Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

IMPROVING

OPERATIONAL EFFICIENCY, CUSTOMER RELATIONS, & OVERALL PROFITABILITY

THROUGH THE USE OF SedonaSync AND OPT WEB SERVICES

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

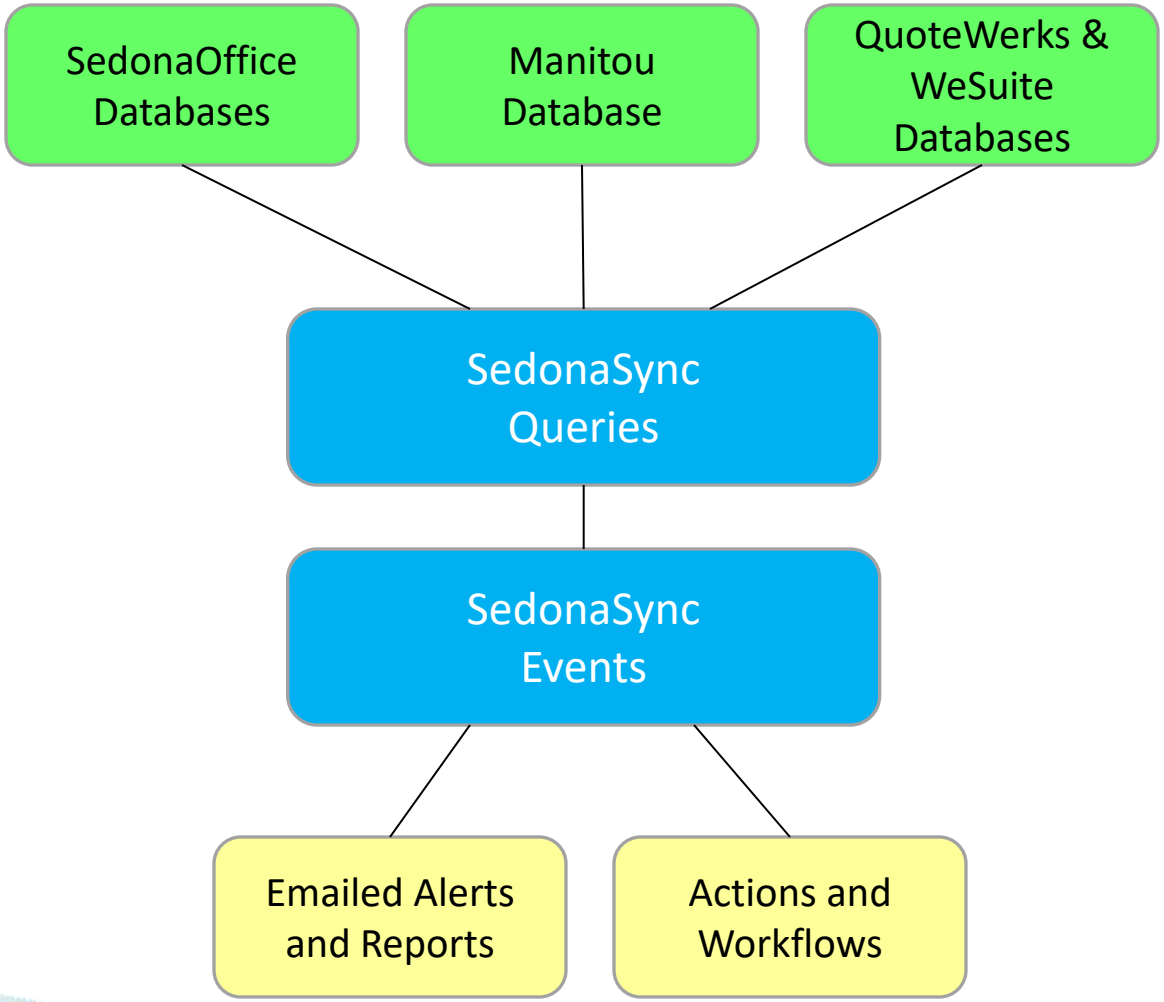
WHAT IS SedonaSync

AND

HOW DOES IT HELP OUR BUSINESS?

SedonaSync

SedonaSync


SedonaOffice Databases
Manitou Database
QuoteWerks & WeSuite Databases
SedonaSync Queries
SedonaSync Events
Emailed Alerts and Reports
Actions and Workflows

Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

Operational Efficiency

Proud to be Business Partners with

VineyardSoft Corporation

and Perennial Software

SedonaSync

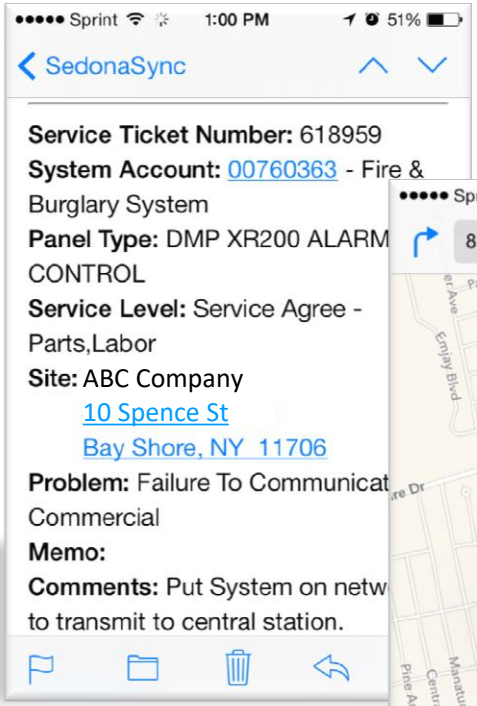
Tomorrow's Tickets

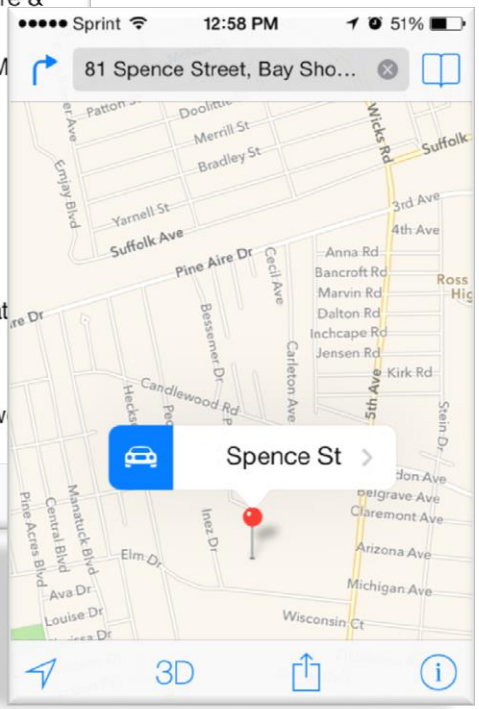
Notify your technicians automatically of the service calls on their schedule for the next day. We have optimized these events for smart phones therefor site address can be used for mapping.

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

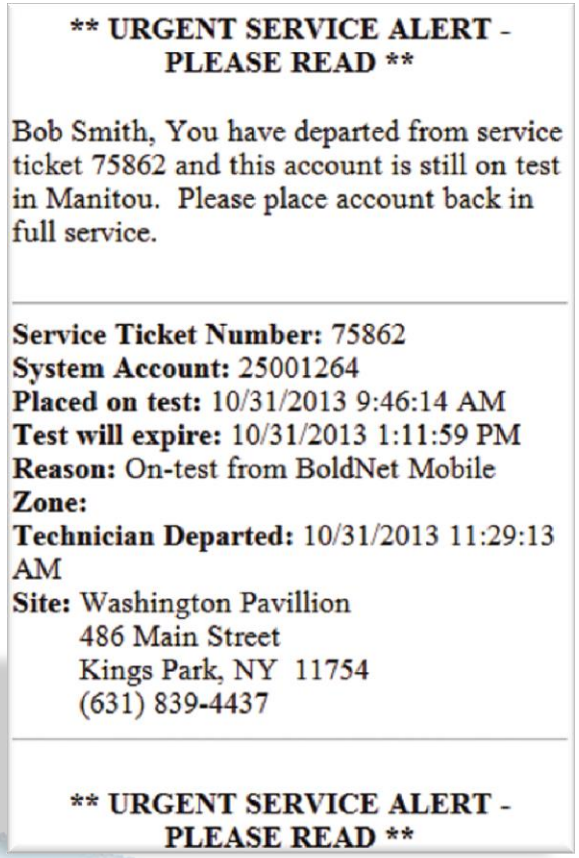
*** THIS IS A KEY ACCOUNT ***
Service Ticket Number: 37466
System Account: NM1867 - Video Surveillance
Panel Type: Closed Circuit Television
Service Level: Standard Service Agreement
Site: Seven Eleven - Store #21
22 Main Street
Manchester, PA 17345
(717) 286-5225
Contact: John Holtz
(717) 751-5498
accounting @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





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 ****

Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

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.

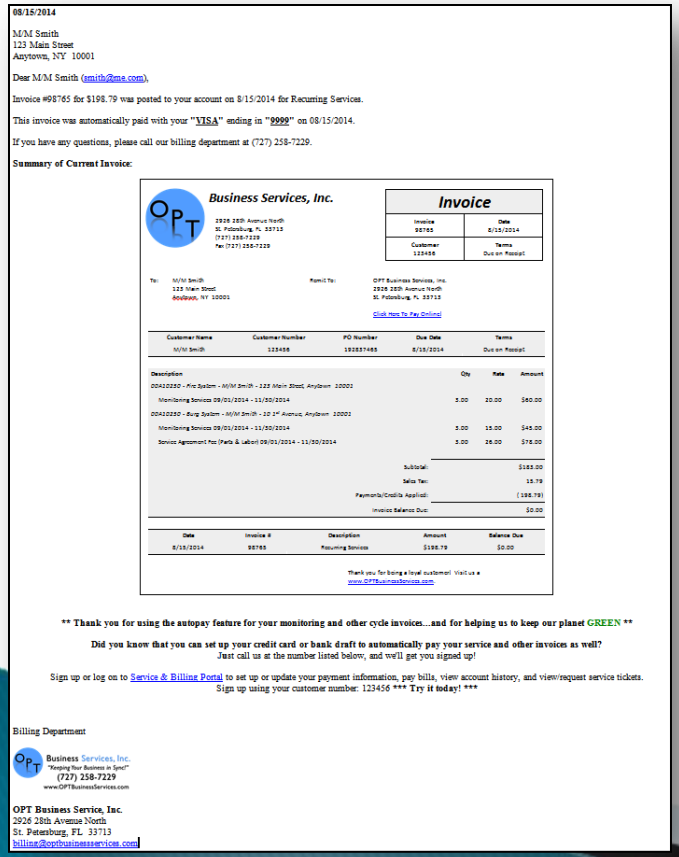
Please click here to take a short survey.

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

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	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	192837465	8/15/2014	Due on Receipt

Description	Qty	Rate	Amount
00410250 - Fire System - M/M Smith - 123 Main Street, Anytown 10001			
Monitoring Services 09/01/2014 - 11/30/2014	3.00	20.00	$60.00
00410250 - 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

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

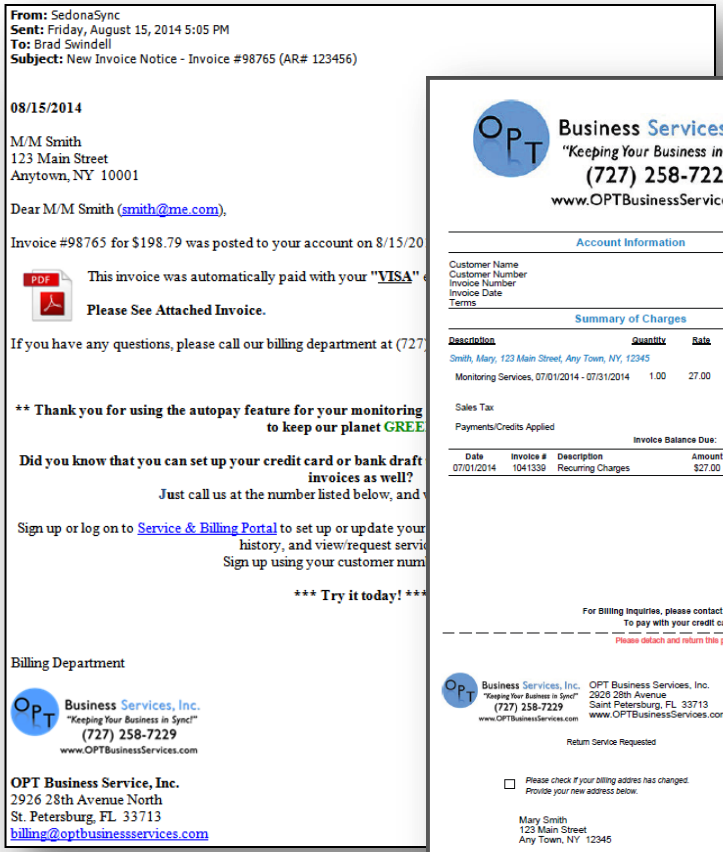
Did you know that you can set up your credit card or bank draft to automatically pay your service and other invoices as well?
Just call us at the number listed below, and we'll get you signed up!

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



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 8/15/20

This invoice was automatically paid with your "VISA"

Please See Attached Invoice.

If you have any questions, please call our billing department at (727

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

**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

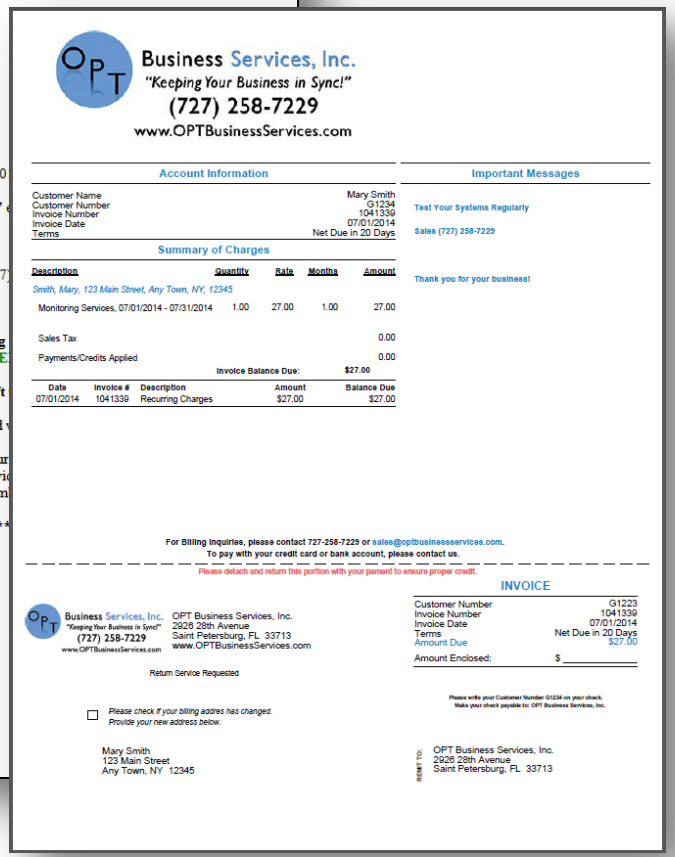
Sign up or log on to Service & Billing Portal to set up or update your
history, and view/request servi
Sign up using your customer num

*** 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



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	1041339
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	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.

INVOICE

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

OPT Business Services, Inc.
2926 28th Avenue
Saint Petersburg, FL 33713
www.OPTBusinessServices.com

Return Service Requested

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

Mary Smith
123 Main Street
Any Town, NY 12345

Customer Number	G1223
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.
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	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, Inc.	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	65219		Recurring Charges	$224.00	$224.00	96 Days Past Due
05/01/2014	65219		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

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

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.

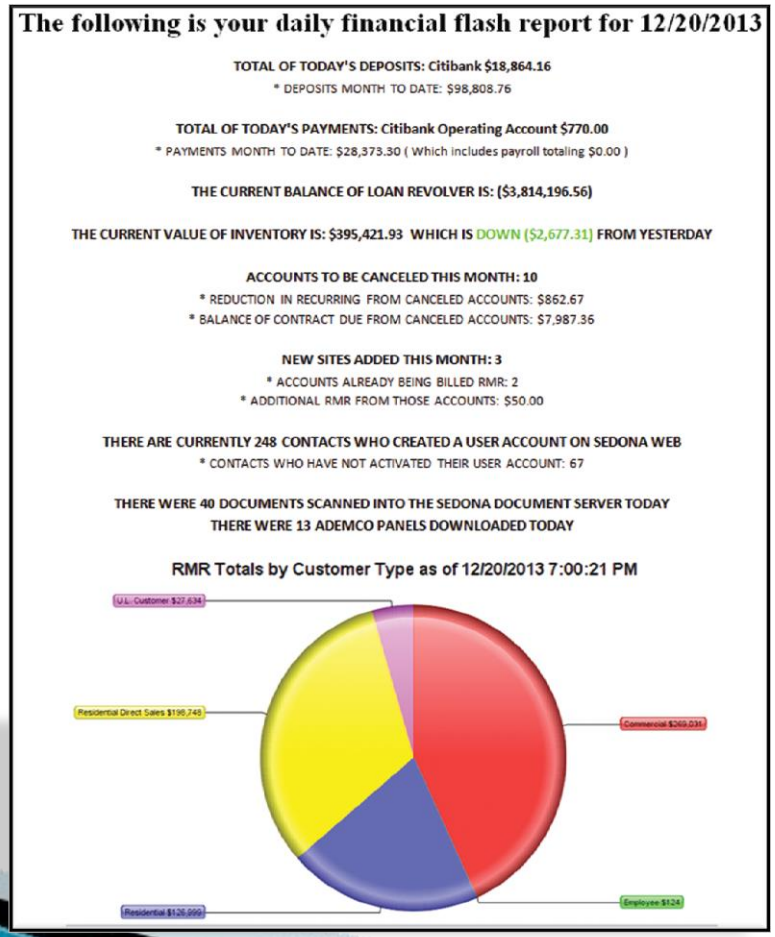
These items may need a cost and price adjustment in Sedona.

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.



The following is your daily financial flash report for 12/20/2013

TOTAL OF TODAY'S DEPOSITS: Citibank $18,864.16

* DEPOSITS MONTH TO DATE: $98,808.76

TOTAL OF TODAY'S PAYMENTS: Citibank Operating Account $770.00

* PAYMENTS MONTH TO DATE: $28,373.30 (Which includes payroll totaling $0.00)

THE CURRENT BALANCE OF LOAN REVOLVER IS: ($3,814,196.56)

THE CURRENT VALUE OF INVENTORY IS: $395,421.93 WHICH IS DOWN ($2,677.31) FROM YESTERDAY

ACCOUNTS TO BE CANCELED THIS MONTH: 10

* REDUCTION IN RECURRING FROM CANCELED ACCOUNTS: $862.67
* BALANCE OF CONTRACT DUE FROM CANCELED ACCOUNTS: $7,987.36

NEW SITES ADDED THIS MONTH: 3

* ACCOUNTS ALREADY BEING BILLED RMR: 2
* ADDITIONAL RMR FROM THOSE ACCOUNTS: $50.00

THERE ARE CURRENTLY 248 CONTACTS WHO CREATED A USER ACCOUNT ON SEDONA WEB

* CONTACTS WHO HAVE NOT ACTIVATED THEIR USER ACCOUNT: 67

THERE WERE 40 DOCUMENTS SCANNED INTO THE SEDONA DOCUMENT SERVER TODAY

THERE WERE 13 ADEMCO PANELS DOWNLOADED TODAY

RMR Totals by Customer Type as of 12/20/2013 7:00:21 PM

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

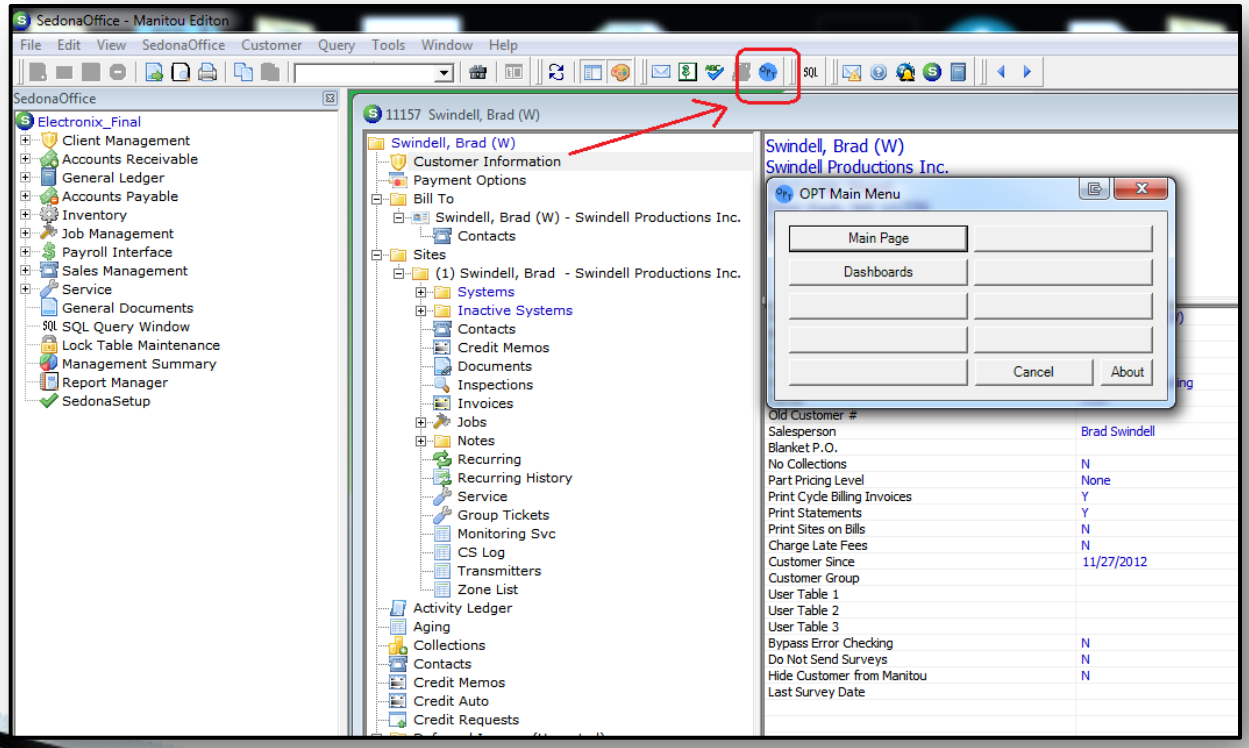
Introducing the OPT Web Services

Proud to be Business Partners with
VineyardSoft Corporation
and Perennial Software

SedonaSync

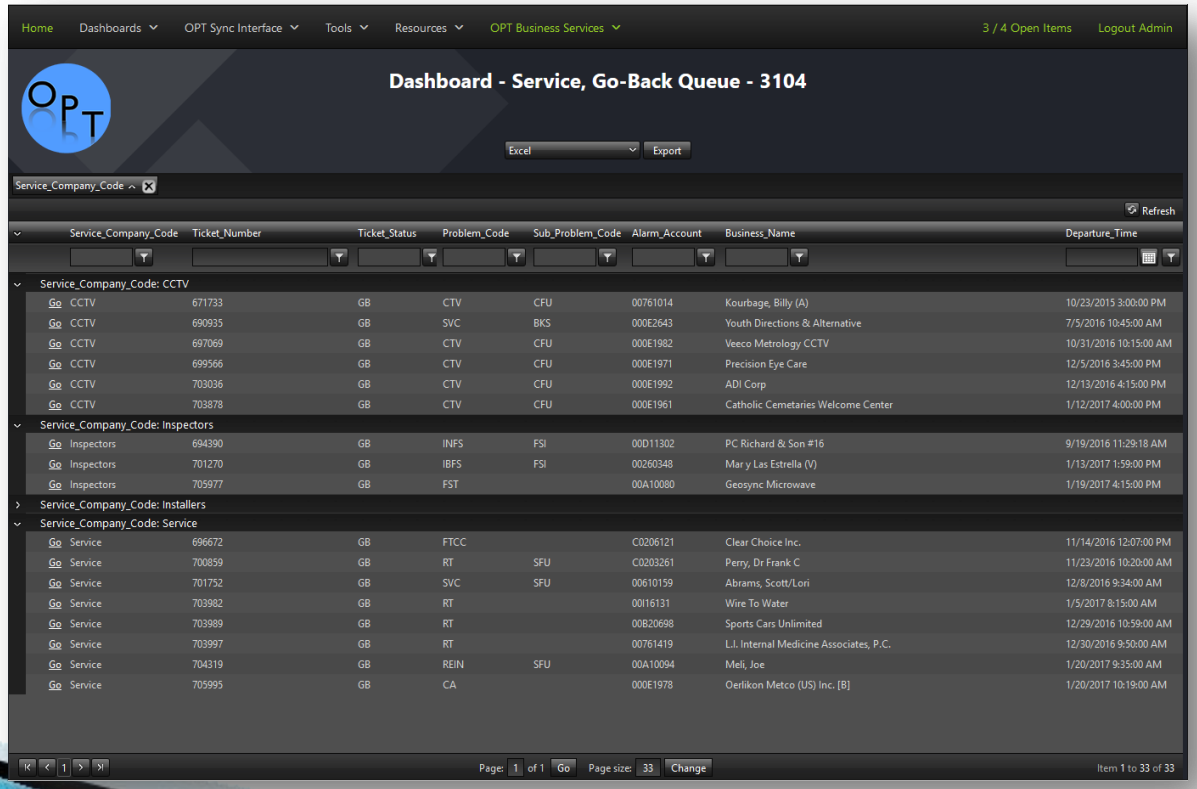
OPT Web Services – Main Menu

- OPT Web Services allows you to connect & access your OPT dashboards and reports from within SedonaOffice.
- Once installed and enabled you will be able to bring up this and the other OPT menus.
- OPT Web Services is our portal for setup, configuration, and monitoring your SedonaSync events, dashboards and other OPT products and services, as well as other OPT Functionality.



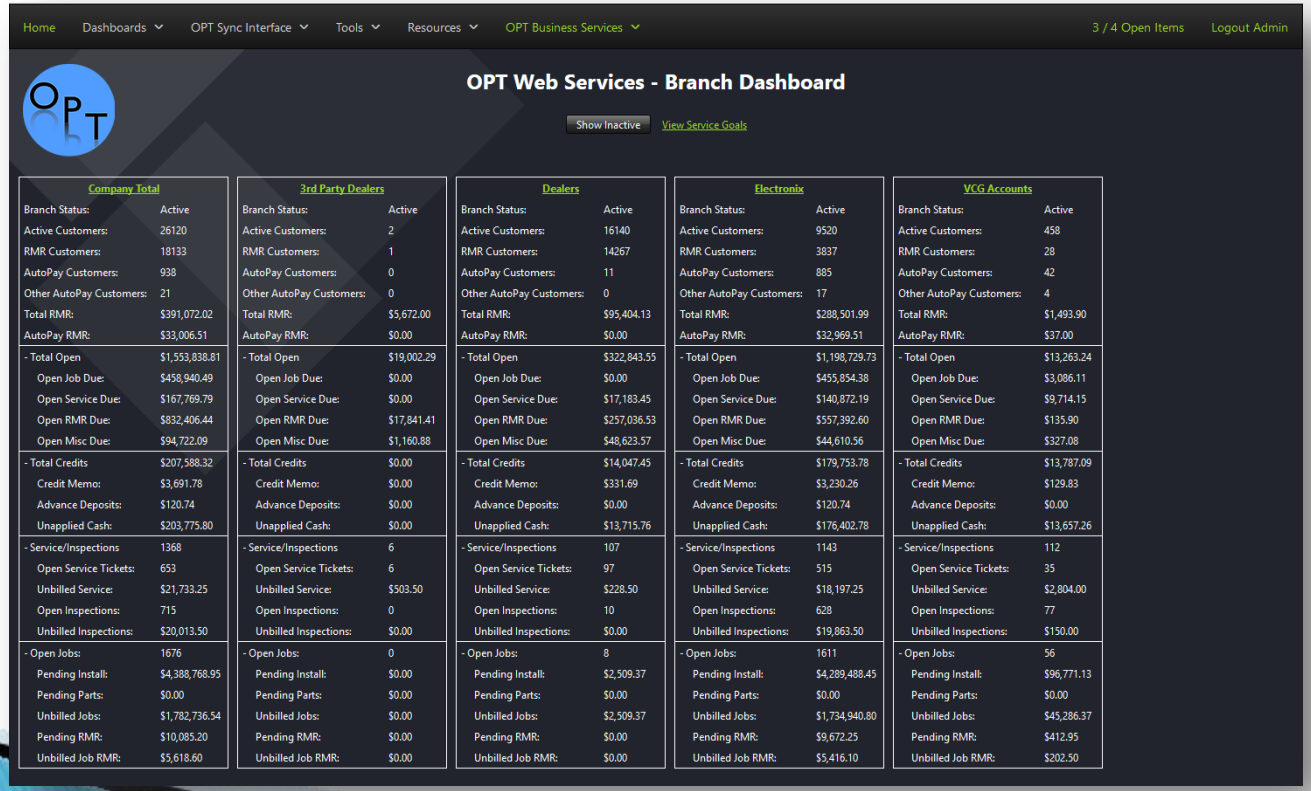
OPT Web Services - Dashboard Portal

- OPT Web Services will allow you to have a one central location to deploy internal resources such as OPT dashboards, reports, and exported lists.
- We have created a universal dashboard module that will display the data from any OPT SedonaSync event while allowing you to group, sort, filter, and export this data to several different formats.



OPT Web Services – Branch Page

- The Branch Dashboard is a great place to get a high level overview of your company's performance.
- Key Performance Indicators include: Customer Count, RMR, Autopay, Open Invoicing, Service/Installation Unbilled and Counts.



Company Total	
Branch Status:	Active
Active Customers:	26120
RMR Customers:	18133
AutoPay Customers:	938
Other AutoPay Customers:	21
Total RMR:	$391,072.02
AutoPay RMR:	$33,006.51
- Total Open	$1,553,838.81
Open Job Due:	$458,940.49
Open Service Due:	$167,769.79
Open RMR Due:	$832,406.44
Open Misc Due:	$94,722.09
- Total Credits	$207,588.32
Credit Memo:	$3,691.78
Advance Deposits:	$120.74
Unapplied Cash:	$203,775.80
- Service/Inspections	1368
Open Service Tickets:	653
Unbilled Service:	$21,733.25
Open Inspections:	715
Unbilled Inspections:	$20,013.50
- Open Jobs:	1676
Pending Install:	$4,388,768.95
Pending Parts:	$0.00
Unbilled Jobs:	$1,782,736.54
Pending RMR:	$10,085.20
Unbilled Job RMR:	$5,618.60

3rd Party Dealers	
Branch Status:	Active
Active Customers:	2
RMR Customers:	1
AutoPay Customers:	0
Other AutoPay Customers:	0
Total RMR:	$5,672.00
AutoPay RMR:	$0.00
- Total Open	$19,002.29
Open Job Due:	$0.00
Open Service Due:	$0.00
Open RMR Due:	$17,841.41
Open Misc Due:	$1,160.88
- Total Credits	$0.00
Credit Memo:	$0.00
Advance Deposits:	$0.00
Unapplied Cash:	$0.00
- Service/Inspections	6
Open Service Tickets:	6
Unbilled Service:	$503.50
Open Inspections:	0
Unbilled Inspections:	$0.00
- Open Jobs:	0
Pending Install:	$0.00
Pending Parts:	$0.00
Unbilled Jobs:	$0.00
Pending RMR:	$0.00
Unbilled Job RMR:	$0.00

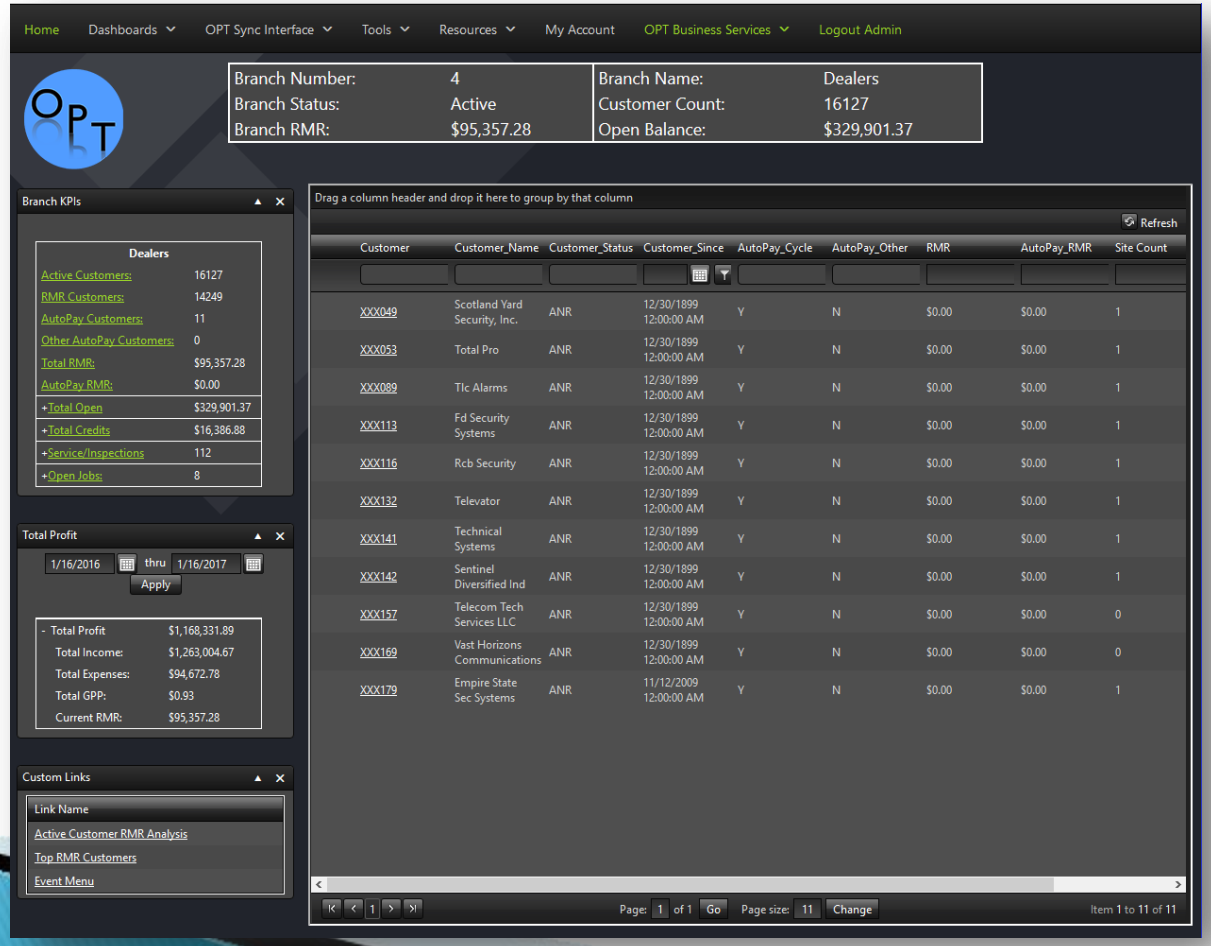
Dealers	
Branch Status:	Active
Active Customers:	16140
RMR Customers:	14267
AutoPay Customers:	11
Other AutoPay Customers:	0
Total RMR:	$95,404.13
AutoPay RMR:	$0.00
- Total Open	$322,843.55
Open Job Due:	$0.00
Open Service Due:	$17,183.45
Open RMR Due:	$257,036.53
Open Misc Due:	$48,623.57
- Total Credits	$14,047.45
Credit Memo:	$331.69
Advance Deposits:	$0.00
Unapplied Cash:	$13,715.76
- Service/Inspections	107
Open Service Tickets:	97
Unbilled Service:	$228.50
Open Inspections:	10
Unbilled Inspections:	$0.00
- Open Jobs:	8
Pending Install:	$2,509.37
Pending Parts:	$0.00
Unbilled Jobs:	$2,509.37
Pending RMR:	$0.00
Unbilled Job RMR:	$0.00

Electronix	
Branch Status:	Active
Active Customers:	9520
RMR Customers:	3837
AutoPay Customers:	885
Other AutoPay Customers:	17
Total RMR:	$288,501.99
AutoPay RMR:	$32,969.51
- Total Open	$1,198,729.73
Open Job Due:	$455,854.38
Open Service Due:	$140,872.19
Open RMR Due:	$557,392.60
Open Misc Due:	$44,610.56
- Total Credits	$179,753.78
Credit Memo:	$3,230.26
Advance Deposits:	$120.74
Unapplied Cash:	$176,402.78
- Service/Inspections	1143
Open Service Tickets:	515
Unbilled Service:	$18,197.25
Open Inspections:	628
Unbilled Inspections:	$19,863.50
- Open Jobs:	1611
Pending Install:	$4,289,488.45
Pending Parts:	$0.00
Unbilled Jobs:	$1,734,940.80
Pending RMR:	$9,672.25
Unbilled Job RMR:	$5,416.10

VCG Accounts	
Branch Status:	Active
Active Customers:	458
RMR Customers:	28
AutoPay Customers:	42
Other AutoPay Customers:	4
Total RMR:	$1,493.90
AutoPay RMR:	$37.00
- Total Open	$13,263.24
Open Job Due:	$3,086.11
Open Service Due:	$9,714.15
Open RMR Due:	$135.90
Open Misc Due:	$327.08
- Total Credits	$13,787.09
Credit Memo:	$129.83
Advance Deposits:	$0.00
Unapplied Cash:	$13,657.26
- Service/Inspections	112
Open Service Tickets:	35
Unbilled Service:	$2,804.00
Open Inspections:	77
Unbilled Inspections:	$150.00
- Open Jobs:	56
Pending Install:	$96,771.13
Pending Parts:	$0.00
Unbilled Jobs:	$45,286.37
Pending RMR:	$412.95
Unbilled Job RMR:	$202.50

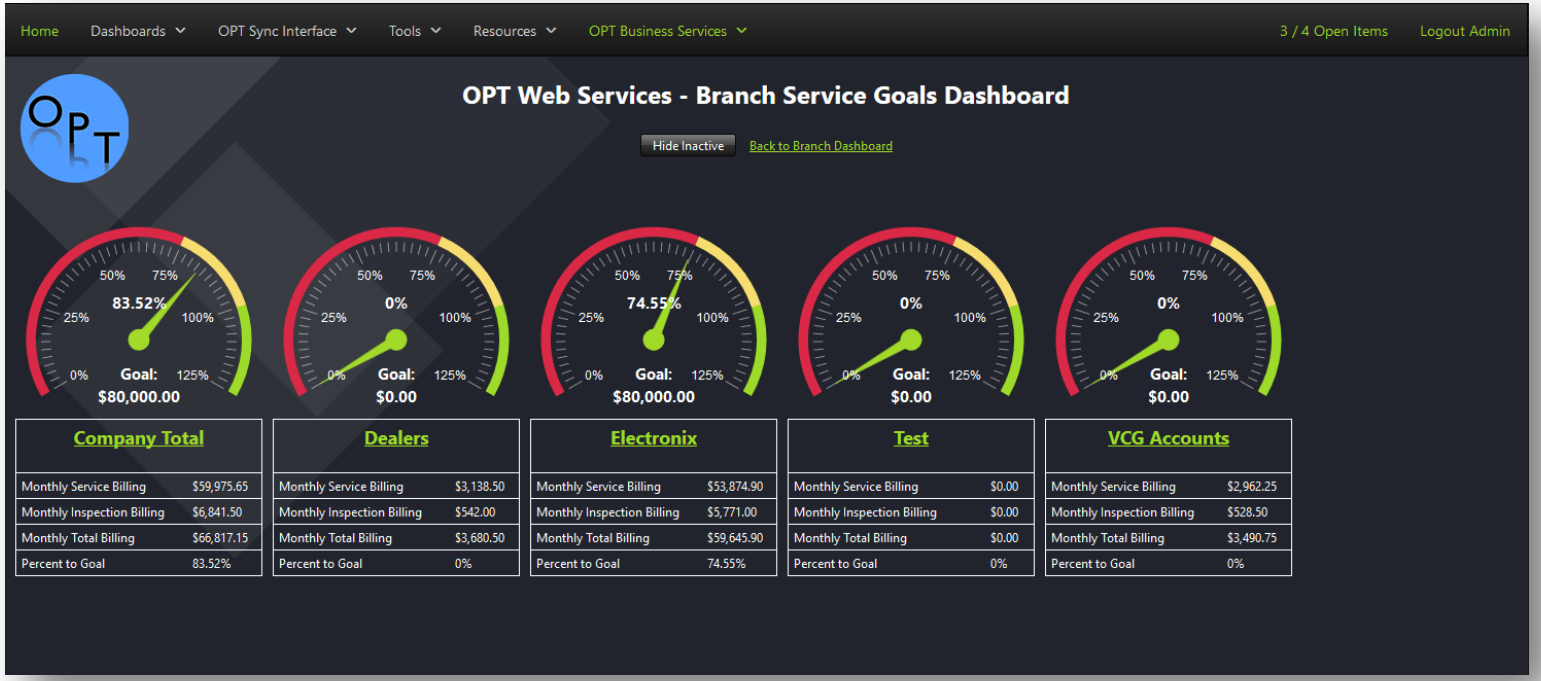
OPT Web Services – Branch Page

- Drill Down allows you to see the details that contribute to the key performance indicators for each branch.



OPT Web Services – Service Goals

- Set a Monthly Service/Inspection Billing Goals
- Monitor Your Daily Progress Towards Those Goals



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

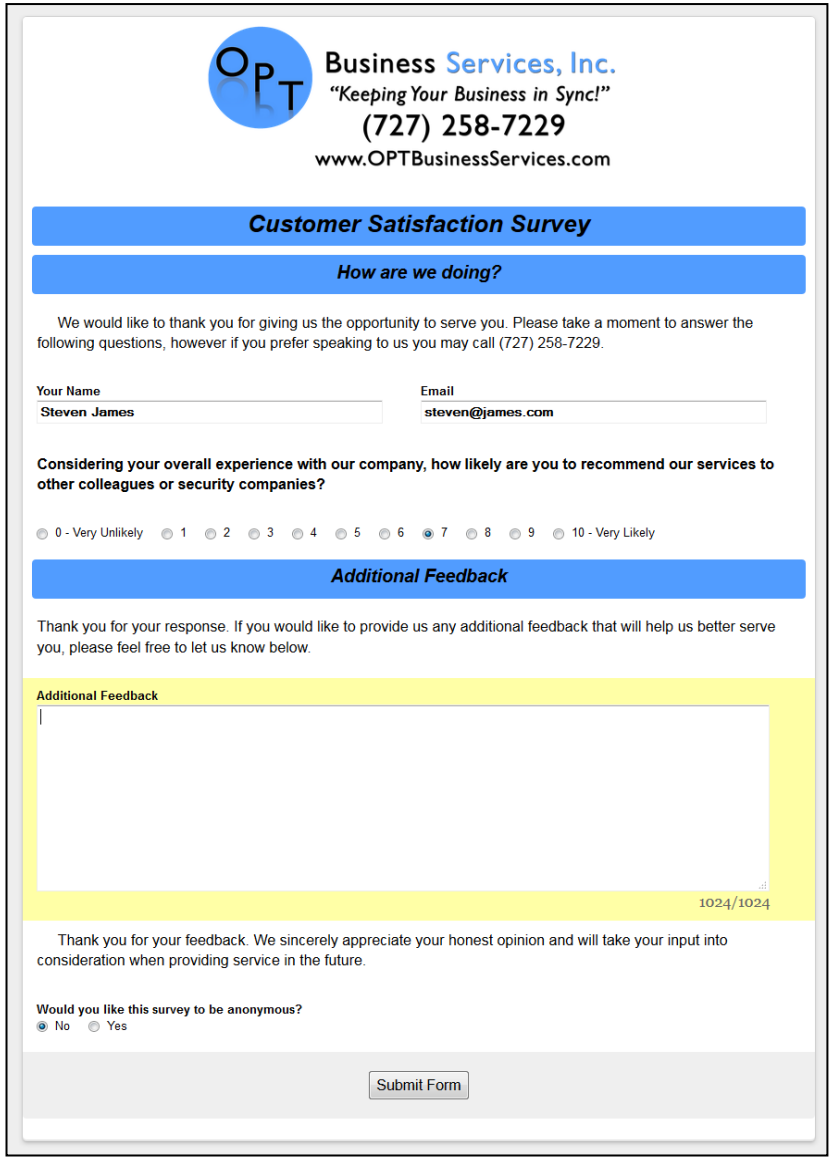
Service@AnyCompany.com

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.



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

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

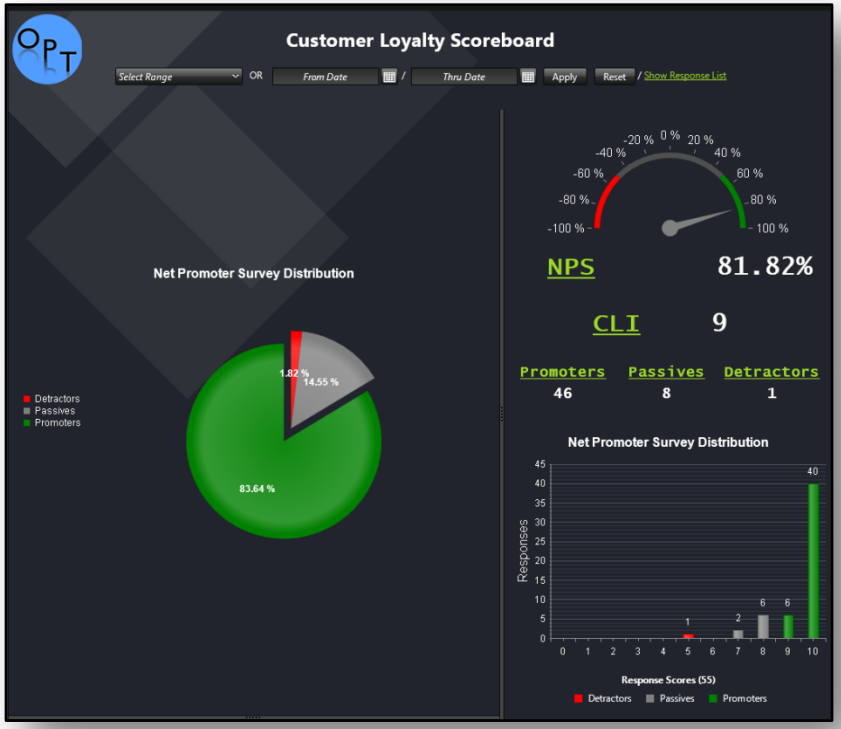
Thank you for your feedback. We sincerely appreciate your honest opinion and will take your input into consideration when providing service in the future.

Would you like this survey to be anonymous?
(No) Yes

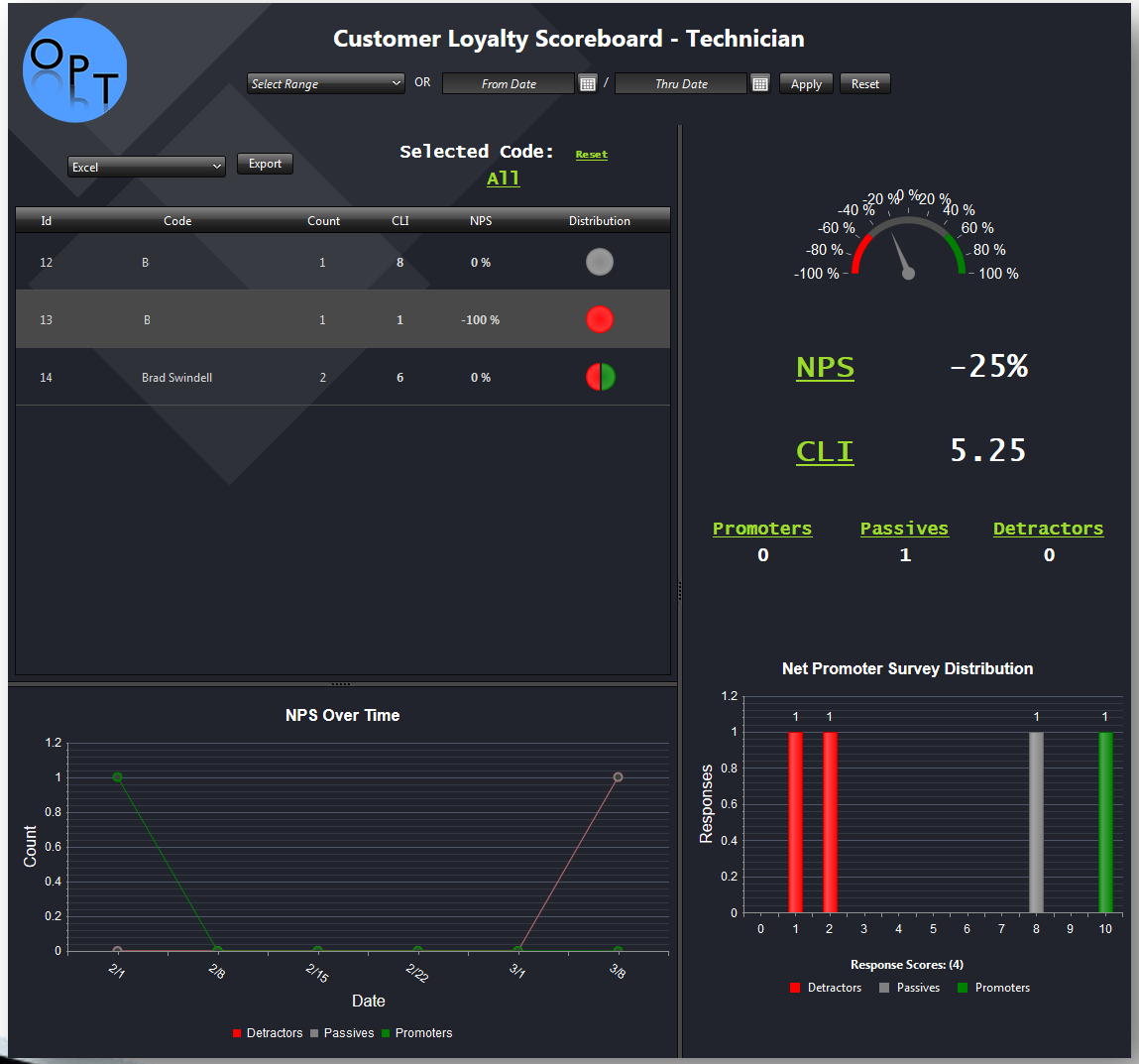
Submit Form

OPT Web Services – Data API

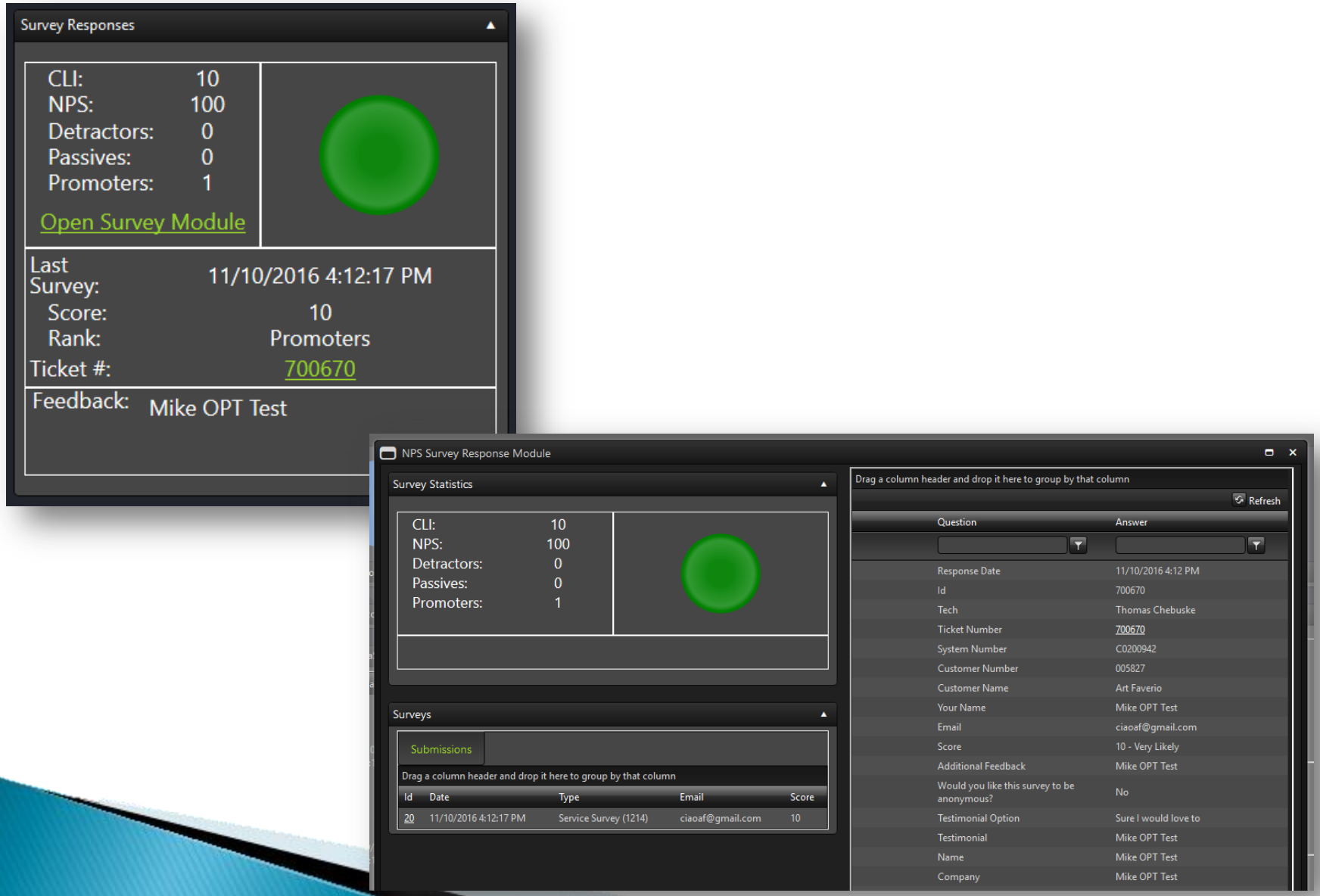
- OPT Web Services API allows us to create a survey module to monitor, rank and analyze your survey submissions.
- Using the OPT Web Services API, we are able to collect information from our survey provider and write this data back into SedonaOffice.



OPT Web Services – Survey Module

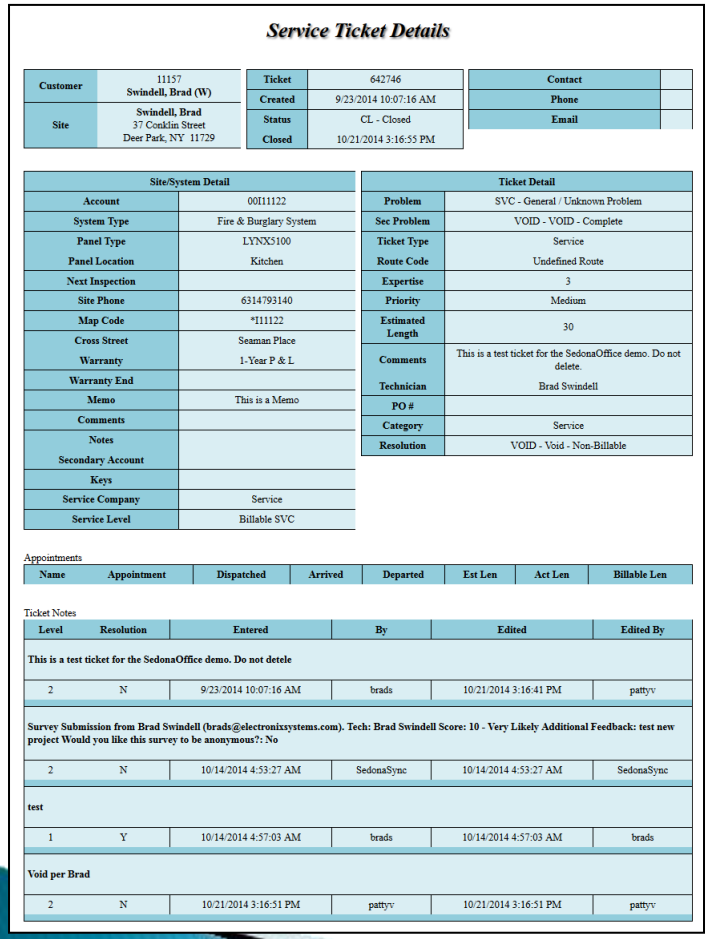


OPT Web Services – Survey Module



OPT Web Services – Data API

- Using the OPT Web Services API, we are able to collect information from our survey provider and bring this data back into SedonaOffice.



Service Ticket Details

Customer	11157 Swindell, Brad (W)	Ticket	642746	Contact	
Site	Swindell, Brad 37 Conklin Street Deer Park, NY 11729	Created	9/23/2014 10:07:16 AM	Phone	
		Status	CL - Closed	Email	
		Closed	10/21/2014 3:16:55 PM		

Site/System Detail	
Account	00I11122
System Type	Fire & Burglary System
Panel Type	LYNX5100
Panel Location	Kitchen
Next Inspection	
Site Phone	6314793140
Map Code	*111122
Cross Street	Seaman Place
Warranty	1-Year P & L
Warranty End	
Memo	This is a Memo
Comments	
Notes	
Secondary Account	
Keys	
Service Company	Service
Service Level	Billable SVC

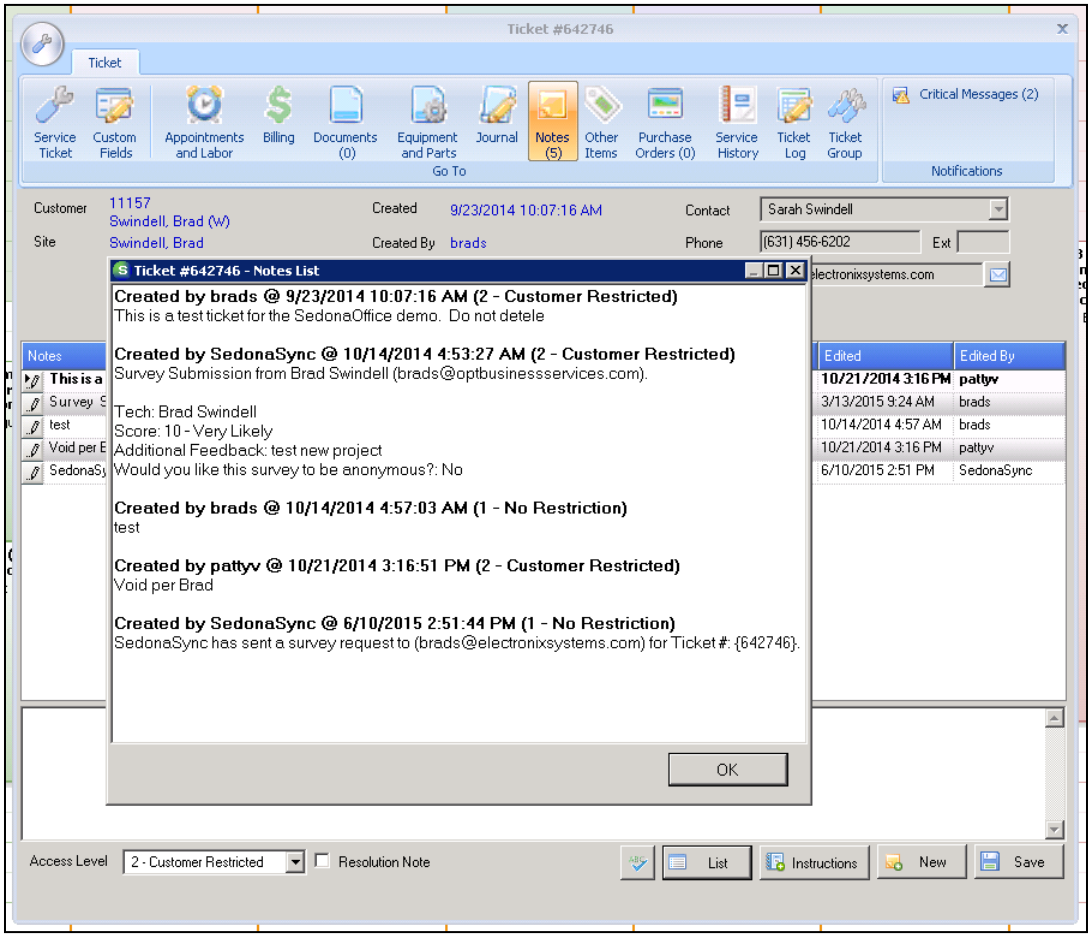
Ticket Detail	
Problem	SVC - General / Unknown Problem
Sec Problem	VOID - VOID - Complete
Ticket Type	Service
Route Code	Undefined Route
Expertise	3
Priority	Medium
Estimated Length	30
Comments	This is a test ticket for the SedonaOffice demo. Do not delete.
Technician	Brad Swindell
PO #	
Category	Service
Resolution	VOID - Void - Non-Billable

Appointments

Name	Appointment	Dispatched	Arrived	Departed	Est Len	Act Len	Billable Len

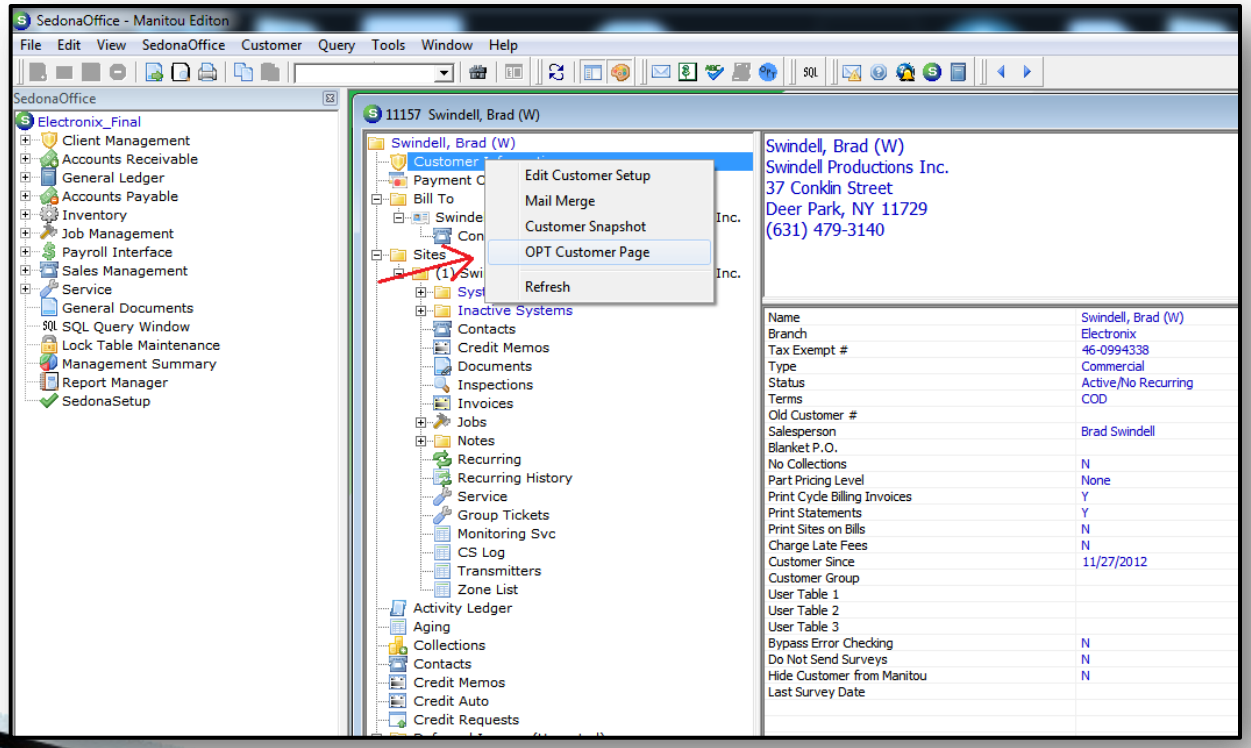
Ticket Notes

Level	Resolution	Entered	By	Edited	Edited By
This is a test ticket for the SedonaOffice demo. Do not detele					
2	N	9/23/2014 10:07:16 AM	brads	10/21/2014 3:16:41 PM	pattyv
Survey Submission from Brad Swindell (brads@electronixsystems.com). Tech: Brad Swindell Score: 10 - Very Likely Additional Feedback: test new project Would you like this survey to be anonymous?: No					
2	N	10/14/2014 4:53:27 AM	SedonaSync	10/14/2014 4:53:27 AM	SedonaSync
test					
1	Y	10/14/2014 4:57:03 AM	brads	10/14/2014 4:57:03 AM	brads
Void per Brad					
2	N	10/21/2014 3:16:51 PM	pattyv	10/21/2014 3:16:51 PM	pattyv



OPT Web Services – Customer Link

- OPT Web Services allows you to launch the portal from different locations within SedonaOffice.
- The customer landing page allows you easy access to display key information about your customer.



OPT Web Services – Customer Page

- Customer Landing Page features include:

Open Invoice Analysis

Customer Level P/L Analysis

Survey Responses

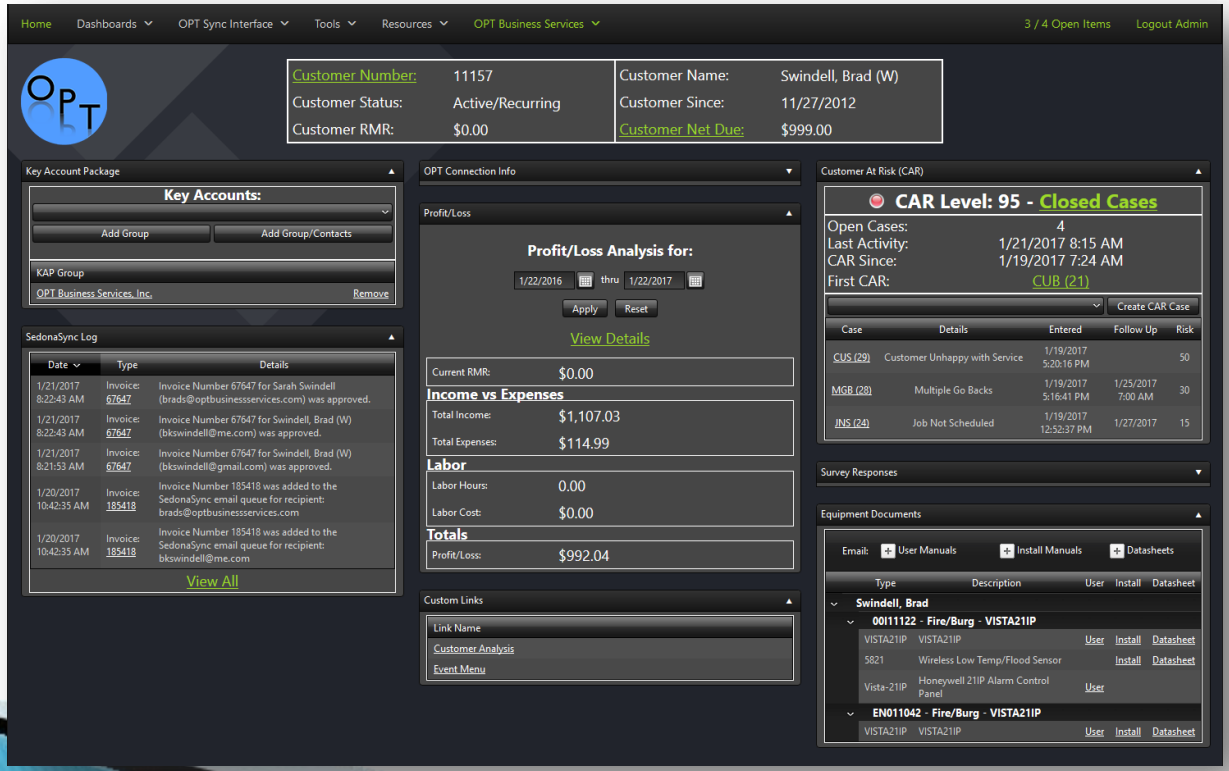
Key Account Group Subscriptions

Access to Custom Reports and Links

Equipment Documents

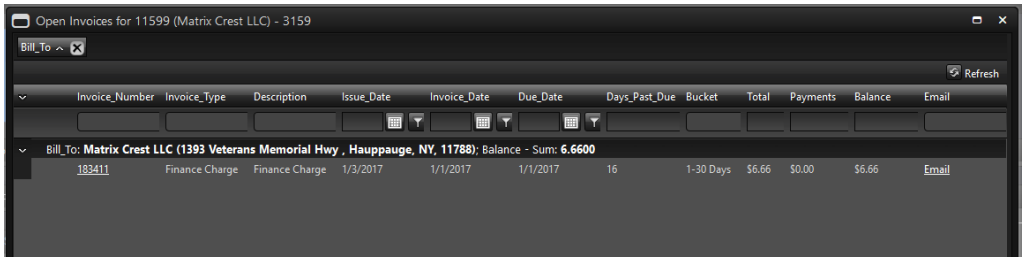
OPT and SedonaSync Activity Log

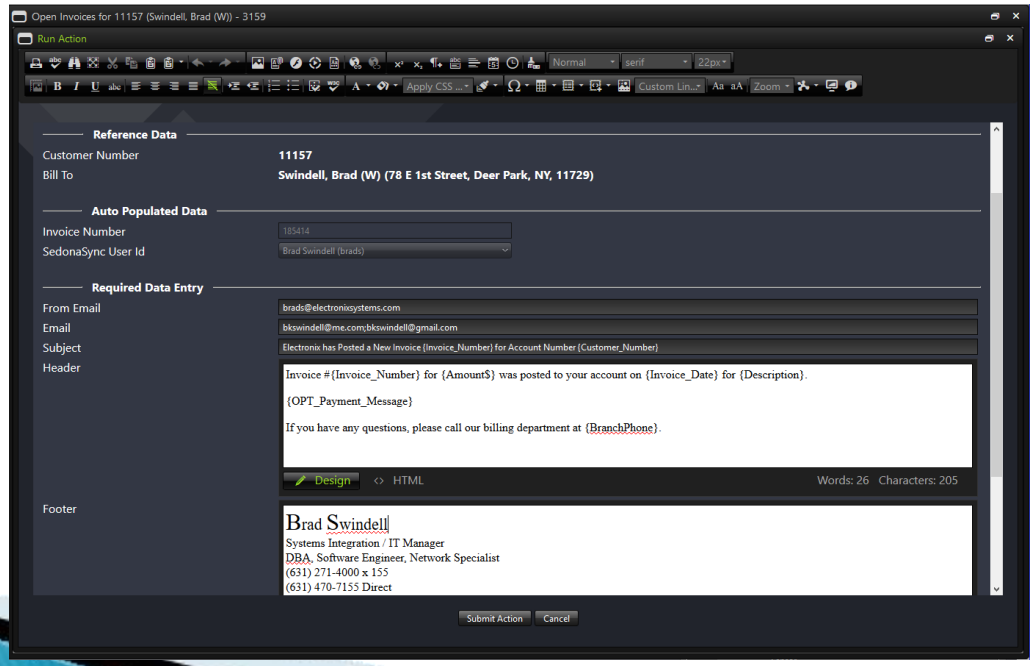
Our Brand New Customer at Risk Module



OPT Web Services – Customer Page

Customer Number:	11157	Customer Name:	Swindell, Brad (W)
Customer Status:	Active/Recurring	Customer Since:	11/27/2012
Customer RMR:	$0.00	Customer Net Due:	$999.00





OPT Web Services – Customer Page

Customer Number:	11157	Customer Name:	Swindell, Brad (W)
Customer Status:	Active/Recurring	Customer Since:	11/27/2012
Customer RMR:	$0.00	Customer Net Due:	$999.00

Survey Responses

CLI:	10
NPS:	100
Detractors:	0
Passives:	0
Promoters:	1

Open Survey Module

Last Survey:	11/10/2016 4:12:17 PM
Score:	10
Rank:	Promoters
Ticket #:	700670
Feedback:	Mike OPT Test

Key Account Package

Key Accounts:

Add Group | Add Group/Contacts

KAP Group	
OPT Business Services, Inc.	Remove

Customer At Risk (CAR)

CAR Level: 95 - Closed Cases

Open Cases:	4
Last Activity:	1/21/2017 8:15 AM
CAR Since:	1/19/2017 7:24 AM
First CAR:	CUB (21)

Create CAR Case

Case	Details	Entered	Follow Up	Risk
CUS (29)	Customer Unhappy with Service	1/19/2017 5:20:16 PM		50
MGB (28)	Multiple Go Backs	1/19/2017 5:16:41 PM	1/25/2017 7:00 AM	30
JNS (24)	Job Not Scheduled	1/19/2017 12:52:37 PM	1/27/2017	15

SedonaSync Log

Date	Type	Details
1/21/2017 8:22:43 AM	Invoice: 67647	Invoice Number 67647 for Sarah Swindell (brads@optbusinessservices.com) was approved.
1/21/2017 8:22:43 AM	Invoice: 67647	Invoice Number 67647 for Swindell, Brad (W) (bkswindell@me.com) was approved.
1/21/2017 8:21:53 AM	Invoice: 67647	Invoice Number 67647 for Swindell, Brad (W) (bkswindell@gmail.com) was approved.
1/20/2017 10:42:35 AM	Invoice: 185418	Invoice Number 185418 was added to the SedonaSync email queue for recipient: brads@optbusinessservices.com
1/20/2017 10:42:35 AM	Invoice: 185418	Invoice Number 185418 was added to the SedonaSync email queue for recipient: bkswindell@me.com

View All

Custom Links

Link Name
Customer Analysis
Event Menu

Equipment Documents

Email: User Manuals | Install Manuals | Datasheets

Type	Description	User	Install	Datasheet
Swindell, Brad				
00I11122 - Fire/Burg - VISTA21IP				
VISTA21IP	VISTA21IP	User	Install	Datasheet
5821	Wireless Low Temp/Flood Sensor		Install	Datasheet
Vista-21IP	Honeywell 21IP Alarm Control Panel	User		
EN011042 - Fire/Burg - VISTA21IP				
VISTA21IP	VISTA21IP	User	Install	Datasheet

Profit/Loss

Profit/Loss Analysis for:

1/22/2016 thru 1/22/2017

Apply | Reset

View Details

Current RMR:	$0.00
Income vs Expenses	
Total Income:	$1,107.03
Total Expenses:	$114.99
Labor	
Labor Hours:	0.00
Labor Cost:	$0.00
Totals	
Profit/Loss:	$992.04

RMR Details

Current RMR: $138.83

RMR Type	RMR	RAR
Other Recurring	$34.95	$419.40
Monitoring	$37.00	$444.00
Service Agreements	$35.00	$420.00
Inspections	$31.88	$382.56
Totals:	**$138.83**	**$1,665.96**

Income vs Expenses

Total Income: $21,009.63

Total Expenses: $13,619.45

Account | Category | Expense | Item Type | Segment

Account Code	Account	Account Type	Income	Expense	Balance
40400	Income - Late Fees	Income	$0.00	$0.00	$0.00
41010	Income - Monitoring	Income	$791.45	$0.00	$791.45
41014	Income - Inspection Contracts	Income	$350.68	$0.00	$350.68
41040	Income - Service Equip/Materials	Income	$800.00	$0.00	$800.00
41041	Income - Service Labor	Income	$1,759.25	$0.00	$1,759.25
41042	Income - Service Agreements	Income	$385.00	$0.00	$385.00
41051	Income - CCTV Labor	Income	$227.00	$0.00	$227.00
41053	Income - CCTV Installation	Income	$6,890.00	$0.00	$6,890.00
41060	Income - Installations	Income	$3,885.00	$0.00	$3,885.00
41062	Income - Approved Fire Installation	Income	$1,600.00	$0.00	$1,600.00
41063	Income - Installation Labor	Income	$4,321.25	$0.00	$4,321.25
50000	COS - Materials	Cost of Goods Sold	$0.00	$4,702.55	($4,702.55)
50010	COS - Labor (Payroll Suspense)	Cost of Goods Sold	$0.00	$8,948.90	($8,948.90)
69999	Purchase Price Variance"	Expense	$0.00	($32.00)	$32.00
Totals:			**$21,009.63**	**$13,619.45**	**$7,390.18**

Labor

Labor Hours: 151.30

Labor Cost: $8,948.90

Type	Hours	Cost
Inspection	0.77	$53.66
Service	26.52	$1,884.08
Job	124.02	$7,011.16
Totals:	**151.31**	**$8,948.90**

Totals

Profit/Loss: $7,390.18

Open in Flex — Take a deeper dive and gain valuable insights using Vivid Flex. Please contact Astute Financial or OPT Business Services for more information.

Account | Category | Expense | Item Type | **Segment**

Segment	Income	Expense	Balance
Customer	$1,174.95	$0.00	$1,174.95
Finance Charges	$127.18	$0.00	$127.18
Inspection	$0.00	$53.66	($53.66)
Job	$17,148.25	$11,257.28	$5,890.97
Service	$2,559.25	$2,308.51	$250.74
Totals:	**$21,009.63**	**$13,619.45**	**$7,390.18**

Account | Category | Expense | **Item Type** | Segment

Item Type	Income	Expense	Balance
Inspections (R)	$350.68	$0.00	$350.68
Inventory Part	$1,070.00	$0.00	$1,070.00
Labor	$6,927.75	$0.00	$6,927.75
Monitoring (R)	$407.00	$0.00	$407.00
Non-Recurring	$15,523.43	$0.00	$15,523.43
Other	($4,038.68)	$13,619.45	($17,658.13)
Other Recurring (R)	$384.45	$0.00	$384.45
Service Agreements (R)	$385.00	$0.00	$385.00
Totals:	**$21,009.63**	**$13,619.45**	**$7,390.18**

Account | **Category** | Expense | Item Type | Segment

Category	Income	Expense	Balance
CCTV	$7,117.00	$5,451.59	$1,665.41
Cycle Billing	$791.45	$0.00	$791.45
G & A	$0.00	$0.00	$0.00
Inspections	$350.68	$53.66	$297.02
Installation	$9,806.25	$6,254.85	$3,551.40
Service	$2,944.25	$1,859.35	$1,084.90
Totals:	**$21,009.63**	**$13,619.45**	**$7,390.18**

Account | Category | **Expense** | Item Type | Segment

Expense Type	Income	Expense	Balance
Labor	$0.00	$8,948.90	($8,948.90)
Material	$15,396.25	$4,702.55	$10,693.70
Other	$5,613.38	($32.00)	$5,645.38
Totals:	**$21,009.63**	**$13,619.45**	**$7,390.18**

OPT Web Services – My Dashboard

- My Open Items Dashboard features include:

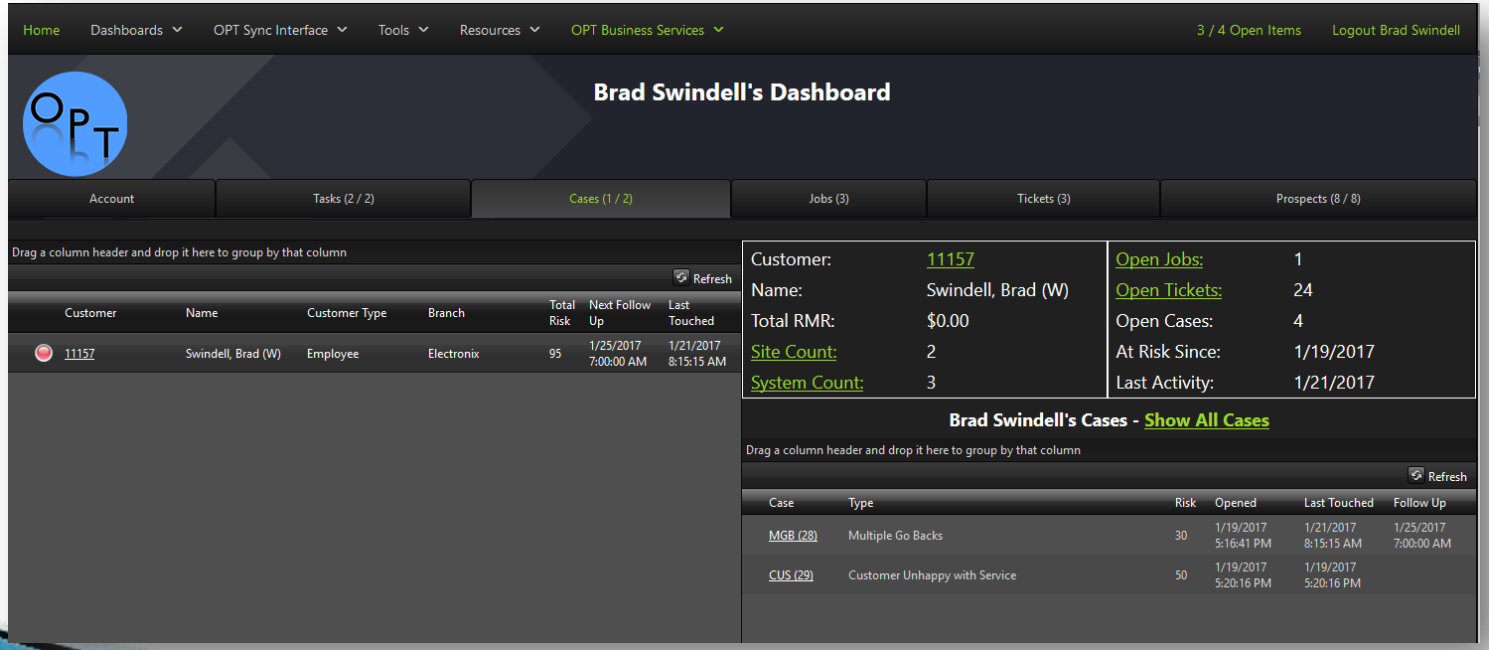
  My Open Tasks

  Jobs where I am the Project Manager or Salesperson.

  Service Tickets where I am the Service Coordinator or Last Service Tech.

  My Open Assigned Cases

  My Open Prospects



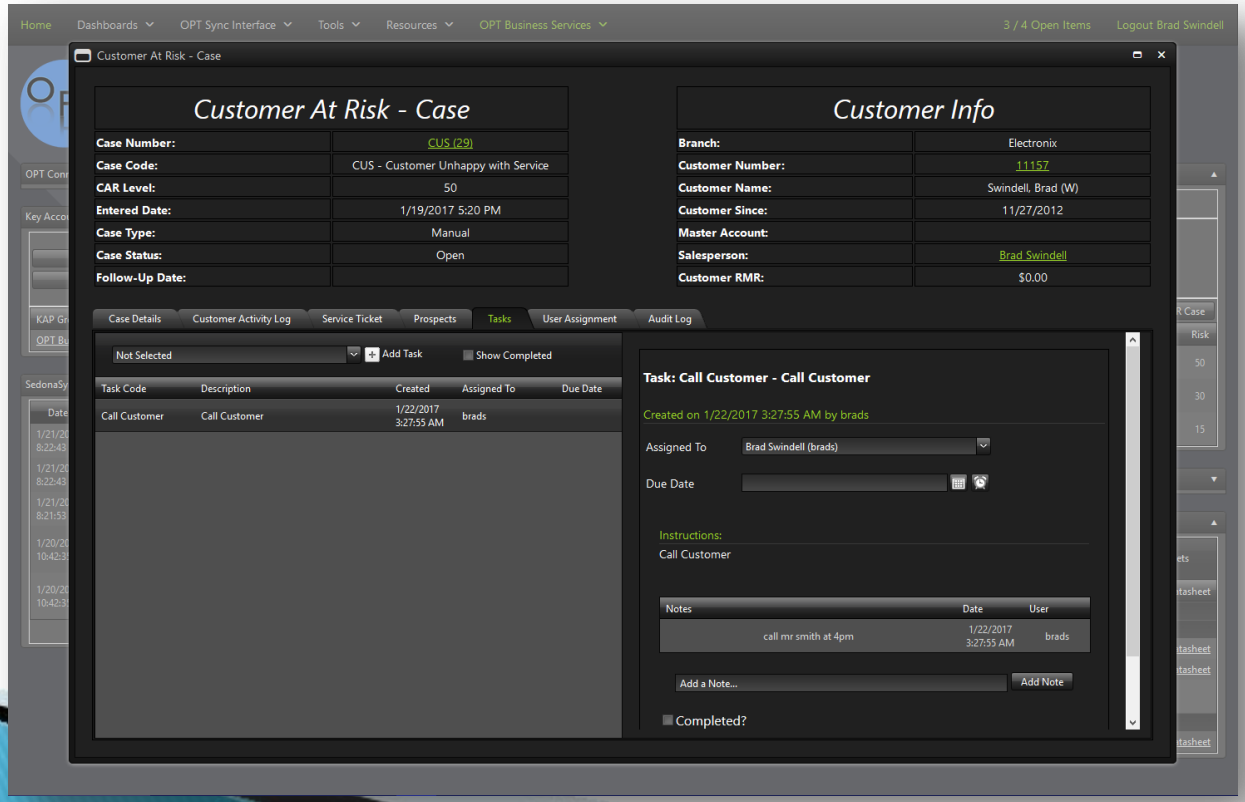
OPT Web Services – CAR Case

- The Customer At Risk Case features include:

  Change Risk Level Assign a Follow Up Date Add Case Notes and Push them to SedonaOffice.

  View Audit Log Create/Link Service Tickets Create/Link Prospects View Customer Activity Log

  Assign Users Setup Notifications Create, Assign, Notate, and Complete Tasks attached to the case.



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 cr
CC About to Expire Report	Internal list of expiring credit cards, with ema
VIP Added to Collections	Internal list of VIP customers added to a colle
VIP Added to Cancellation Queue	Internal list of VIP customers added to the car
Large Customer added to Collections	Internal list of customers with more than $x.x
Large Customer added to Cancellation Queue	Internal list of customers with more then $x.x
Past Due Service Ticket Alert	Alert to AR when service ticket is created/sch
RMR Dropped below Threshold	Internal list of customers whose RMR has drop
New Invoice Posted with Details	Email to customers when invoice is created, i
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
Service Tickets Arrived but not Departed	Internal list of service tickets arrived but not d
Service Tickets Related To Radios	Internal list of service tickets relating to radio
Service Tickets Related To Install Issues	Internal list of service tickets relating to instal
Panels that Need to be Unlocked	Internal list of service tickets where the panel
Reminder of Service Call	Email to customer reminding them of future s
Dispatched Tech	Email to customer notifying that tech is in rou
Dispatched Tech With Photo	Email to customer notifying that tech is in rou
Tomorrow's Service Tickets	Internal list of tomorrows 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 resolve
Service Ticket Follow-up Report	Internal list of service tickets needing a Go Ba
Service Call Survey	Email to customer a satisfaction survey link to
Inactive Part Was Used	Internal list of service tickets where an inactiv
Part Discounted Beyond Threshold	Internal list of service tickets where a part wa
Service Tickets Ready to be Closed	Internal list of service tickets that have been a
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 ser
SedonaWeb Service Tickets Report	Internal list of service tickets generated via Se
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
Dispatched Tech With Photo (Key)	Email to Key Account Manager notifying that t
Daily Open Service Ticket Snapshot (Key)	Email to Key Account Manager with list of curr
Service Tickets Created (Key)	Email to Key Account Manager with list of new
Service Tickets Resolved (Key)	Email to Key Account Manager with list of reso
Service Tickets Scheduled (Key)	Email to Key Account Manager with list of sche
Technician Stop Summary	Internal list of tech's start/stop/travel and job
Customers having x Tickets in y Days.	Internal list of Customers with having multipl
Auto Email Service Details to Tech (Requested)	Email to technician of new service call when r
Service Tickets Onsite Longer then x Min.	Email to technician when they are on site long
Closed Service Tickets by Resolution Code	Internal list of service tickets closed for billing
Service Ticket Scheduled	Email to customer when new service ticket is
Service Ticket Snapshot by Service Level	Internal list of open service ticket count by se

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 fo
Workstations Needing Approval	Report, listing of all workstations needing app
New Workstations Added	Report, listing of added workstations.
UL Access Audit Report	Report for UL showing who has access to hand
Dealer Add/Delete Report Summary	Report, listing dealers add and deletion totals
Dealer Add/Delete Report Details	Report, listing dealers adds and deletions for
Dealers Missing Emails	Report, listing dealers without email address
Reactivated Customers by Dealer	Report, listing customers that are being react

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 notating 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 ye
Dashboard - Sales, Total Sales	Dashboard showing the total sales (Jobs Sold) for this month, l salesmen and breaking out RMR.
Dashboard - Service, GoBack Queue	Dynamic Dashboards showing all the tickets in the GoBack Que
Dashboard - Service, Onsite Tickets	Dynamic Dashboards showing all the tickets that where a techn
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 configu Additional dashboards may be added for additional days for $2
Dashboard - Service, Unbilled Tickets	Dynamic Dashboards showing the list of service tickets for that 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

Manitou Actions	Description
Raise Threat Level	Action, Raise threat level by X if X incidents are received within
Lower Threat Level	Action, Lower threat level by X if no incidents received within
Restore Threat Level	Action, Set threat level to X if receive X _____ alarms received
Access Trouble Notification	Create, "Access Trouble" signal, If X bad reads received in X mi
Alarm Verified Notification	Create, "Alarm Verified" if receive alarms on more then 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 Preformed	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 a
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
Installation Complete	Email to customer upon competition 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 Use
Create COD Critical Messages	Action, Creates a Critical Message on accounts when account is
Copy Critical Messages to Ticket Notes	Action, Copies System Critical Message to Service Ticket Notes users to see the Critical Messages. Also used in email to techn
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 System for quick reference and GoBack events.
New SedonaWeb Force Pending	Action, when new SedonaWeb user is added, place user as ina
Service Tickets Generated via SedonaWeb	Action, Changes Problem Codes on tickets generated via Sedo
Update Service Ticket Data	Action, Changes service ticket data based on existing service ti

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 Alerter	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 technications 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 salesman 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 ___@_____.___ 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

Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

SedonaSync

SedonaOffice®
The #1 Financial Software for Security Companies

Bold Technologies

QuoteWerks

WeSuite
growing business strong

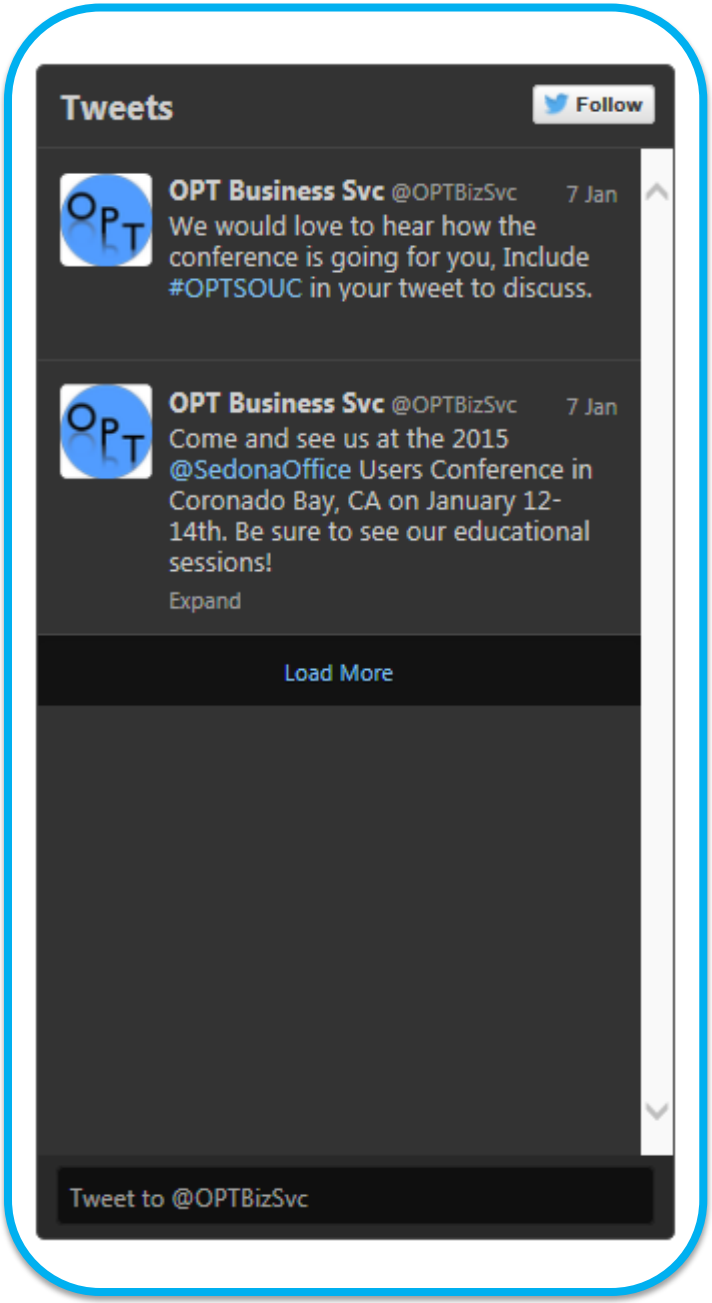
We are honored to be working with:

- Washington Alarm
- Scarsdale Security Systems
- Sonitrol Verified Electronic Security
- Advantech Security • Fire • Access • Video Incorporated
- Signal Service — Family owned and operated since 1976 — Get Connected - Stay Protected
- Doyle Security for your life.™
- Connexion2 Lone Worker Security • The Safest Option
- Johns Brothers Security™
- Guardian Security Life and Property Protection
- Amherst Alarm, Inc. Watching Out For WNY Since 1984
- Alarms Unlimited Professional Security Solutions
- Vision
- Dynamark Security Centers "We Protect America"
- Alarm Engineering
- Acadiana Security Plus, Inc. 839-1880
- Warning Protected by World Wide Security Systems
- ISS Integrated Security Systems
- Kings III Emergency Communications
- Electronic Systems Central Station Alarms, Inc.
- Security One "The One For Security" 1 State License B-3182 (210) 341-8900
- Safeguard
- Integrated Security Solutions
- Per Mar
- Select Security
- JM Your Resource For The Future
- Security Central
- Wilsons Security
- FMC Fire Monitoring of Canada Inc.
- ADS
- Since 1910 New York Merchants Protective Company

Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

Follow @OPTBizSvc