SedonaOffice

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SedonaOffice 101
All About the Customer Explorer

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The Customer Explorer

The Customer Explorer was designed to be the "One Call – One Answer" solution. Information displayed within the Customer Explorer provides a User with static data and transactional history to be able to answer nearly any customer inquiry. Depending on a User's permissions, they may also be able to perform certain transactions within the Customer Explorer.

Understanding the layout and navigation within the Customer Explorer will enable Users to find and access information quickly.

Navigation

Navigating within the Customer Explorer is fairly easy once the basic design concepts are understood.

The Customer Explorer is a window divided into four panes:

- Customer Tree
- BillTo / Site Summary
- Financial Summary
- Active Pane (Grid)
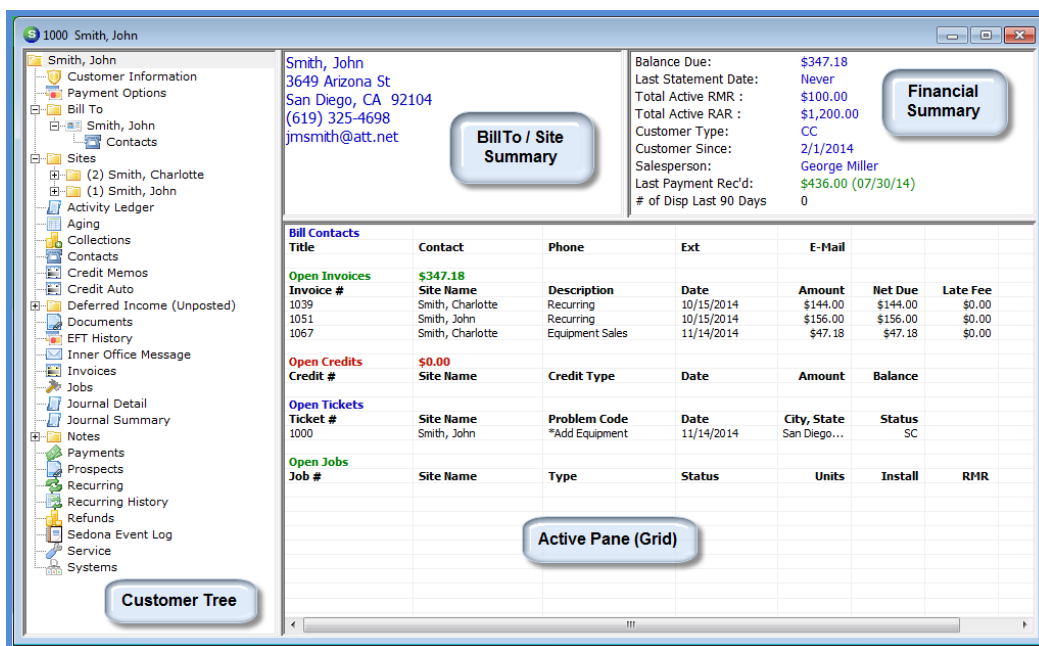
Notes

Customer Tree

The Customer Tree pane of the Customer Explorer is composed of two major areas; the Customer Structure and Customer Options & Activities. All customer tree options located above the Activity Ledger are part of the customer structure. From the Activity Ledger down is the Activity and Information for the Customer.

Notes

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When first opening a Customer Explorer, in the BillTo/Site Summary pane, the primary BillTo Information will be displayed. If the customer has more than one BillTo record, when clicking on other BillTo's from the customer tree, the pane will be refreshed with the corresponding information.

When clicking on a Site within the customer tree, the Site information will be displayed.
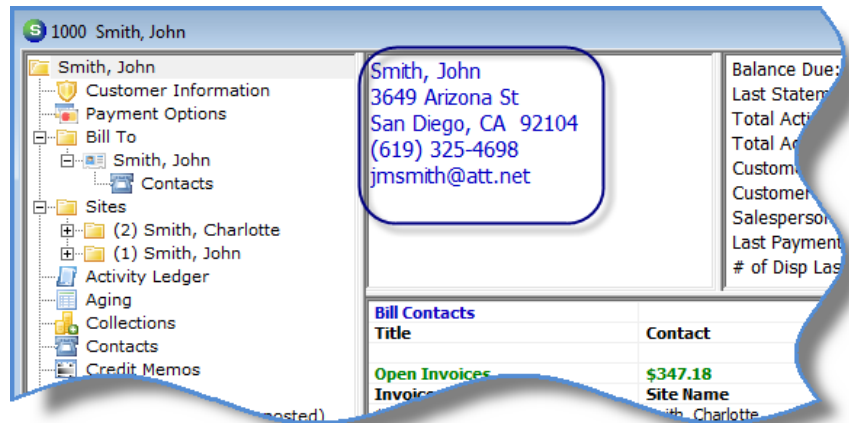
Notes

Financial Summary

The Financial Summary pane will display the following information:

- Balance Due – the net of all customer invoices and unapplied payments/credits
- Last Statement Date
- Total Active RMR – the total monthly recurring for all sites/systems for the customer.
- Total Active RAR – the total annual recurring for all sites/systems for the customer (RMR x 12).
- Customer Type – information displayed from the customer setup.
- Customer Since (date) – information displayed from the customer setup.
- Salesperson – information displayed from the customer setup.
- Last Payment Received – date of the most recent payment entered for the customer.
- # of Dispatches – the number of technician dispatches from service tickets in the last # of days. The setting is maintained in SedonaSetup/Service Setup Defaults.
- EFT Pending – If the customer has a pending (un-posted) EFT payment, the amount along with the date the EFT was entered by a User will be displayed.

Notes

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Active Pane (Grid)

When clicking on an option from the Customer Tree, information will be displayed in the Active pane. If clicking on an item where there has been no history, the Active pane will be blank.

Notes

View Options

Active Pane Grid Lines Display

Gridlines On

Gridlines Off

Notes
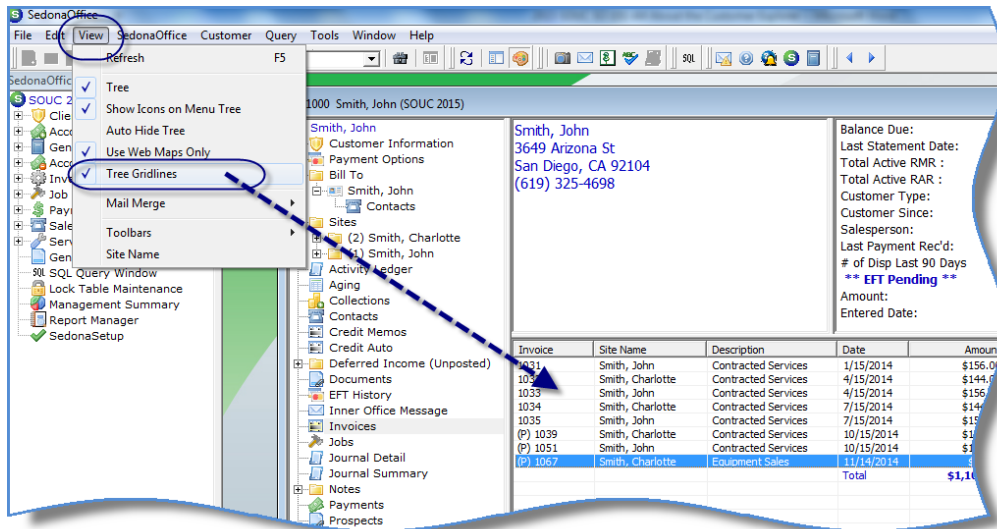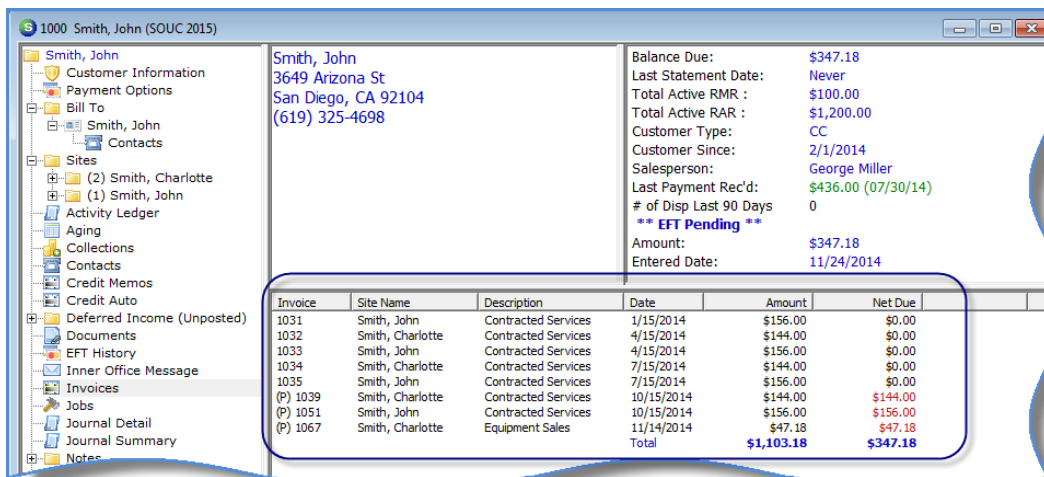
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There is a View option available to determine whether to show the Site Name or the Site Address within the Customer Tree. This selection is remembered for the User; then next time the User logs into the application their view option will be shown.

Site Name View

Site Address View

Notes
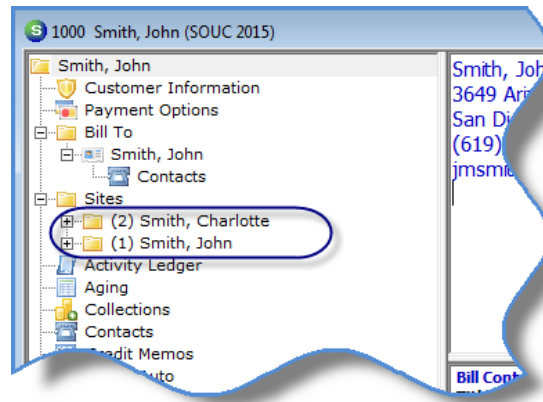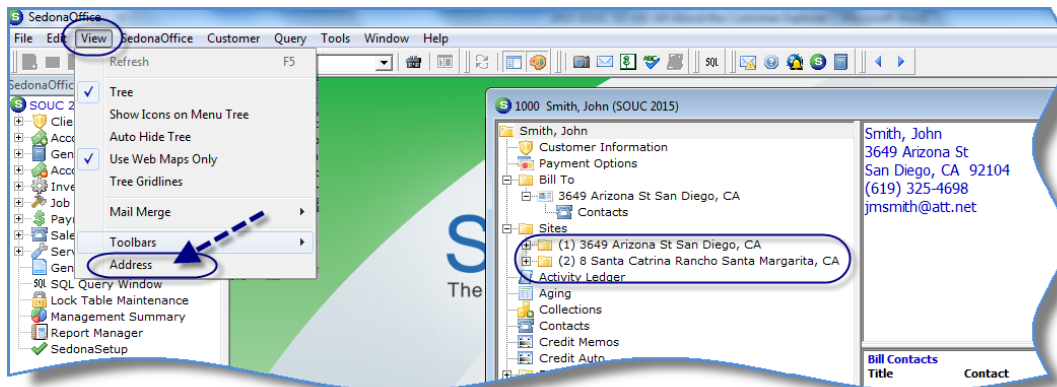
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The Customer Tree

As mentioned above, the Customer Tree is composed of two major areas; the Customer Structure and Customer Options & Activities.

Customer Structure

The Customer Structure section of the Customer Explorer is designed in a menu tree fashion with sub menus below some menu tree items. Clicking on the "+" sign to the left of each menu item will expand the menu tree to reveal additional information and menu options. Additional information will be displayed in the Active Pane as each menu tree item is highlighted. If no activity has occurred for the menu tree item selected, the active pane will be blank.

Notes

Customer Options & Activities

The Customer Options & Activities consists of all customer tree options below the Customer Structure. When clicking on a tree option, any activity for that item will be displayed in the active pane.

Depending upon the User's permissions, certain transactions may be performed within the Options and Activities area. When right-clicking on a tree option, additional options, if any, are exposed.

Notes