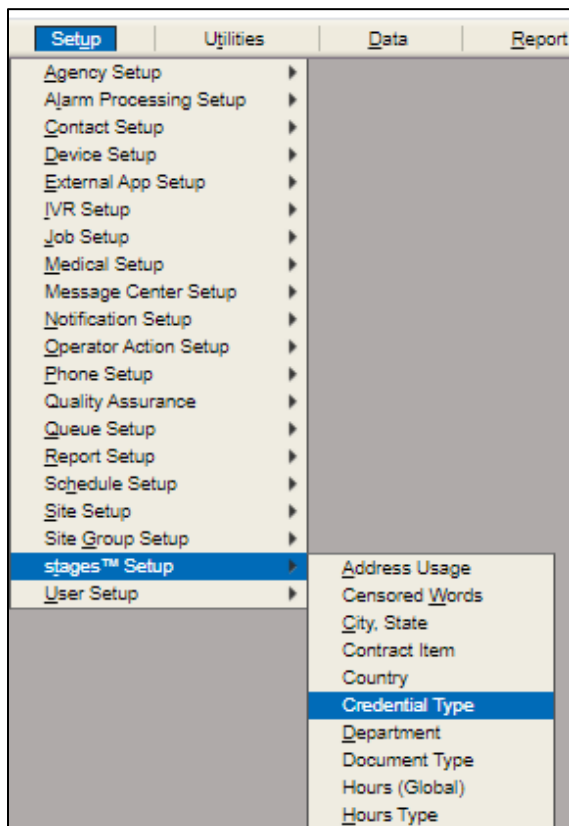
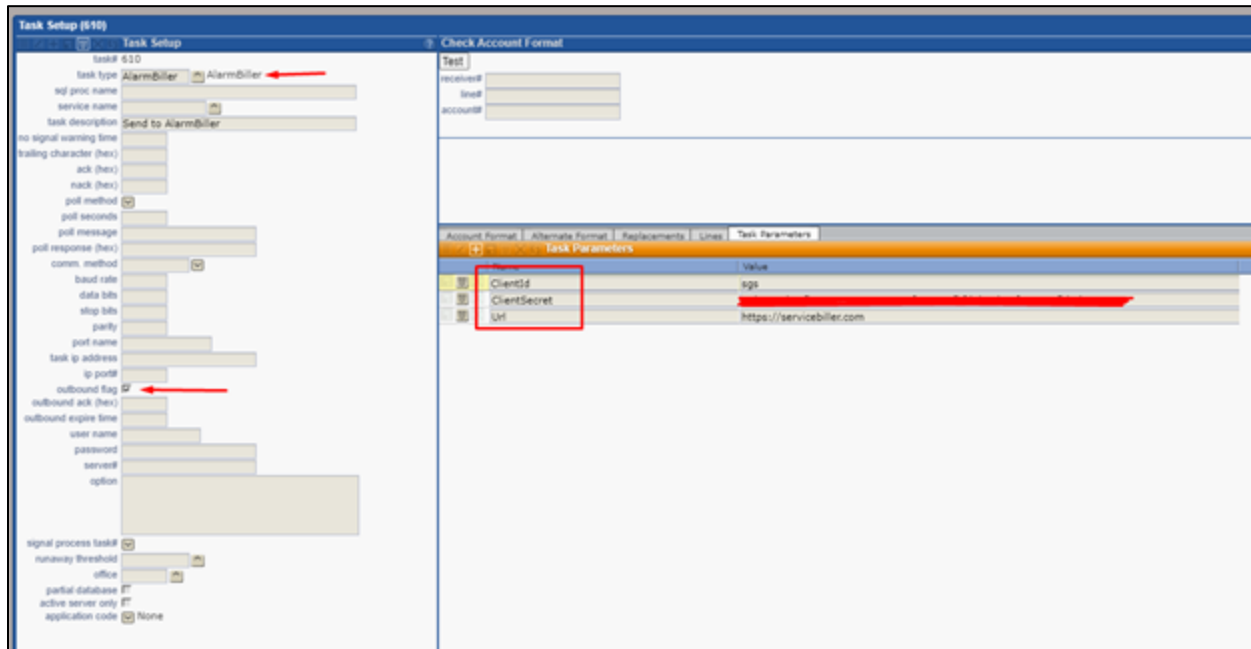
This is used to set the default value of the "Copy to CS" checkbox on the SedonaOffice Site form.

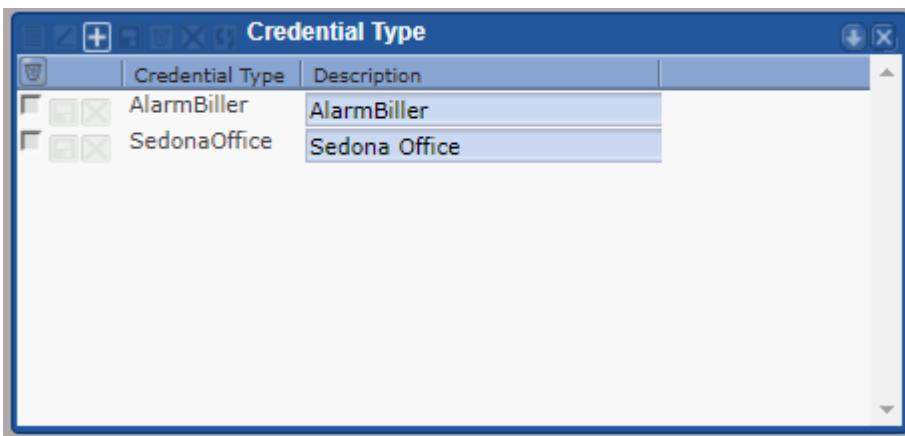
The Copy to CS option can be changed at any time while on this form editing the site but will be set to the default value from the integration setup when the form is opened. This option indicates if the Central Station entity should be updated with the common name/address/phone information when changed in SedonaOffice. Full details of this are explained in the Site form section.

A screenshot of the SedonaOffice Site form for customer 10245. The form is titled "10245 (1) Wines Wines Wines Wines" and contains various fields for site information, address, and tax details. At the bottom of the form, there is a "Copy to CS" checkbox which is checked and highlighted with a red box. Other visible fields include "Site Number" (1), "Site Name" (Wines Wines Wines Wines), "Address" (1 Pinot Noir Dr, Sonoma, CA 95476), "Phone 1" ((707) 555-0778), "Phone 2" ((707) 555-0779), "Eax" ((707) 555-1778), "Branch" (Your Branch), "Cross Street" (Cabernet Ln), "Customer Since" (5/20/2021), "CS Integration" (SGS), "Xmit#" (SO10240), "Tax Group" (Your State), and "Cycle Tax Group" (Your State). The form also includes a "Comments" section with the text "Try the wine every time you go by." and a "CS Sync" button.

Stages Setup

During the implementation phase of the integration, the credential setup will be performed by the Central Station via a task in Stages.

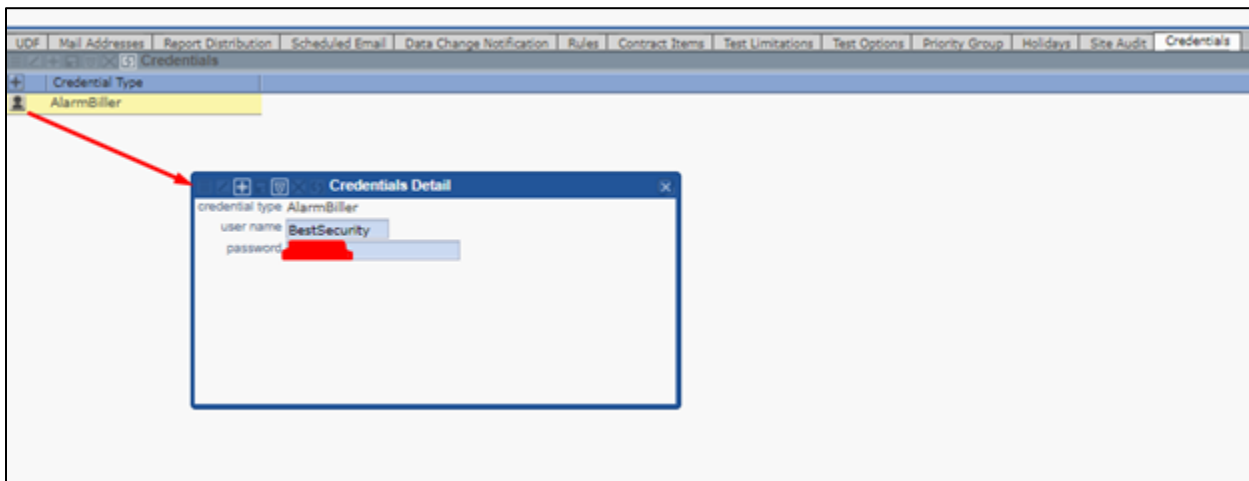




In Stages dealer login, navigate to Setup > Site Group Setup. Select the Site Group used for SedonaOffice.

From the Detail tab on the right side of the page, click the Credentials tab.

The Site Group must have credentials defined with the Credential Type = SedonaOffice with the username and password defined. The credential types are defined via Task Setup during the implementation phase of the integration.



Integration Process

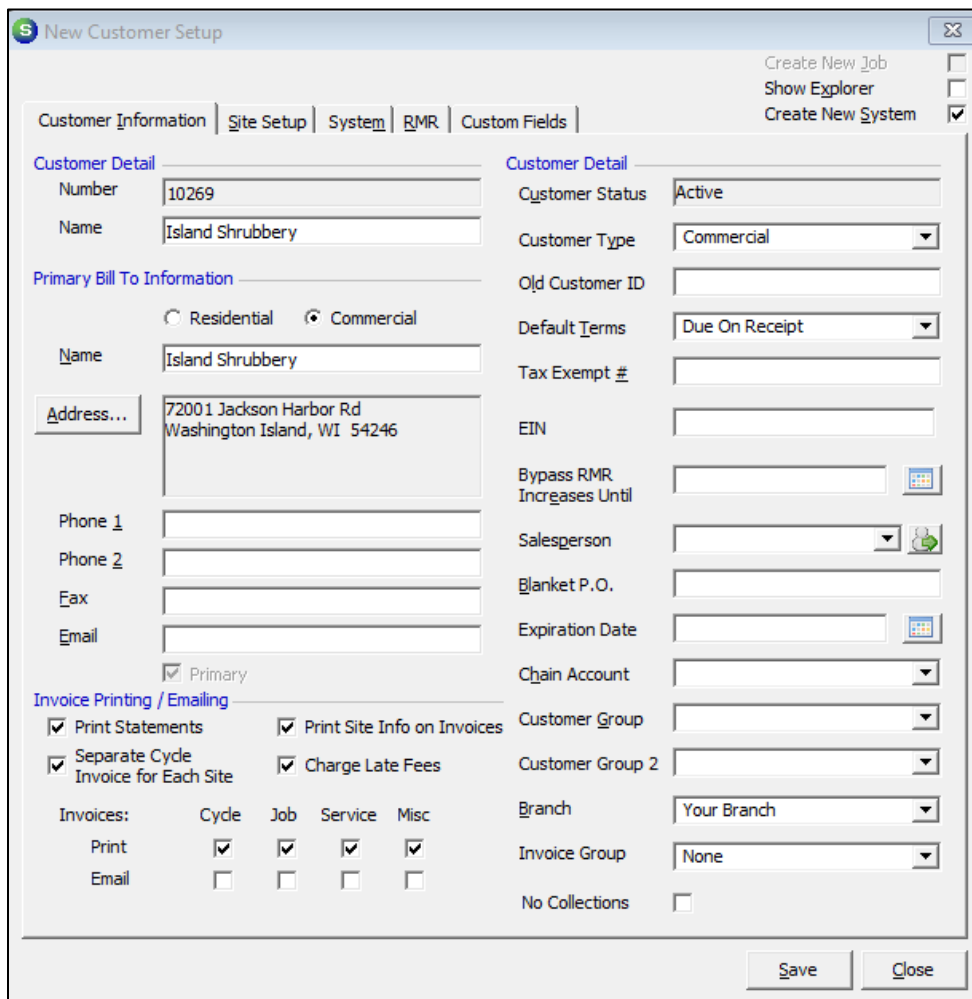
SedonaOffice Integration - New Customer Setup

The SedonaOffice new customer setup form provides the ability to push the Site/System into Stages from SedonaOffice or pull information from an existing Site/Device from Stages into SedonaOffice. The entities are linked to each other as part of the "save" process.

When linking to an existing site in Stages, the name and address entered in SedonaOffice are used to automatically find an exact match in Stages - hence the inclusion of name/address "flow" here.

Customer Information

When entering a new customer in SedonaOffice, the name and address is entered on the Customer Information tab:



New Customer Setup

Customer Information | Site Setup | System | RMR | Custom Fields

Create New Job
 Show Explorer
 Create New System

Customer Detail

Number: 10269
 Name: Island Shrubbery

Primary Bill To Information

Residential Commercial

Name: Island Shrubbery
 Address...: 72001 Jackson Harbor Rd
 Washington Island, WI 54246

Phone 1:
 Phone 2:
 Fax:
 Email:




Primary

Invoice Printing / Emailing

Print Statements Print Site Info on Invoices
 Separate Cycle Invoice for Each Site Charge Late Fees

Invoices:	Cycle	Job	Service	Misc
Print	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Customer Detail

Customer Status: Active
 Customer Type: Commercial
 Old Customer ID:
 Default Terms: Due On Receipt
 Tax Exempt #:
 EIN:
 Bypass RMR Increases Until: 
 Salesperson: 
 Blanket P.O.:
 Expiration Date: 
 Chain Account:
 Customer Group:
 Customer Group 2:
 Branch: Your Branch
 Invoice Group: None
 No Collections:

Save Close

Site Setup

Moving to the Site Setup tab, the name/address (and phones) are copied to the site. These fields can be modified to be different than the customer if so desired, but they are typically the same.

The CS Integration drop-down at the top of the Site Setup form is shown if any integrators are available for selection.

New Customer Setup

Customer Information | **Site Setup** | System | RMR | Custom Fields

CS Integration: <Not integrated>

Site Information

Branch: Your Branch

Cross Street: []

Map Code: []

Customer Since: 9/3/2021

Site Name and Address

Residential Commercial

Site Number: 1

Name: Island Shrubbery

Address...: 72001 Jackson Harbor Rd
Washington Island, WI 54246

Phone 1: []

Phone 2: []

Fax: []

Comments: []

Tax Setup

Tax Group: Your State

State Sales Tax	6.0%
County Sales Tax	1.0%

Cycle Tax Group: Your State

State Sales Tax	6.0%
County Sales Tax	1.0%

Tax Exempt #: []

Buttons: Save, Close

Link to Existing

If the site has already been entered in Stages, choose the "Existing" button underneath the CS Integration field. If the Stages Xmit# is known, it can be entered directly in the Xmit# field. To do a lookup of Stages sites that are available to be linked, use the link/lookup button to the right of the Xmit# field (pointed to by arrow):

The screenshot shows the 'New Customer Setup' window with the following details:

- Customer Information:** CS Integration: SGS; Xmit#: [Empty]; Site Name and Address: Residential (unselected), Commercial (selected); Site Number: 1; Name: Island Shrubbery; Address: 72001 Jackson Harbor Rd, Washington Island, WI 54246; Phone 1, Phone 2, Fax: [Empty]; Comments: [Empty].
- Site Information:** Branch: Your Branch; Cross Street: [Empty]; Map Code: [Empty]; Customer Since: 9/3/2021.
- Tax Setup:** Tax Group: Your State; State Sales Tax: 6.0%; County Sales Tax: 1.0%; Cycle Tax Group: Your State; State Sales Tax: 6.0%; County Sales Tax: 1.0%; Tax Exempt #: [Empty].

Buttons: Save, Close.

When the lookup form is first opened, it will automatically attempt to find an exact match in Stages for the SedonaOffice site's name, first address line, and city. If found, the Stages site will be shown in the results:

The screenshot shows a dialog box titled "CS Site Lookup" with a close button (X) in the top right corner. At the top, there is a "Search By:" dropdown menu set to "<None>" and a "Search" button. Below it is a "Search Data:" text input field. The main area contains a table with the following data:

Xmit#	Name	Address	City	State
> 710001	Island Shrubbery	72001 Jackson Harbor Rd	Washington Island	WI

At the bottom right of the dialog box are "Select" and "Cancel" buttons.

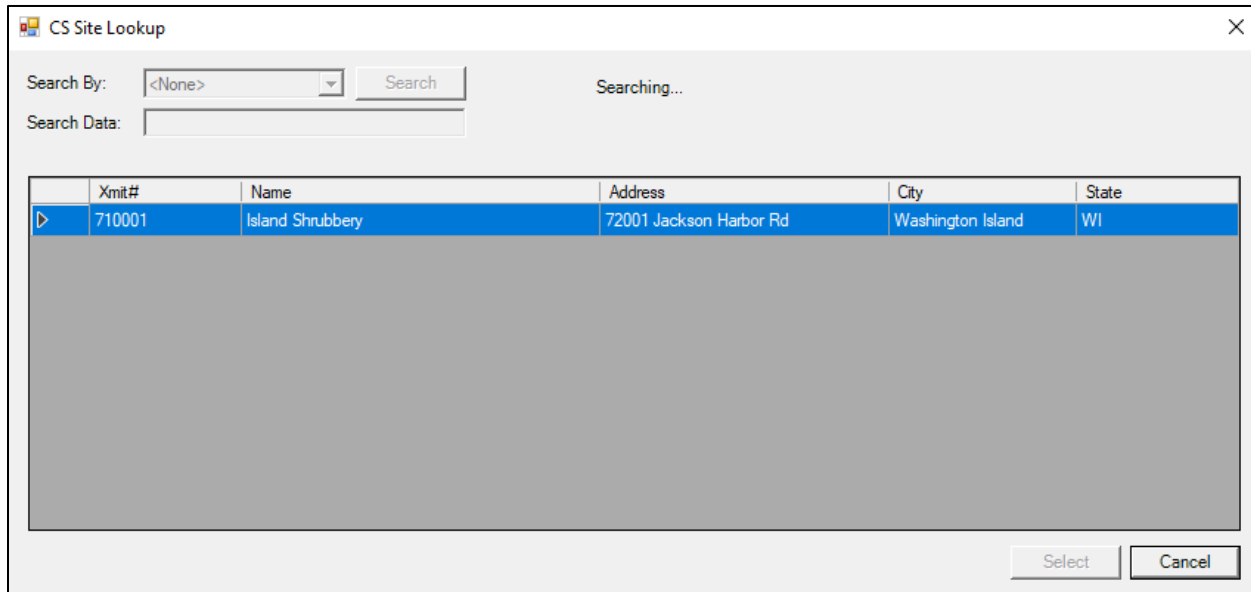
If that is not the desired site or no matching site was found, a manual search can be performed.

This screenshot shows the same "CS Site Lookup" dialog box. The "Search By:" dropdown menu is open, showing a list of options: "<None>", "Name", "Address", and "City". The "Search" button is visible to the right of the dropdown. The "Search Data:" field is empty. The table below still contains the same data as in the previous screenshot:

Xmit#	Name	Address	City	State
> 710001	Island Shrubbery	72001 Jackson Harbor Rd	Washington Island	WI

The "Select" and "Cancel" buttons are at the bottom right.

Stages sites can be searched by name, address, or city. The desired search filter is entered in the Search Data field. If no filters are desired, Search By can be set to <None>. Upon pressing Search, the currently unlinked Stages sites within the search parameters will be retrieved and displayed. Search By <none> will retrieve all currently unlinked Stages sites, which may take some extra time.




The screenshot shows a window titled "CS Site Lookup" with a search interface. The "Search By:" dropdown is set to "<None>" and the "Search" button is pressed. The "Search Data:" field is empty. The text "Searching..." is displayed in the top right area. Below the search fields is a table with the following data:

Xmit#	Name	Address	City	State
710001	Island Shrubbery	72001 Jackson Harbor Rd	Washington Island	WI

At the bottom right of the window are "Select" and "Cancel" buttons.

"Searching..." will be displayed at the top of the form while the search is in process. When "Searching..." is no longer shown, all applicable sites have been retrieved.

If there is nothing in the results window, there were no sites within the search parameters:



The screenshot shows the "CS Site Lookup" window with "Search By:" set to "City" and "Search Data:" containing "Omaha". The table below the search fields is empty, indicating no results were found. The "Select" and "Cancel" buttons are visible at the bottom right.

If a site is selected, the Xmit# will be populated, and the name/address from Stages will be pulled into the Site Setup form:

The screenshot shows the 'New Customer Setup' window with the 'Site Setup' tab selected. The form is populated with data from a Stages site. The 'Customer Information' section shows 'CS Integration' set to 'SGS' and 'Xmit#' as '1024402'. The 'Site Name and Address' section shows 'Site Number' as '1', 'Name' as 'Island Ammo 10244-2', and 'Address...' as '55067 Range Line Rd, Washington Island, WI 54246'. The 'Site Information' section shows 'Branch' as 'Your Branch' and 'Customer Since' as '9/3/2021'. The 'Tax Setup' section shows 'Tax Group' and 'Cycle Tax Group' both set to 'Your State', with 'State Sales Tax' at 6.0% and 'County Sales Tax' at 1.0%. There are also fields for 'Phone 1', 'Phone 2', 'Fax', and 'Tax Exempt #'. The 'Comments' section is empty. At the bottom, there are buttons for 'Stages Site Info', 'Save', and 'Close'. In the top right corner, there are checkboxes for 'Create New Job', 'Show Explorer', and 'Create New System'.

If that is the case, a Stages site other than Island Shrubbery was selected, which caused the different name and address to be populated on the form.

Back to Island Shrubbery - that has now been selected, and the name/address as well as the phone numbers have been pulled from Stages and populated on the site form.

Notice that the Stages Site Info button is now available on the bottom left of the form.

The screenshot shows a software window titled "New Customer Setup" with a menu bar containing "Customer Information", "Site Setup", "System", "RMR", and "Custom Fields". On the right side, there are three checkboxes: "Create New Job" (unchecked), "Show Explorer" (unchecked), and "Create New System" (checked). The form is divided into several sections:

- Customer Information:** Includes a dropdown for "CS Integration" (set to "SGS"), radio buttons for "New" and "Existing" (with "Existing" selected), and a text field for "Xmit#" containing "710001".
- Site Name and Address:** Includes radio buttons for "Residential" and "Commercial" (with "Commercial" selected), a "Site Number" field with "1", a "Name" field with "Island Shrubbery", and an "Address..." field with "72001 Jackson Harbor Rd" and "Washington Island, WI 54246".
- Phone:** Three text fields for "Phone 1", "Phone 2", and "Fax", all containing "(920) 555-4009", "(920) 555-4008", and "(920) 555-4003" respectively.
- Comments:** A large empty text area.
- Site Information:** Includes a "Branch" dropdown (set to "Your Branch"), "Cross Street" and "Map Code" text fields, and a "Customer Since" date field (set to "9/3/2021").
- Tax Setup:** Includes a "Tax Group" dropdown (set to "Your State") with a sub-table showing "State Sales Tax" at 6.0% and "County Sales Tax" at 1.0%. A "Cycle Tax Group" dropdown (also set to "Your State") has an identical sub-table. A "Tax Exempt #" text field is also present.

At the bottom of the window, there are three buttons: "Stages Site Info" on the left, and "Save" and "Close" on the right.

Once a valid Xmit# has been selected, this button allows some of the Stages site information to be displayed and edited:

Stages Integration - Site

Xmit#: 710001
 Site Name: Island Shrubbery
 Address: 72001 Jackson Harbor Rd
 Address 2:
 City: Washington Island
 State: WI
 ZIP Code: 54246
 County: Door
 Region: Wisconsin

Time Zone: (GMT-06:00) Central Time (US & Canada)
 Site Type: Commercial
 Phone 1: 920.555.4009
 Ext: Type: Premise
 Phone 2: 920.555.4008
 Ext: Type: Second Prem
 Fax: 920.555.4003
 Ext: Type: Fax
 Permit:

Directions:
 Address Info:
 Cross Street:
 Pets:
 Keys?:
 UL Code: Select UL Code
 Authority: Select Authority

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Email	ECV	Keys	Passcode
1	Kate	Bush	920.555.8344		Home phone					<input type="checkbox"/>	<input type="checkbox"/>	hedgetrimme
2	Henry	Hosta	920.555.3991		Cell					<input type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

"Common" information, defined as name, address, and phone numbers, must be edited on the SedonaOffice site form, where both sides can be kept in sync (this is discussed later). Information contained solely in Stages (data not greyed out) can be edited here if desired, and Stages will be updated accordingly. The History and On Test tabs seen here will be discussed later.

System

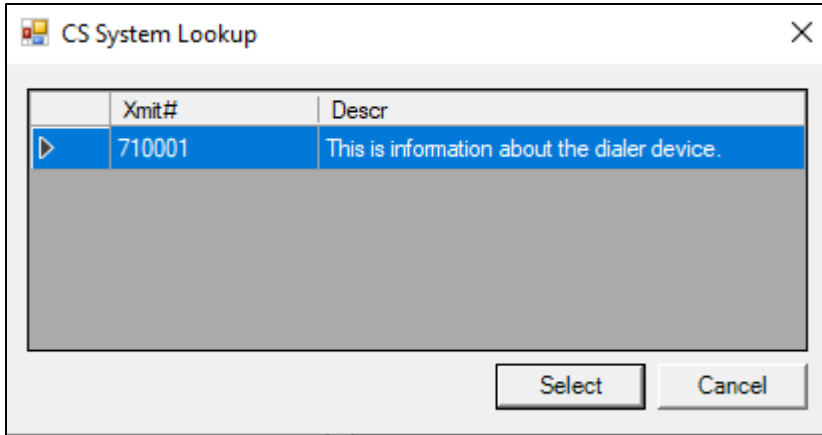
On the New Customer Setup System tab, the CS Integration field shows the selected integrator, but cannot be changed as a site's systems all must have the same integrator if they are indeed linked to a CS system. However, at least one of the site's systems must be linked if the site itself is linked. So, in the case of a new SedonaOffice customer/site, one new system is also created and must be linked if the site is linked

The screenshot shows the 'New Customer Setup' window with the 'System' tab selected. The interface includes several sections of configuration fields:

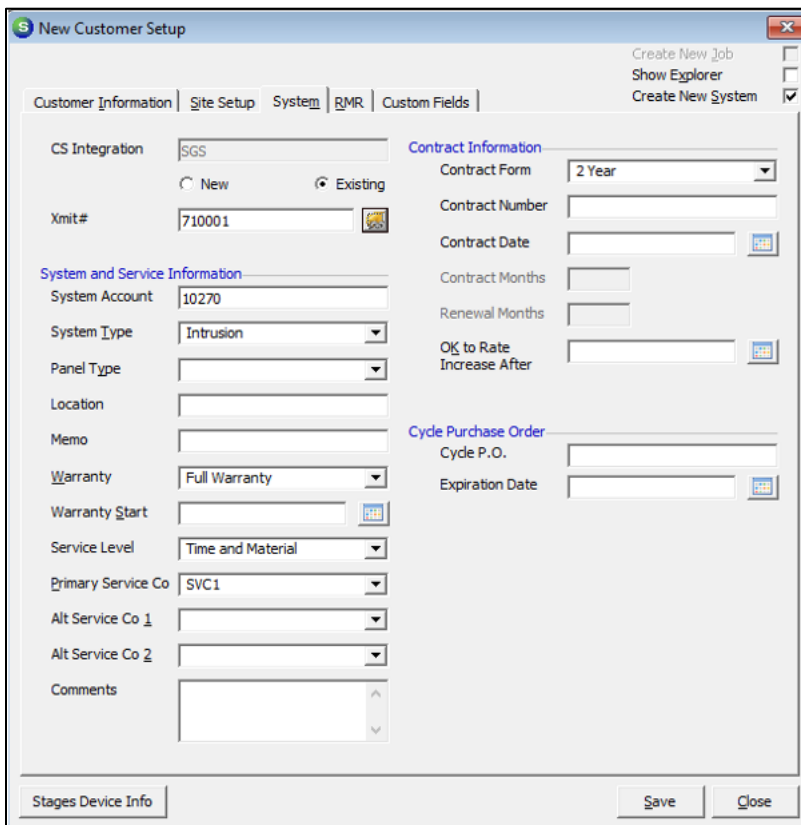
- Customer Information:** Tabs for Customer Information, Site Setup, System, RMR, and Custom Fields.
- CS Integration:** A dropdown menu showing 'SGS'. Below it are radio buttons for 'New' and 'Existing', with 'Existing' selected.
- Xmit#:** A text input field with a calendar icon.
- System and Service Information:**
 - System Account: 10270
 - System Type: Intrusion
 - Panel Type: (empty dropdown)
 - Location: (empty text field)
 - Memo: (empty text field)
 - Warranty: Full Warranty
 - Warranty Start: (empty text field with calendar icon)
 - Service Level: Time and Material
 - Primary Service Co: SVC1
 - Alt Service Co 1: (empty dropdown)
 - Alt Service Co 2: (empty dropdown)
 - Comments: (empty text area)
- Contract Information:**
 - Contract Form: 2 Year
 - Contract Number: (empty text field)
 - Contract Date: (empty text field with calendar icon)
 - Contract Months: (empty text field)
 - Renewal Months: (empty text field)
 - OK to Rate Increase After: (empty text field with calendar icon)
- Cycle Purchase Order:**
 - Cycle P.O.: (empty text field)
 - Expiration Date: (empty text field with calendar icon)

At the top right, there are checkboxes for 'Create New Job', 'Show Explorer', and 'Create New System' (checked). At the bottom right, there are 'Save' and 'Close' buttons.

Because the site is being linked to an existing Stages site, the option exists for the SedonaOffice system to create and push a new device into Stages, or to link to an existing device in Stages. When linking to an existing, the device Xmit# can be entered directly, or the link/lookup button can be utilized as it was for the site:



The CS System Lookup will automatically show all currently unlinked devices of the Stages site. No search filters are necessary. Once a valid device Xmit# has been selected, the Stages Device Info button is available at the bottom left of the form:



This button allows some of the Stages device information to be displayed and edited:

Point	Signal Status	Signal Code	Event Code	Location	Type	Description
1	Alarm		Log Only			Front door
2	Alarm		Log Only			Back Door

Because there is no "common" information between SedonaOffice systems and Stages devices (as there is with sites), all the information on this form can be edited if desired and will update Stages. The On Test tab seen here will be discussed later.

If it is desired to create/push a new device to an existing Stages site, the Stages Device Info button is used to enter the data for the new device. This is discussed further in the Push New section.

Once the SedonaOffice customer is saved, the Sedona site will point to the Stages site, the Sedona system will point to the Stages device, and the Stages site and device Billing IDs will be updated with the SedonaOffice site ID and system ID respectively, thus linking the entities together.

Push New

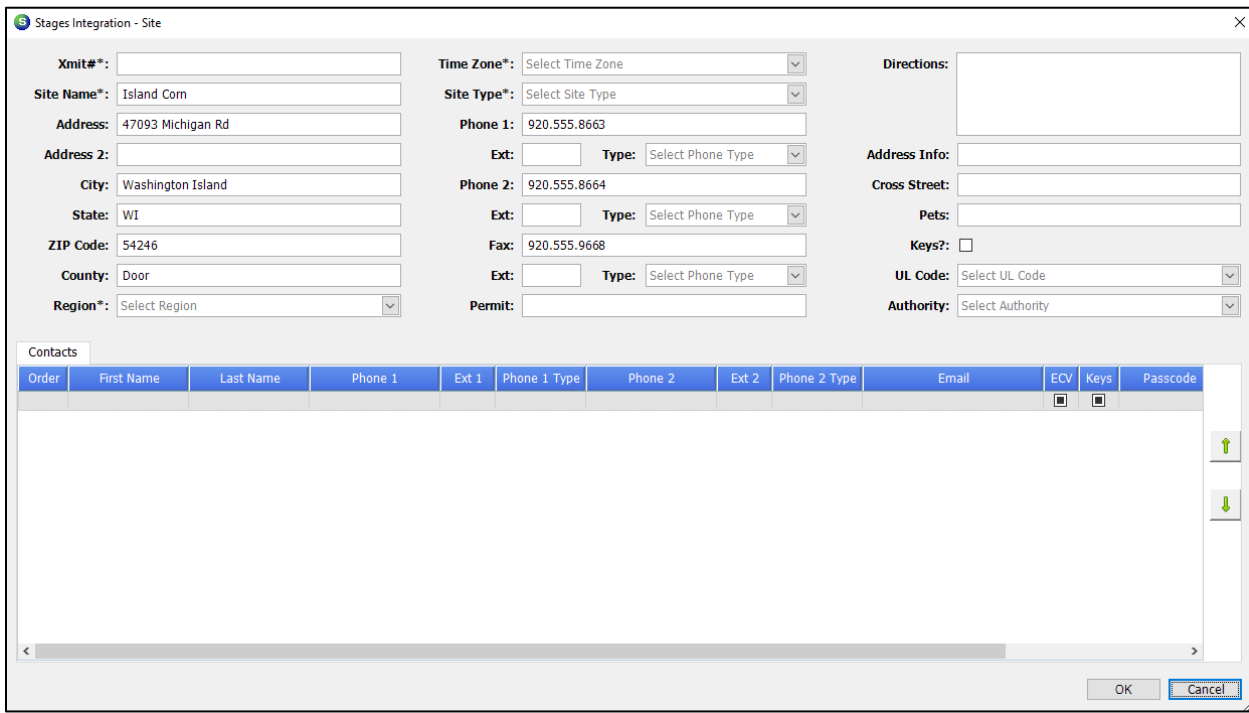
To push a new site/device into Stages (meaning the site has not yet been added in Stages), choose the "New" button underneath the CS Integration field.

Notice that the **Stages Site Info** button is now available on the bottom left of the form.

The screenshot shows a software window titled "New Customer Setup" with several tabs: Customer Information, Site Setup, System, RMR, and Custom Fields. The "Site Setup" tab is active. The form is divided into several sections:

- CS Integration:** A dropdown menu is set to "SGS". Below it are two radio buttons: "New" (which is selected and has a dashed border) and "Existing".
- Site Information:** Includes a "Branch" dropdown set to "Your Branch", "Cross Street" and "Map Code" text boxes, and a "Customer Since" date field set to "9/7/2021".
- Site Name and Address:** Includes radio buttons for "Residential" and "Commercial" (selected). Below are fields for "Site Number" (1), "Name" (Island Corn), and "Address..." (47093 Michigan Rd, Washington Island, WI 54246). There are also fields for "Phone 1", "Phone 2", and "Fax", all with "(920) 555-8663", "(920) 555-8664", and "(920) 555-9668" respectively.
- Tax Setup:** Includes a "Tax Group" dropdown set to "Your State" and a "Cycle Tax Group" dropdown also set to "Your State". Below each dropdown are two rows of tax rates: "State Sales Tax" at 6.0% and "County Sales Tax" at 1.0%.
- Comments:** A large empty text area at the bottom left.
- Buttons:** At the bottom left is a button labeled "Stages Site Info". At the bottom right are "Save" and "Close" buttons.

When pushing New, this button **must** be used to enter at least the minimum required information for a new site to be added in Stages. Required information is identified by an asterisk (*) at the end of a field label, such as in Xmit#* and Site Name* below.



Notice the name, address, and phone information as entered on the SedonaOffice Site Setup form has been pulled in to populate the appropriate fields. Because the site does not yet exist in Stages, all of the information can be edited here (different than "Existing" Stages site above). For information about the fields themselves, please refer to Stages documentation.

One particular item to note is that if a phone number has been populated, the phone type must be selected on this form.

This form can be displayed/edited multiple times during the new customer entry process.

- Pressing OK will save the current data in memory for use going forward.
- Pressing Cancel will ignore any changes made during the current editing of the form and revert back to the previously "saved" data in memory.

The most recent "saved" data on this form (by pressing OK) is used when pushing the new Stages site at the time the SedonaOffice new customer is saved. If any required information is missing at that time, a message will indicate that and the 'save' will be cancelled.

If the name, address, or phone numbers are changed here and ultimately are different from the SedonaOffice site when it is saved, the SedonaOffice site and Stages site will be out of sync in regard to the information that is different, meaning the other side will not get updated when the corresponding information is changed on one side. This is typically an undesired situation, but occasionally necessary.

Example of completed information:

Stages Integration - Site

Xmit#*: 5010271
 Site Name*: Island Com
 Address: 47093 Michigan Rd
 Address 2:
 City: Washington Island
 State: WI
 ZIP Code: 54246
 County: Door
 Region*: Wisconsin

Time Zone*: (GMT-06:00) Central Time (US & Canada)
 Site Type*: Commercial
 Phone 1: 920.555.8663
 Ext: Type: Business
 Phone 2: 920.555.8664
 Ext: Type: Second Prem
 Fax: 920.555.9668
 Ext: Type: Fax
 Permit:

Directions: Take Main Rd north to Michigan and turn right.
 Address Info: Right side of road after the fence.
 Cross Street: 471st Ave
 Pets: Fido the dog
 Keys?:
 UL Code: Select UL Code
 Authority: Full Control

Contacts

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Email	ECV	Keys	Passcode
1	Shirley	Shucks	920.555.3991		Cell				shucks@islandcom.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	sweet
2	Edward	Ear	920.555.9331		Cell				ear@islandcom.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	buttered

OK Cancel

Moving back to the New Customer Setup System tab, the CS Integration field shows the selected integrator and the New option is selected. These cannot be changed as a new site/device is being pushed to Stages.

Notice that the Stages Device Info button is immediately available on the bottom left of the form.

The screenshot shows a software window titled "New Customer Setup" with a close button in the top right corner. The window has a tabbed interface with the following tabs: "Customer Information", "Site Setup", "System" (which is selected and highlighted with a dotted border), "RMR", and "Custom Fields".

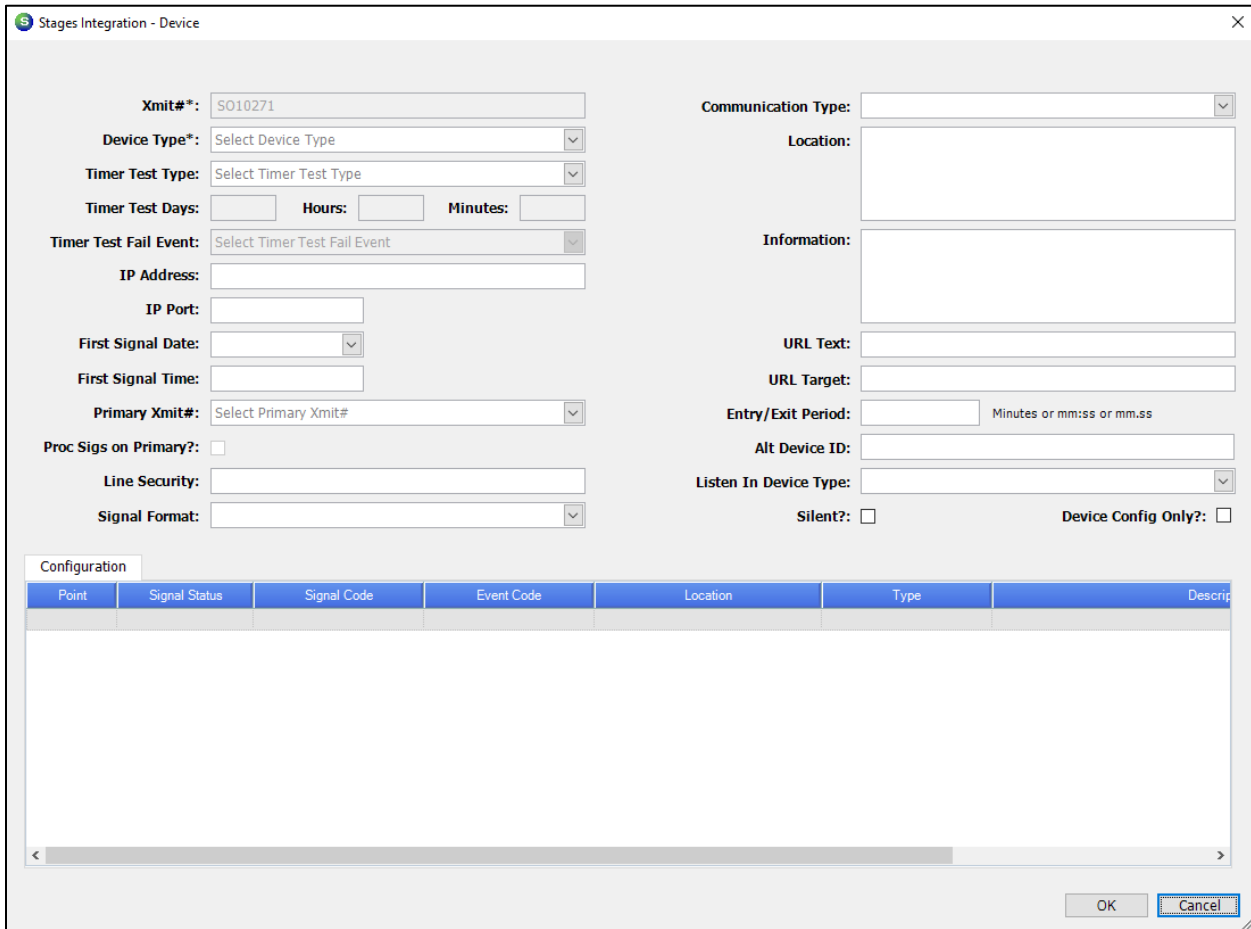
On the right side of the window, there are three checkboxes: "Create New Job" (unchecked), "Show Explorer" (unchecked), and "Create New System" (checked).

The main content area is divided into several sections:

- CS Integration:** A text field containing "SGS". Below it are two radio buttons: "New" (selected) and "Existing" (unselected).
- System and Service Information:** A section containing several fields: "System Account" (text field with "10271"), "System Type" (dropdown menu with "Intrusion" selected), "Panel Type" (dropdown menu), "Location" (text field), "Memo" (text field), "Warranty" (dropdown menu with "Full Warranty" selected), "Warranty Start" (text field with a calendar icon), "Service Level" (dropdown menu with "Time and Material" selected), "Primary Service Co" (dropdown menu with "SVC1" selected), "Alt Service Co 1" (dropdown menu), "Alt Service Co 2" (dropdown menu), and "Comments" (text area with up/down arrow icons).
- Contract Information:** A section containing: "Contract Form" (dropdown menu with "2 Year" selected), "Contract Number" (text field), "Contract Date" (text field with a calendar icon), "Contract Months" (text field), "Renewal Months" (text field), and "OK to Rate Increase After" (text field with a calendar icon).
- Cycle Purchase Order:** A section containing: "Cycle P.O." (text field) and "Expiration Date" (text field with a calendar icon).

At the bottom of the window, there are three buttons: "Stages Device Info" on the left, and "Save" and "Close" on the right.

When pushing New, this button **must** be used to enter at least the minimum required information for a new device to be added in Stages. Required information is identified by an asterisk (*) at the end of a field label, such as in Xmit#* and Device Type* below.



The screenshot shows a configuration window titled "Stages Integration - Device". It contains the following fields and options:

- Xmit#*:** Text input field containing "SO10271".
- Device Type*:** Dropdown menu with "Select Device Type".
- Timer Test Type:** Dropdown menu with "Select Timer Test Type".
- Timer Test Days:** Text input field.
- Hours:** Text input field.
- Minutes:** Text input field.
- Timer Test Fail Event:** Dropdown menu with "Select Timer Test Fail Event".
- IP Address:** Text input field.
- IP Port:** Text input field.
- First Signal Date:** Date selection dropdown.
- First Signal Time:** Time selection dropdown.
- Primary Xmit#:** Dropdown menu with "Select Primary Xmit#".
- Proc Sigs on Primary?:** Check box (unchecked).
- Line Security:** Text input field.
- Signal Format:** Dropdown menu.
- Communication Type:** Dropdown menu.
- Location:** Text input field.
- Information:** Text input field.
- URL Text:** Text input field.
- URL Target:** Text input field.
- Entry/Exit Period:** Text input field with a label "Minutes or mm:ss or mm.ss".
- Alt Device ID:** Text input field.
- Listen In Device Type:** Dropdown menu.
- Silent?:** Check box (unchecked).
- Device Config Only?:** Check box (unchecked).

At the bottom, there is a "Configuration" tab and a table with the following columns: Point, Signal Status, Signal Code, Event Code, Location, Type, and Description. The table is currently empty.

In the case of a new Stages site/device, the device Xmit# must be the same as the site, so this field is pre-populated and cannot be changed. For information about the fields themselves, please refer to Stages documentation.

Example of completed information:

Point	Signal Status	Signal Code	Event Code	Location	Type	Descrip
1	Alarm		Log Only	Front Door	Magnetic Contact	
2	Alarm		Log Only	Back Door	Magnetic Contact	
3	Alarm		Medical			

Same as the Stages Site Info form, this form can be displayed/edited multiple times during the new customer entry process.

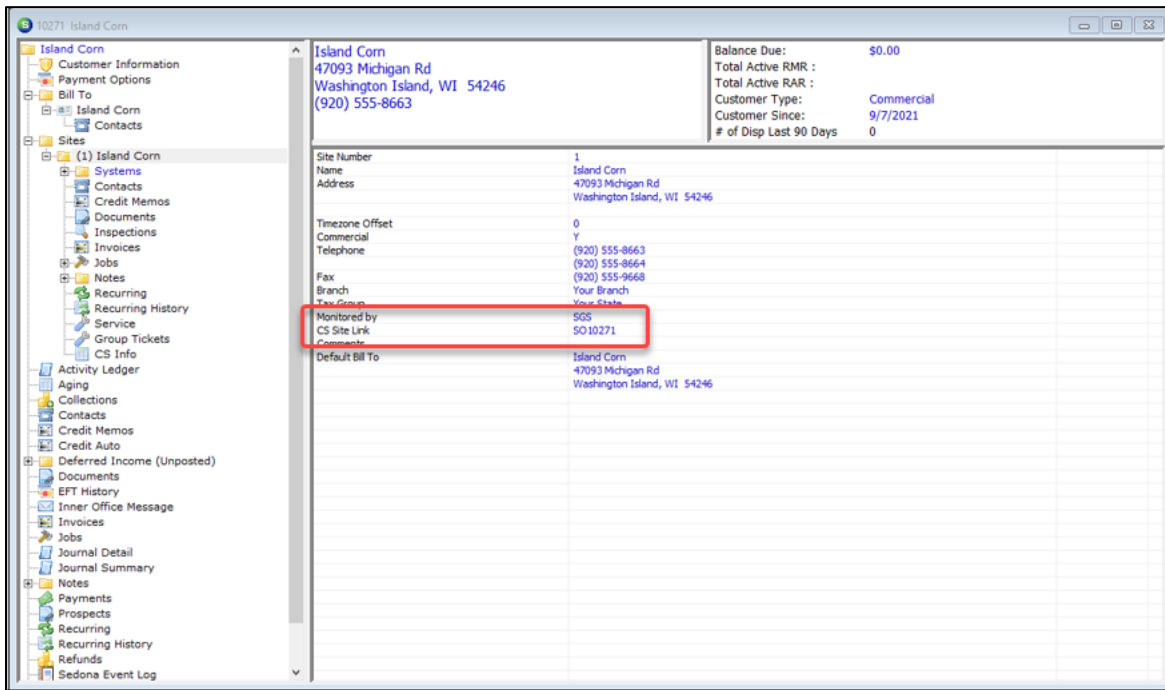
- Pressing OK will save the current data in memory for use going forward.
- Pressing Cancel will ignore any changes made during the current editing of the form and revert back to the previously "saved" data in memory.

The most recent "saved" data on this form (by pressing OK) is used when pushing the new Stages device at the time the SedonaOffice new customer is saved. If any required information is missing at that time, a message will indicate that and the 'save' will be cancelled.

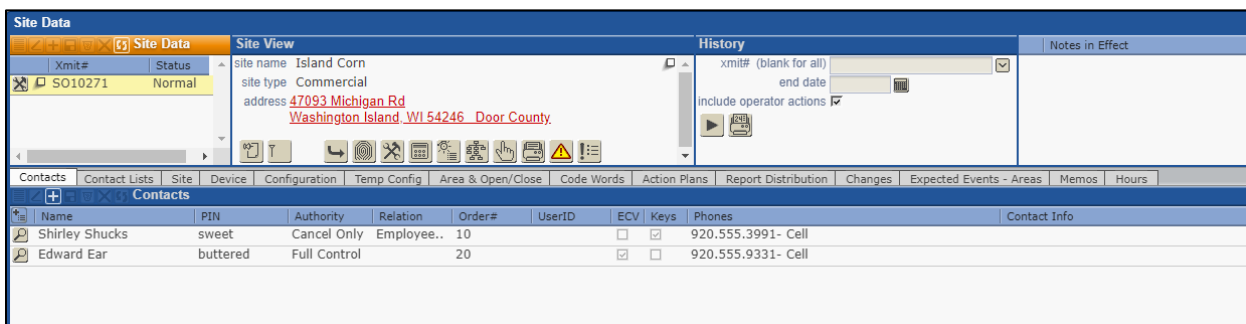
Completed New Customer Example

Following is an example of the completed new SedonaOffice customer having pushed to a new Stages site/device.

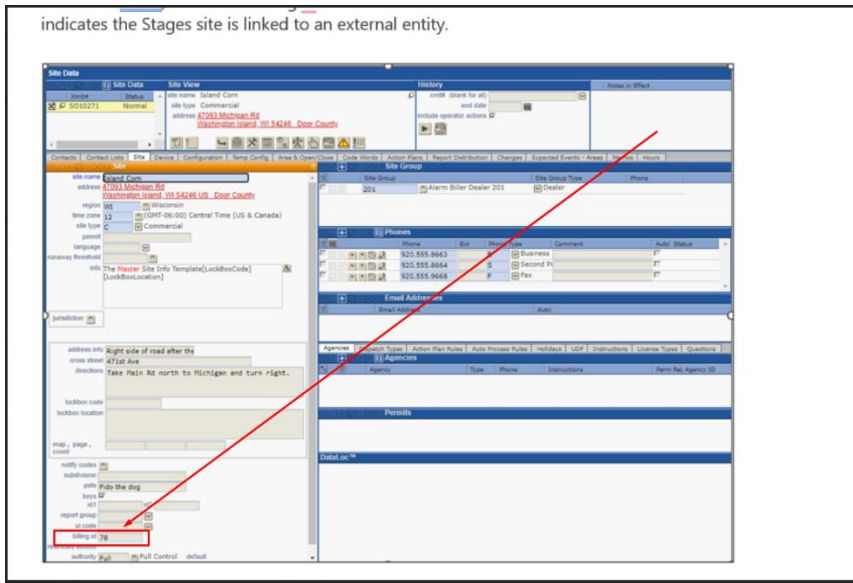
SedonaOffice site, selected in the tree. Notice the Monitored by and CS Site Link fields in the details window. The CS Site Link contains the Stages site's Xmit#.



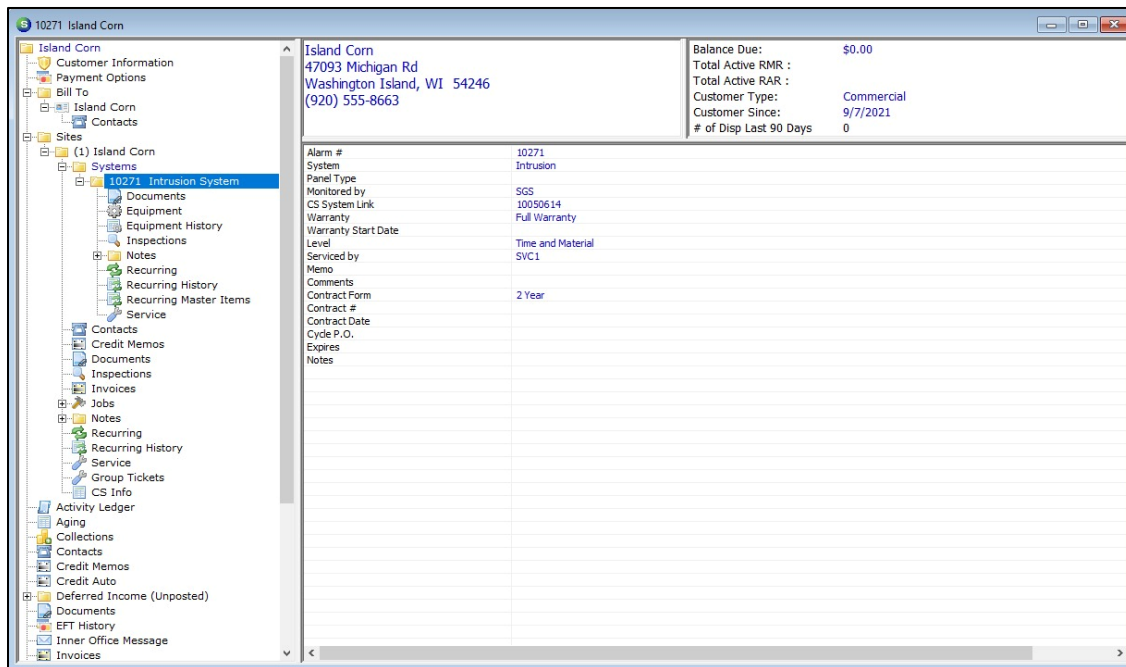
The corresponding site as seen in Stages.



In the site detail, notice the billing id which contains the SedonaOffice internal customer site ID. This indicates the Stages site is linked to an external entity.



Another example...SedonaOffice system, selected in the tree. Notice the Monitored by and CS System Link fields in the details window. The CS System Link contains the Stages device's internal ID number.



The corresponding device as seen in Stages. In the device detail, notice the billing id which contains the SedonaOffice internal customer system ID. This indicates the Stages device is linked to an external entity.

The screenshot displays a software interface with two main sections: 'Site Data' and 'Device'.

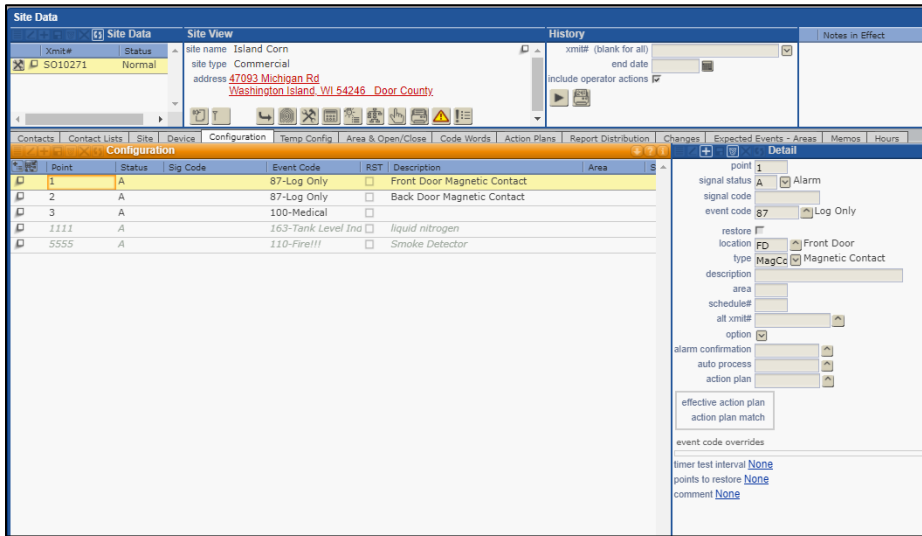
Site Data:

- Xmit#: SO10271
- Status: Normal
- Site View:
 - site name: Island Corn
 - site type: Commercial
 - address: 47093 Michigan Rd, Washington Island, WI 54246, Door County

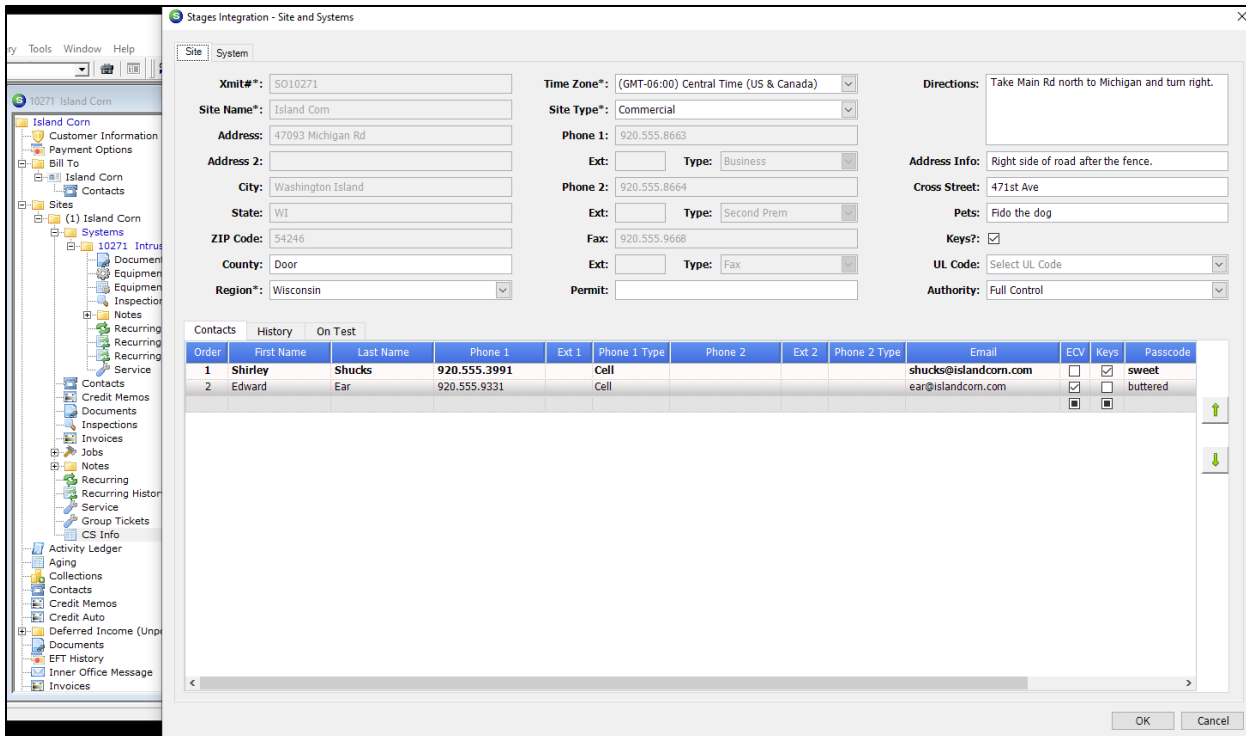
Device:

- xmit# SO10271 all device id signals forwarded to
- oos category: oos date
- device type: A1440 (Ademco 1440)
- timer test:
 - default type: 1 (Any signal)
 - days: 1, hours: 2, minutes: 0
 - fail event: 87 (Log Only)
 - alternate interval: [blank], alternate when disarmed:
- ivt#: [blank]
- primary xmit#: [blank]
- communication type: Dialer
- platform: [blank]
- ip address: [blank], port: [blank]
- line security: [blank]
- listen in device type: [blank]
- uri text: [blank], uri target: [blank]
- program label: [blank]
- program path: [blank]
- program argument: [blank]
- signal format: AdemcoH (Ademco High Speed action plan)
- entry/exit period: 00:00
- location: NW corner of basement
- information: This is general information about the device.
- billing id: 102
- user name: [blank], password: [blank]
- first signal date: [blank], first signal time: [blank]
- first in service date: 09/07/21 15:05:25
- last in service date: 09/07/21 15:05:25

Device configuration as entered via SedonaOffice.



Selecting "CS Info" in the tree will open the Site and Systems form. The SedonaOffice site plus all its systems are shown as tabs. When a tab is selected, the corresponding linked data from Stages is displayed and can be edited. This is discussed later in editing sites and systems.

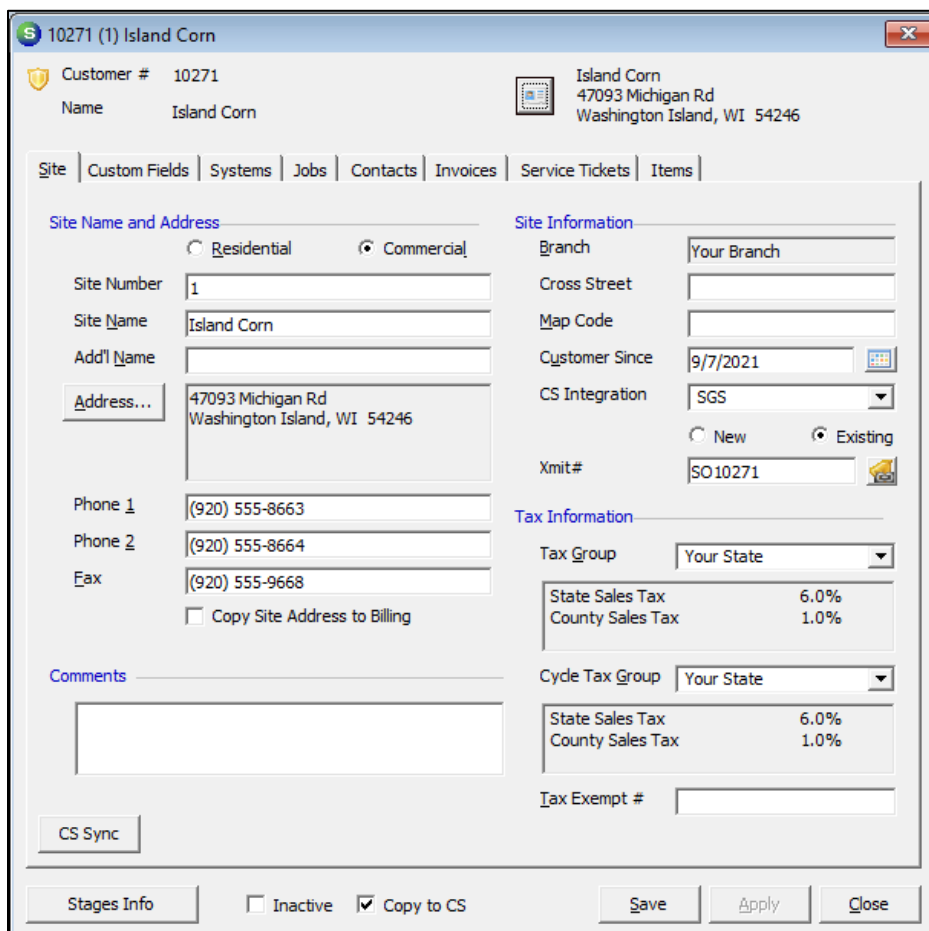


SedonaOffice Integration - Existing Customer

Editing an existing SedonaOffice customer (site/system) is where the bulk of the integration functionality takes place. Linking, unlinking, and viewing/editing of Stages information (including on/off test) can all take place while editing a SedonaOffice system, with the addition of updating common information and syncing name/address while editing a SedonaOffice site.

Updating Common Information

"Common Information" includes the site name, address, and phone numbers. SedonaOffice will not attempt to update Stages unless the Copy to CS option at the bottom of the form is checked, and the original information on both sides exactly matches. Using the example data below, the following will explain what "exactly matches" means.



Name:

If the SedonaOffice site's name is changed from "Island Corn" to "Island Sweet Corn", the linked Stages site's name will only be changed if it is currently "Island Corn". If Stages already has a different name, it will not be updated.

Address:

When changing any portion of the address, the entire address block must match. This means address 1, address 2, city, state, and zip all must exactly match, or Stages will not be updated.

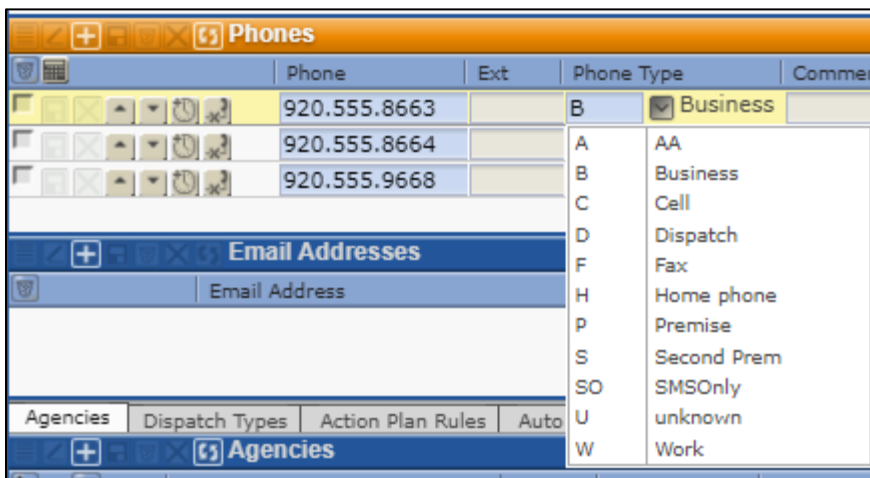
If the above address has a change to any part of it, including a 2nd address line added, the current Stages address must exactly match SedonaOffice's pre-change address:

47093 Michigan Rd
 Washington Island
 WI
 54246

Otherwise, it will not be updated. Also note that the "short state" 2-character abbreviation is used in the comparison/update.

Phone:

If either Phone 1 or Phone 2 is changed, SedonaOffice will search through all existing site phone numbers in Stages for a matching phone that does not have the word "fax" in its phone type description:



For example, if the Business Phone Type is (920) 555-8663 and is changed to (920) 555-8665, the business phone in Stages will be updated because it matches and "Business" does not have the word "fax" in it.

If the Fax number in SedonaOffice is changed, the same functionality takes place, but only for Stages phones *with* the word "fax" in the phone type description.

Syncing Name/Address

If the SedonaOffice name/address is currently out of sync with the Stages name/address, the CS Sync button can be utilized to quickly get the data back in sync.

The screenshot shows a software window titled "10271 (1) Island Corn". At the top, it displays "Customer # 10271" and "Name Island Corn". The address is listed as "Island Corn, 47093 Michigan Rd, Washington Island, WI 54246". Below this are tabs for "Site", "Custom Fields", "Systems", "Jobs", "Contacts", "Invoices", "Service Tickets", and "Items". The "Site" tab is active, showing two main sections: "Site Name and Address" and "Site Information".

In the "Site Name and Address" section, there are radio buttons for "Residential" and "Commercial" (selected). Fields include "Site Number" (1), "Site Name" (Island Sweet Corn), "Add'l Name", "Address..." (47039 Michigan St, Unit A, Washington Island, WI 54246), "Phone 1", "Phone 2", and "Fax". A checkbox labeled "Copy Site Address to Billing" is highlighted with a red box and is currently unchecked.

The "Site Information" section includes "Branch" (Your Branch), "Cross Street", "Map Code", "Customer Since" (9/7/2021), "CS Integration" (SGS), and "Xmit#" (SO10271). There are also radio buttons for "New" and "Existing" (selected).

The "Tax Information" section shows "Tax Group" (Your State) and two identical tax rate tables:




State Sales Tax	6.0%
County Sales Tax	1.0%

 Below this is "Cycle Tax Group" (Your State) and another identical tax rate table, followed by a "Tax Exempt #" field.

At the bottom left, a "CS Sync" button is highlighted with a red box. At the bottom right, there are buttons for "Save", "Apply", and "Close". At the very bottom, there are checkboxes for "Inactive" (checked) and "Copy to CS" (checked), along with a "Stages Info" button.

If changes to the site address should be automatically applied to the billing address, ensure the "Copy Site Address to Billing" option is enabled before opening the sync form. Changes on the sync form are immediately applied upon pressing OK. If that option is not enabled, the billing address will have to be manually updated if needed.

Pressing CS Sync will open the Manual Sync form:

	Copy Sedona information to Stages.
	Copy Stages information to Sedona.
	Revert (refresh) information back to what it was when this form was first opened.

The top row of buttons affects all fields with one click. The "refresh" button at the bottom right of the Sedona Site frame affects all Sedona fields. The "refresh" button at the bottom right of the Stages Site frame affects all Stages fields. The remaining buttons affect the fields they are between (name, address, etc.).

Pressing OK on this form will immediately update both SedonaOffice and Stages as applicable.

Site Linking

While editing a currently unlinked site, integration linking can be accomplished in the same manner as on the New Customer Setup form. However, the site must have at least one existing system. Furthermore, if the SedonaOffice site is being linked to an existing Stages site, the first (or only) system of that SedonaOffice site will be automatically linked to the Stages device with the same Xmit# as its site. If there are multiple systems, the system linking can be changed if desired after the site has been saved with the new link established.

The screenshot shows a software window titled "10271 (1) Island Corn". The interface is divided into several sections:

- Customer Information:** Customer # 10271, Name Island Corn, Address 47093 Michigan Rd, Washington Island, WI 54246.
- Navigation:** Site | Custom Fields | Systems | Jobs | Contacts | Invoices | Service Tickets | Items
- Site Name and Address:**
 - Residential (unselected) / Commercial (selected)
 - Site Number: 1
 - Site Name: Island Corn
 - Add'l Name: (empty)
 - Address...: 47093 Michigan Rd, Washington Island, WI 54246
 - Phone 1: (920) 555-8663
 - Phone 2: (920) 555-8664
 - Fax: (920) 555-9668
 - Copy Site Address to Billing
- Site Information:**
 - Branch: Your Branch
 - Cross Street: (empty)
 - Map Code: (empty)
 - Customer Since: 9/7/2021
 - CS Integration: <Not integrated>** (highlighted with a red box)
- Tax Information:**
 - Tax Group: Your State
 - State Sales Tax: 6.0%
 - County Sales Tax: 1.0%
 - Cycle Tax Group: Your State
 - State Sales Tax: 6.0%
 - County Sales Tax: 1.0%
 - Tax Exempt #: (empty)
- Comments:** (empty text area)
- Buttons:** Inactive (checkbox), Save, Apply, Close

Notice below the same New/Existing options and Xmit# entry as on the New Customer Setup form. Linking is performed in the exact same manner as on that form.

10271 (1) Island Corn
X

Customer # 10271

Name Island Corn

Island Corn
47093 Michigan Rd
Washington Island, WI 54246

Site
Custom Fields
Systems
Jobs
Contacts
Invoices
Service Tickets
Items

Site Name and Address

Residential Commercial

Site Number

Site Name

Add'l Name

Address...

Phone 1

Phone 2

Fax

Copy Site Address to Billing

Comments

Site Information

Branch

Cross Street

Map Code

Customer Since

CS Integration

New Existing

Xmit#

Tax Information

Tax Group

State Sales Tax	6.0%
County Sales Tax	1.0%

Cycle Tax Group

State Sales Tax	6.0%
County Sales Tax	1.0%

Tax Exempt #

Inactive

Save

Apply

Close

SedonaOffice 6.2.0.2 and later: The CS Integration allows for the use of Alarm Companies linked to an integration (Real) or not linked to an integration (Non-real) . Monitored By has been added to the new customer wizard form system tab. The following business rules are applied:

- CS integration fields and associated functionality will now accommodate "non-real" integrations - those with a null (or 1) Integration_Id in CS_Alarm_Company table.
- If the site has a "real" integration, all systems must be integrated with the same company.
- If a site has a system with non-real integration, other systems must also be non-real, but can be any non-real company.
- In the customer tree, Monitored By will only be shown if all the site's systems have the same integration.
- Stages integrations can only be selected on the site form.
- "Old" integrations (Manitou) can only be selected on the system form.
- Non-real integrations can only be selected on the system form.
- Stages integrations can only be set to <Not integrated> which will unlink from the CS.
- Once a Manitou integration is established, there is no way to unlink it from within SedonaOffice. It must be unlinked from Manitou.
- If a site or system with an integration is missing an external link, opening the site and system forms will return a message that the external link needs to be populated.
- Systems of the same site can be "Monitored By" any non-real integration.
- Systems of the same site must be linked to the same real integration.
- There cannot be a mix of real / non-real integrations for systems of the same site.
- Non-real integrations do not require or show any information related to a real integration (such as new/existing radio buttons, CS link field, CS Info buttons, Copy to CS, etc.), and do not attempt to do any CS verification, updating, or linking/unlinking.

Site Unlinking

While editing a currently linked site, a site can be unlinked from its Stages site. This will also unlink all linked systems from their Stages device. To unlink the site, choose <Not integrated> from the drop-down list.

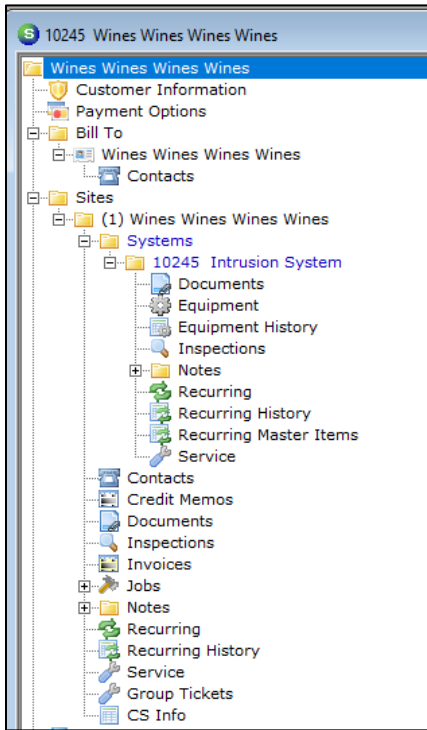
The screenshot shows a software window titled "10271 (1) Island Corn" with various tabs and fields. The "CS Integration" dropdown menu is open, displaying a list of integration options. The "Stages" option is highlighted in blue, indicating it is the current selection. Other options include "<Not integrated>", "Manitou", and "SGS".

Name	Description
<Not integrated>	Not integrated
Manitou	Manitou
SGS	Stages
Your Company	Your Company

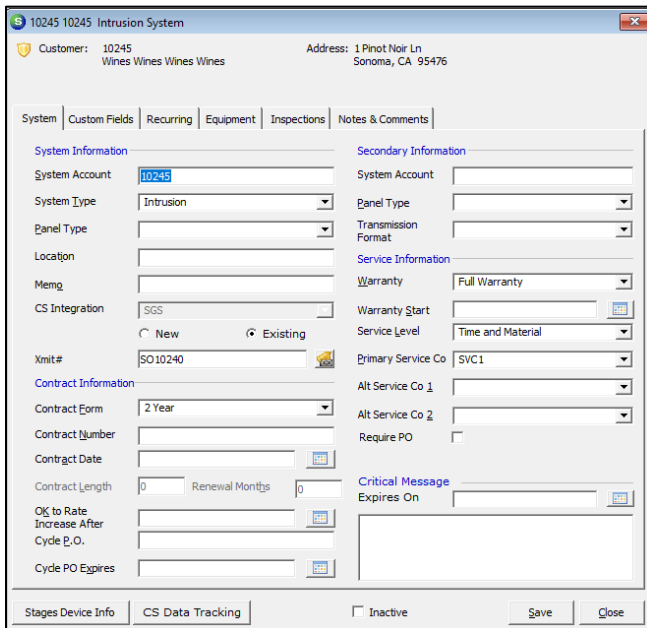
Upon saving the site information, the systems and the site will be unlinked from their Stages devices/site. The associated billing id information will be removed from the Stages records.

System Linking

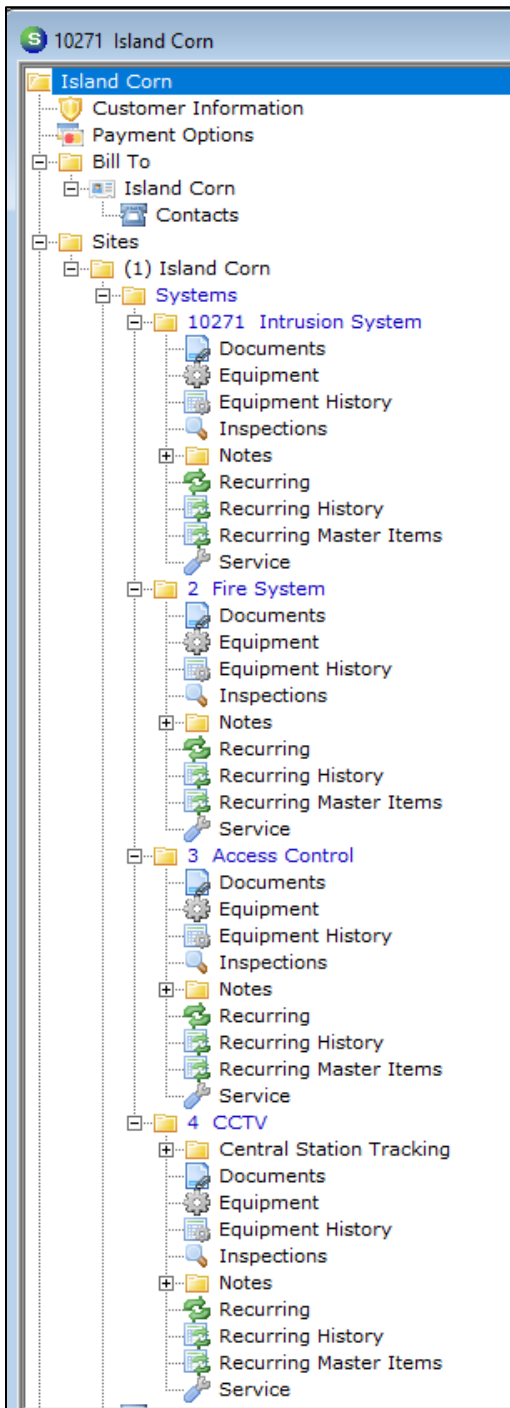
If a site has only one system, ...that system's CS Integration cannot be changed.



However, the Xmit# to which it is linked **can** be changed if the Stages site has more than one device.



If the site has multiple systems,



...each system can be linked:

...or unlinked:

...as long as at least one system remains linked. If only one system is linked, that system's CS Integration cannot be changed, functioning the same as a site with a single system.

The process of linking a system is the same as on the New Customer Setup form. However, the same CS Integration as its site (and other systems) must be selected as all systems of a site must be linked to devices of the same Stages site. A system is unlinked by choosing <Not integrated> from the drop-down list, in the same manner as unlinking a site.

System Relinking

A unique feature of a SedonaOffice site being linked to a Stages site with multiple devices is the ability to change the device to which a system is linked. System 4 is currently linked to SO10271C:

10271 4 CCTV

Customer: 10271
Island Corn

Address: 47093 Michigan Rd
Washington Island, WI 54246

System | Custom Fields | Recurring | Equipment | Inspections | Notes & Comments

System Information

System Account: 4

System Type: CCTV

Panel Type: []

Location: []

Memg: []

CS Integration: SGS

New Existing

Xmit#: SO10271C

Contract Information

Contract Form: 2 Year

Contract Number: []

Contract Date: []

Contract Length: 0 Renewal Months 0

OK to Rate Increase After: []

Cycle P.O.: []

Cycle PO Expires: []

Secondary Information

System Account: []

Panel Type: []

Transmission Format: []

Service Information

Warranty: Full Warranty

Warranty Start: []

Service Level: Time and Material

Primary Service Co: SVC1

Alt Service Co 1: []

Alt Service Co 2: []

Require PO:

Critical Message

Expires On: []

Stages Device Info | CS Data Tracking | Inactive | Save | Close

This can be changed to a different, currently unlinked device, either by lookup or direct entry:

10271 4 CCTV

Customer: 10271
Island Corn

Address: 47093 Michigan Rd
Washington Island, WI 54246

System | Custom Fields | Recurring | Equipment | Inspections | Notes & Comments

System Information

System Account: 4

System Type: CCTV

Panel Type:

Location:

Memg:

CS Integration: SGS

New Existing

Xmit#: SO10271B

Contract Information

Contract Form: 2 Year

Contract Number:

Contract Date:

Contract Length: 0 Renewal Months: 0

OK to Rate Increase After:

Cycle PO Expires:

Secondary Information

System Account:

Panel Type:

Transmission Format:

Service Information

Warranty: Full Warranty

Warranty Start:

Service Level: Time and Material

Primary Service Co: SVC1

Alt Service Co 1:

Alt Service Co 2:

Require PO:

Critical Message

Expires On:

Stages Device Info | CS Data Tracking | Inactive | Save | Close

Upon saving the system changes, it will be unlinked from SO10271C and linked to SO10271B.

Regardless of a Stages site having multiple devices or not, a system can be unlinked from its current device and push a new device by selecting the New button and entering the device information as described in New Customer Setup. When the system information is saved, it will be unlinked from its existing device, and then the new device will be pushed into Stages and linked with the system.

Viewing/Editing Stages Information

Editing SedonaOffice Site

When editing an existing site, pressing the Stages Info button will display the Stages Site and Systems form, which provides a means to see and edit a linked site's entire site and system hierarchy in one place.

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Xmit#: 5010271
 Site Name*: Island Corn
 Address: 47093 Michigan Rd
 Address 2:
 City: Washington Island
 State: WI
 ZIP Code: 54246
 County: Door
 Region*: Wisconsin

Time Zone*: (GMT-06:00) Central Time (US & Canada)
 Site Type*: Commercial
 Phone 1: 920.555.8663
 Ext: Type: Business
 Phone 2: 920.555.8664
 Ext: Type: Second Prem
 Fax: 920.555.9668
 Ext: Type: Fax
 Permit:

Directions: Take Main Rd north to Michigan and turn right.
 Address Info: Right side of road after the fence.
 Cross Street: 471st Ave
 Pets: Fido the dog
 Keys?:
 UL Code: Select UL Code
 Authority: Full Control

Contacts History On Test

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Email	ECV	Keys	Passcode
1	Shirley	Shucks	920.555.3991		Cell				shucks@islandcorn.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	sweet
2	Edward	Ear	920.555.9331		Cell				ear@islandcorn.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	buttered

OK Cancel

A tab is included for each system of the SedonaOffice site, whether linked or not.

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Linked To CS:

Xmit#: SO10271

Device Type: Ademco 1440

Timer Test Type: Any signal

Timer Test Days: 1 Hours: 2 Minutes: 0

Timer Test Fail Event: Log Only

IP Address:

IP Port:

First Signal Date:

First Signal Time:

Primary Xmit#: Select Primary Xmit#

Proc Sigs on Primary?:

Line Security:

Signal Format: Ademco High Speed

SO System Acct / Type: 10271 / Intrusion

Communication Type: Dialer

Location: NW corner of basement

Information: This is general information about the device.

URL Text:

URL Target:

Entry/Exit Period: 00:00 Minutes or mm:ss or mm:ss

Alt Device ID:

Listen In Device Type:

Silent?: Device Config Only?:

Point	Signal Status	Signal Code	Event Code	Location	Type	Description
1	Alarm		Log Only			Front Door Magnetic Contact
2	Alarm		Log Only			Back Door Magnetic Contact
3	Alarm		Medical			

OK Cancel

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Linked To CS:

SO System Acct / Type: 2 / Fire

OK Cancel

Point	Signal Status	Signal Code	Event Code	Location	Type	Description

The editable portion of the site and device information can be changed here and will immediately update Stages when OK is pressed.

If there is more than one system, system linking and unlinking can also be performed on this form, and will be applied immediately when OK is pressed. To link/unlink a system, click the "Linked To CS" checkbox:

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Linked To CS: New Existing

Xmit#:

Device Type*:

Timer Test Type:

Timer Test Days: Hours: Minutes:

Timer Test Fail Event:

IP Address:

IP Port:

First Signal Date:

First Signal Time:

Primary Xmit#:

Proc Sigs on Primary?:

Line Security:

Signal Format:

SO System Acct / Type:

Communication Type:

Location:

Information:

URL Text:

URL Target:

Entry/Exit Period: Minutes or mm:ss or mm.ss

Alt Device ID:

Listen In Device Type:

Silent?: Device Config Only?:

Point	Signal Status	Signal Code	Event Code	Location	Type	Description
-------	---------------	-------------	------------	----------	------	-------------

OK Cancel

We are now in the process of linking system 2 to a Stages device. The same New/Existing options and Xmit# entry are available here as on the SedonaOffice system edit form, and function in the exact same manner. Doing a lookup shows there are 2 devices available for linking:

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Linked To CS: New Existing

Xmit#:

Device Type*:

Timer Test Type:

Timer Test Days: Hours: Minutes:

Timer Test Fail Event:

IP Address:

IP Port:

First Signal Date:

First Signal Time:

Primary Xmit#:

Proc Sigs on Primary?:

Line Security:

Signal Format:

SO System Acct / Type:

Communication Type:

Location:

Information:

URL Text:

URL Target:

Entry/Exit Period: Minutes or mm:ss or mm.ss

Alt Device ID:

Listen In Device Type:

Silent?: Device Config Only?:

Point	Signal Status	Signal Code	Event Code	Location	Type	Description
-------	---------------	-------------	------------	----------	------	-------------

CS System Lookup

Xmit#	Descr
S010271A	
S010271B	

Select Cancel

OK Cancel

Selecting one will populate that device's information into the form:

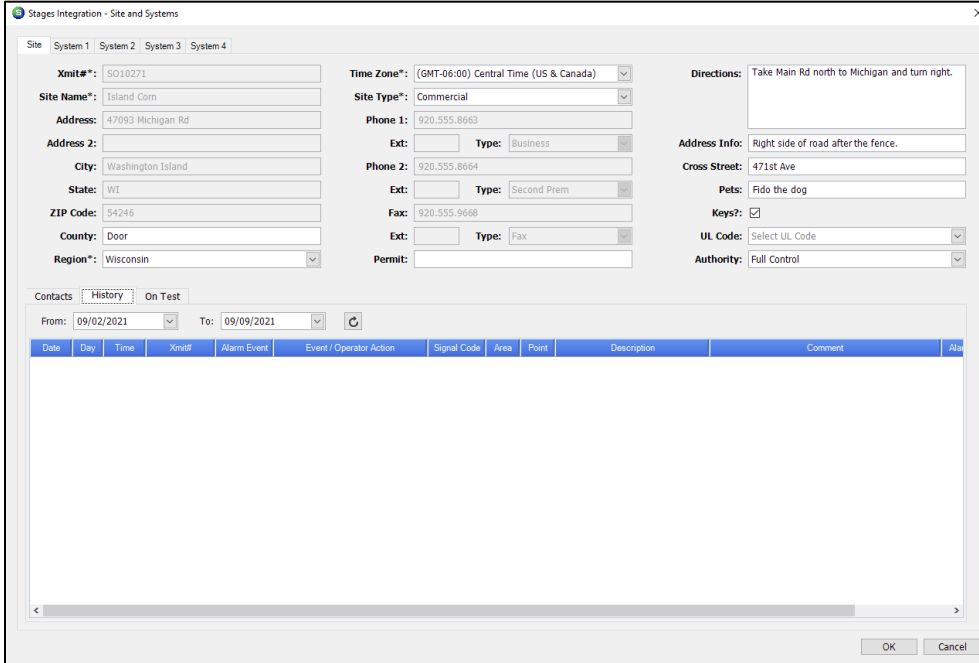
Point	Signal Status	Signal Code	Event Code	Location	Type	Description
1	Alarm		Medical			Kitchen Smoke Detector
2	Alarm		Medical			Garage Smoke Detector
3	Alarm		Medical			Bedroom - front Smoke Detector
4	Alarm		Medical			Living Room Smoke Detector

The device information is the same as what is available when the Stages Device Info button is pressed on the SedonaOffice system edit form. This information can be edited if so desired and will update Stages at the same time the link is established when OK is pressed.

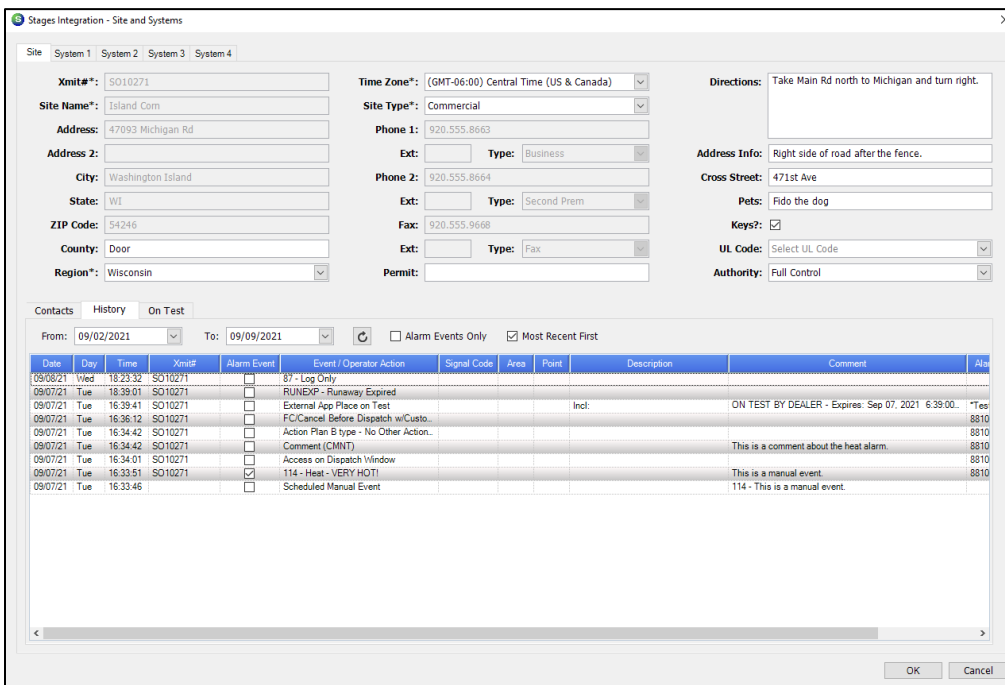
System 4 could be unlinked at the same time. All linking changes and data edits are applied at the time OK is pressed.

Stages Site History

The Site tab contains a History tab that allows the Stages site history to be viewed. Because history is at the site level in Stages, Site is the only tab where the history is available.



Choose the desired date range and press the refresh button. The selected history will be retrieved and displayed similarly to how it looks in Stages.



To reverse the order in which the history is displayed and have the oldest history first, uncheck the Most Recent First option. Checking the Alarm Events Only option will show only those lines that have the Alarm Event column checked. The history can be refreshed at will and must be refreshed for a new date range to take effect.

On Test

The Site and all System tabs have the On Test tab available. They all function in the same manner except one small difference when a new test entry is created, which is discussed below. Selecting the On Test tab for the first time will automatically retrieve the test information. Once the test information has been retrieved, it is available on all Site and System tabs and will remain static until manually refreshed or a new test entry is created here.

This display shows the same information as when viewed in the Stages client. Expired entries are italicized. To put the site/device on test, press the New Test Entry button.

An entry form similar to what is used in the Stages client is displayed. The test categories as defined in Stages are available to be selected. Please note that the test times are in site local time.

Notice the Site Test option is checked. This is the default behavior when a new test is entered from the Site tab. If the option is unchecked, the test entry will apply only to the Xmit# of the site:

On Test Entry

Category*: ONE HOUR TEST

Effective Date*: 09/09/21 15:37 Times are site local:

Expire Date*: 09/09/21 16:37 (GMT-06:00) Central Time...

Test Comment:

Site Test: Only Xmit# SO10271

Notify Option: <None>

Notify Recipient:

OK Cancel

In this example we will put the entire site on test:

On Test Entry

Category*: ONE HOUR TEST

Effective Date*: 09/09/21 15:37 Times are site local:

Expire Date*: 09/09/21 16:37 (GMT-06:00) Central Time...

Test Comment: This is a new test entry to test some signals.

Site Test:

Notify Option: <None>

Notify Recipient:

OK Cancel

Upon pressing OK, the test request will be sent to Stages and if successful will show in the On Test information:

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Xmit#: 5010271
 Site Name*: Island Com
 Address: 47093 Michigan Rd
 Address 2:
 City: Washington Island
 State: WI
 ZIP Code: 54246
 County: Door
 Region*: Wisconsin

Time Zone*: (GMT-06:00) Central Time (US & Canada)
 Site Type*: Commercial
 Phone 1: 920.555.8663
 Ext: Type: Business
 Phone 2: 920.555.8664
 Ext: Type: Second Prem
 Fax: 920.555.9668
 Ext: Type: Fax
 Permit:

Directions: Take Main Rd north to Michigan and turn right.
 Address Info: Right side of road after the fence.
 Cross Street: 471st Ave
 Pets: Fido the dog
 Keys?:
 UL Code: Select UL Code
 Authority: Full Control

Contacts History **On Test**

New Test Entry

Delete	Edit	Category	Type	Details	Initials	Test Effective	Test Expires	Xmit#	Comment
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 16:37	SO10271C	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 16:37	SO10271B	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 16:37	SO10271A	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 16:37	SO10271	This is a new test entry to test some signals.
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271C	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271B	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271A	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271	
		ON TEST BY DEALER	List	Incl:	Access, Remote	09/07/21 16:39	09/07/21 18:39	SO10271	Testing points 1 and 2.

OK Cancel

Notice that the On Test tab text now shows in red to alert the user that a test is currently active. Current test entries can be edited or deleted in the same manner as they can be in the Stages client. Editing a test entry essentially provides the means for the time to be extended:

On Test Entry

Category*: ONE HOUR TEST

Effective Date*: 09/09/21 15:43 Times are site local:
 Expire Date*: 09/09/21 16:37 (GMT-06:00) Central Time...

Test Comment:

Site Test:

Notify Option:

Notify Recipient:

OK Cancel

On Test Entry

Category*: ONE HOUR TEST

Effective Date*: 09/09/21 15:43 Times are site local:

Expire Date*: 09/09/21 18:37 (GMT-06:00) Central Time...

Test Comment:

Site Test:

Notify Option:

Notify Recipient:

OK Cancel

Contacts History **On Test**

New Test Entry

Delete	Edit	Category	Type	Details	Initials	Test Effective	Test Expires	Xmit#	Comment
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271C	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271B	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271A	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271	This is a new test entry to test some signals.
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271C	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271B	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271A	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271	
		ON TEST BY DEALER	List	Incl:	Access, Remote	09/07/21 16:39	09/07/21 18:39	SO10271	Testing points 1 and 2.

As mentioned earlier, there is one slight difference when entering a new test entry from a system tab. In this case we are on system 4:

Stages Integration - Site and Systems

Site System 1 System 2 System 3 System 4

Linked To CS:

Xmit#: SO10271C

Device Type*: Radionics 330

Timer Test Type: Select Timer Test Type

Timer Test Days: Hours: Minutes:

Timer Test Fail Event: Select Timer Test Fail Event

IP Address:

IP Port:

First Signal Date:

First Signal Time:

Primary Xmit#: Select Primary Xmit#

Proc Sigs on Primary?:

Line Security:

Signal Format: Radionics 6500

SO System Act / Type: 4 / CCTV

Communication Type: Dialer

Location:

Information: Misc information about this device.

URL Text:

URL Target:

Entry/Exit Period: Minutes or mm:ss or mm.ss

Alt Device ID:

Listen In Device Type:

Silent?: Device Config Only?:

Configuration **On Test**

New Test Entry

Delete	Edit	Category	Type	Details	Initials	Test Effective	Test Expires	Xmit#	Comment
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271C	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271B	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271A	This is a new test entry to test some signals.
<input checked="" type="checkbox"/>		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:43	09/09/21 18:37	SO10271	This is a new test entry to test some signals.
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271C	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271B	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271A	
		ONE HOUR TEST	All	All Points - Site Test	Access, Remote	09/09/21 15:33	09/09/21 15:33	SO10271	
		ON TEST BY DEALER	List	Incl:	Access, Remote	09/07/21 16:39	09/07/21 18:39	SO10271	Testing points 1 and 2.

OK Cancel

On Test Entry

Category*: ONE HOUR TEST

Effective Date*: 09/09/21 15:56 Times are site local:

Expire Date*: 09/09/21 16:56 (GMT-06:00) Central Time...

Test Comment:

Site Test: Only Xmit# SO10271C

Notify Option: <None>

Notify Recipient:

OK Cancel

Note that by default, Site Test is unchecked, and the test will apply only to the selected system's device. The entire site can still be put on test by checking the option. All other functionality is the same as if from the Site tab.

Editing SedonaOffice System

When editing a SedonaOffice system, pressing the Stages Device Info button will display the Stages device information for that system only, similar to that system's tab on the Site and Systems form:

Stages Integration - Device

Xmit#: SO10271

Device Type*: Ademco 1440

Timer Test Type: Any signal

Timer Test Days: 1 Hours: 2 Minutes: 0

Timer Test Fail Event: Log Only

IP Address:

IP Port:

First Signal Date:

First Signal Time:

Primary Xmit#: Select Primary Xmit#

Proc Sigs on Primary?:

Line Security:

Signal Format: Ademco High Speed

Communication Type: Dialer

Location: NW corner of basement

Information: This is general information about the device.

URL Text:

URL Target:

Entry/Exit Period: 00:00 Minutes or mm:ss or mm.ss

Alt Device ID:

Listen In Device Type:

Silent?: Device Config Only?:

Point	Signal Status	Signal Code	Event Code	Location	Type	Descrip
1	Alarm		Log Only			Front Door Magnetic Contact
2	Alarm		Log Only			Back Door Magnetic Contact
3	Alarm		Medical			

OK Cancel

System linking cannot be changed from here, but all other functionalities including editing of device information and on test entry is the same as from the Site and Systems form.