



Business Services, Inc.

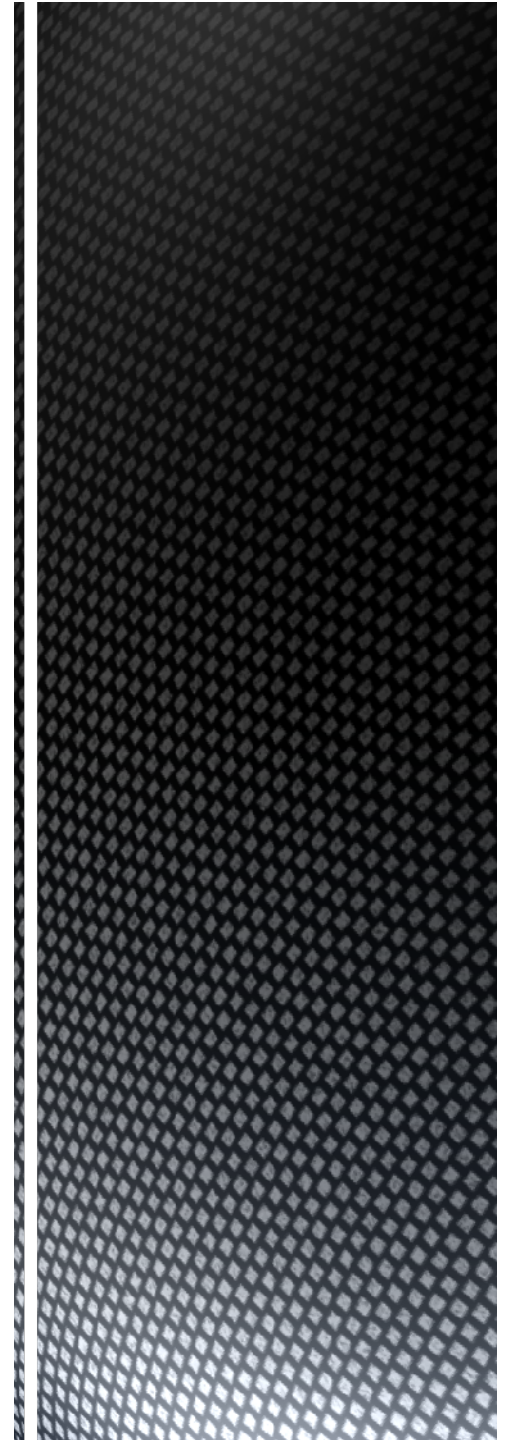
"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

EVENTS AND SAMPLES

SedonaSync



Email Invoice Suite

»» OPT SedonaSync Event 1118

SedonaSync Invoicing Options

SedonaOffice Invoice Notification

From: SedonaSync
Sent: Friday, August 15, 2014 5:05 AM
To: Brad Swindell
Subject: New Invoice Notice

Dear Smith, M/M,

This is an automated response from [REDACTED].

Invoice #98765 for \$198.79 has been posted to your account on 08/15/2014.

This is for Recurring Services.

This invoice will automatically be paid with your Visa ending in 9999 on or around the [REDACTED] of September.

To review your account online, please visit our online bill pay at [REDACTED]

Please call [REDACTED] at ([REDACTED]) [REDACTED]-[REDACTED] with any questions.

Thank you,
 [REDACTED]
 ([REDACTED]) [REDACTED]-[REDACTED]

SedonaOffice Cycle Invoice Event

From: SedonaSync
Sent: Friday, August 15, 2014 5:05 PM
To: Brad Swindell
Subject: New Invoice from OPT Business Services, Inc.

Dear Mr. & Mrs. Smith,

Invoice #98765 for \$198.79 has been created to your account on 08/15/2014 for Recurring Services.

This invoice will automatically be paid with your Visa ending in 9999 on or around the [REDACTED] of February.

Summary of Current Invoice

Customer #	Invoice #	Date	Due Date	PO #
123456	98765	08/15/2014	08/15/2014	

Description	Qty	Rate	Amount	Remit Payment To:
Monitoring Services 09/01/2014 - 11/30/2014	3.00	20.00	60.00	OPT Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713
Fire System - 123 Main Street Anytown, NY				
Monitoring Services 09/01/2014 - 11/30/2014	3.00	15.00	45.00	
Burg System - 10 1st Avenue Anytown, NY				
Service Agreement Fee (Parts & Labor) 09/01/2014 - 11/30/2014	3.00	26.00	78.00	Log In: To Pay Online [REDACTED]
Burg System - 10 1st Avenue Anytown, NY				
Subtotal:			\$183.00	
Sales Tax:			15.79	
Payments/Credits Applied:			(0.00)	
Invoice Balance Due:			\$198.79	

Contact Us:
 Billing questions: ([REDACTED]) [REDACTED]-[REDACTED]
 Support: [REDACTED]



SedonaSync Invoicing Options

OPT Email Invoice Master Format

08/15/2014


ABC Alarm Company
PO Box 1234
Anytown, NY 10001

Dear ABC Alarm Company (ap@abcsecurity.com).

Invoice #98765 for \$338.00 was posted to your account on 8/15/2014 for Recurring Services.

If you have any questions, please call our billing department at (727) 258-7229.

Summary of Current Invoice:



Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax (727) 258-7229

Invoice

Invoice	Date
98765	8/15/2014
Customer	Terms
123456	Due On Receipt

To: ABC Alarm Company
PO Box 1234
Anytown, NY 10001

Remit To: OPT Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
[Click Here To Pay Online!](#)

Customer Name	Customer Number	PO Number	Due Date	Terms
ABC Alarm Company	123456		8/15/2014	Due On Receipt

Description	Qty	Rate	Amount
Dealer Monitoring Services With O/C & Test, 09/01/2014 - 09/30/2014	10.00	13.50	\$135.00
Wholesale - Digital Monitoring Fee, 09/01/2014 - 09/30/2014	10.00	5.50	\$55.00
Wholesale - Open/Close Reporting (Supervised), 09/01/2014 - 09/30/2014	5.00	8.00	\$40.00
Wholesale - Radio Monitoring (GSM), 09/01/2014 - 09/30/2014	8.00	13.50	\$108.00
Subtotal:			\$338.00
Sales Tax:			0.00
Payments/Credits Applied:			(0.00)
Invoice Balance Due:			\$338.00

Date	Invoice #	Description	Amount	Balance Due
8/15/2014	98765	Recurring Services	\$338.00	\$338.00

OPT Email Invoice Standard Format

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001


Dear M/M Smith (smith@ma.com).

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.

This invoice was automatically paid with your "VISA" ending in "9999" on 08/15/2014.

If you have any questions, please call our billing department at (727) 258-7229.

Summary of Current Invoice:



Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax (727) 258-7229

Invoice

Invoice	Date
98765	8/15/2014
Customer	Terms
123456	Due on Receipt

To: M/M Smith
123 Main Street
Anytown, NY 10001

Remit To: OPT Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
[Click Here To Pay Online!](#)

Customer Name	Customer Number	PO Number	Due Date	Terms
M/M Smith	123456	100007465	8/15/2014	Due on Receipt

Description	Qty	Rate	Amount
09H02000 - Fire Alarm - M/M Smith - 222 Main Street, Anytown 10001			
Monitoring Service 09/01/2014 - 11/30/2014	3.00	20.00	\$60.00
09H02000 - Burg Alarm - M/M Smith - 20 1st Avenue, Anytown 10001			
Monitoring Service 09/01/2014 - 11/30/2014	3.00	15.00	\$45.00
Service Agreement For Parts & Labor 09/01/2014 - 11/30/2014	3.00	26.00	\$78.00
Subtotal:			\$183.00
Sales Tax:			15.79
Payments/Credits Applied:			(100.00)
Invoice Balance Due:			\$98.79

Date	Invoice #	Description	Amount	Balance Due
8/15/2014	98765	Recurring Services	\$198.79	\$0.00


Thank you for being a loyal customer. Visit us at www.OPTBusinessServices.com

** Thank you for using the autopay feature for your monitoring and other cycle invoices...and for helping us to keep our planet GREEN **

Did you know that you can set up your credit card or bank draft to automatically pay your service and invoices as well?
Just call us at the number listed below, and we'll get you signed up!

Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets.
Sign up using your customer number: 123456 *** Try it today! ***

Billing Department:

 Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

OPT Business Service, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
billing@optbusinessservices.com

SedonaSync Invoicing Options

OPT Email Invoice – Modular Format


Dear M/M Smith,
 Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.
 This invoice was automatically paid with your "VISA" ending in "9999" on 8/15/2014.

Invoice	
Customer Name	Smith, M/M
Customer Number	123456
Invoice Number	98765
Invoice Date	8/15/2014
Terms	Due On Receipt
Due Date	8/15/2014
PO Number	192837465

Item Description	Quantity	Rate	Amount
00A10250 - Fire System - M/M Smith - 123 Main Street, Anytown 10001 Monitoring Services 09/01/2014 - 11/30/2014	3.00	20.00	\$20.00
00B10250 - Burg System - M/M Smith - 10 1st Avenue, Anytown 10001 Monitoring Services 09/01/2014 - 11/30/2014	3.00	15.00	\$15.00
Service Agreement Fee (Parts & Labor) 09/01/2014 - 11/30/2014	3.00	26.00	\$78.00
SubTotal			\$183.00
Sales Tax			15.79
Credits Applied			(198.79)
Invoice Balance Due:			\$0.00

Important Messages
 Thank you for being a loyal customer! Visit us at www.OPTBusinessServices.com.

Online Bill Pay
 Save time with Online Bill Pay. Fast, free and easy to use. Schedule a one-time or recurring payment for your monthly service and say goodbye to late or missed payments.



Payment Details

If paying by check, always include your invoice and account number. **Please make checks payable and remit to:**
 OPT Business Services, Inc.
 2926 28th Avenue North
 St. Petersburg, FL 33713

Returned Check Fee:
 If a check is returned unpaid, there will be a returned check fee of \$50.00. Payment by check constitutes acceptance of these terms.

Late or No Payment Charges:
 If payment is not received by the "Due Date" indicated on your invoice, a late fee of 18% of the total unpaid balance (calculated annually at minimum of \$10.00) may be charged.

Contact Us

Office: (727) 258-7229
 Fax: (727) 258-7229
 Billing questions: Billing@OPTBusinessServices.com
 Support: Support@OPTBusinessServices.com

Like us on Facebook
 Follow us on Twitter
 Subscribe to our YouTube Channel
 Connect on LinkedIn

OPT Business Services, Inc.
 State License #0000000000
 2926 28th Avenue North
 St. Petersburg, FL 33713
 Phone: (727) 258-7229 / Fax: (727) 258-7229
www.OPTBusinessServices.com

Please do not respond to this email; this is an auto-generated message. You are receiving this automated invoice because you subscribed to our emailing services. To be removed from receiving these emailed invoices, please call (727) 258-7229..

Thank you for using the autopay feature for your monitoring and other cycle invoices and for helping us to keep our planet GREEN.

Sign up or log on to [Online Bill Pay](#) and you can set up your credit card or bank draft to automatically pay your service invoices as well.

SedonaSync Invoicing Options

OPT Email Invoice as PDF Attachment


From: SedonaSync
Sent: Friday, August 15, 2014 5:05 PM
To: Brad Swindell
Subject: New Invoice Notice - Invoice #98765 (AR# 123456)

08/15/2014

M/M Smith
 123 Main Street
 Anytown, NY 10001

Dear M/M Smith (smith@me.com),

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.

 This invoice was automatically paid with your "VISA" ending in "9999" on 08/15/2014.
Please See Attached Invoice.

If you have any questions, please call our billing department at (727) 258-7229.


**** Thank you for using the autopay feature for your monitoring and other cycle invoices... and for helping us to keep our planet GREEN ****

Did you know that you can set up your credit card or bank draft to automatically pay your service and other invoices as well?
 Just call us at the number listed below, and we'll get you signed up!

Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets.
 Sign up using your customer number: 123456

*** Try it today! ***

Billing Department


 Business Services, Inc.
 "Keeping Your Business in Sync!"
 (727) 258-7229
 www.OPTBusinessServices.com

OPT Business Service, Inc.
 2926 28th Avenue North
 St. Petersburg, FL 33713
billing@optbusinessservices.com

OPT Email PDF Invoice Standard Format



Business Services, Inc.
 "Keeping Your Business in Sync!"
 (727) 258-7229
 www.OPTBusinessServices.com

Invoice	
Invoice Number 12747	Date 12/15/2010
Customer Number 001234	Due Date 01/01/2011

To: Mary Smith
 123 Main Street
 Any Town, NY 12345

Remit To: OPT Business Services, Inc.
 2926 28th Avenue
 Saint Petersburg, FL 33713

Amount enclosed: _____ Net Due: **\$0.00** Detach And Return Top Portion With Your Payment

Customer Name	Customer Number	PO Number	Invoice Date	Due Date
Smith, Mary	001234		12/15/2010	01/01/2011

Quantity	Description	Months	Rate	Amount
A1230001 - Security System - Smith, Mary - 123 Main Street, Any Town, NY				
1.00	Digital Monitoring Fee, 01/01/2011 - 03/31/2011	3.00	\$26.95	\$80.85
	Subtotal:			\$87.82
	Tax			\$6.97
	Payments/Credits Applied			\$87.82
	Invoice Balance Due:			\$0.00

Please Test Your Systems Regularly
 Thank you for your business!

Date	Invoice #	Description	Amount	Balance Due
12/15/2010	12747	Recurring Services	\$87.82	\$0.00




Business Services, Inc.
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 (727) 258-7229
 www.OPTBusinessServices.com

The staff at OPT Business Services, Inc. wishes you a safe and happy holiday!

SedonaSync Invoicing Options

OPT Email PDF Invoice
Bridgestone Format

OPT Email PDF Invoice
Euro Format




Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

<p style="text-align: center;"><u>Account Information</u></p> <p>Customer Name: Mary Smith Customer Number: G1234 Invoice Number: 1041339 Invoice Date: 07/01/2014 Terms: Net Due in 20 Days</p>	<p style="text-align: center;"><u>Important Messages</u></p> <p>Test Your Systems Regularly Sales (727) 258-7229</p> <p>Thank you for your business!</p>
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<u>Summary of Charges</u>				
Description	Quantity	Rate	Months	Amount
<i>Smith, Mary, 123 Main Street, Any Town, NY, 12345</i>				
Monitoring Services, 07/01/2014 - 07/31/2014	1.00	27.00	1.00	27.00
Sales Tax				0.00
Payments/Credits Applied				0.00
Invoice Balance Due:				\$27.00

Date	Invoice #	Description	Amount	Balance Due
07/01/2014	1041339	Recurring Charges	\$27.00	\$27.00

For Billing Inquiries, please contact 727-258-7229 or sales@optbusinessservices.com.
To pay with your credit card or bank account, please contact us.
Please detach and return this portion with your payment to ensure proper credit.



Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

Return Service Requested

Please check if your billing address has changed.
Provide your new address below:


Mary Smith
123 Main Street
Any Town, NY 12345

INVOICE

Customer Number: G1234
Invoice Number: 1041339
Invoice Date: 07/01/2014
Terms: Net Due in 20 Days
Amount Due: \$27.00
Amount Enclosed: \$ _____

Please write your Customer Number G1234 on your check.
Make your check payable to: OPT Business Services, Inc.

REMIT TO: OPT Business Services, Inc.
2528 28th Avenue
Saint Petersburg, FL 33713



Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

I N V O I C E IN10003

Date: 05/01/2014
Payment Date: 04/02/2014

Invoice To:
Some Company
123 Main Street
Any Town, S12 1AB

Customer ID: BAR001 PO Number: Contact: Page: 1

PRODUCT ID	QUANTITY	MONTHS	UNIT PRICE	VALUE
BAR001-1-1 - Lone Worker - Some Company - 123 Main Street, Any Town, S12 1AB				
Monitoring Services, 01/01/2014 - 09/30/2014	1.00	12.00	29.50	364.00

Analysis				Total Goods	354.00
Code	Goods	Rate	VAT		
VAT Tax	354.00	20.00%	70.80		
Total Value				424.80	

Test Your Systems Regularly Payments/Credits Applied

Thank you for your business! Invoice Balance Due: **424.80**

This Invoice is Priced in Pounds Sterling

Bank Payment Details

Bank:	LA B C Bank	IBAN:	LA00 ABC 1234 5678 9012 34
Account:	OPT Business Service, Inc	Swift:	LABC123
Sort Code / Account No:	12-34-56 / 01234567	BIC:	ABC567834

Please Make All Cheques Payable to OPT Business Services, Inc.

Standard Invoice Layout

- Profile Header
- Message 1
- Address Format
- Salutation
- Body Header
- Invoice Logo
(Uses Message 4 Block)

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001


Dear M/M Smith (smith@msa.com),

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.

This invoice was automatically paid with your "VISA" ending in "9999" on 08/15/2014.

If you have any questions, please call our billing department at (727) 258-7229.

Summary of Current Invoice:



Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax: (727) 258-7229

Invoice		Date	
Invoice	98765	Date	8/15/2014
Customer		Terms	
Customer	123456	Terms	Due on Receipt

To: M/M Smith 123 Main Street Anytown, NY 10001

From: OPT Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713

[Click Here To Pay Online](#)

Customer Name	Customer Number	PO Number	Due Date	Terms
M/M Smith	123456	192857485	8/15/2014	Due on Receipt

Description	Qty	Rate	Amount
DDA12230 - Fire System - M/M Smith - 123 Main Street, Anytown 10001			
Monitoring Services 09/01/2014 - 11/30/2014	3.00	20.00	\$60.00
DDA12230 - Burg System - M/M Smith - 10 1st Avenue, Anytown 10001			
Monitoring Services 09/01/2014 - 11/30/2014	3.00	15.00	\$45.00
Service Agreement Fee (Parts & Labor) 09/01/2014 - 11/30/2014	3.00	26.00	\$78.00
Subtotal:			\$183.00
Sales Tax:			15.79
Payments/Credits Applied:			(-198.79)
Invoice Balance Due:			\$0.00

Date	Invoice #	Description	Amount	Balance Due
8/15/2014	98765	Recurring Services	\$198.79	\$0.00


Thank you for being a loyal customer! Visit us at www.OPTBusinessServices.com

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Did you know that you can set up your credit card or bank draft to automatically pay your service and other invoices as well?
Just call us at the number listed below, and we'll get you signed up!

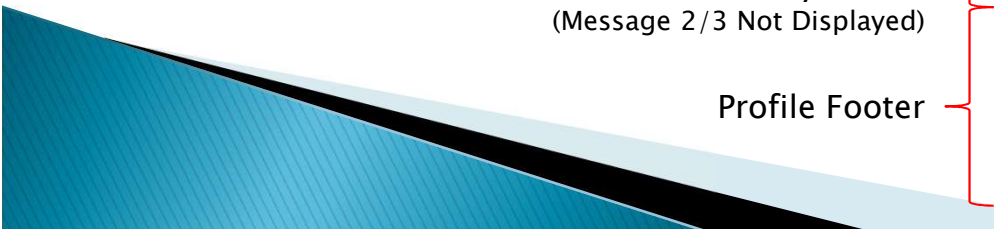
Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets.
Sign up using your customer number: 123456 *** Try it today! ***

Billing Department

 **Business Services, Inc.**
"Keeping Your Business in Sync!"
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www.OPTBusinessServices.com

OPT Business Service, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
billing@optbusinessservices.com

- Cycle AutoPay Message
- Non Cycle AutoPay Message
- Body Footer
(Message 2/3 Not Displayed)
- Profile Footer



Modular Invoice Layout

Profile Header

Salutation

Body Header

Template colors are selectable within the interface.

Message 1

Message 2

Message 3

Invoice Logo
(Uses Message 4 Block)

Body Footer

Cycle AutoPay Message

Non Cycle AutoPay Message

Profile Footer

Dear M/M Smith,
Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.
This invoice was automatically paid with your "VISA" ending in "9999" on 8/15/2014.

Invoice

Customer Name	Smith, M/M
Customer Number	123456
Invoice Number	98765
Invoice Date	8/15/2014
Terms	Due On Receipt
Due Date	8/15/2014
PO Number	192837465

Item Description	Quantity	Rate	Amount
00A10250 - Fire System - M/M Smith - 123 Main Street, Anytown 10001 Monitoring Services 09/01/2014 - 11/30/2014	3.00	20.00	\$20.00
00B10250 - Burg System - M/M Smith - 10 1st Avenue, Anytown 10001 Monitoring Services 09/01/2014 - 11/30/2014	3.00	15.00	\$15.00
Service Agreement Fee (Parts & Labor) 09/01/2014 - 11/30/2014	3.00	26.00	\$78.00
SubTotal			\$183.00
Sales Tax			15.79
Credits Applied			(198.79)
Invoice Balance Due:			\$0.00

Important Messages

Thank you for being a loyal customer! Visit us at www.OPTBusinessServices.com.

Online Bill Pay

Save time with Online Bill Pay. Fast, free and easy to use. Schedule a one-time or recurring payment for your monthly service and say goodbye to late or missed payments.

Payment Details

If paying by check, always include your invoice and account number.	Please make checks payable and remit to:
Returned Check Fee: If a check is returned unpaid, there will be a returned check fee of \$50.00. Payment by check constitutes acceptance of these terms.	OPT Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713

Late or No Payment Charges:
If payment is not received by the "Due Date" indicated on your invoice, a late fee of 18% of the total unpaid balance (calculated annually at minimum of \$10.00) may be charged.

Contact Us

Office: (727) 258-7229	Like us on Facebook
Fax: (727) 258-7229	Follow us on Twitter
Billing questions: Billings@OPTBusinessServices.com	Subscribe to our YouTube Channel
Support: Support@OPTBusinessServices.com	Connect on LinkedIn

OPT Business Services, Inc.
State License #0000000000
2926 28th Avenue North
St. Petersburg, FL 33713
Phone: (727) 258-7229 / Fax: (727) 258-7229
www.OPTBusinessServices.com

Please do not respond to this email; this is an auto-generated message. You are receiving this automated invoice because you subscribed to our emailing services. To be removed from receiving these emailed invoices, please call (727) 258-7229.

Thank you for using the autopay feature for your monitoring and other cycle invoices and for helping us to keep our planet GREEN.

Sign up or log on to [Online Bill Pay](#) and you can set up your credit card or bank draft to automatically pay your service invoices as well.

PDF Invoice Format - Email

Profile Header
Message 1
Address Format
Salutation
Body Header
Cycle AutoPay Message
Non Cycle AutoPay Message
Body Footer
(Message 2/3 Not Displayed)
Profile Footer


From: SedonaSync
Sent: Friday, August 15, 2014 5:05 PM
To: Brad Swindell
Subject: New Invoice Notice - Invoice #98765 (AR# 123456)

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001

Dear M/M Smith (smith@me.com),

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.

 This invoice was automatically paid with your "VISA" ending in "9999" on 08/15/2014.
Please See Attached Invoice.

If you have any questions, please call our billing department at (727) 258-7229.


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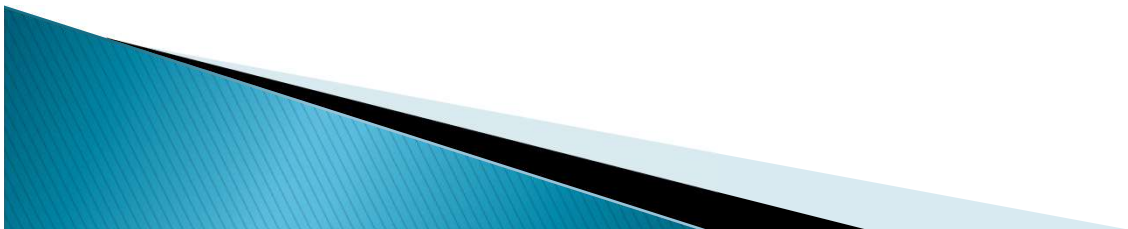
Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets.
Sign up using your customer number: 123456

*** Try it today! ***

Billing Department

 **Business Services, Inc.**
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OPT Business Service, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
billing@optbusinessservices.com



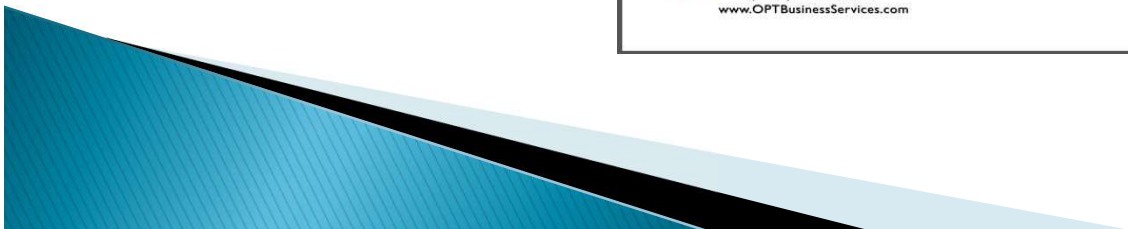
Standard PDF Invoice Format

Invoice Logo
(Uses Message 4 Block)

Message 1
Message 2
Message 3


 Business Services, Inc. "Keeping Your Business in Sync!" (727) 258-7229 www.OPTBusinessServices.com	Invoice																																				
	Invoice Number 12747	Date 12/15/2010																																			
Customer Number 001234	Due Date 01/01/2011																																				
To: Mary Smith 123 Main Street Any Town, NY 12345	Remit To: OPT Business Services, Inc. 2526 28th Avenue Saint Petersburg, FL 33713																																				
Amount enclosed: _____ Net Due: \$0.00 Detach And Return Top Portion With Your Payment																																					
<table border="1"> <thead> <tr> <th>Customer Name</th> <th>Customer Number</th> <th>PO Number</th> <th>Invoice Date</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>Smith, Mary</td> <td>001234</td> <td></td> <td>12/15/2010</td> <td>01/01/2011</td> </tr> </tbody> </table>	Customer Name	Customer Number	PO Number	Invoice Date	Due Date	Smith, Mary	001234		12/15/2010	01/01/2011																											
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<table border="1"> <thead> <tr> <th>Quantity</th> <th>Description</th> <th>Months</th> <th>Rate</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>A1230001 - Security System - Smith, Mary - 123 Main Street, Any Town, NY</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>1.00</td> <td>Digital Monitoring Fee, 01/01/2011 - 03/31/2011</td> <td>3.00</td> <td>\$26.95</td> <td>\$80.85</td> </tr> <tr> <td colspan="4" style="text-align: right;">Subtotal:</td> <td>\$87.82</td> </tr> <tr> <td colspan="4" style="text-align: right;">Tax</td> <td>\$8.67</td> </tr> <tr> <td colspan="4" style="text-align: right;">Payments/Credits Applied</td> <td>\$87.82</td> </tr> <tr> <td colspan="4" style="text-align: right;">Invoice Balance Due:</td> <td>\$0.00</td> </tr> </tbody> </table>	Quantity	Description	Months	Rate	Amount	A1230001 - Security System - Smith, Mary - 123 Main Street, Any Town, NY					1.00	Digital Monitoring Fee, 01/01/2011 - 03/31/2011	3.00	\$26.95	\$80.85	Subtotal:				\$87.82	Tax				\$8.67	Payments/Credits Applied				\$87.82	Invoice Balance Due:				\$0.00		
Quantity	Description	Months	Rate	Amount																																	
A1230001 - Security System - Smith, Mary - 123 Main Street, Any Town, NY																																					
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Invoice Balance Due:				\$0.00																																	
Please Test Your Systems Regularly Thank you for your business!																																					
<table border="1"> <thead> <tr> <th>Date</th> <th>Invoice #</th> <th>Description</th> <th>Amount</th> <th>Balance Due</th> </tr> </thead> <tbody> <tr> <td>12/15/2010</td> <td>12747</td> <td>Recurring Services</td> <td>\$87.82</td> <td>\$0.00</td> </tr> </tbody> </table>	Date	Invoice #	Description	Amount	Balance Due	12/15/2010	12747	Recurring Services	\$87.82	\$0.00																											
Date	Invoice #	Description	Amount	Balance Due																																	
12/15/2010	12747	Recurring Services	\$87.82	\$0.00																																	
 Business Services, Inc. "Keeping Your Business in Sync!" (727) 258-7229 www.OPTBusinessServices.com	The staff at OPT Business Services, Inc. wishes you a safe and happy holiday!																																				

Background Color/Shading



Bridgestone PDF Invoice Format

Invoice Logo
(Uses Message 4 Block)



Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

Account Information

Customer Name	Mary Smith
Customer Number	G1234
Invoice Number	1041330
Invoice Date	07/01/2014
Terms	Net Due in 20 Days

Important Messages

Test Your Systems Regularly

Sales (727) 258-7229


Thank you for your business!

Summary of Charges

Description	Quantity	Rate	Months	Amount
Smith, Mary, 123 Main Street, Any Town, NY, 12345				
Monitoring Services, 07/01/2014 - 07/31/2014	1.00	27.00	1.00	27.00
Sales Tax				0.00
Payments/Credits Applied				0.00
Invoice Balance Due:				\$27.00

Date	Invoice #	Description	Amount	Balance Due
07/01/2014	1041330	Recurring Charges	\$27.00	\$27.00

For Billing Inquiries, please contact 727-258-7229 or sales@optbusinessservices.com.
 To pay with your credit card or bank account, please contact us.
 Please detach and return this portion with your payment to ensure proper credit.



Business Services, Inc.
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(727) 258-7229
www.OPTBusinessServices.com

Return Service Requested

Please check if your billing address has changed.
 Provide your new address below:

Mary Smith
 123 Main Street
 Any Town, NY 12345

INVOICE

Customer Number	G1234
Invoice Number	1041330
Invoice Date	07/01/2014
Terms	Net Due in 20 Days
Amount Due	\$27.00
Amount Enclosed:	\$ _____

Please write your Customer Number G1234 on your check.
 Make your check payable to: OPT Business Services, Inc.


SEND TO: OPT Business Services, Inc.
 2026 28th Avenue
 Saint Petersburg, FL 33713

Message 1
Message 2
Message 3

Euro PDF Invoice Format

I N V O I C E IN10003

Date 05/01/2014
Payment Date 04/02/2014

 **Business Services, Inc.**
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

Invoice To:
Some Company
123 Main Street
Any Town, S12 1AB

Customer ID: BAR001 PO Number: Contact: Page: 1

PRODUCT ID	QUANTITY	MONTHS	UNIT PRICE	VALUE
BAR001-1-1 - Lone Worker - Some Company - 123 Main Street, Any Town, S12 1AB				
Monitoring Services, 01/01/2014 - 08/30/2014	1.00	12.00	29.50	354.00

Analysis				Total Goods	354.00
Code	Goods	Rate	VAT	Total VAT	70.80
VAT Tax	354.00	20.00%	70.80	Total Value	424.80

Test Your Systems Regularly
Thank you for your business!

Payments/Credits Applied
Invoice Balance Due: 424.80

This Invoice is Priced in Pounds Sterling

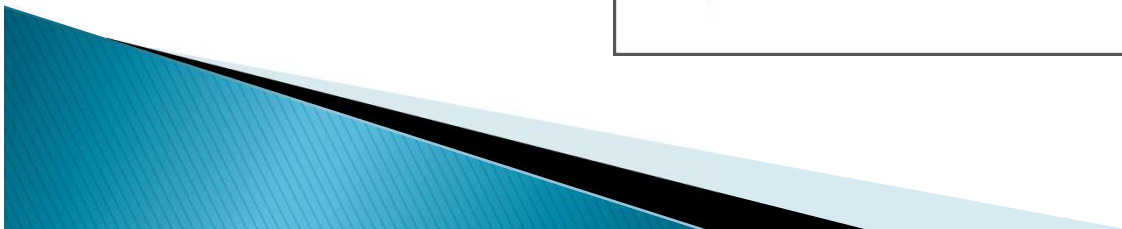
Bank Payment Details

Bank:	LA B C Bank	IBAN:	LADO ABC 1234 5678 9012 34
Account:	OPT Business Service, Inc	Swift:	LABC123
Sort Code / Account No:	12-34-56 / 01234567	BIC:	ABC987654

Please Make All Cheques Payable to OPT Business Services, Inc.

Invoice Logo
(Uses Message 4 Block)

Message 1
Message 2
Message 3



1134 Email Invoice Run Log

Here is the AutoEmail Invoice Daily Run Log.

8/15/2014

Invoice Number	Invoice Type (Master)	Invoice Date Issue Date	Customer Info	Branch	Valid Email (Address)	Email Queue Status	In Queue Out Queue
116547	C (N)	9/1/2014 8/11/2014 9:40:00 AM	(23) Smith, M/M	OPT	True (smith@me.com)	Not Emailed	8/11/2014 9:42:37 AM
116549	C (N)	9/1/2014 8/11/2014 9:40:00 AM	(27) Doe, John	OPT	True (jdoe@unknown.com)	Not Emailed	8/11/2014 9:42:37 AM
116570	C (N)	8/15/2014 8/11/2014 9:40:03 AM	(235) We R Farms	OPT	True (ap@wrf.com)	Emailed	8/11/2014 9:42:37 AM 8/15/2014 8:05:20 AM
117530	C (N)	8/15/2014 8/11/2014 9:41:46 AM	(11520) Millers, M/M	OPT	True (us@millers.com)	Emailed	8/11/2014 9:42:40 AM 8/15/2014 8:05:22 AM
117563	C (N)	8/15/2014 8/11/2014 9:41:49 AM	(11716) Wendy's Food Corp	OPT	True (invoices@wendys.com)	Emailed	8/11/2014 9:42:40 AM 8/15/2014 8:05:22 AM
117750	C (Y)	8/15/2014 8/15/2014 11:30:52 AM	(123456) ABC Alarm Company	Dealers	True (abc@me.com)	Emailed	8/15/2014 11:32:13 AM 8/15/2014 11:40:56 AM
117758	C (Y)	8/15/2014 8/15/2014 11:30:54 AM	(215) Alarm Me	Dealers	True (ap@alarmme.com)	Emailed	8/15/2014 11:32:13 AM 8/15/2014 11:40:56 AM
117785	S (N)	8/15/2014 8/15/2014 1:25:34 PM	(7367) Central Labs	OPT	True (accountspayable@clabs.com)	Emailed	8/15/2014 1:29:07 PM 8/15/2014 1:35:16 PM
117806	S (Y)	8/15/2014 8/15/2014 3:49:12 PM	(171) McDonalds	OPT	True (invoice@mclds.com)	Emailed	8/15/2014 3:49:32 PM 8/15/2014 4:05:23 PM



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1135 Invoices in Print Queue

Here are the invoices that have been left in the SedonaOffice Print Queue.

8/15/2014

Invoice Number	Invoice Type (Master)	Invoice Date Issue Date	Customer Info	Branch	Valid Email (Address)	Email Queue Status	In Queue Out Queue
116184	O (N)	8/1/2014 8/1/2014	(7130) Joseph, M/M	OPT	False ()	Email Invoice (N) Not In Email Queue	
116264	J (N)	8/1/2014 8/1/2014	(2604) Richards, M/M	OPT	False ()	Email Invoice (N) Not In Email Queue	
117664	S (Y)	8/14/2014 8/14/2014	(127) ABC International	OPT	True (abc@aol.com)	Email Invoice (N) Not In Email Queue	
117668	S (N)	8/14/2014 8/14/2014	(8749) Community Center	OPT	False ()	Email Invoice (N) Not In Email Queue	
117683	J (N)	8/15/2014 8/15/2014	(10289) Smith, M/M	OPT	True (smith@me.com)	Email Invoice (N) Not In Email Queue	
117731	C (Y)	8/15/2014 8/15/2014	(123456) ABC Security	Dealers	False ()	Email Invoice (N) Not In Email Queue	



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Email Statements Suite

»» OPT SedonaSync Event 1109

1130 Collection Letter Email Preview

List of Customers Setup for Collection Emails.

8/15/2014 9:01:33 AM

Customer Info	Bill To (Email)	Total Past Due	Oldest Invoice	Collection Status	Collection Queue	Last Collections Action	Blocked - Reason
000029 (AR) Commercial	XYZ Associates	\$195.54	31 Days	Current	1 - 30	Auto Put in Queue alyssai (08/14/2014 9:47 AM) Last Queue (1 - 30)	Missing Email Bucket 2 (31-60 Days)
000084 (AR) Commercial	Some Big Company	\$140,679.84	31 Days	Service Hold	1 - 30	Posted Unapplied Cash alyssai (08/14/2014 9:47 AM) Last Queue (1 - 30)	Missing Email Bucket 2 (31-60 Days)
000336 (AR) Commercial	Development Corp ap@development.com	\$10,862.50	38 Days	Current	31-60	Auto Put in Queue alyssai (08/14/2014 9:47 AM) Last Queue (31-60)	Bucket 2 (31-60 Days)
003260 (ANR) Commercial	Urgent Care	\$123.29	31 Days			Auto Remove From Queue sabbacal (08/01/2014 11:40 AM) Last Queue (VCG Over 60 Days)	Missing Email Bucket 2 (31-60 Days)
003580 (AR) Commercial	Baptist Church	\$973.52	46 Days	Current	31-60	Updated Payment alyssai (08/14/2014 9:47 AM) Last Queue (31-60)	Missing Email Bucket 2 (31-60 Days)
003693 (AR) Commercial	Equipment Sales invoices@sales.com	\$4,408.31	44 Days	Service Hold	31-60	Flagged For Follow-Up alyssai (08/14/2014 9:47 AM) Last Queue (31-60)	Bucket 2 (31-60 Days)
003954 (AR) Commercial	Parts International	\$211.82	31 Days	Current	1 - 30	Posted Payment alyssai (08/14/2014 9:47 AM) Last Queue (1 - 30)	Missing Email Bucket 2 (31-60 Days)
48 (ANR) Residential	OPT Protection	\$3.56	487 Days			Manual Remove From Queue micheles (07/11/2013 2:20 PM) Last Queue (Dealers Over 60)	Missing Email Bucket 5 (120+ Days)
152 (ANR) Residential	Alarms R Us	\$491.75	153 Days	Over 60 Days Past Due	Dealers Over 60	Posted Payment alyssai (08/14/2014 9:47 AM) Last Queue (Dealers Over 60)	Missing Email Bucket 5 (120+ Days)
190 (ANR) Residential	ABC Alarms	\$15,202.27	195 Days	Payment Plan	Dealers Over 60	Posted Unapplied Cash alyssai (08/14/2014 9:47 AM) Last Queue (Dealers Over 60)	Missing Email Bucket 5 (120+ Days)
233 (ANR) Commercial	Smith, M/M	\$250.28	373 Days	Service Hold	Over 120	Called for Payment alyssai (08/14/2014 9:47 AM) Last Queue (Over 120)	Missing Email Bucket 5 (120+ Days)

Collection Letter Email



Collection Email – Classic Statement

Profile Header
Message 1

Address Format

Salutation

Body Header
w/ Dynamic Collection Letter

Background Color/Shading

Body Footer

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001

Dear M/M Smith,

Our records indicate your account is past due in excess of 30 days with this office. OPT Business Services wants to make sure that everything regarding your account is handled correctly. It is our goal to provide you with the best possible service. If this is just an oversight, please act now to bring your account current.

Statement:

Invoice Date	Invoice Number	PO Number	Description	Total Amount	Balance Due	Due Date	Status	Days Past Due
06/25/2014	113494		Repair Services	\$666.42	\$666.42	6/25/2014	31-60 Days	51
07/15/2014	114667		Recurring Services	\$130.19	\$130.19	7/15/2014	31-60 Days	31

1-30 Days	31-60 Days	61-90 Days	91-120 Days	120+ Days	Total Due
\$0.00	\$796.61	\$0.00	\$0.00	\$0.00	\$796.61

If you are experiencing any difficulty to cause you to withhold payment, please contact us immediately.

I think you would agree that due to the nature of the services provided and out of courtesy to OPT Business Services, payments to this office warrant prompt and immediate attention. I would hope that this is just an oversight and upon receipt of this notice, you will give us your immediate attention.

We appreciate your business and wish to service you in every way possible, but we do expect timely payment. Currently your past due amount violates our contractual agreement and could potentially jeopardize and interrupt future services.

Please give this matter your immediate attention so that no further action is required. If you have any questions or concerns regarding this notice or would like to pay your bill over the phone, please contact us at (727) 258-7229 or via email at Billing@OPTBusinessServices.com.

To review or pay your account online, please visit our online bill payment portal at [Online Bill Pay](#). If you have already sent in payment, thank you for your payment and continued business.

Sincerely,



Collection Email – Classic Statement

Body Footer
(Message 2/3 Not Displayed)

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Sincerely,

Accounts Receivable

Cycle AutoPay Message

Sign up or log on to [OPT Bill Pay](#) and you can set up your credit card or bank draft to automatically pay your monitoring or other cycle invoices.

Don't have access to a computer? No problem, just call us at the number listed below, and we'll get you signed up!

Non Cycle AutoPay Message

Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets.

Sign up using your customer number: 1234567

***** Try it today! *****

Profile Footer



OPT Business Service, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
billing@optbusinessservices.com

This is an auto-generated message powered by SedonaSync. Please contact our billing department for more information.

Collection Email – Standard Statement

- Profile Header
- Message 1
- Address Format
- Salutation
- Body Header
w/ Dynamic Collection Letter
- Statement Logo
(Uses Message 4 Block)

08/15/2014

Steve's Liquors, Inc.
24 E. Main Street
Wantagh, NY 11793

Dear Steve's Liquors, Inc.,

Our records indicate your account is past due in excess of 90 days with this office. OPT Business Services wants to make sure that everything regarding your account is handled correctly. It is our goal to provide you with the best possible service. If this is just an oversight, please act now to bring your account current.

Statement:



Business Services, Inc.

2926 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax (727) 258-7229

Statement	
Date	Customer
08/15/2014	1234567
Due Date	Amount Due
08/15/2014	\$1,695.00

To: Steve's Liquors, Inc.
24 E. Main Street

Wantagh, NY 11793

Remit To: OPT Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713

[Click Here To Pay Online!](#)

Customer Name	Customer Number	Statement Date	Due Date
Steve's Liquors	1234567	08/15/2014	08/15/2014

Allow the customer to retrieve all their open invoices.

Date	Invoice	PO	Description	Amount	Balance Due	Status
04/24/2014	65186		Service Call	\$118.75	\$118.75	103 Days Past Due
05/01/2014	65219		Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	65132		Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	64956		Recurring Charges	\$246.68	\$246.68	96 Days Past Due

1-30 days	31-60 days	61-90 days	91-120 days	over 120	Balance Due
\$0.00	\$0.00	\$0.00	\$813.43	\$0.00	\$813.43

Collection Email – Standard Statement

Body Footer
(Message 2/3 Not Displayed)

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Accounts Receivable

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Sign up using your customer number: 1234567

***** Try it today! *****

Profile Footer



OPT Business Service, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
billing@optbusinessservices.com

This is an auto-generated message powered by SedonaSync. Please contact our billing department for more information.



Business Services, Inc.

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(727) 258-7229

www.OPTBusinessServices.com

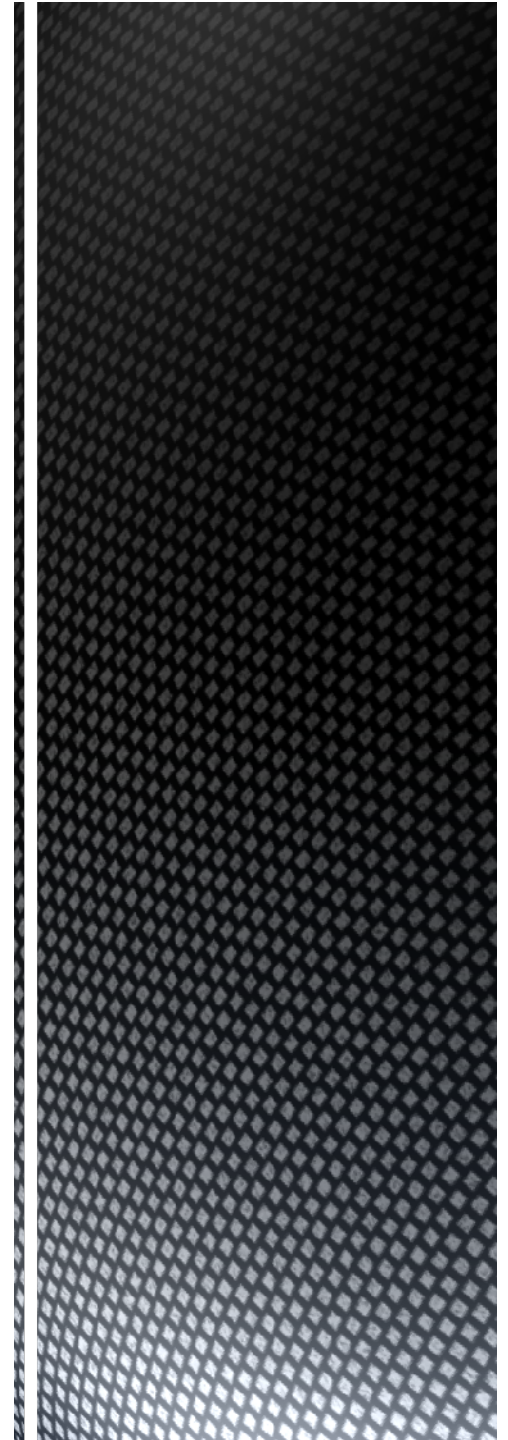
Operational Efficiency

Proud to be Business Partners with

VineyardSoft Corporation

and Perennial Software

SedonaSync



Tomorrow's Tickets

Notify your technicians automatically of the service calls on their schedule for the next day. We have optimized these events for smart phones therefore site address can be used for mapping.

Bob Smith, here is a list of your tickets for tomorrow (12/17/2013).

Service Ticket Number: 38924
System Account: 89008717 - Burglary Fire Combination
Panel Type: FA168CPS
Service Level: T/M \$50 Trip Charge
Site: Steinburg, Gary
482 Elmwood Avenue
Mechanicsburg, PA 17055
(717) 791-8973
Contact: Dominick
(717) 256-5873
gsteinburg@me.com
Problem: Low Battery
Location: Basement under stairs.
Memo: Customer has two big dogs.
Comments: Customer had extended power failure due to construction. Power restored but system still shows low battery.
Scheduled For: 12/17/2013 10:00:00 AM

**** THIS IS A KEY ACCOUNT ****

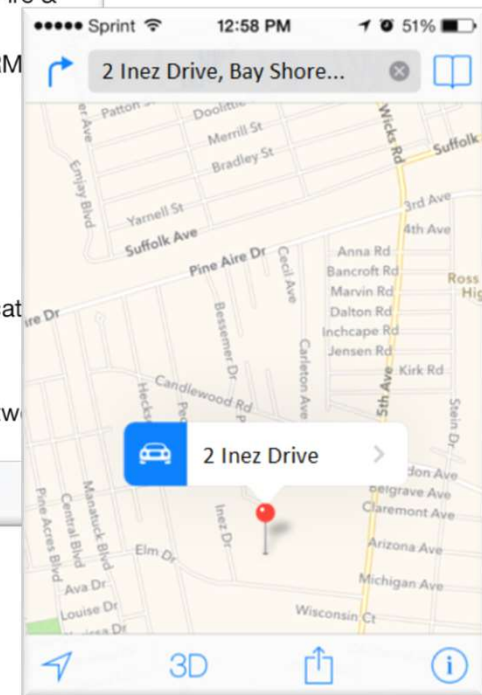
Service Ticket Number: 37466
System Account: NM1867 - Video Surveillance
Panel Type: Closed Circuit Television
Service Level: Standard Service Agreement
Site: Seven Eleven - Store #21
22 Main Street
Manchester, PA 17345
(717) 286-5225
Contact: John Holtz
(717) 751-5498
accounting@psjholdings.com
Problem: Priority Service on Video System
Location:
Memo:
Comments: DVR is down - it has power but will not connect
Scheduled For: 12/17/2013 11:00:00 AM

Sprint 1:00 PM 51%

< SedonaSync >

Service Ticket Number: 618959
System Account: [00760363](#) - Fire & Burglary System
Panel Type: DMP XR200 ALARM CONTROL
Service Level: Service Agree - Parts,Labor
Site: ABC Company
[2 Inez Drive](#)
[Bay Shore, NY 11706](#)
Problem: Failure To Communicat
Commercial
Memo:
Comments: Put System on netw
to transmit to central station.

🚩 📁 🗑️ ↶



Alerts – Still on Test

With the addition of FSU and VRT devices, now it is more necessary to verify that the technician has put the account back in full service. We can now notify the service department and/or technician that the account is still on test after they have left the service call.

**** URGENT SERVICE ALERT -
PLEASE READ ****

Bob Smith, You have departed from service ticket 75862 and this account is still on test in Manitou. Please place account back in full service.

Service Ticket Number: 75862
System Account: 25001264
Placed on test: 10/31/2013 9:46:14 AM
Test will expire: 10/31/2013 1:11:59 PM
Reason: On-test from BoldNet Mobile
Zone:
Technician Departed: 10/31/2013 11:29:13 AM
Site: Washington Pavillion
486 Main Street
Kings Park, NY 11754
(631) 839-4437

**** URGENT SERVICE ALERT -
PLEASE READ ****

Ticket Status Reports

Keep track of service tickets throughout the process. We offer reporting on virtually any condition you would need. Our "Go-Back" report can show you the customers waiting on additional service.

We all get busy, but closing service tickets in a timely fashion is extremely important from accounting to accounts receivable. Don't fall behind in processing, our "Departed but not Closed" report will show all of your tickets that need to be completed after the service has been preformed.

Our "Closed Ticket" report allows you to audit your closed tickets on a daily basis to identify billing mistakes.

Departed Needing Go-Back Report
(8/26/2013)

Ticket	Status	Problem	Sub Problem	Company	Account Number	Alarm Account	Customer Name	Departure	Last Tech
41430 (S)	GB	Acc- Reprogram		Main	2997-4		DHSS Biggs Building	5/23/2013 8:45:00 AM	Brian Chantry
41863 (S)	GB	CCTV- DVR Error		Main	1880		CR SD CR HS Burg	6/11/2013 3:25:19 PM	Kevin Cowster
43036 (S)	GB	Fire- Fire Trouble		Main	2502	7527380	Dogfish B		
43120 (S)	GB	CCTV- Camera Out		Main	1692-15		Smyrn Interne		
43790 (I)	GB	Remind- Fire Alarm Insp		Main	2451-12	1570317	DSU Job		
43127 (S)	GB	CCTV- Camera Out		Main	4205-39		Connectio		
43185 (S)	GB	Acc- Card Reader		Main	2809		Peninsula		
42919 (S)	GB	CCTV- Camera Out		Main	1904		City Of		

Departed but not Closed Report
(10/31/2013)

Ticket	Status	Invoiced	Problem	Sub Problem	Company	Account Number	Alarm Account	Customer Name	Departure	Last Tech
42126 (I)	RS	N	Remind- Fire Alarm Insp		Main	4483		Beginnings And Beyond	5/22/2013 8:27:52 AM	George Marcellus
41863 (S)	SC	N	Acc- Offline Panel		Main	2063		DTCC Terry ETB Bldg	5/28/2013 11:30:32 AM	Brian Chantry
42499 (I)	RS	N	Remind- Fire Alarm Insp		Main	2926	8950025	Coastal Leis		
42445 (I)	RS	N	Remind- Fire Alarm Insp		Main	1119		Exxon OFN		
42500 (I)	RS	N	Remind- Fire Alarm Insp		Main	1079		DE Eye Ca		
42552 (I)	RS	N	Remind- Fire Alarm Insp		Main	1755	7529587	Peoples Uni Of C		
42411 (I)	RS	N	Remind- Fire Alarm Insp		Main	3756		Yoon's Ma Acad		
42441 (I)	RS	N	Remind- Fire Alarm Insp		Main	4071		205 Camden Ave Apa		

Tickets Closed Yesterday
Please verify correct billing. (10/29/2013)

Customer	Customer Name	Ticket	Problem	Resolution	Service Level	System Type	Billable	Billed	Warranty Expires
009914	Huntington Country Club	618594	FTCC	VOID	Billable Eng Fire	General	N		
10242	SHOR YOSHUV Institute	618905	FSA	RES	Billable Eng Fire	Fire	N		
003924	Heartland	618842	FTCC	VOID	Billable Guard	General	N		
10907	CXCT	618859	FST	VOID	Billable SVC	Fire	N		
006849	Jordan Fashions	618852	SVC	VOID	Billable SVC	General	N		
005522	Reiner, June	618867	FTCR	RES	Billable SVC	General	N		
004345	Bio Botanica	618868	FTCR	RES	Billable SVC	General	N		
009590	Quality Kung (Plant 1)(P1-2)	618869	FTCC	RES	Billable SVC	General	N		
008624	Modzelewska, Donald & Rebecca	618873	FTCR	RES	Billable SVC	General	N		
007202	Tesonere, Mr. & Mrs	618875	FTCR	RES	Billable SVC	General	N		

Purchase Order / Inventory Reports

We now offer several reports tracking various inventory related conditions.

Our “Low Stock Count” report will let you know what you may need to order, while our “Open Purchase Orders” reports will let you know if you are still waiting for equipment.

In addition we also have a report that show “Jobs that Require Purchase Orders”.

Jobs without purchase orders after 7 days.

10/29/2013

Job #	Customer	Job Type	Status	Created
885	Village Green Associates	Comm Fire Addon	Install-Order Equip	04/29/2011
891	Dejoy, Michael	Res Burg-Fire New	Install-Schedule Install	05/02/2011
1049	CSHL	Comm Fire Addon	Install-Close-out Docs	06/29/2011
1204	CSHL	Comm Fire Addon	Install-Close-out Docs	08/24/2011
1344	Dantes, Andrew	Res Burg New	Lauren-File Permits	10/26/2011
1390	CSHL	Comm CA Addon	Install-Close-out Docs	11/17/2011
1392	CSHL	Comm Burg Addon	Install-Close-out Docs	11/17/2011
1398	Cox & Co.	Comm Fire Addon	Install-Schedule Survey	11/22/2011
1463	Cox & Co.	Comm Fire Addon	Install-Job Costing	12/13/2011
1492	Keogh, Lauren	Comm Burg Addon	Install-Scheduled Install	12/20/2011
1720	BBU Bumbo Bakery	Comm CCTV Addon	George-Final Review	03/12/2012

The following Purchase Orders have been open for more than 30 days.

PO #	Entered	Ordered	Vendor	PO Amount	DE	Job/Ticket	Customer
6207	08/30/2013	8/30/2013	ADI (CC)	\$1,633.94	N	J-3154	John Paul Electric (V)
6243	09/10/2013	9/10/2013	ADI (CC)	\$657.84	N		
6260	09/11/2013	9/11/2013	J. C. Gray Company Inc. (CC)	\$5,636.14	N		
6283	09/16/2013	9/16/2013	ADI (CC)	\$1,190.55	N	J-3197	Hand Center
6308	09/19/2013	9/19/2013	ADI (CC)	\$0.00	N		
6317	09/20/2013	9/20/2013	ADI (CC)	\$328.00	N		

Parts with less than their minimum quantities.

Main - 8/28/2013 6:04:03 PM

Warehouse	Part #	Description	New On Hand	Minimum Qty	Shortage	Vendor
Main	1-2 inch EMT Pipe	1/2" EMT Pipe per Foot	2	20	-18	N&S10
Main	1-2 inch PVC Pipe	1/2" PVC Pipe per foot	10	100	-90	N&S10
Main	1076CD	3/4 RECESSED DEL PLL/ DEL THRW	5	10	-5	ADI10
Main	1076CN	3/4"SPDT STL DR 3/8#GAP WHITE	6	10	-4	ADI10
Main	1076D	1" RECESSED STEEL DOOR/DPDT	4	10	-6	ADI10
Main	1084DN	SNTRL CNTCT SCR MNT DP/DTH NAT	0	5	-5	ADI10
Main	1100RBAT	Wireless Repeater Replacement Battery	0	1	-1	DMP10
Main	111	1 ZONE PROCESSOR - 4 PULSOR	0	1	-1	ADI10
Main	1135-W	Wireless Siren for XTL Panel	0	1	-1	DMP10
Main	1142-B	2 Button Wireless Hold-up Device	0	1	-1	DMP10



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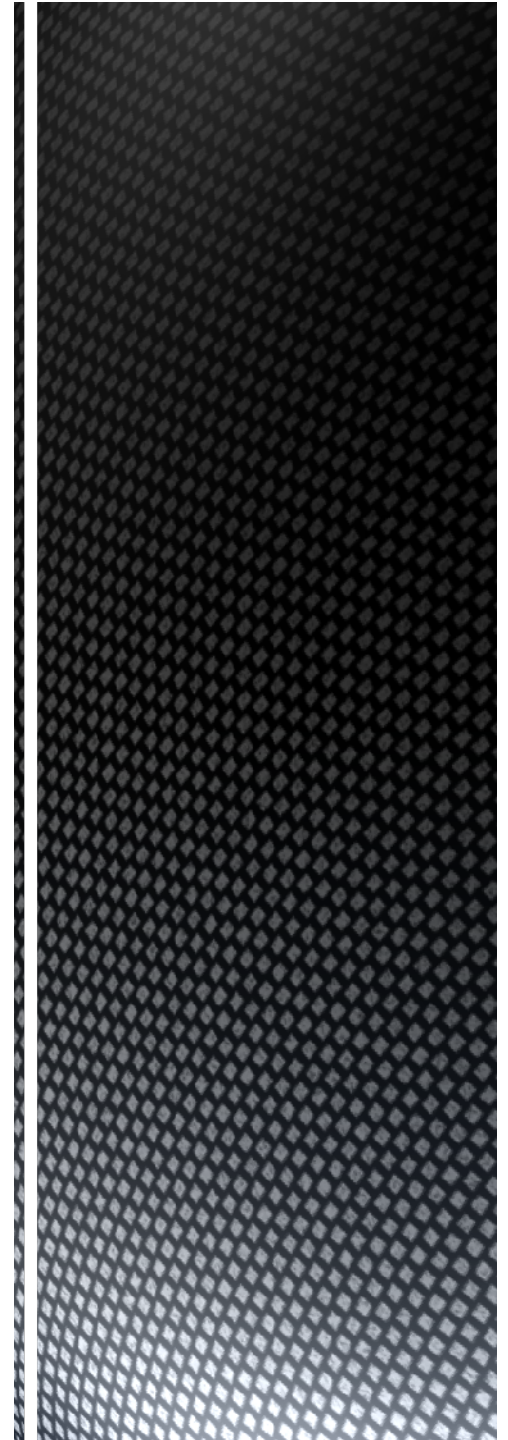
Customer Relations

Proud to be Business Partners with

VineyardSoft Corporation

and Perennial Software

SedonaSync



Service Ticket Notifications

Keep in communication with your clients.

Our service notification events includes events to keep the customer informed.

A few examples includes:

- *Service ticket has been created and/or scheduled.*
- *Reminder of an upcoming service call.*
- *Notification when the technician is on their way with or without a photo.*
- *Thank you follow-up letter along with a survey link.*

Dear Bart Simpson (bartsimpson@me.com),

We would like to remind you that we have a scheduled appointment tomorrow morning at:

Springfield High School
123 Main Street
Springfield, CA 92623

We will be addressing your recent service request:
Low battery without restore on 12/30.

You will be receiving another email when our technician has been dispatched.

If you have any questions, please don't hesitate to call our office at (727) 258-7229.

Dear Bart Simpson (bartsimpson@me.com),


Our technician has been dispatched to:

123 Main Street
Springfield, CA 92623

And will be addressing the following issues:

PROBLEM: Low battery with no restore on 12/30

Quality service will be performed today by: Don P



If you have any questions, please don't hesitate to call our office at (888) 123-1234

Dear Bart Simpson (bartsimpson@me.com),

We were privileged to have the opportunity to serve you, and we greatly value your business. We look forward to continuing our relationship with you in the future, and if you should have any other issues arise, please do not hesitate to contact us. If you would not mind taking a few minutes and completing this short survey to let us know how we did and if there is anything we can do to better assist you.

[Please click here to take a short survey.](#)

Our commitment to providing you with the very best service is our primary goal. For your reference your account number is **1234**.

If you have any questions, please don't hesitate to call our office at 337-839-1880

1214 - Service Call Survey

06/23/2015

Steven James
123 Main Road
Anytown, NY 11557

Dear Steven James (steven@james.com),

We were privileged to have the opportunity to serve you, and we greatly value your business. We look forward to continuing our relationship with you in the future, and if you should have any other issues arise, please do not hesitate to contact us. If you would not mind taking a few minutes and completing this short survey to let us know how we did and if there is anything we can do to better assist you.

Based on recent services, how likely are you to recommend us to family, friends, or colleagues?

Not at all likely

Extremely likely

0 1 2 3 4 5 6 7 8 9 10

Our commitment to providing you with the very best service is our primary goal. For your reference your account number is **010128**. If you have any questions please feel free to give us a call at (123) 456-7890.

Sincerely,

Service Department

Service@AnyCompany.com

Any Company, Inc.
123 Main Avenue
Anytown, NY 11111
Phone: (123) 456-7890
www.AnyCompany.com

Sign up or log on to [Bill Pay](#) and you can set up your credit card or bank draft to automatically pay your monitoring or other cycle invoices.

Don't have access to a computer? No problem, just call us at the number listed below, and we'll get you signed up!

Give us a call or email and we can set up your credit card or bank draft to automatically pay your service invoices as well.

NOTICE: This email address Service@AnyCompany.com is covered under the Electronic Communications Privacy Act, 18 USC 2510-2521, and is legally privileged. It is intended for use only by the person to whom it is addressed. If the reader of this message is not the intended recipient, or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified, that any usage, dissemination, distribution, or copying of this communication is strictly prohibited. If you have received this in error, please notify the sender only of the error and then destroy the original message and all copies. Thank you.



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Customer Satisfaction Survey

How are we doing?

We would like to thank you for giving us the opportunity to serve you. Please take a moment to answer the following questions, however if you prefer speaking to us you may call (727) 258-7229.

Your Name

Steven James

Email

steven@james.com

Considering your overall experience with our company, how likely are you to recommend our services to other colleagues or security companies?

0 - Very Unlikely 1 2 3 4 5 6 7 8 9 10 - Very Likely

Additional Feedback

Thank you for your response. If you would like to provide us any additional feedback that will help us better serve you, please feel free to let us know below.

Additional Feedback

1024/1024

Thank you for your feedback. We sincerely appreciate your honest opinion and will take your input into consideration when providing service in the future.

Would you like this survey to be anonymous?

No Yes

Submit Form

Email Invoicing

Save time and money by going green and automating your invoicing processes. Our Email Invoice suite allows you to choose from several formats and options and can be configured to work with your processing rules. We can also send out a PDF invoice attached by using the SedonaSync Reports and Crystal Reports modules.

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001


Dear M/M Smith (smith@me.com),

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014 for Recurring Services.

This invoice was automatically paid with your "VISA" ending in "9999" on 08/15/2014.

If you have any questions, please call our billing department at (727) 258-7229.

Summary of Current Invoice:

 Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713 (727) 258-7229 Fax: (727) 258-7229		Invoice Invoice # 98765 Date 08/15/2014 Customer 123456 Terms Due on Receipt	
To: M/M Smith 123 Main Street Anytown, NY 10001	Account No: OPT Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713 Click here to Pay Online!		
Customer Name: M/M Smith	Customer Number: 123456	PO Number: 123456789	Due Date: 8/15/2014
Description		Qty	Rate Amount
0042222 - Mnt System - M/M Smith - 123 Main Street, Anytown 20002			
Monitoring Services 08/01/2014 - 11/30/2014		3.00	20.00 \$60.00
0042222 - Burg System - M/M Smith - 123 Main Street, Anytown 20002			
Monitoring Services 08/01/2014 - 11/30/2014		3.00	18.00 \$54.00
Service Agreement Fee (Fees & Labor) 08/01/2014 - 11/30/2014		3.00	28.00 \$84.00
		Subtotal:	\$198.00
		Sales Tax:	15.78
		Payments/Credits Applied:	(-198.78)
		Invoice Balance Due:	\$0.00
Date: 8/15/2014	Invoice #: 98765	Description: Recurring Services	Amount: \$198.78 Balance Due: \$0.00


*Thank you for being a loyal customer! Visit us at www.OPTBusinessServices.com!

**** Thank you for using the autopay feature for your monitoring and other cycle invoices...and for helping us to keep our planet GREEN ****

Did you know that you can set up your credit card or bank draft to automatically pay your service and other invoices as well? Just call us at the number listed below, and we'll get you signed up!

Sign up or log on to [Service & Billing Portal](#) to set up or update your payment information, pay bills, view account history, and view/request service tickets. Sign up using your customer number: 123456 *** Try it today! ***

Billing Department

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www.OPTBusinessServices.com

OPT Business Service, Inc.
 2926 28th Avenue North
 St. Petersburg, FL 33713
billing@optbusinessservices.com


From: SedonaSync
Sent: Friday, August 15, 2014 5:05 PM
To: Brad Swindell
Subject: New Invoice Notice - Invoice #98765 (AR# 123456)


08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001

Dear M/M Smith (smith@me.com),

Invoice #98765 for \$198.79 was posted to your account on 8/15/2014

 This invoice was automatically paid with your "VISA"

 Please See Attached Invoice.


If you have any questions, please call our billing department at (727) 258-7229

**** Thank you for using the autopay feature for your monitoring to keep our planet GREEN**

Did you know that you can set up your credit card or bank draft invoices as well? Just call us at the number listed below, and we'll get you signed up!

Sign up or log on to [Service & Billing Portal](#) to set up or update your payment history, and view/request service tickets. Sign up using your customer number: 123456 *** Try it today! ***

Billing Department

 **Business Services, Inc.**
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www.OPTBusinessServices.com

OPT Business Service, Inc.
 2926 28th Avenue North
 St. Petersburg, FL 33713
billing@optbusinessservices.com

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Account Information		Important Messages	
Customer Name: Mary Smith	Customer Number: G1234	Test Your Systems Regularly	
Invoice Number: 1041339	Invoice Date: 07/01/2014	Sales (727) 258-7229	
Terms: Net Due in 20 Days			
Summary of Charges			
Description	Quantity	Rate	Months
Smith, Mary, 123 Main Street, Any Town, NY, 12345			
Monitoring Services, 07/01/2014 - 07/31/2014	1.00	27.00	1.00
Sales Tax:			0.00
Payments/Credits Applied:			0.00
Invoice Balance Due:			\$27.00
Date	Invoice #	Description	Amount
07/01/2014	1041339	Recurring Charges	\$27.00
		Balance Due	\$27.00

Thank you for your business!

For Billing Inquiries, please contact 727-258-7229 or sales@optbusinessservices.com.
 To pay with your credit card or bank account, please contact us.
Please detach and return this portion with your payment to ensure proper credit.

INVOICE		Customer Number: G1234
OPT Business Services, Inc. "Keeping Your Business in Sync!" (727) 258-7229 www.OPTBusinessServices.com		Invoice Number: 1041339
Return Service Requested		Invoice Date: 07/01/2014
<input type="checkbox"/> Please check if your billing address has changed. Provide your new address below.		Terms: Net Due in 20 Days
		Amount Due: \$27.00
		Amount Enclosed: \$

Mary Smith
123 Main Street
Any Town, NY 12345

SENT TO: OPT Business Services, Inc.
2926 28th Avenue
Saint Petersburg, FL 33713

Automated Collections

Send friendly letters to your customers with outstanding balances. Included within the letter can be a statement.

You control the wording and frequency. This is a great way to encourage your customers to use SedonaWeb.

08/15/2014

M/M Smith
123 Main Street
Anytown, NY 10001

Dear M/M Smith,

Our records indicate your account is past due in excess of 30 days with this office. OPT Business Services wants to make sure that everything regarding your account is handled correctly. It is our goal to provide you with the best possible service. If this is just an oversight, please act now to bring your account current.

Statement:

Invoice Date	Invoice Number	PO Number	Description	Total Amount	Balance Due	Due Date	Status	Days Past Due
06/25/2014	113494		Repair Services	\$666.42	\$666.42	6/25/2014	31-60 Days	51
07/15/2014	114667		Recurring Services	\$130.19	\$130.19	7/15/2014	31-60 Days	31

1-30 Days	31-60 Days	61-90 Days	91-120 Days	120+ Days	Total Due
\$0.00	\$796.61	\$0.00	\$0.00	\$0.00	\$796.61

If you are experiencing any difficulty to cause you to withhold payment, please contact us immediately.

I think you would agree that due to the nature of the services provided and out of courtesy to OPT Business Services, payments to this office warrant prompt and immediate attention. I would hope that this is just an oversight and upon receipt of this notice, you will give us your immediate attention.

We appreciate your business and wish to service you in every way possible, but we do expect timely payment. Currently your past due amount violates our contractual agreement and could potentially jeopardize and or interrupt future services.

Please give this matter your immediate attention so that no further action is required. If you have any questions or concerns regarding this notice or would like to pay your bill over the phone, please contact us at (727) 258-7229 or via email at Billing@OPTBusinessServices.com.

To review or pay your account online, please visit our online bill payment portal at [Online Bill Pay](#). If you have already sent in payment, thank you for your payment and continued business.

Sincerely,

08/15/2014

Steve's Liquors, Inc.
24 E. Main Street
Wantagh, NY 11793

Dear Steve's Liquors, Inc.,

Our records indicate your account is past due in excess of 90 days with this office. OPT Business Services wants to make sure that everything regarding your account is handled correctly. It is our goal to provide you with the best possible service. If this is just an oversight, please act now to bring your account current.

Statement:



Business Services, Inc.
2926 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax (727) 258-7229

Statement	
Date 08/15/2014	Customer 1234567
Due Date 08/15/2014	Amount Due \$1,695.00

To: Steve's Liquors, Inc. 24 E. Main Street Wantagh, NY 11793

Remit To: OPT Business Services, Inc. 2926 28th Avenue North St. Petersburg, FL 33713

[Click Here To Pay Online!](#)

Customer	Customer Number	Statement Date	Due Date
Steve's Liquors,	1234567	08/15/2014	08/15/2014

Date	Invoice	PO	Description	Amount	Balance Due	Status
04/24/2014	65186		Service Call	\$118.75	\$118.75	103 Days Past Due
05/01/2014	65219		Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	65132		Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	64956		Recurring Charges	\$246.68	\$246.68	96 Days Past Due

1-30 days	31-60 days	61-90 days	91-120 days	over 120	Balance Due
\$0.00	\$0.00	\$0.00	\$813.43	\$0.00	\$813.43

Allow the customer to retrieve all their open invoices.

1102 - ACH Payment Posted

Payment Receipt

03/17/2014

Bart Simpson
101 Cartoon Dr.
Sunshine, FL 33713

Dear Bart Simpson,

This is a confirmation notification of your recent ACH transaction.

A payment in the amount of **\$28.00** has been posted to invoice **#648210**.

Submit Date: **3/14/2014**
Last 4: **1234**

Thank you for using the autopay feature for your monitoring and other cycle invoices...and for helping us to keep our planet **GREEN**

**** NEW FEATURE **** Sign up or log on to www.OPTBusinessServices.com and you can set up your credit card or bank draft to automatically pay your service invoices as well.
***** Try it today! *****

If you have any questions, please call our Service Center at **(727) 258-7229**

Please visit us online at www.OPTBusinessServices.com



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www.OPTBusinessServices.com

1125 – Payment Failure Notification

12/15/2014

Bob Marley
55 Blue Sky Dr.
Gulfport, FL 33707

Dear Bob Marley,

This is a notification from ABC Security for your recent CC/ACH transaction.

A payment in the amount of **\$40.99** was not able to be processed for invoice **#85049**.

Submit Date: *12/12/2014*

Last 4: *1234*

Reason: *U83 - Auth Decline*

Description: *Transaction was declined due to authorizer declination*

**** Thank you for using the autopay feature for your monitoring and other cycle invoices...and for helping us to keep our planet GREEN ****

Please log into www.ABCSecurity.com to review or update a service ticket, manage your payment methods, set up auto-pay, and now pay your monitoring and service invoices as well.



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Sales Lead Tracking Reports

Track sales leads using WeSuite, QuoteWerks or SedonaOffice Prospects.

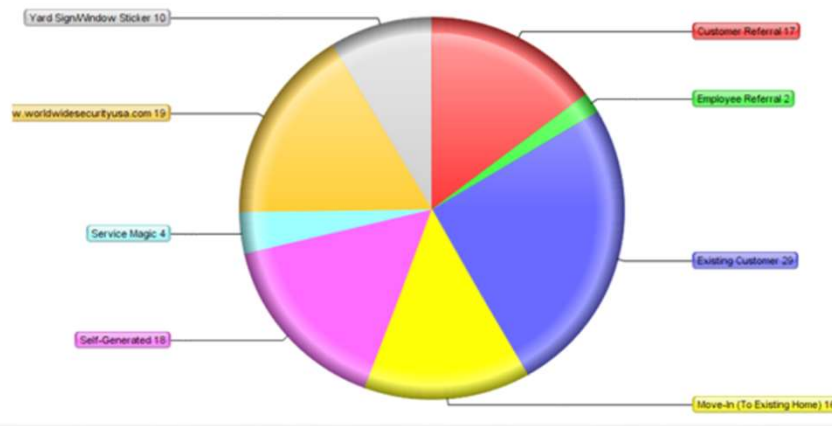
Our sales lead reports can be customized to serve management or as a tool for your sales staff.

*The following information is provided for marketing & sales purposes.
Please see attached files for additional information*

(10/28/2013 1:15:34 PM)

Contact	Company	Phone	Email	Salesperson	Lead Source	Date Entered
Schoenfeld, Joel		(516) 921-6625		Lenny Minervini	Existing Customer	10/28/2013
DeSantis, Arun		(516) 375-3502		Tom Hickey	Existing Customer	10/28/2013
Sehwyn, Stewart		(718) 799-4443		Steve Moran	Service Magic	10/28/2013
Rosenblatt, Michael				Laura Vanasco	Move-In (To Existing Home)	10/28/2013
NEW HOME OWNER				Laura Vanasco	Move-In (To Existing Home)	10/28/2013
OAK		(516) 773-4334		Laura Vanasco	Move-In (To Existing Home)	10/28/2013

Monthly Lead Tracking for 10 as of 10/28/2013





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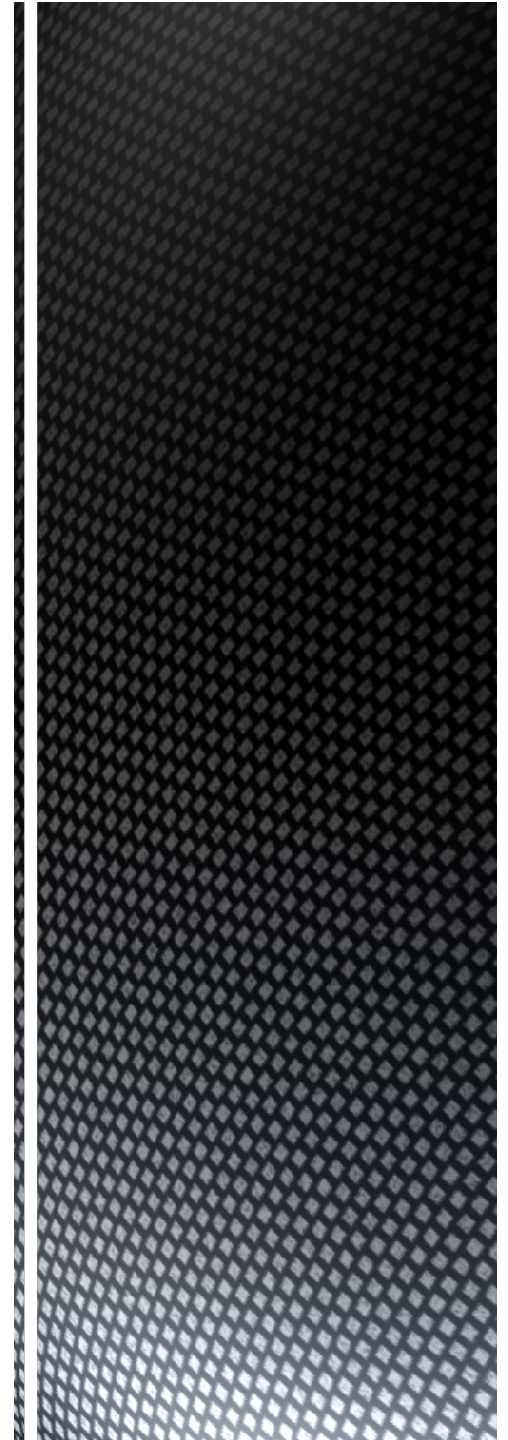
Overall Profitability

Proud to be Business Partners with

VineyardSoft Corporation

and Perennial Software

SedonaSync



Service Flash Reports

Keep your eye on the ball, track the performance of your service departments.

Identify trends in service billing and monitor your performance statistics.

Monthly Service Flash Report

Last Month Service Statistics
From 12/01/2013 thru 12/31/2013

Service Company	Open Tickets on 12/01/2013	Tickets Opened Last Month	Tickets Closed Last Month	Net Change	Open Tickets on 12/31/2013	Tickets Invoiced Last Month	Total Sales in Parts	Total Sales in Labor	Total Sales in Other	Total Sales	Currently Open Tickets	Resolved, No Service	Total Serviced	Serviced In Single Appointment	Average Opened Per Week	Average Closed Per Week
Service	600	1312	1314	-2	598	187	\$9,298.50	\$20,934.75	\$157.00	\$30,390.25	619	1054	450	421 (93%)	263	263
Guards	113	145	160	-15	98	66	\$0.00	\$6,377.00	\$0.00	\$6,377.00	102	15	204	204 (100%)	29	40
Inspectors	31	21	20	1	32	10	\$1,065.00	\$2,529.03	\$0.00	\$3,594.03	32	50	294	204 (69%)	55	56
CCTV	48	29	29	0	48	18	\$2,819.78	\$4,327.25	\$1,545.00	\$8,692.03	48	4	31	22 (70%)	5	6
Installers	160	112	118	-6	154	61	\$7,608.06	\$13,355.66	\$1,633.50	\$22,597.22	154	20	169	110 (65%)	23	27
ALA10	1	0	0	0	1	0	\$0.00	\$0.00	\$0.00	\$0.00	1	0	0			
Monthly Totals	953	1619	1641	-22	931	342	\$20,791.34	\$47,523.69	\$3,335.50	\$71,650.53	956	1143	1148	961 (83%)	365	385
(2014) YTD	931	25	0	25	956	0	\$0.00	\$0.00	\$0.00	\$0.00		0	1	1 (100%)	25	
(2013)	964	21219	21252	-33	931	4100	\$250,574.92	\$556,592.97	\$9,087.28	\$816,255.17		14481	10418	8538 (81%)	454	461
(2012)	528	22891	22455	436	964	4039	\$266,885.50	\$509,730.25	\$6,074.47	\$782,690.22		15793	9413	7973 (84%)	486	475
(2011)	927	24780	25179	-399	528	4446	\$253,208.41	\$586,788.65	\$34,078.53	\$874,075.59		17491	10611	8780 (82%)	522	540
(2010)	827	24834	24723	111	927	1856	\$90,108.25	\$247,336.03	\$6,812.62	\$344,256.90		21645	4088	3411 (83%)	499	485
(2009)	576	23918	23663	255	827	0	\$0.00	\$0.00	\$0.00	\$0.00		23663	0		451	446

Open Service Tickets by Month/Year

Now (1/1/2014)	12/1/2013	11/1/2013	10/1/2013	9/1/2013	8/1/2013	7/1/2013	6/1/2013
956	953	611	810	759	803	616	509
1/1/2014	1/1/2013	1/1/2012	1/1/2011	1/1/2010	1/1/2009	1/1/2008	1/1/2007
931	964	528	927	827	576	725	581

Purchase Price Variance - Report

Stay ahead of changes in purchasing.

With our PPV report, you can monitor any adjustment made to a part on a Job or Service ticket that varies from the standard cost. Know when to adjust the part cost or find a replacement.

The following items have posted to the PPV account.

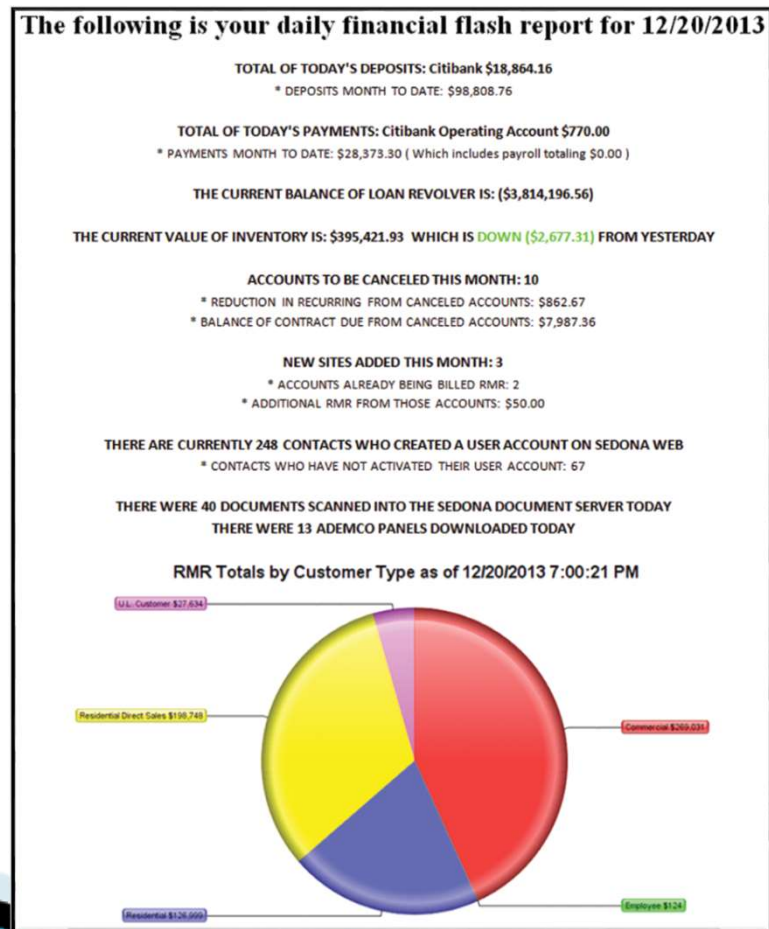
These items may need a cost and price adjustment in Sedona.

Date/Time	Reference	Job/Ticket	C/D	Amount	Part Number
10/30/2013 7:42:07 AM	6522		D	\$0.47	HSR
10/30/2013 7:41:54 AM	6522		D	\$4.23	HSR
10/30/2013 10:31:01 AM	762636-24	J -3287	D	\$0.45	RP-20
10/30/2013 9:52:27 AM	762636-32		D	(\$24.00)	260CO
10/30/2013 2:34:29 PM	6546		D	\$0.74	HUB2SA
10/30/2013 2:15:33 PM	6537	S -618158	D	\$20.85	PW-PS12260F
10/30/2013 2:26:02 PM	6547	J -3303	D	\$17.70	PTS-C
10/30/2013 2:34:30 PM	6546		D	(\$47.00)	JKS1AED

Financial Flash Reports

Know what is going on with your business.

We can deliver key performance indicators (KPI) directly to the people with the need to know.



1230 – Systems Having X Tickets in Y Days

The following customers have had at least 3 or more service tickets on a system within the past 60 days.

8/7/2015 3:12:14 PM

Branch	Service Level	Customer	Site Name	System	System Type	Panel Type	Tkts	Cust. RMR	Cust. Since	Last Serv. Ticket Number	Last Tech
Corp	Kroger Local	00005-0028	7-11 Market #124	R10173	Intrusion	RAD 7212	3	\$0.00	6/1/1993	6/17/2015 227353	S.Rogers
Corp	Kroger Local	00005-0134	7-11 Market #193	R10480	Intrusion	RAD 7212	3	\$0.00	1/22/1999	7/30/2015 228270	N.Fury
Corp	On Contract	04561	IGA Foods	C42040	Fire	RAD 7412	7	\$296.44	4/25/1994	7/20/2015 227751	B.Banner
Corp	On Contract	01261	California Pizza Kitchen	C10046	Intrusion	RAD 9112 B	4	\$156.45	9/5/1983	8/6/2015 228457	J.Howlett
Corp	On Contract	05077	St. Marys Catholi	K50145	Intrusion	1ST ALERT	3	\$45.45	2/28/1997	7/21/2015 227827	P.Couson

2114 - Service Ticket & Installation Process Metrics Flash Report

Service Ticket and Installation Process Metrics Flash Report

1/5/2015 8:54:51 AM

Customer #: 600238

Ticket: S- 54672

Site Name: ABC Palm Supply

Final Status: Closed

Closed: 12/27/2014 10:06:34 AM Closed By: Julian

Final Close: 12/27/2014 10:06:34 AM Final By: Julian

Created	Scheduled By	1st Scheduled Timestamp	Time from Creation to 1st Scheduled	First Appointment	Time from 1st Scheduled to 1st Appointment	First Arrival	Time from 1st Scheduled Appointment to 1st Arrival
12/26/2014 7:46:25 AM	BradS	12/26/2014 7:46:33 AM	00:00:00:08 Minutes (DD:HH:MM:SS)	12/26/2014 10:00:00 AM	00:02:13:27 Hours (DD:HH:MM:SS)	12/26/2014 2:45:00 PM	00:04:45:00 Hours (DD:HH:MM:SS)

Ticket Notes

User	Note Date	Ticket Note
LisaG	12/26/2014 3:06 PM	Check system, zone 11 check, check zone 11, transmitter is bad, replaced it, 1 pcs 5816. Test locally 30 times, it works well. Test signal to central, system normal. WAR
SedonaSync	12/26/2014 7:48 AM	CUSTOMER MSG - Entered: Jun 13 2014 11:02AM Entered by: JohnS Expires: Never Critical Msg: WE ALSO MONITOR HIS HOUSE 910407
LisaG	12/26/2014 7:46 AM	9-5 LOSS OF SUPERVISION REAR GARAGE DOOR/ CALL B4 GOING

2111 - AutoPay Statistics Flash Report

ACH AutoPay Statistics Flash Report

12/08/2014

Branch	Date	Total RMR Covered by AutoPay	Accounts With AutoPay for RMR	Accounts With AutoPay for Everything Else
Main Branch	12/08/2014	\$178,452.83	5143	60
Yesterday	12/07/2014	\$178,452.83	5143	60
Saturday	12/06/2014	\$178,372.93	5141	60
Friday	12/05/2014	\$178,476.78	5144	60
Thursday	12/04/2014	\$178,115.38	5137	60
Wednesday	12/03/2014	\$177,934.68	5133	60
Tuesday	12/02/2014	\$177,760.93	5128	60
Last Monday	12/01/2014	\$177,674.13	5126	60
November	11/01/2014	\$175,302.93	5074	56
October	10/01/2014	\$173,056.43	5030	56
September	09/01/2014	\$171,648.38	5013	55
August	08/01/2014	\$169,127.18	4966	54
July	07/01/2014	\$168,398.02	4956	54
June	06/01/2014	\$167,500.39	4938	52



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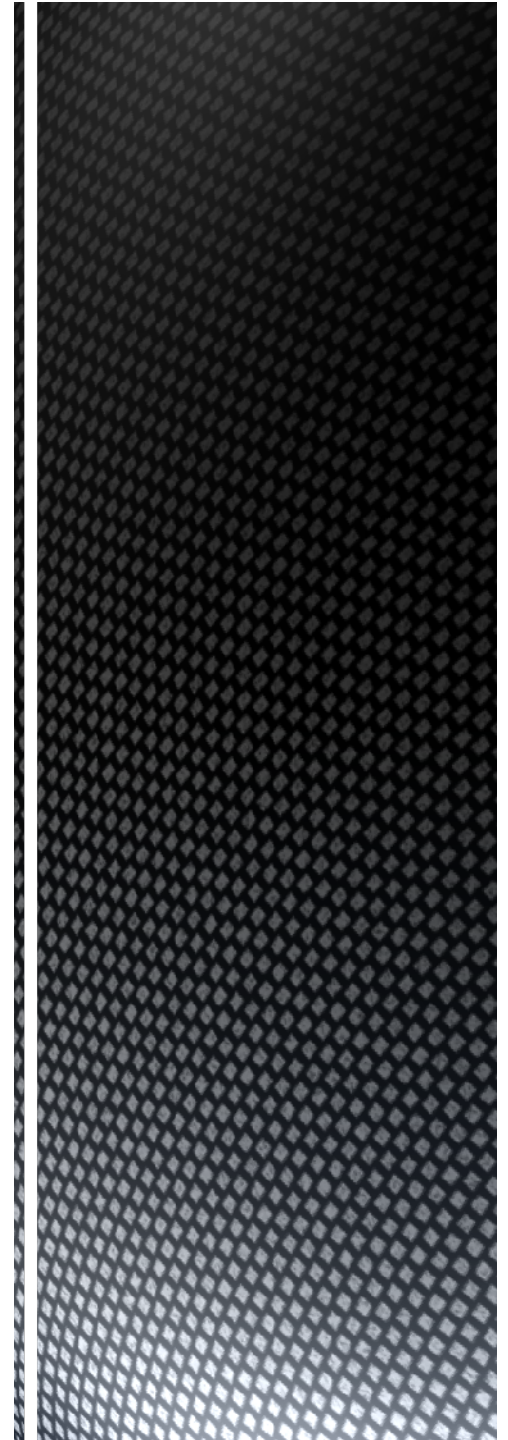
OPT Manitou Events

Proud to be Business Partners with

VineyardSoft Corporation

and Perennial Software

SedonaSync



Dealer Online/Offline Report Summary

We are very pleased to introduce events for Bold Technologies' Manitou Central Station Software.

Getting statistics out of Manitou has never been so easy!

A report can now be delivered to you and your dealers when accounts go online and offline.



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Dealer Online/Offline Report Summary.

8/1/2013 - 8/31/2013


Dealer Name	Dealer Number	Onlines	Offlines	Total Online	Total Offline
Dealer Accounts	0	0	0	29	40
Alarms R Us	00002	1	2	139	90
Safe N Secure	00003	1	1	197	142
ADT	00005	3	2	206	338
Safety First	00006	1	1	273	546
High Temp	00021	1	20	151	136
24hr Protection	00022	2	1	409	180

Dealer Online/Offline Report Details

We also offer the same report in detail that will show you which accounts were added or deleted.

This is also the ideal report to send to your dealers at the end of the month.

Each dealer would receive only their details for their own accounts.



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Dealer Online/Offline Report
 8/1/2013 - 8/31/2013

Alarms R Us (00002) has (139) Online Accounts and (90) Offline Accounts.

Name	Account	Online/Offline	Code	Reason
(1) Accounts when Online.				
American Outfitters	630207	8/6/2013 9:02:58 PM		
(2) Accounts when Offline.				
Walsenburg Law Firm	630236	8/5/2013 2:42:57 PM	2	Per Fax
Eastpoint Health	A11054	8/28/2013 6:14:17 PM	2	Per Email

Safe N Secure (00003) has (197) Online Accounts and (142) Offline Accounts.

Name	Account	Online/Offline	Code	Reason
(1) Accounts when Online.				
Michael Phelps	I18930	8/26/2013 10:03:23 PM		
(1) Accounts when Offline.				
John Glassberg	630786	8/7/2013 6:38:28 PM	2	Per Email

ADT (00005) has (206) Online Accounts and (338) Offline Accounts.

Name	Account	Online/Offline	Code	Reason
(3) Accounts when Online.				
JFK School Commons	210091	8/9/2013 2:23:35 PM		

Late To Test - Reports

Leverage the power of cross linking reports. Know what is going on with your customers.

Have they stopped paying? Have they changed central stations?

Late To Test Customers over 90 days past due

(10/30/2013 4:30:05 AM)

Manitou #	Sedona #	Sec.Sedona #	Customer	Site Name	Site Phone	Customer Since	Over 90	Over 120	Net Due
25001021	25001021		900330	Feldis Florist - Garden City	(516) 747-3330	1/18/2010	\$514.88	\$3,547.83	\$4,388.59
25001254	25001254	18003395	901150	Kohner, Mrs. Nicole	(516) 414-7101	11/18/2010	\$0.00	\$975.67	\$1,951.34
25001483	25001483		902595	Hickey, Mr. Daniel	(631) 828-8059	3/23/2011	\$0.00	\$83.64	\$173.90
25001937	25001937		904799	D & H Deli	(718) 522-5612	2/7/2012	\$117.55	\$0.00	\$235.10
25001983	25001983		904900	Muldan-David Inc.	(718) 848-2229	12/12/2012	\$0.00	\$407.34	\$407.34
25002058	25002058	18004486	905000	McMichaels, Charles	(718) 450-8793	4/3/2012	\$189.85	\$0.00	\$434.82
25002142	25002142		905116	Lopez, Antonio	(718) 292-1883	5/2/2012	\$185.41	\$0.00	\$413.88
25002366	25002366		905530	Paumanok Elementary School	(631) 592-3650	9/28/2012	\$2,046.00	\$0.00	\$6,771.38
25002380	25002380		905530	Natatorium @ Half Hollow Hills High School West	(631) 592-3257	9/28/2012	\$2,046.00	\$0.00	\$6,771.38
25002383	25002383		905530	Bus Storage Depot	(631) 592-3862	9/28/2012	\$2,046.00	\$0.00	\$6,771.38
25002393	25002393		905530	Half Hollow Hills High School West	(631) 592-3257	9/28/2012	\$2,046.00	\$0.00	\$6,771.38

Late To Test - Reports

Late To Test Customers - **Medical/PERS/Panic Systems**

(10/30/2013 4:15:01 AM)

Manitou #	Sedona #	Sec.Sedona #	Panel	Customer	Site Name	Site Address	Town, State	Zip	Customer Email
22000309	22000309		Life Sentry PERS	904329	Lefkowitz, Rabbi	1001 Hazel Place	Woodmere, NY	11598	
22000519	22000519		Life Button 24	714223	Grunberg, Mrs. Helga	71-42 167th St	Flushing, NY	11365	
22000543	22000543		Life Button 24	909891	Rodriguez, Mrs. Elba	1496 Stafford Avenue,	Merritt Island, FL	32952	
85009102	85009102		Life Button GPS	904213	North Side School	110 East Williston Road	Old Westbury, NY	11568	
85009106	85009106		Life Button GPS	904213	Willets Road Middle School	458 I. U. Willets Road	Roslyn Heights, NY	11577	

Late To Test Customers - **Commercial Fire**

(10/30/2013 4:00:14 AM)

Manitou #	Sedona #	Sec.Sedona #	Panel	Customer	Site Name	Site Address	Town, State	Zip	Customer Email
25001199	25001199		Firelite 411UDAC	900376	We Transport - Hempstead	35 Brooklyn Road	Hempstead, NY	11550	
25001288	25001288		Vista 32FB	902481	Moonlight Hookah Lounge	332 East Jericho Turnpike	Huntington Station, NY	11746	
25002366	25002366		Silent Knight 5129	905530	Paumanok Elementary School	1 Seamen Neck Road	Dix Hills, NY	11746	
25002383	25002383		Napco GEM 3200	905530	Bus Storage Depot	25B Burrs Lane	Dix Hills, NY	11746	
42001274	42001274		Notifier AFC600	654529	Phillipsburg Hall	2-8 Hudson Street	Yonkers, NY	10701	
42003291	42003291		Firelite	654506	Dave & Busters, Inc	1856 Vets Highway	Islandia, NY	11749	
42000833	42000833		FA 140C	655497	Holiday Square	10 Muncy Ave,fire	West Babylon, NY	11704	holidaysquare@homeproperties.com

Late To Test Customers - ALL

(Advanced Excel Worksheet Attached)

(10/30/2013 5:01:10 AM)

Manitou #	Sedona #	Panel	INTVL	Customer	Site Name	Site Address	Town, State	Zip	Customer Email
22000309	22000309	Life Sentry PERS	7 Day	904329	Lefkowitz, Rabbi	1001 Hazel Place	Woodmere, NY	11598	
22000519	22000519	Life Button 24	28 Day	714223	Grunberg, Mrs. Helga	71-42 167th St	Flushing, NY	11365	
22000543	22000543	Life Button 24	7 Day	909891	Rodriguez, Mrs. Elba	1496 Stafford Avenue,	Merritt Island, FL	32952	
25001021	25001021	Vista 15P	7 Day	900330	Feldis Florist - Garden City	160 7th Street	Garden City, NY	11530	

Alerts – Still on Test

With the addition of FSU and VRT devices, now it is more necessary to verify that the technician has put the account back in full service. We can now notify the service department and/or technician that the account is still on test after they have left the service call.

**** URGENT SERVICE ALERT -
PLEASE READ ****

Bob Smith, You have departed from service ticket 75862 and this account is still on test in Manitou. Please place account back in full service.

Service Ticket Number: 75862
System Account: 25001264
Placed on test: 10/31/2013 9:46:14 AM
Test will expire: 10/31/2013 1:11:59 PM
Reason: On-test from BoldNet Mobile
Zone:
Technician Departed: 10/31/2013 11:29:13 AM
Site: Washington Pavillion
486 Main Street
Kings Park, NY 11754
(631) 839-4437

**** URGENT SERVICE ALERT -
PLEASE READ ****

OPT Sync Events

AR Reports	Description
ACH Payments About to Post	Email to customer reminding them of future ACH payment post in X days.
ACH Payments Posted	Email to customers when ACH payments post
New Invoice Posted with Bank Draft Attached	Email to customers when invoice is created with bank account attached for AutoPay.
New Invoice Posted with CC Attached	Email to customers when invoice is created with credit card attached for AutoPay.
New Invoice Posted without AutoPay	Email to customers when invoice is created without payment method attached for AutoPay.
New Invoice Posted with Invoice Detail	Email to customers when invoice details to customer when posted.
Customers Past Due	Internal list of customers with unpaid invoices over \$x.xx
Invoices Past Due	Internal list of unpaid invoices over \$x.xx, can be sorted by invoice type.
Collection Email	Email to customer with friendly reminder that invoice is still open after X days.
CC About to Expire Customer Email	Email to customer indicating their AutoPay credit card is about to expire.
CC About to Expire Report	Internal list of expiring credit cards, with email to customer.
VIP Added to Collections	Internal list of VIP customers added to a collection.
VIP Added to Cancellation Queue	Internal list of VIP customers added to the cancellation queue.
Large Customer added to Collections	Internal list of customers with more than \$x.xk in sales.
Large Customer added to Cancellation Queue	Internal list of customers with more than \$x.xk in sales.
Past Due Service Ticket Alert	Alert to AR when service ticket is created/scheduled.
RMR Dropped below Threshold	Internal list of customers whose RMR has dropped below a set threshold.
New Invoice Posted with Details	Email to customers when invoice is created, including details.
New Invoice Posted for Dealers	Email to dealers when cycle invoice is created.

Service Reports	Description
Missed Service Appointment	Internal list of service appointments that have been missed.
Service Tickets Arrived but not Departed	Internal list of service tickets arrived but not departed.
Service Tickets Related To Radios	Internal list of service tickets relating to radio issues.
Service Tickets Related To Install Issues	Internal list of service tickets relating to installation issues.
Panels that Need to be Unlocked	Internal list of service tickets where the panel needs to be unlocked.
Reminder of Service Call	Email to customer reminding them of future service call.
Dispatched Tech	Email to customer notifying that tech is in route.
Dispatched Tech With Photo	Email to customer notifying that tech is in route, including photo.
Tomorrow's Service Tickets	Internal list of tomorrow's service calls. Can be emailed to individual technician.
Auto Email Service Details to Tech	Email to technician of new service call is scheduled.
Service Ticket Created	Email to customer when new service ticket is entered.
Service Ticket Follow-up Email	Email to manager when service call is resolved.
Service Ticket Follow-up Report	Internal list of service tickets needing a Go Back call.
Service Call Survey	Email to customer a satisfaction survey link to rate the service.
Inactive Part Was Used	Internal list of service tickets where an inactive part was used.
Part Discounted Beyond Threshold	Internal list of service tickets where a part was discounted beyond a set threshold.
Service Tickets Ready to be Closed	Internal list of service tickets that have been ready to be closed.
Closed Service Tickets by Service Level	Internal list of service tickets closed for billing.
Service Contact Profitability Warning	Internal list of RAR where total amount of service tickets is low.
SedonaWeb Service Tickets Report	Internal list of service tickets generated via SedonaWeb.
SedonaWeb Service Tickets Action	Action, Changes Problem Codes on tickets generated via SedonaWeb.
Service Tickets Missing Contact Info	Internal list of service tickets generated without contact information.
Inspections Not Linked to RMR	Internal list of inspections that are not linked to RMR.
Dispatched Tech With Photo (Key)	Email to Key Account Manager notifying that tech is in route, including photo.
Daily Open Service Ticket Snapshot (Key)	Email to Key Account Manager with list of current open service tickets.
Service Tickets Created (Key)	Email to Key Account Manager with list of new service tickets created.
Service Tickets Resolved (Key)	Email to Key Account Manager with list of resolved service tickets.
Service Tickets Scheduled (Key)	Email to Key Account Manager with list of scheduled service tickets.
Technician Stop Summary	Internal list of tech's start/stop/travel and job completion times.
Customers having x Tickets in y Days	Internal list of Customers with having multiple tickets in a set period.
Auto Email Service Details to Tech (Requested)	Email to technician of new service call when requested.
Service Tickets Onsite Longer than x Min.	Email to technician when they are on site longer than a set time.
Closed Service Tickets by Resolution Code	Internal list of service tickets closed for billing, categorized by resolution code.
Service Ticket Scheduled	Email to customer when new service ticket is scheduled.
Service Ticket Snapshot by Service Level	Internal list of open service ticket count by service level.

Manitou	Description
Operators Logged in But Inactive	Alert, Email to Supervisor when a user is logged in but has not been in alarm processing for X minutes.
Operator Signal Handling Report	Report, listing of users' signal handling statistics for the day.
Operator Watchdog Report	Report, listing of users' Watchdog statistics for the day.
Workstations Needing Approval	Report, listing of all workstations needing approval.
New Workstations Added	Report, listing of added workstations.
UL Access Audit Report	Report for UL showing who has access to hand-held devices.
Dealer Add/Delete Report Summary	Report, listing dealers add and deletion totals.
Dealer Add/Delete Report Details	Report, listing dealers adds and deletions for individual dealers.
Dealers Missing Emails	Report, listing dealers without email addresses.
Reactivated Customers by Dealer	Report, listing customers that are being reactivated by dealer.

Web Reports	Description
New SedonaWeb User Email	Email to customer with SedonaWeb Intro.
New SedonaWeb User Report	Internal list of new SedonaWeb users.
New SedonaWeb Critical Message	Action, to add customer or site critical messages noting that this customer has web access.
New SedonaWeb Force Pending	Action, when new SedonaWeb user is added, place user as inactive pending account review.
New SedonaWeb User Linking - Customer	Email to customer notifying that new customer is now linked.
New SedonaWeb User Linking	Internal list of new SedonaWeb user linking.

Dashboards	Description
Dashboard - Unified Dashboard Master	Master Dashboard Interface, combines dynamic dashboards into one web service. Uses tabbed design to access multiple dashboards from one location. Includes configuration of 4 dynamic dashboards linked into the master. Individual dashboards are below.
Dashboard - Inspections, RMR Linking	A series of dashboards showing the a list of inspections that are not currently linked and what must be done to correct the link.
Dashboard - Inspections, Listing	Dashboard showing the a list of the inspections for the next week.
Dashboard - Sales, Total Sales	Dashboard showing the total sales (Jobs Sold) for this month, by salesmen and breaking out RMR.
Dashboard - Service, GoBack Queue	Dynamic Dashboards showing all the tickets in the GoBack Queue.
Dashboard - Service, Onsite Tickets	Dynamic Dashboards showing all the tickets that were a technician's first onsite visit.
Dashboard - Service, Unclosed Tickets	Dynamic Dashboards showing all the tickets that are not closed using the RTI and RTC sub-problem code logic. Dashboards are separated by service company.
Dashboard - Service, Tomorrows Tickets	Dynamic Dashboards showing the list of service tickets for tomorrow. Separated by service company, this dashboard will show the customer and towns. Can be configured to show additional days for additional days for 52 weeks.
Dashboard - Service, Unbilled Tickets	Dynamic Dashboards showing the list of service tickets for that month that are not billed correctly.
Dashboard - Job, Queues	Dashboard showing the list of jobs in a specific job queue.
Dashboard - Job, Statuses	Dashboard showing the list of jobs at a specific job status.
Dashboard - Web, Account List	Dashboard showing the list of current and pending SedonaWeb accounts.

Manitou Actions	Description
Raise Threat Level	Action, Raise threat level by X if X incidents are received within a set period.
Lower Threat Level	Action, Lower threat level by X if no incidents are received within a set period.
Restore Threat Level	Action, Set threat level to X if receive X alarms received within a set period.
Access Trouble Notification	Create, "Access Trouble" signal, If X bad reads received in X minutes.
Alarm Verified Notification	Create, "Alarm Verified" if receive alarms on more than x zones with in x minutes.
Auto Generate Service Ticket Action Pattern	Action, Create service ticket automatically using the auto client and action patterns.
Update Service Ticket When Signals Tested	Action, Updates service ticket if tech sends signals while onsite.

Job Reports	Description
Job Reversals Pre formed	Internal list of job reversals.
Jobs Ready to be Closed	Internal list of jobs ready to be closed.
Jobs Dispatched but not Arrived	Internal list of jobs that have been dispatched but not arrived.
Jobs Arrived but not Departed	Internal list of jobs that have been arrived but not departed after threshold.
Job Task Completed	Internal list of jobs that have had a specific task completed.
Job Task Completed - Customer Email	Email to customer based on completion of job task.
Job Status Report	Internal list of jobs that have a specific status.
Installation Customer Survey	Email to customer a link to take a customer satisfaction survey.
Job Scheduled + Task Signoff	Internal alert with schedule/job/customer detail when a job is scheduled.
Installation Complete	Email to customer upon completion of job.
New Job Entered	Email to customer upon entering a new job.
New Job Scheduled	Email to customer upon scheduling a job.
Job Dispatched Tech	Email to customer notifying that tech is in route.
Job Dispatched Tech With Photo	Email to customer notifying that tech is in route, included tech photo.
Reminder of Job Schedule	Email to customer reminding them of their job schedule.

Action Events	Description
Create Web Account Critical Messages	Action, Creates a Critical Message on accounts where Web User is active.
Create COD Critical Messages	Action, Creates a Critical Message on accounts when account is in COD.
Copy Critical Messages to Ticket Notes	Action, Copies System Critical Message to Service Ticket Notes for users to see the Critical Messages. Also used in email to technician.
Flag Accounts as COD	Action, Flags accounts as COD based on account data.
Auto Remove Collection Status	Action, Removes collection status when account is current automatically.
Set Last Service Call w/ Technician	Action, Records last service departure and technician name to events.
New SedonaWeb Force Pending	Action, when new SedonaWeb user is added, place user as inactive pending account review.
Service Tickets Generated via SedonaWeb	Action, Changes Problem Codes on tickets generated via SedonaWeb.
Update Service Ticket Data	Action, Changes service ticket data based on existing service ticket.

Inventory Reports	Description
Low Stock Count	Internal list of products that have met their low stock threshold.
POs Open for More Than x Days	Internal list of purchase orders that have not been closed.
PPV Alerters	Internal report detailing any changes to the Purchase Price Variance account.
Jobs without PO created after x Days	Internal list of jobs that are waiting on a Purchase Order(s) to be generated.

Flash Reports	Description
Daily Service Flash	Internal Flash Report of service data for the day, includes open tickets, closed tickets, invoiced tickets, appointments, follow-ups, reschedules and inspections. Data is sorted by service company.
Monthly Service Statistics	Internal Flash Report of service data for the month, includes open tickets, closed tickets, invoiced tickets w/ totals and go backs sorted by company.
Daily Operations Flash	Internal Flash Report outlining daily and monthly service and installation billing, open tickets and jobs, and financials based on those open jobs, now with added service ticket contact counts and jobs ready to close counts.
Daily Financial Flash	Internal Flash Report outlining all financial happenings in the company: Deposits, payments, account cancels MTD (with balance of contract) and account adds MTD (with RMR).
Daily Cancellation Flash	Internal Flash Report detailing accounts added to the cancellation queue. Including the RMR, contract balance, reason, effective date and any additional memos.
Monthly Inspection Statistics	Internal Flash Report of inspection data for the month, includes open tickets, closed tickets, invoiced tickets w/ totals and go backs sorted by company.
Monthly Service/Inspections Statistics	Combined Flash Report for Service/Inspections, distributed by service company.

System Reports	Description
New SedonaOffice User	Internal list of new generated SedonaOffice users and their access levels.
New SedonaOffice Employee	Internal list of new generated SedonaOffice employees and their user assignment.
Sedona Documents Entered	Internal list of new attached customer documents to SedonaDocs.
Email Blast to Dealers	Customizable Email that can be sent out your dealers.
Email Blast to Customers	Customizable Email that can be sent out your customers.
New SedonaOffice Tech	Internal list of newly added technicians to SedonaOffice.
Income Statement by Branch	Internal Report showing Income and Expense GLs per Branch at the EOM.

Sales Reports	Description
New Sales Lead Email to Customer	Email to customer to thank them for the new prospect.
New Sales Lead Email to Salesperson	Email to salesperson to notify of new prospect.
New Sales Lead Report	Internal list of new prospects. Can be emailed to individual salesmen.
Lead Source Report	Internal list of prospects entered the previous day, with lead source & salesperson.
Sales Lead Status	Internal list of current prospects and their status. Can be emailed to individual salesmen.
Daily Sales Report	Report of Jobs Sold Daily and Sales Summary.

Data Entry Reports	Description
Phone Number Not Valid	Internal list of phone numbers that do not match the (123) 456-7890 formatting rule.
Email Address Not Valid	Internal list of email address that do not match the @domain.com formatting rule.
Email Address Not Provided for Field	Internal list of missing email addresses from a field in SedonaOffice.
Panel Type Missing	Internal list of missing panel type information from a system.
System ID Formatting Issues	Internal list of systems that do not match the supplied formatting rules.

Sedona/Manitou	Description
RMR Not Being Billed for Services Provided	Internal list of Services in Manitou that is does not have RMR linked.
Service Not Being Provided for RMR Billed	Internal list of RMR that does not have a Manitou service linked.
User/Password Mismatch	Internal List of Users/Passwords that do not match in Sedona/Manitou.
Customers Not Linked	Internal List of Customers that are not linked in Sedona/Manitou.
LTT Customers Over X Days Past Due	Internal List of Customers that are LTT and have been over X days past due.
LTT Customers w/ Spreadsheet	Internal List of all Customers that are LTT with attached report.
LTT Customers, Commercial Fire	Internal List of Commercial Fire Customers that are LTT.

OPT Sync Event Suites and Packages

- ACH / CC Notification Suite
- Technician Notification Suite
- Service Key Account Package
- Service Suites
 - Internal Notifications
 - Customer Notifications
- Inventory Suite
- Customer Billing Package
 - Email Invoicing Suite
 - Email Statements Suite
- Job Key Account Package
- Job Suites
 - Internal Notifications
 - Customer Notifications
- Sales Suite



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