14th ANNUAL USERS CONFERENCE

January 25 – 27, 2016 | Bonita Springs, FL

Client Management 101 – Part 2

Presented by:
Lisa Gambatese & Melissa Robinson

PERENNIAL SOFTWARE 20TH ANNIVERSARY

Makers of SedonaOffice and AlarmBiller®

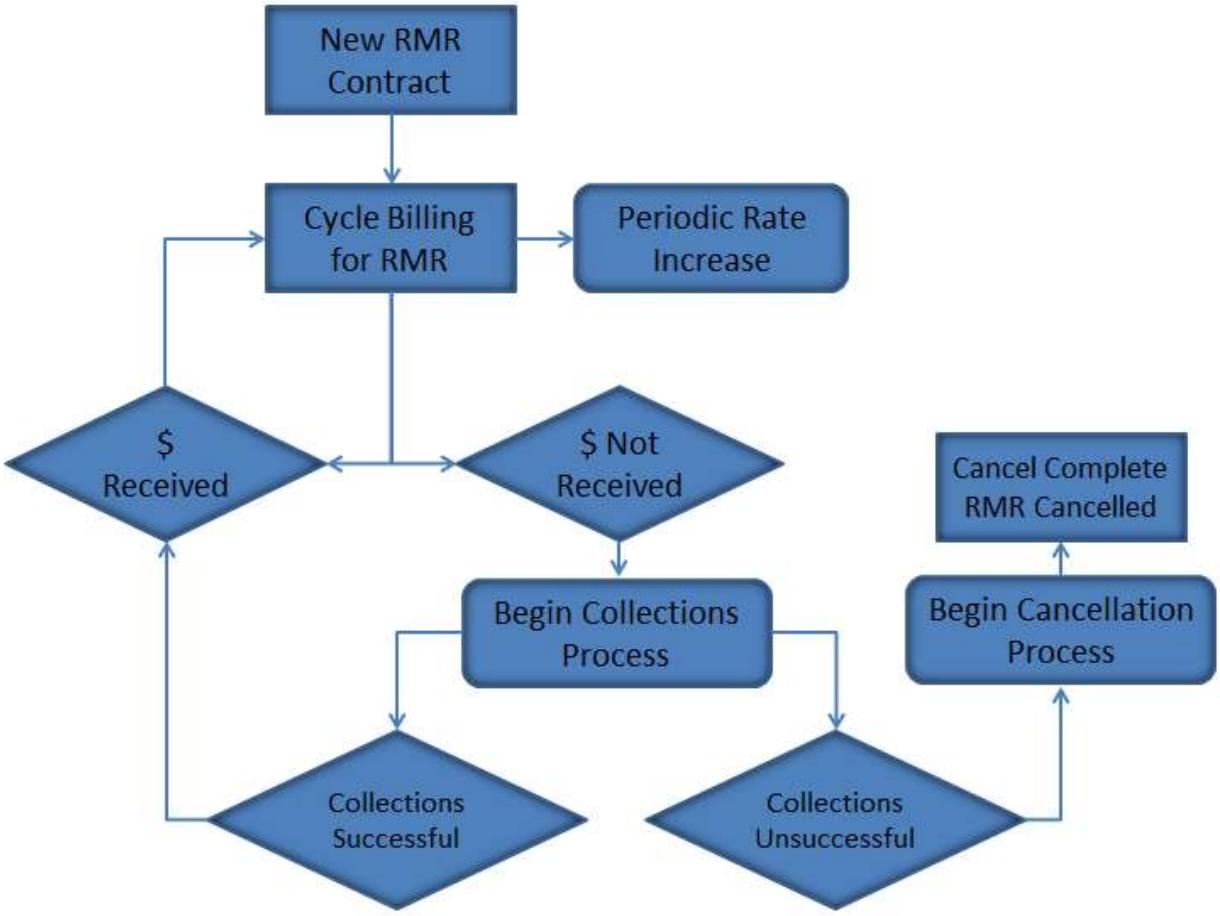
This Page Intentionally Left Blank

Table of Contents

Recurring Monthly Revenue....4
RMR Basics....5
Recurring Line....6
RMR Tracking....7
Creating New Recurring....8
Set-up Recurring when creating a New Customer....8
Set-up Recurring from the Customer Explorer....9
Recurring Line Changes....10
Recurring Line Rate Increase....12
Recurring Line Rate Decrease....13
Site Copy....14
Equipment List Maintenance....16

Recurring Monthly Revenue

RMR (Recurring Monthly Revenue) is typically the driving source of revenue for most security companies. Within SedonaOffice, RMR is linked to customer Systems or Sites and tracked throughout the entire lifecycle of the customer. Based upon the methods SedonaOffice employs to track RMR, many pre-designed reports are available to immediately evaluate how your company is growing or why you may be losing customers.



RMR Basics

It is important to know some key terminology - these definitions are based on their usage within SedonaOffice.

Recurring Revenue

Recurring Revenue is any revenue that is scheduled to be invoiced to a Customer on an ongoing basis.

RMR – "Recurring Monthly Revenue"

RMR is the Recurring Revenue invoiced on a Monthly basis. RMR is the standard measurement used by SedonaOffice to manage Recurring Revenue.

RAR – "Recurring Annual Revenue"

RAR is the Recurring Revenue invoiced on an Annual basis. This is the RMR multiplied by 12.

RMR in Force

The RMR in Force is the RMR that is or was active at any given period of time. The RMR in Force is inclusive of its start date and its end date.

For example, if you had a Recurring Item, scheduled to start on Jan. 1 and end on Jan. 31, the RMR in Force would be in affect from the 1st through the 31st. Even though the Recurring Item is cancelling on the 31st, it is still in force on the 31st because the Recurring Item was invoiced through this date.

Notes

Recurring Line

A Recurring Line is the actual Recurring Revenue setup for a Customer. Key elements of a Recurring Line include:

- Recurring Start Date – (Cycle Start Date)

  This is the Date the Recurring Item first started. This is the Activation date of the Recurring Revenue.

- Recurring End Date – (Cycle End Date)

  This is the Date the Recurring Item stops being invoiced. This is the Cancel date of the Recurring Revenue.

- Next Cycle Date

  This is the next date the Recurring Item will be Cycled (an invoice created for the Customer).

- Cycle

  Either; Monthly, Quarterly, Semi-Annual or Annual. The period for which the recurring charges will be invoiced to the Customer.

- Monthly Amount

  The RMR, this is the monthly amount that will be invoiced for the Recurring Item. *This is the amount that will be used for RMR Auditing.*

- Cycle Amount

  This is normally the Monthly Amount times its Cycle. This can be overwritten if the Cycle amount is not equally divisible, for example if you are invoicing $100 per quarter.

Notes

RMR Tracking

RMR Tracking (History) is the net change of the Recurring Revenue for a Customer. The RMR Tracking is maintained in the ***AR_RMR_Tracking*** SQL table.
RMR is tracked so you can report on the history and changes to your recurring revenue.

There are two very important data elements to every RMR Tracking record.

Effective Date

The date the change in Recurring Revenue actually takes place. This date is very important as it has an effect on the RMR Auditing.

RMR Reason

The reason code why the Recurring Revenue amount actually changed. Every change to RMR requires a RMR Reason.

Adding/Creating New Recurring Revenue

There are two methods of adding Recurring Revenue.

- New Recurring Revenue – Creating RMR that did not exist prior.
- Increasing an existing Recurring Line – This is commonly known as a Rate Increase

Cancelling/Decreasing Recurring Revenue

There are two means to lower Recurring Revenue.

- Full Cancellation – This would be a full reduction of the RMR
- Partial Cancellation – This would be a partial decrease of the RMR, commonly known as a Rate Decrease.

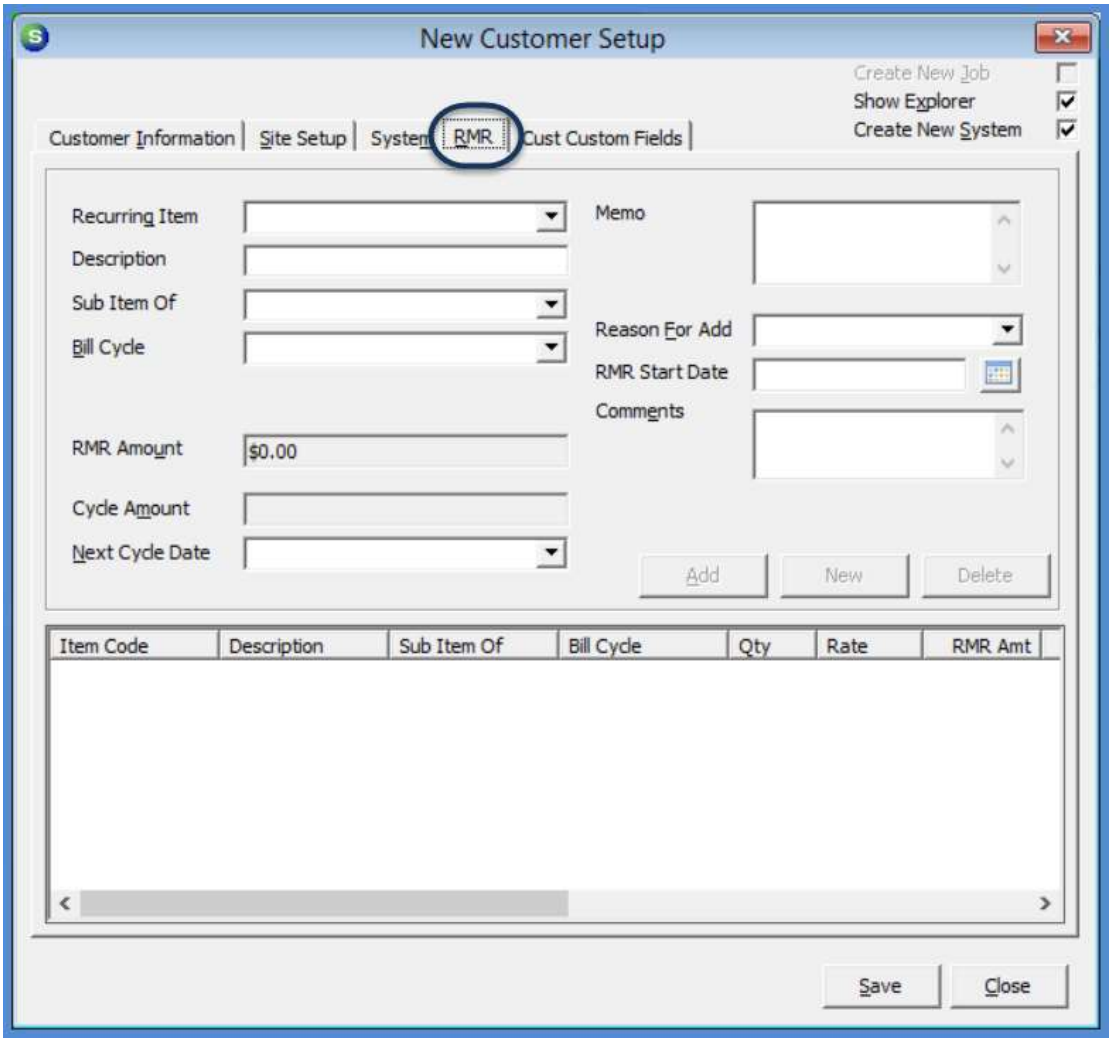
Notes

Creating New Recurring

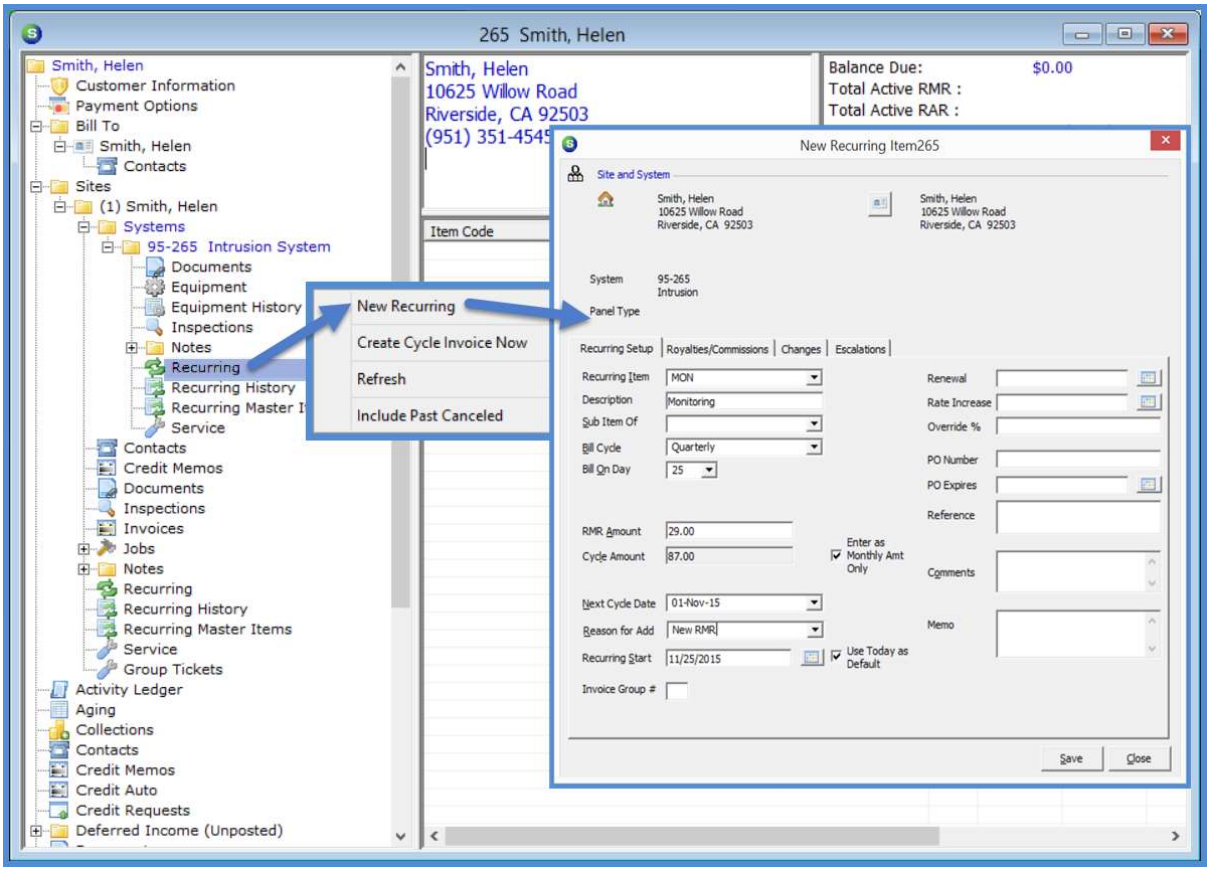
New Recurring Lines can be created by three different methods:

- Setting up the Recurring Lines when creating a new Customer.
- Manually setting up the Recurring Line from the Customer Explorer record.
- Created when invoicing Recurring on a Job record.

Set-up Recurring when creating a New Customer



Set-up Recurring from the Customer Explorer



Notes

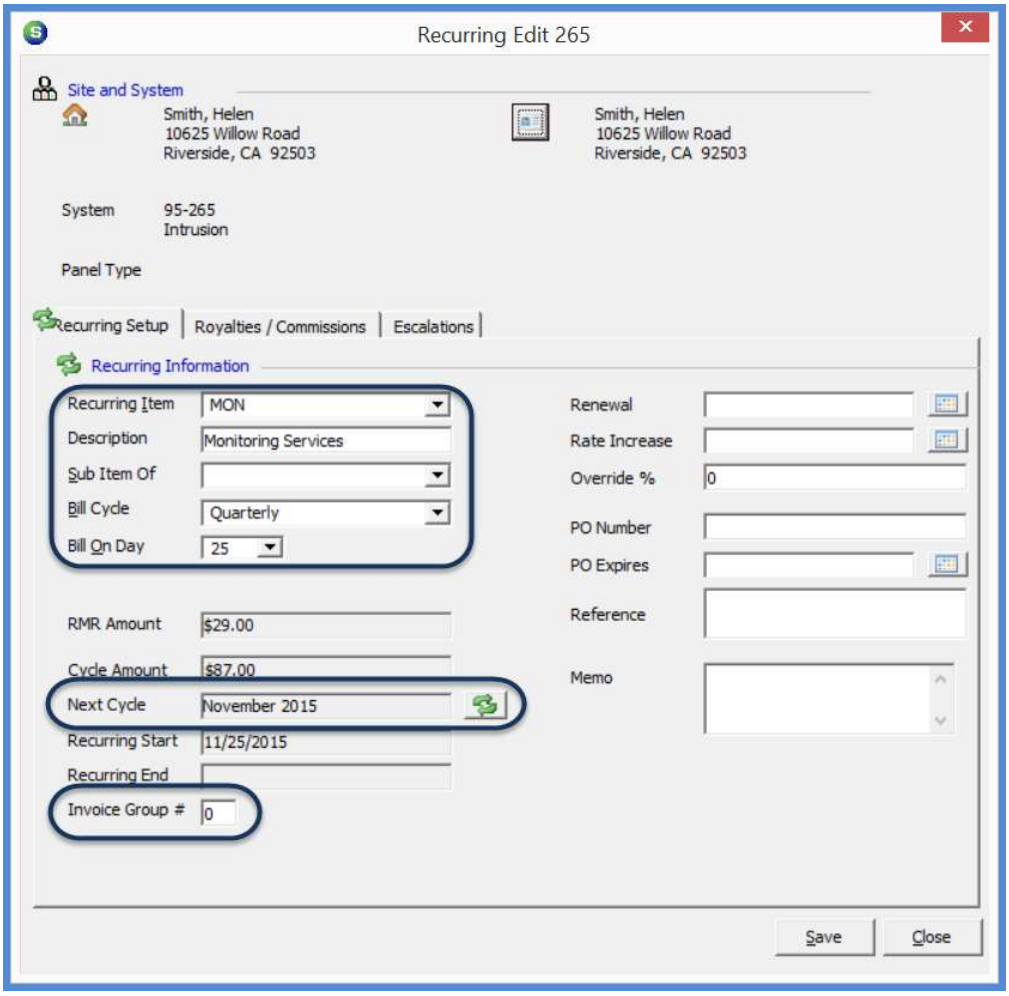
Recurring Line Changes

Certain fields on a Recurring Line may be modified if necessary. One of these fields is the Billing Cycle; before changing the billing cycle, make certain to consider any invoicing or crediting ramifications that may result.

Key Editable Fields on a Recurring Line

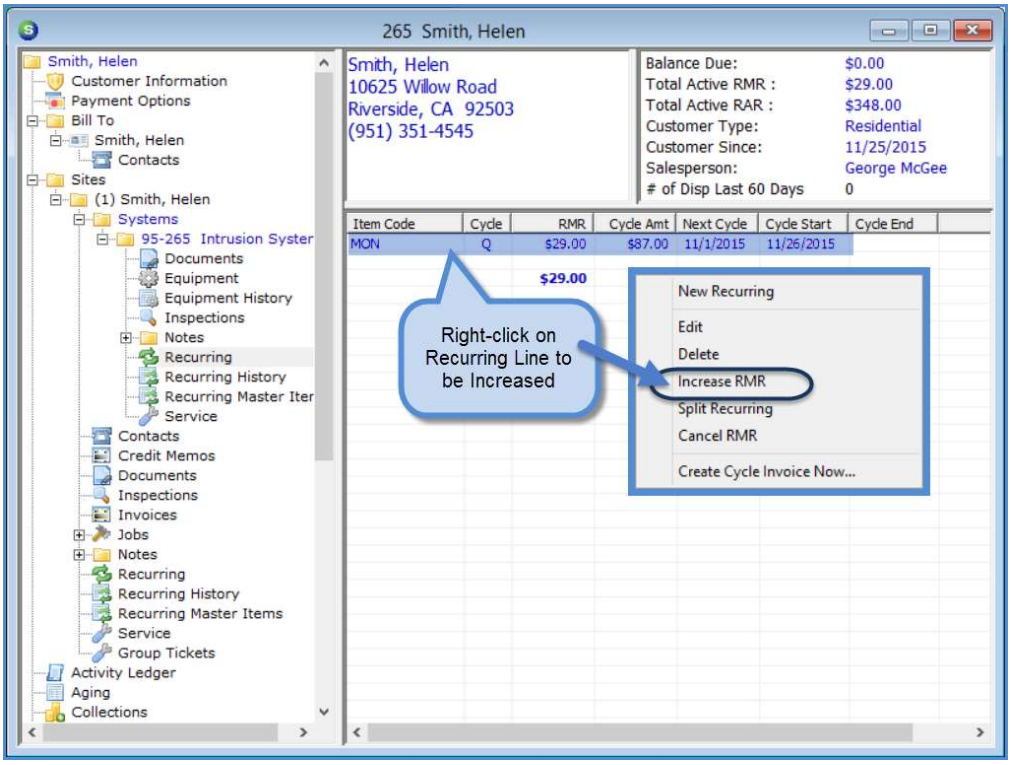
- Recurring Item
- Description
- Sub Item Of
- Bill Cycle
- Next Cycle Date (only with User Permissions granted)
- Invoice Group
- Any of the data entry fields on the right side of the form

Notes


Recurring Edit 265
Site and System
Smith, Helen
10625 Willow Road
Riverside, CA 92503
Smith, Helen
10625 Willow Road
Riverside, CA 92503
System
95-265
Intrusion
Panel Type
Recurring Setup
Royalties / Commissions
Escalations
Recurring Information
Recurring Item
MON
Description
Monitoring Services
Sub Item Of
Bill Cycle
Quarterly
Bill On Day
25
RMR Amount
$29.00
Cycle Amount
$87.00
Next Cycle
November 2015
Recurring Start
11/25/2015
Recurring End
Invoice Group #
0
Renewal
Rate Increase
Override %
0
PO Number
PO Expires
Reference
Memo
Save
Close

Recurring Line Rate Increase

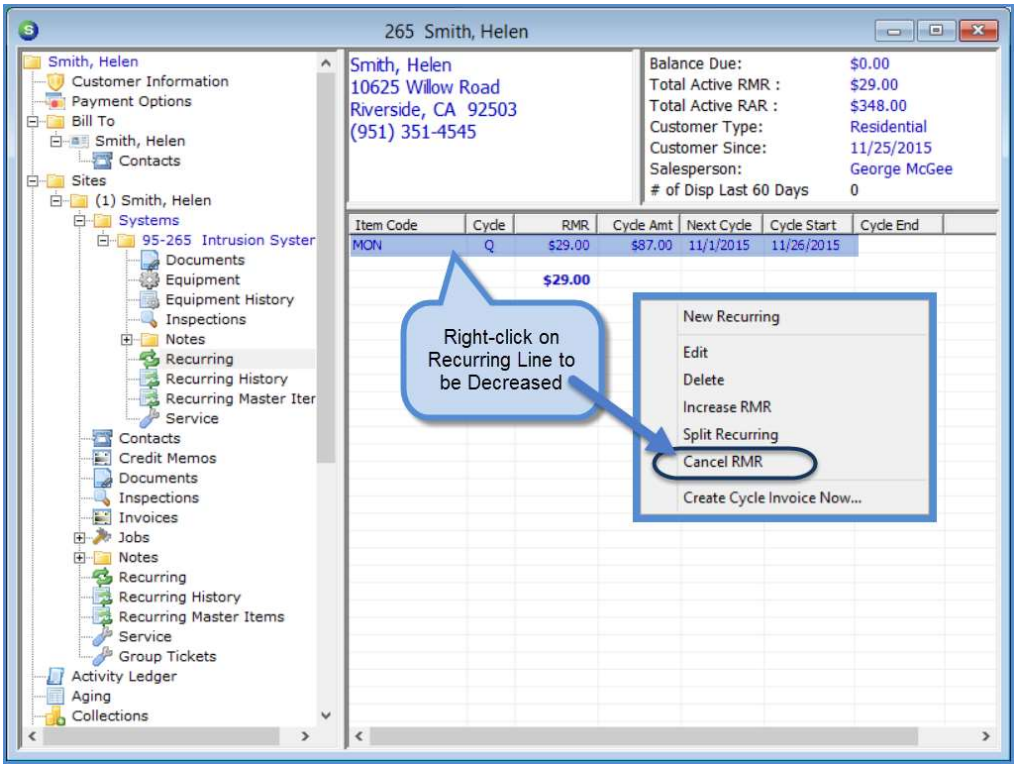
You may perform a manual Rate Increase on any Recurring Line using the right-click option *Increase RMR*.



Notes

Recurring Line Rate Decrease

You may perform a manual Rate Decrease on any Recurring Line using the right-click option *Cancel RMR* – this is considered a partial cancellation.



Notes

Site Copy

This option is used when a Customer moves from a Site where your company has equipment installed and another Customer moves into the same Site and your company will be monitoring and/or servicing the system(s) for the new Customer. This function will copy the site and system information from one customer to another. This function only makes a copy of this information.

When performing a Site Copy, the User has the option of **moving** Service/Inspection Ticket History from the old customer to the new customer.

If your company is using SedonaDocs, and documents are attached to the original Customer's Site(s) and/or System(s), the User will have the option to **move** all or selected documents to the new Customer.

Important Notes:

1) Before performing a Site Copy, make certain the original Customer's Site(s) and System(s) that are to be copied are not Inactive. If the original Customer has previously been canceled, you will need to reactivate the account first. Once the Site Copy has been performed, you will go back and inactivate/cancel the Customer manually.

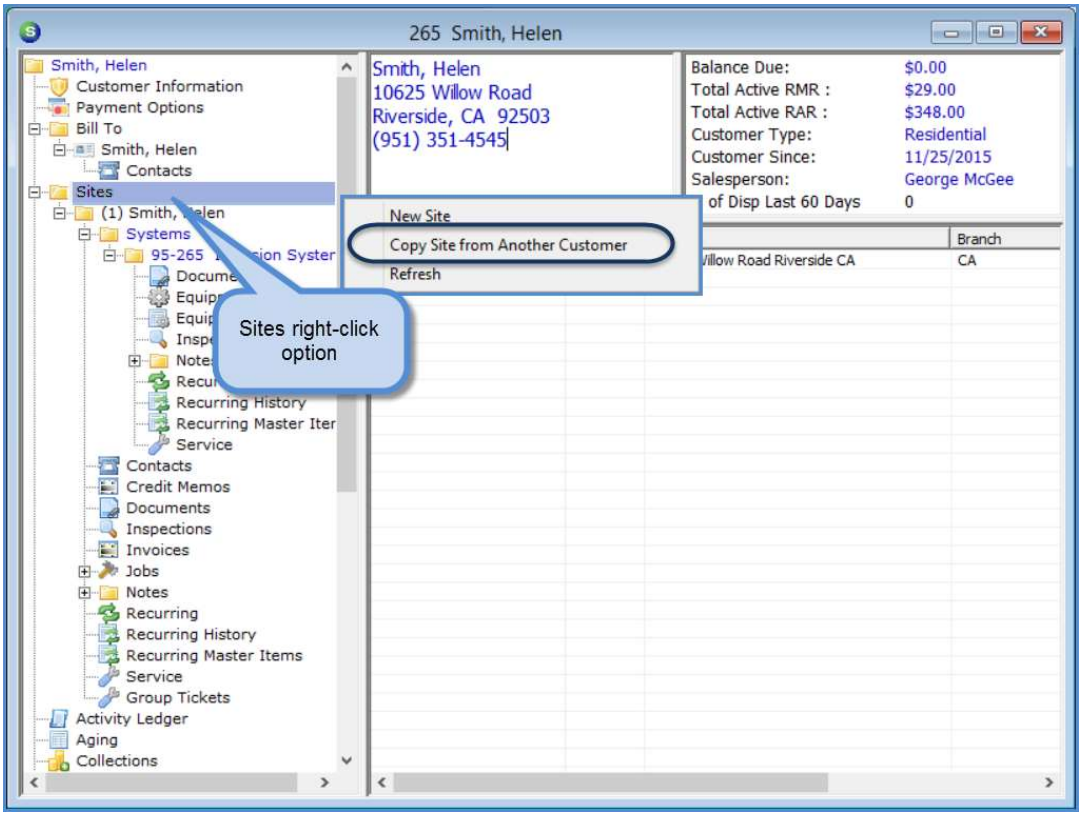
2) Before using this function, make certain that all Tickets on the canceled customer record have been closed; otherwise any open tickets will be moved to the new customer.

3) Financial information is not copied to the new customer including invoices/payment history or recurring lines.

4) When a Site copy is performed and the User selects to copy the canceled customer's System information, the contract information from the previous customer is copied into the new customer and will need to be edited with information pertinent to the new customer.

Notes

Customer Explorer – Site Copy Function

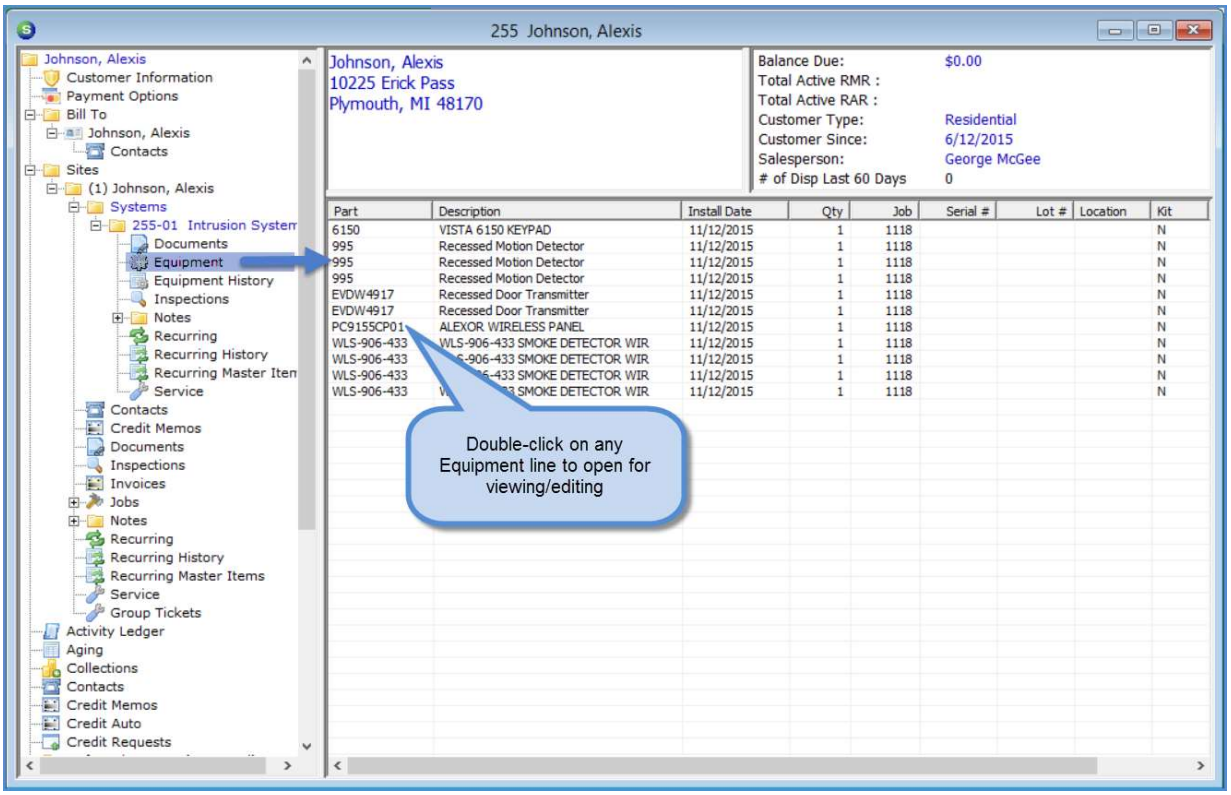


Notes

Equipment List Maintenance

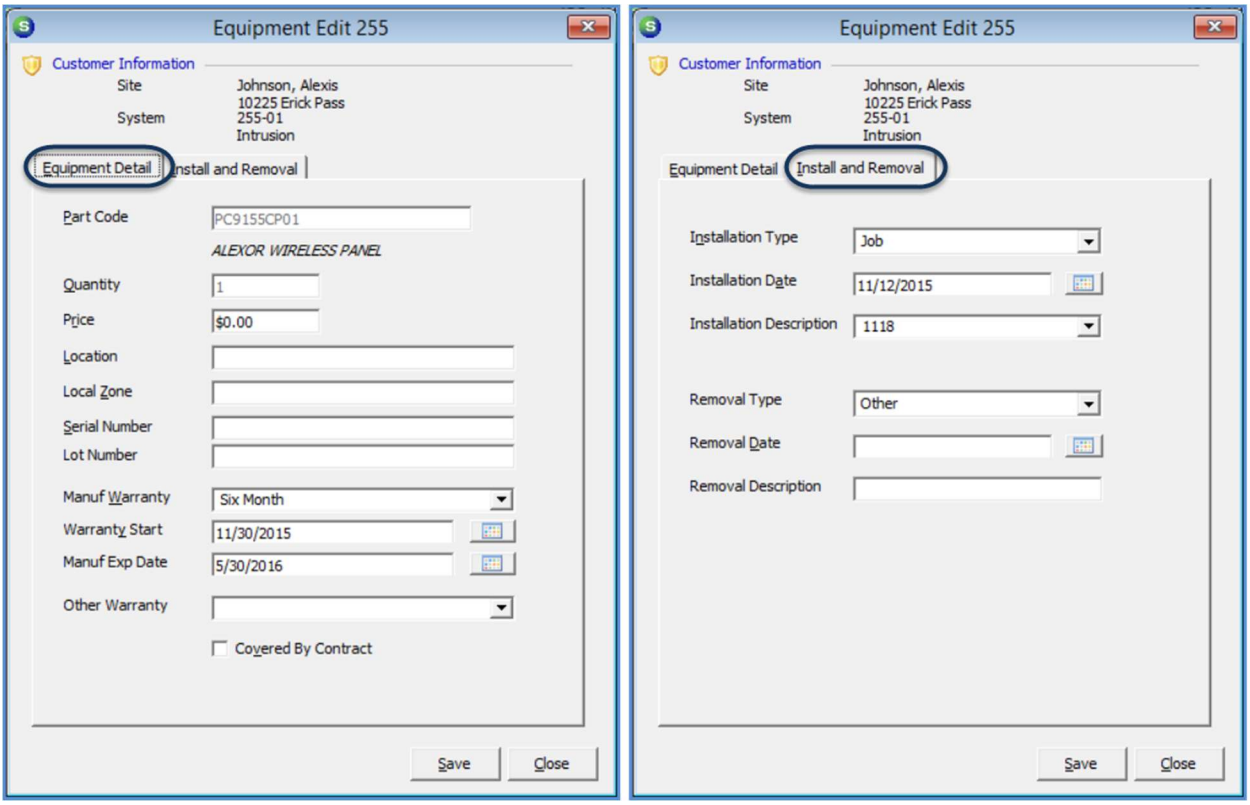
There a several options available to maintain a System's Equipment List:

- Parts may be edited to add additional information
- New Parts may be manually added
- Parts may be removed if no longer in service



Notes

Equipment in Edit Mode



Notes