



14th ANNUAL USERS CONFERENCE
January 25 – 27, 2016 | Bonita Springs, FL

Client Management 101 – Part 1

Presented by:
Melissa Robinson & Laurie Salim

This Page Intentionally Left Blank

Table of Contents

It's All About the Customer5
 Regular Customer Structure.....6
 Master Account Structure7

Customer Creation Methods.....9
 Creating a Regular Customer10
 Creating a Master Account.....20

New Customer Additional Data Entry.....26

Customer Maintenance.....28
 Billing Address Change.....28
 Change of Ownership28
 Entering Notes28

Client Management 101 – Customer Creation & Maintenance

This session will focus on best practices when creating a maintaining Customer Accounts.

It's All About the Customer

The core of the majority of all data transactions is customer related. A Customer, in SedonaOffice, is a business or individual with which your company has a business relationship to provide any or all of the following: installation services, monitoring services, or servicing systems. Each Customer is attached to certain elements that provide the structure for business transactions.

There are two different customer structures available; *Regular Customers* and *Master Accounts*. Regular customers are used mostly in residential situations. Master accounts are typically used for large commercial situations and provide special options for invoicing and managing these types of customers that are not available for Regular Customers.

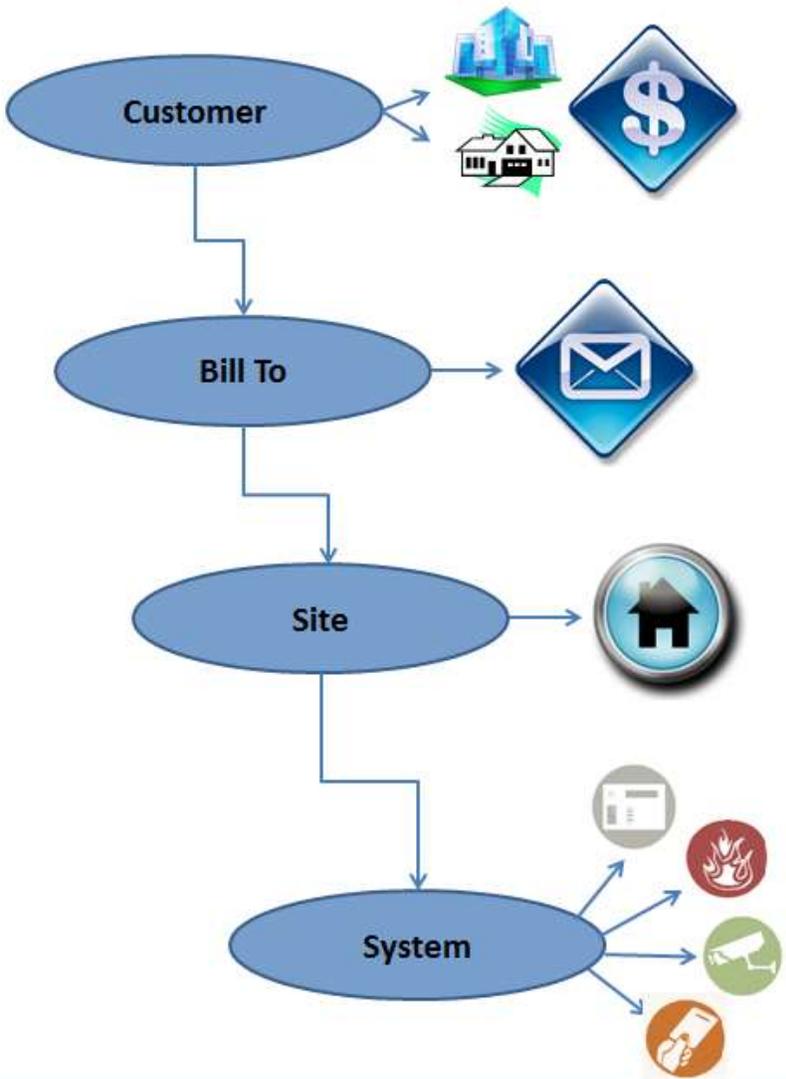
Notes

Regular Customer Structure

The Regular Customer structure typically consists of four levels; the Customer, Bill To, Site and System. Each unique Customer must have at least one corresponding Bill To, and at least one Site. The fourth optional level is the System. System records are only required if any of the following applies:

- The SedonaSchedule module is implemented
- The Job Management module is implemented
- Recurring Services are linked to a System
- SedonaOffice is interfaced with Bold Manitou

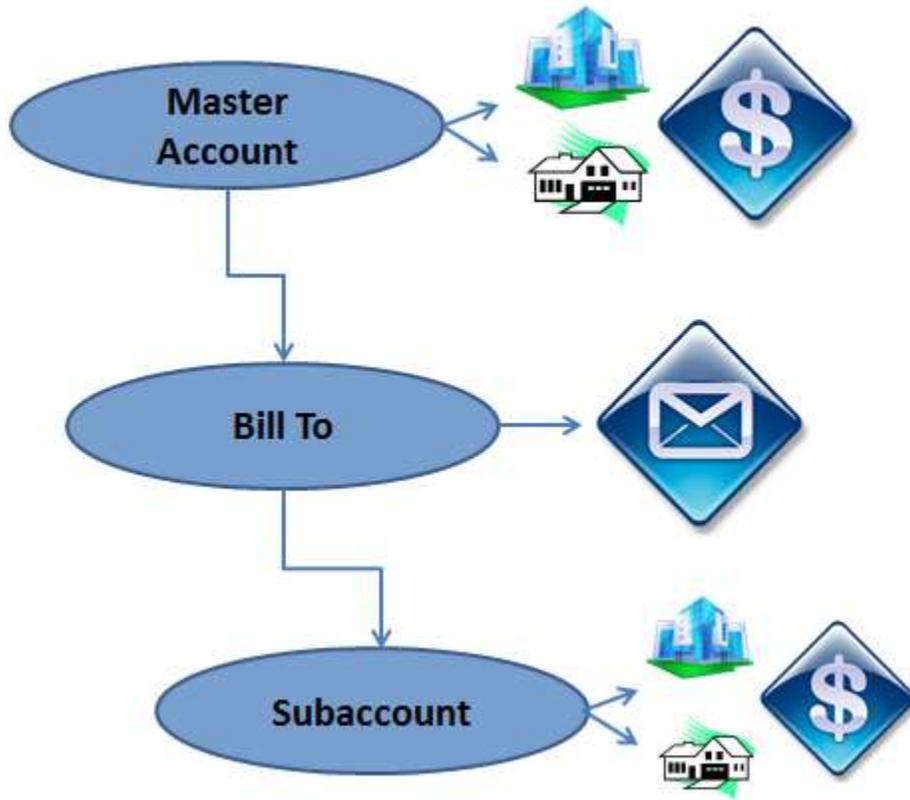
The following pages will describe the elements of the Customer structure within SedonaOffice.



Master Account Structure

The Master Account Customer structure was developed to better handle the large amounts of data of several customers grouped under the umbrella of one customer – the Master Account. A Master Account structure differs from the Regular Customer in that the Master Account has no Sites or Systems, rather is the parent of Subaccounts. A Subaccount is a Regular Customer linked to a Master Account. Products and services incurred by a Subaccount may be invoiced directly to the Subaccount or to the Master Account.

A Master Account contains three levels; the Master Account [Customer], Bill To, and Subaccounts. Each unique Subaccount linked to the Master Account typically has four levels to the structure; at least one Bill To, at least one Site and optionally but most likely at least one System.



Customer Creation Methods

The creation of the two customer types; Regular Customers and Master Accounts differs in the data entry process. The creation of both types of Customers will be covered in this session.

When creating a new Customer, the User has the option of creating a System record and Recurring Lines at this time. If an Installation Job is going to be created after the Customer record is saved, the User should create the System record when creating the new Customer. If a System record is not created before an Installation Job is created, other Users will not be able to create a Service Ticket if it is necessary to send out a Service Technician to work on the Job while it is in progress. If Recurring Lines are going to be activated and invoiced on an Installation Job, the User will not create Recurring Lines during the creation of a new Customer. The Recurring Lines will be set up and activated through the Installation Job.

Note: When creating Customer and Site records, the format in which the name is entered is of great importance. Names appear printed on various documents and proper formatting will insure a well presented document to your customer.

Notes

Creating a Regular Customer

A new Customer may be created by choosing one of two paths:

- From the main application menu, navigate to the *Client Management* module, then select the *New Customer* option.

- From the main application toolbar, click the binoculars icon  , then click the *New* button located at the lower right of the *Customer Lookup* form.

Customer Information Setup

The Customer Information tab of the New Customer Setup form is divided into three sections; Customer Detail, Primary Bill To Information, and Invoice Printing.

In any data entry field which displays an arrow to the right of the field  , the User must make a selection from the drop-down list. In fields without an arrow to the right, the User may enter any information desired as long as the number of characters does not exceed the field limit.

Clicking the *Tab* key on the keyboard will advance to the next data entry field. Pressing the *Shift and Tab* keys simultaneously will take the User back one field. You may also use the mouse to click on the next field to enter information.

There are also accelerator keys assigned to most of the data entry field labels. If a field label has a character that is underlined, clicking ALT + the underlined letter will jump to that field. For example in the Name field, the accelerator key is N; to jump to that field from anywhere on this form, click ALT N.

Notes

The Customer Information form is used to setup the Customer Name, the Primary Billing address and other billing related options. There are many data entry fields on the Customer Information form, some of which are required:

- Customer Number

- Customer Name

- Bill To Name

- Bill To Address

- Customer Type

- Default Terms

- Branch

New Customer Setup

Create New Job
Show Explorer
Create New System

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

Customer Detail

Number: 263
Name: Walker, Theodore

Primary Bill To Information

Residential Commercial

Name: Walker, Theodore
Address...: 16500 Capella St
Riverside, CA 92504

Phone 1: (951) 341-8899
Phone 2:
Fax:
Email: theo.walker@gmail.com
 Primary

Invoice Printing

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

Customer Detail

Customer Status: Active
Customer Type: Residential
Old Customer ID:
Default Terms: Due On Receipt
Tax Exempt #:
Bypass RMR Increases Until:
Salesperson: George.McGee
Blanket P.O.:
Expiration Date:
Chain Account:
Customer Group:
Customer Group 2:
Branch: CA
No Collections:

Save Close

Notes

Site Setup

The Site Setup form is divided into four sections; Site Name and Address, Comments, Site Information and Tax Setup.

The Site is the physical location of where you will be installing, servicing and/or monitoring one or more Systems.

There are many data entry fields on the Site Setup form, some of which are required:

- Site Number
- Site Name
- Site Address
- Customer Since (date)
- Tax Group
- Cycle Tax Group

New Customer Setup

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

Create New Job
Show Explorer
Create New System

Site Name and Address

Residential Commercial

Site Number: 1
Name: Walker, Theodore
Address...: 16500 Capella St
Riverside, CA 92504

Phone 1: (951) 341-8899
Phone 2:
Fax:
Comments:

Site Information

Branch: CA
Cross Street:
Map Code:
Customer Since: 11/17/2015
C/S Linking:
Tax Setup

Tax Group: CA-Sales Tax
CA-Sales Tax 8.0%

Cycle Tax Group: CA-Sales Tax
CA-Sales Tax 8.0%

Tax Exempt #:

Save Close

Notes

System Setup

The System form is divided into three sections; System Information, Contract Information, and Cycle Purchase Order. If more than one System is being installed, you will setup the information for the first system, then add the additional systems after the Customer has been saved.

Required fields on the System form are:

- System Account
- System Type
- Warranty (type)
- Service Level
- Primary Service Company

The screenshot displays the 'New Customer Setup' window with the 'System' tab selected and circled in blue. The window is divided into three main sections: System and Service Information, Contract Information, and Cycle Purchase Order. The System and Service Information section is highlighted in yellow and contains the following fields: System Account (263), System Type (Intrusion), Panel Type, Location, Monitored By, Memo, Warranty (Full Warranty), Warranty Start, Service Level (T&M-RSC), Primary Service Co (MI-T&M), Alt Service Co 1, Alt Service Co 2, and Comments. The Contract Information section includes Contract Form (5 Year), Contract Number, Contract Date, Contract Months, Renewal Months, and OK to Rate Increase After. The Cycle Purchase Order section includes Cycle P.O. and Expiration Date. The window also features a 'System' tab, a 'Cust Custom Fields' tab, and a 'Site Setup' tab. The 'System' tab is circled in blue. The window has a title bar with 'New Customer Setup' and a close button. The bottom of the window has 'Save' and 'Close' buttons.

Notes

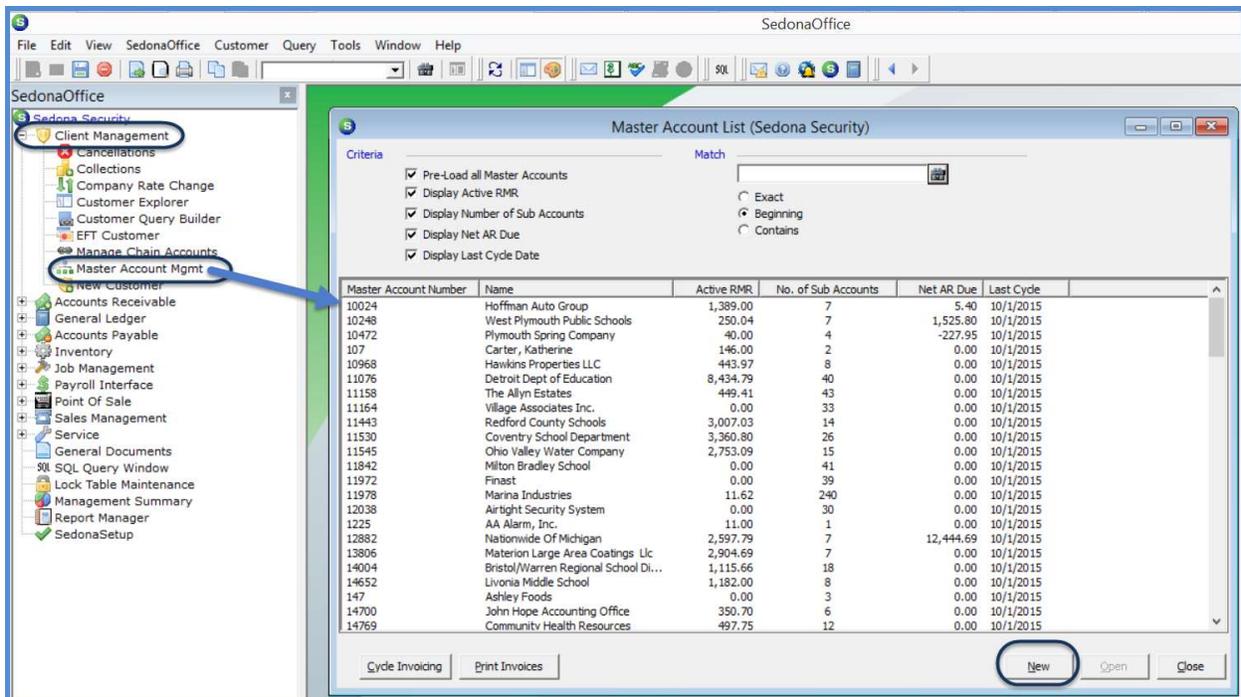
Creating a Master Account

A Master Account may be manually created or a Regular Customer may be converted into a Master Account. Depending on the method used, the end result will be a bit different.

Manually Creating a Master Account from the Master Account List

Using this method, the Master Account will be created, and then once saved, Subaccounts will be manually created on the new Master Account record.

Beginning from the Client Management/Master Account Mgmt, click on the *New* button located at the bottom of the Master Account list.



Notes

Master Account Setup

There are three possible data entry forms available when creating a new Master Account: Customer Information, Custom Fields, and Services. The Custom Fields tab is only available if the User has permissions to enter information into this form.

Customer Information

The data entry form for Customer Information is nearly identical to that of a Regular Customer. The only differences are the Create New System and Create New Job checkboxes do not appear on this form since a Master Account does not have Sites or Systems.

The screenshot shows the 'New Master Account Setup (Sedona Security)' window. The 'Customer Information' tab is selected and circled. The form is divided into several sections:

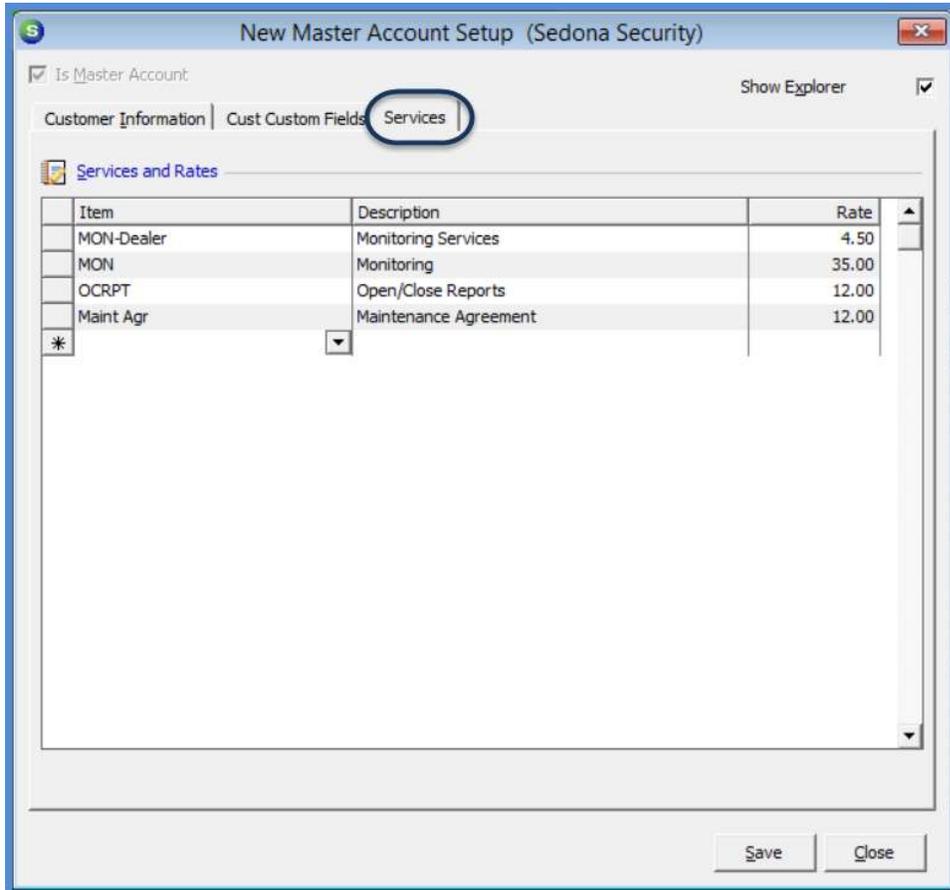
- Customer Detail:** Number (Allied), Name (Allied Security Services), Customer Status (Active), Customer Type (Commercial), Old Customer ID, Default Terms (Due On Receipt), Tax Exempt #, Bypass RMR Increases Until, Salesperson (Jeff Craig), Blanket P.O., Expiration Date, Chain Account, Customer Group, Customer Group 2, Branch (CA), No Collections (unchecked).
- Primary Bill To Information:** Residential (unchecked), Commercial (checked), Name (Allied Security Services), Address... (PO Box 321, Santa Ana, CA 92706), Phone 1 ((714) 459-3636), Phone 2, Fax, Email.
- Invoice Printing:** Print Cycle Invoices (checked), Print Site Info on Invoices (checked), Print Statements (checked), Charge Late Fees (checked), Separate Cycle Invoice for Each Site (checked).
- Other:** Is Master Account (checked), Show Explorer (checked).

Buttons for 'Save' and 'Close' are located at the bottom right of the window.

Notes

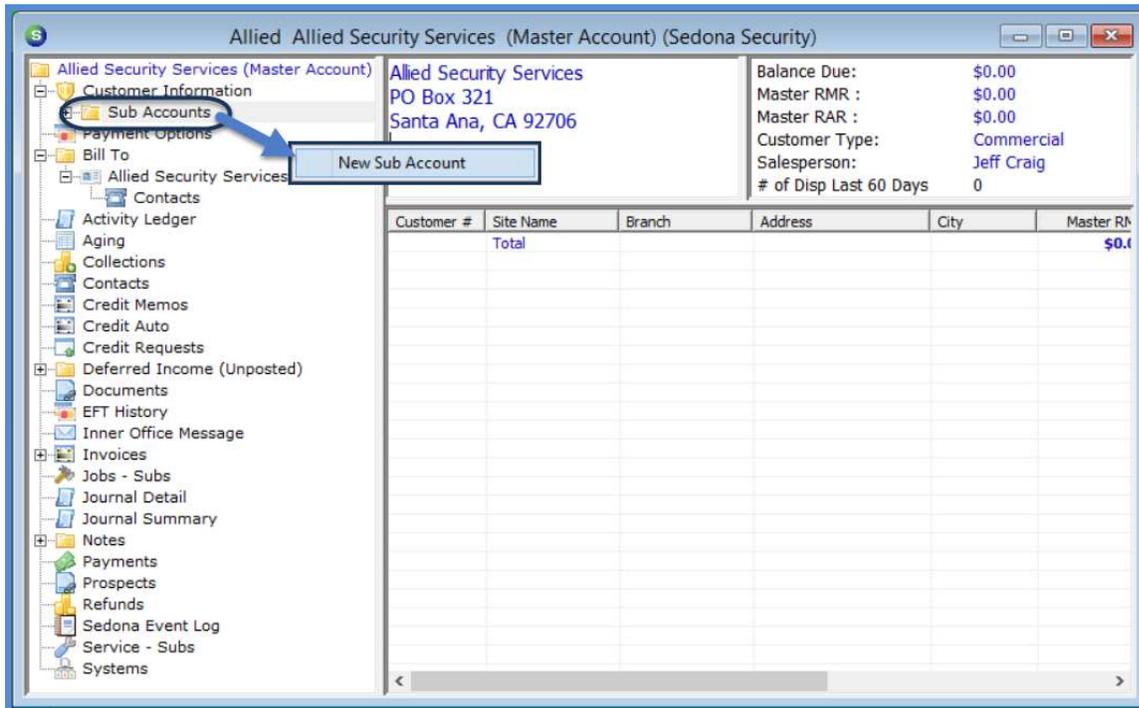
Services

The Services data entry form is unique to Master Accounts. This form is used to setup a list of recurring type Invoice Items along with default prices that would be used when setting up recurring lines on the Subaccounts.



Notes

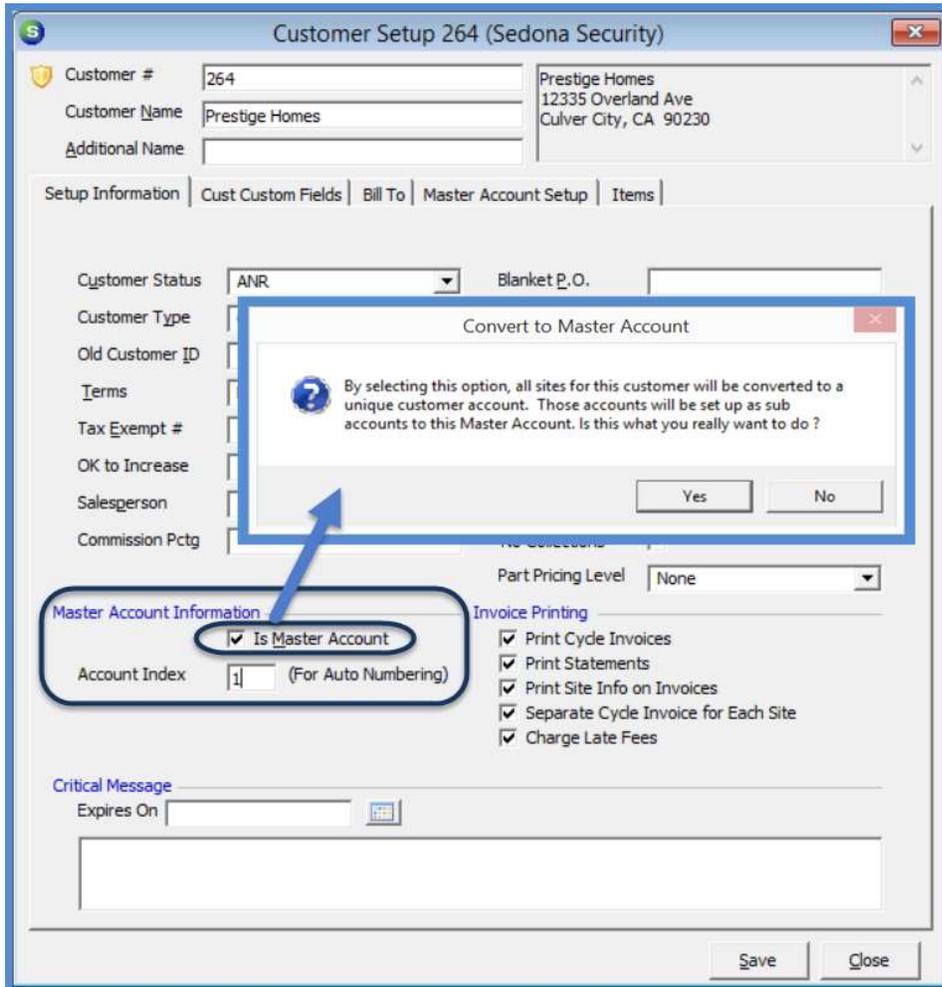
Once the Master Account has been saved, Subaccounts are added by right-clicking on the Sub Accounts option on the customer tree within the customer explorer of the master account.



Notes

Converting a Regular Customer into a Master Account

Using this method, a Regular Customer is created, then once saved will be converted into a Master Account. After converting to a Master Account, the first Subaccount is automatically created from the Site record created when the Regular Customer was saved; additional Subaccounts will be manually added on the new Master Account record.



Notes

New Customer Additional Data Entry

Once a new customer is saved, additional information may be setup for the customer including:

- Contacts – Customer and/or Site
- Additional Bill To records
- Customer Items
- Site Items
- Payment Information – Credit Card and/or EFT Bank
- Additional Sites
- Additional Systems
- Central Station Tracking Information (if activated)

Notes

Customer Maintenance

Billing Address Change

If a Customer's primary billing address is changing, the best practice is to create a new Bill To record on the account and mark it as the primary, rather than modify the current billing information.

Change of Ownership

If a new customer is taking over the responsibility of an existing System, a new Customer is created, and then the Site Transfer option is used to copy the Site/System information from the previous owner to the new Customer.

Entering Notes

When entering Notes from the Customer Explorer, the appropriate location of where to enter the note is important.

- Customer Level Notes - If the note is relative to the entire customer account, the note should be entered at the Customer level.
- Site Level Notes – If the note is relative to a specific Site, the note should be entered on the appropriate Site.
- System Level Notes – If the note is relative to a specific System, the note should be entered on the appropriate System.

Notes