

www.OPTBusinessServices.com

### IMPROVING

### OPERATIONAL EFFICIENCY, CUSTOMER RELATIONS, & OVERALL PROFITABILITY

## THROUGH THE USE OF SedonaSync AND OPT WEB SERVICES



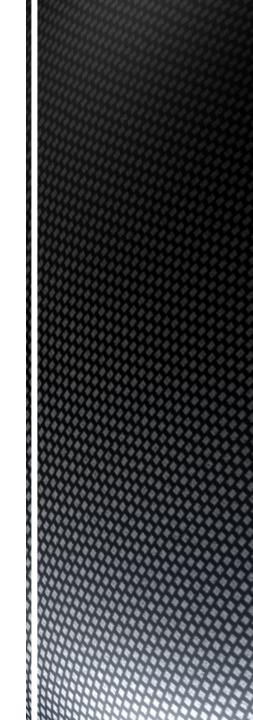


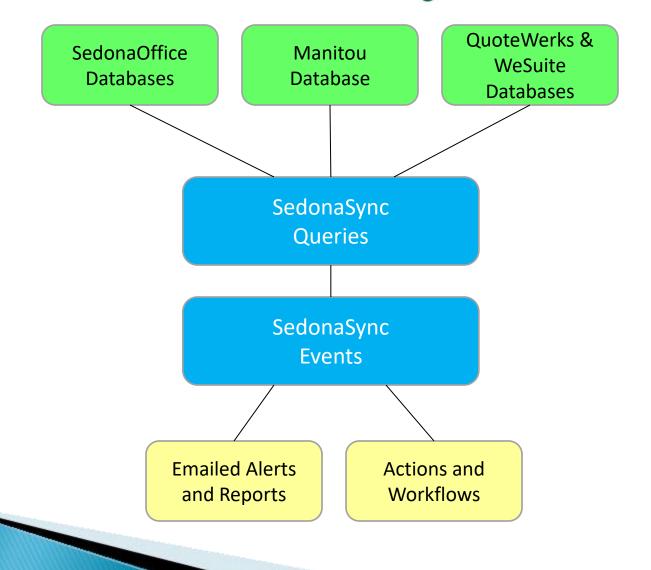


### WHAT IS SedonaSync

### AND

## HOW DOES IT HELP OUR BUSINESS?

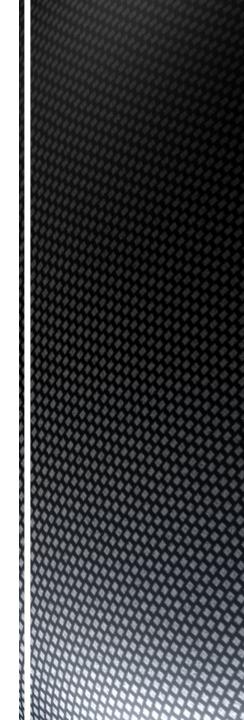






## **Operational Efficiency**

Proud to be Business Partners with VineyardSoft Corporation and Perennial Software



## **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).

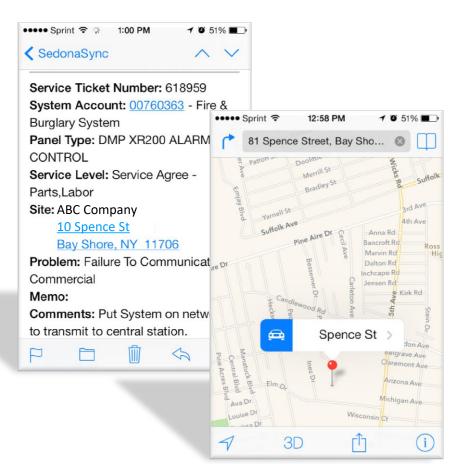
Service Ticket Number: 38924 System Account: 89008717 - Burglary Fire Combination Panel Type: FA168CPS Service Level: T/M \$50 Trip Charge Site: Steinburg, Gary 482 Elmwood Avenue Mechanicsburg, PA 17055 (717) 791-8973 Contact: Dominick (717) 256-5873 <u>gsteinburg@me.com</u> Problem: Low Battery Location: Basement under stairs. Memo: Customer has two big dogs. Comments: Customer had extended power failure due to

### \*\* THIS IS A KEY ACCOUNT \*\*

construction. Power restored but system still shows low battery.

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 @psiholdings.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

Scheduled For: 12/17/2013 10:00:00 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.

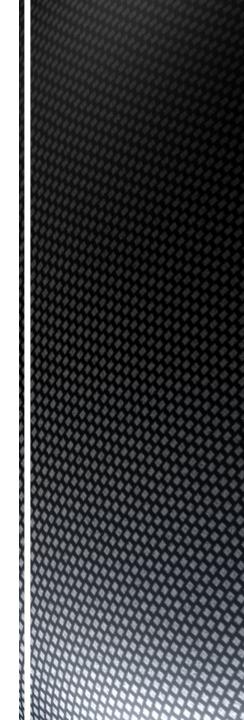
Service Ticket Number: 75862 System Account: 25001264 Placed on test: 10/31/2013 9:46:14 AM Test will expire: 10/31/2013 1:11:59 PM Reason: On-test from BoldNet Mobile Zone: Technician Departed: 10/31/2013 11:29:13 AM Site: Washington Pavillion 486 Main Street Kings Park, NY 11754 (631) 839-4437

> \*\* URGENT SERVICE ALERT -PLEASE READ \*\*



## **Customer Relations**

Proud to be Business Partners with VineyardSoft Corporation and Perennial Software



## **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.

8/15/2014									
I/M Smith 23 Main Street anytown, NY 10001									
ear M/M Smith (smith@me.co	om).								
avoice #98765 for \$198.79 was		on 8/15/2014 for Recu	ring Services.						
This invoice was automatically j			-						
If you have any questions, pleas									
Summary of Current Invoice:									
	Bu	siness Services,	Inc					1	
	$O_{\mathbf{D}}$	a 260 Averys Neth	mc.		nvoi				
		26 285h Avenue North Pelesburg, R. 33713 7) 255-7229		Invoice 98765		044 8/15/2	014		
		(727) 258-7229		Customer 125456		Term Duc on A			
	Te: M/M Smith 125 Main Street 604940, NY 1000		292	Business Services, Inc 5 25th Avenue North Ielesburg, FL 33713					
				k Hore To Pay Online)					
	Customer Name	Customer Number	PO Number	Due Date		Term	•		
	M/M Smith	123456	192837465	8/15/2014		Out on A	ocoipt		
	Description	WM Smith - 125 Main Street, Ar			QN	Table .	Amount		
	Monitoring Soviets 09/0				3.00	20.00	Sec.co		
		M/M Smith - 10 14 Avenue, An	ylawn 20002						
	Monitoring Soviets 09/0 Soviet Agreement Pet (Pa	01/2014 - 11/30/2014 eta & Lebor) 09/01/2014 - 11/	30/2014		3.00	15.00 26.00	\$45.00 \$78.00		
				subsect-			\$165.00		
				Subtobal: Sales Tax:			\$183.00 15.79		
				Cradita Applied:			( 198.79)		
			Invo	ice Salance Due:			\$0.00		
	Dete 5/15/2014	Invoice #	Description Recurring Services	Amoun 5195.7		Galance So.c			
	8/18/2014	96765					~		
			Thank you for www.OPTBus	being a leval evatem incustorvices.com.	el Visitius	•			
-	using the autopay fea	-						-	.N **
Did you ki	now that you can set up Ju	p your credit card or l ast call us at the numbe					other inv	ices as well?	
Sign up or log on to S	Service & Billing Portal	to set up or update you	r payment informat	ion, pay bills, v	iew acco	ount histo	ry, and vi	w/request service t	a tickets.
	Sij	gn up using your custo	mer number: 12345	6 *** Try it to	iay! **	•			
Billing Department									
Business Services, Inc.									
(727) 258-7229 www.OPTBusinessServices.com									
OPT Business Service. Inc.									
926 28th Avenue North it. Petersburg, FL 33713									

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 ( <u>smith@me.com</u> ), Invoice #98765 for \$198.79 was posted to your account on \$/15/20 Post This invoice was automatically paid with your " <u>VISA</u> " of Please See Attached Invoice.	Business Services, Inc. "Keping Your Business in Sync!" (727) 258-7229 www.OPTBusinessServices.com Account Information Customer Name Customer Name Customer Name Customer Name Customer Name Customer Name Customer Name Customer Name Summary of Charges	Important Messages Teat Your Systems Regulary Sales (727) 258-7229
If you have any questions, please call our billing department at (727)	Description Quantity Rate Months Amount Smith, Many, 123 Main Street, Any Town, NY, 12345 Monitorina Services, 07/01/2014 - 07/31/2014 1.00 27.00 1.00 27.00	Thank you for your business!
** 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 v Sign up or log on to <u>Service &amp; Billing Porta</u> ! to set up or update your history, and view/request servic Sign up using your customer num	Sales Tax 0.00 Payments/Credits Applied 0.00 Date Involce Batance Due: \$27.00 Date Involce # Description Amount 07/01/2014 1041339 Recurring Charges \$27.00 S27.00	
*** Try it today! ***	For Billing Inquiries, please contact 727-2557-223 or table@ To pay with your credit card or bank account, plea Please didact and refurn this portion with your parent of	ase contact us.
Billing Department Business Services, Inc. "Keping Bur Business in Sync" (727) 258-7229 www.OPTBusinessServices.com	Business Services, Inc. Twenge for James Services, Inc. 2020 25th Avenue 2020 25th Avenue Www.OPTBusiness Services, Inc. 2020 25th Avenue Www.OPTBusiness Services, Inc. Www.OPTBusiness Services, Inc. WWW.OPTBusines	INVOICE           Customer Number         1041339           Invoice Number         1041339           Invoice Date         1041304           Amount Use         Net Due in 2020ys           Amount Enclosed:         \$
OPT Business Service, Inc. 2926 28th Avenue North St. Petersburg, FL 33713 <u>billing@optbusinessservices.com</u>	Piece check f your billing address has changed. Provide your new address below. Many Smith 123 Main Street Any Town, NY 12345	Aller of the processing of the level of the process. Main processing parks in of the binst forwar, but OPT Business Services, Inc. 2020 20th 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 <u>Billing@OPTBusinessServices.com</u>.

To review or pay your account online, please visit our online bill payment portal at <u>Online Bill Pay</u>. If you have already sent in payment, thank you for your payment and continued business.

### 38/15/2014

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:

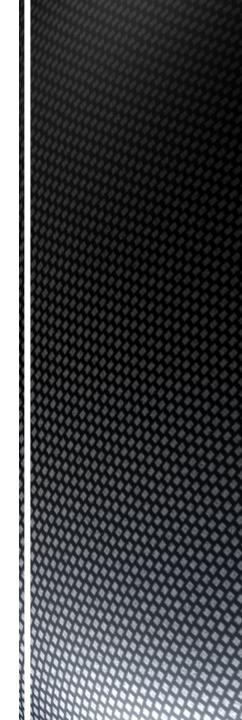
$\mathbf{r}$	Business S	ervices, Inc.		State	ment
ĭζτ	292623th Avenue No St. Petersburg, FL 33			Date 08/15/2014	Customer 12345 67
	(727) 258-7229 Fax (727) 258-7229			Due Date 06/15/2014	Amount Due \$1,695.00
o: Steve's Liqu 24 E. Main: Wantagh, M	Street	Remit To:	29 26 28 <sup>th</sup> A	ss Services, Inc. venue North urg, FL 33713	
wanagn, i	. 11/99		Click Here 1	o Pay Online!	
Custor	ner Name	Customer Number		Statement Date	Due Date
Steve's	Liquors, Inc.	1234567		08/15/2014	06/15/2014
Date	Invoice PO	Description	Amount	Balance Due	Status
04/24/2014	65136	Service Call	\$118.75	\$118.75	103 Days Past Due
05/01/2014	65 21 9	Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	65 219	Recurring Charges	\$224.00	\$224.00	96 Days Past Due
05/01/2014	65 219	Recurring Charges	\$246.68	\$246.68	96 Days Past Due
1-30 days	<b></b>				
	31-60 days	61-90 days	91-120 days	over 120	Balance Due

Sincerely,



## **Overall Profitability**

Proud to be Business Partners with VineyardSoft Corporation and Perennial Software



## **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.

						Mo	Last	Month Servi 12/01/2013 the	e Statistics	Report 3						
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.

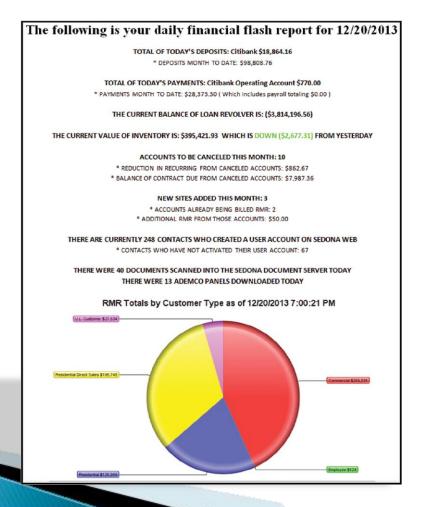
With our PPV report, you can monitor any adjustment made to a part on a Job or Service ticket that varies from the standard cost. Know when to adjust the part cost or find a replacement.

	The follow	ving ite	ems h	ave posted i	to the PPV account.
		These items	may need	l a cost and price adju	stment 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.

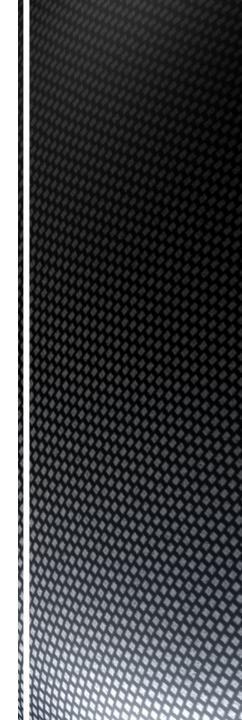
We can deliver key performance indicators (KPI) directly to the people with the need to know.





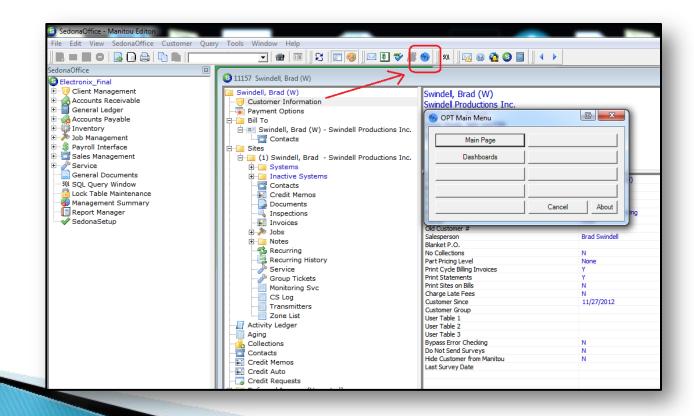
# Introducing the OPT Web Services

Proud to be Business Partners with VineyardSoft Corporation and Perennial Software



## 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.

Home Dashboards >	OPT Sync Interface			OPT Business Serv - Service, Excel	, Go-E	Back Qu	eue - 3104	3 / 4 Open Items Logout Admin
								Refresh
<ul> <li>Service_Company_Co</li> </ul>	de Ticket_Number	Ticket_Stat				Alarm_Account	Business_Name	Departure_Time
T		<b>T</b>	T		T		T T	
<ul> <li>Service_Company_Code: Company_Code: Company_C</li></ul>	сти							
							Kourbage, Billy (A)	
						000E2643	Youth Directions & Alternative	7/5/2016 10:45:00 AM
						000E1982	Veeco Metrology CCTV	
<u>Go</u> CCTV						000E1971		
						000E1961	Catholic Cemetaries Welcome Center	
<ul> <li>Service_Company_Code: In</li> </ul>	nspectors							
Go Inspectors						00260348	Mar y Las Estrella (V)	
<u>Go</u> Inspectors								
Service_Company_Code: In Code: In Co								
<ul> <li>Service_Company_Code: S</li> </ul>								
<u>Go</u> Service	696672							
<u>Go</u> Service							Perry, Dr Frank C	11/23/2016 10:20:00 AM
<u>Go</u> Service						00610159	Abrams, Scott/Lori	12/8/2016 9:34:00 AM
<u>Go</u> Service							Wire To Water	1/5/2017 8:15:00 AM
<u>Go</u> Service	703989					00B20698	Sports Cars Unlimited	12/29/2016 10:59:00 AM
<u>Go</u> Service							L.I. Internal Medicine Associates, P.C.	12/30/2016 9:50:00 AM
<u>Go</u> Service						00A10094	Meli, Joe	
<u>Go</u> Service						000E1978	Oerlikon Metco (US) Inc. [B]	1/20/2017 10:19:00 AM

Page: 1 of 1 Go Page size: 33 Change

# **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.

Home Dashboards	✓ OPT Sy	nc Interface 🗸 🛛 Tools 🗸	Resourc	es 👻 OPT Business Se	rvices 🗸		_		3 /	/ 4 Open Items	
				OPT Web Ser	vices - I	Branch Dashbo	bard				
<b>C</b> LT				Sho	w Inactive V	iew Service Goals					
Company Tot:	al	3rd Party Dealer	<	Dealers	]	Electronix	]	VCG Accounts			
Branch Status:	Active	Branch Status:	Active	Branch Status:	Active	Branch Status:	Active	Branch Status:	Active		
Active Customers:	26120	Active Customers:	2	Active Customers:	16140	Active Customers:	9520	Active Customers:	458		
RMR Customers:	18133	RMR Customers:	1	RMR Customers:	14267	RMR Customers:	3837	RMR Customers:	28		
AutoPay Customers:	938	AutoPay Customers:	0	AutoPay Customers:		AutoPay Customers:	885	AutoPay Customers:	42		
Other AutoPay Customers:	21	Other AutoPay Customers:	0	Other AutoPay Customers:		Other AutoPay Customers:	17	Other AutoPay Customers:			
Total RMR:	\$391,072.02	Total RMR:	\$5,672.00	Total RMR:	\$95,404.13	Total RMR:	\$288,501.99	Total RMR:	\$1,493.90		
AutoPay RMR:	\$33,006.51	AutoPay RMR:	\$0.00	AutoPay RMR:	\$0.00	AutoPay RMR:	\$32,969.51	AutoPay RMR:	\$37.00		
- Total Open	\$1,553,838.81	- Total Open	\$19,002.29	- Total Open	\$322,843.55	- Total Open	\$1,198,729.73	- Total Open	\$13,263.24		
Open Job Due:	\$458,940.49	Open Job Due:	\$0.00	Open Job Due:	\$0.00	Open Job Due:	\$455,854.38	Open Job Due:	\$3,086.11		
Open Service Due:	\$167,769.79	Open Service Due:	\$0.00	Open Service Due:	\$17,183.45	Open Service Due:	\$140,872.19	Open Service Due:	\$9,714.15		
Open RMR Due:	\$832,406.44	Open RMR Due:	\$17,841.41	Open RMR Due:	\$257,036.53	Open RMR Due:	\$557,392.60	Open RMR Due:	\$135.90		
Open Misc Due:	\$94,722.09	Open Misc Due:	\$1,160.88	Open Misc Due:	\$48,623.57	Open Misc Due:	\$44,610.56	Open Misc Due:	\$327.08		
- Total Credits	\$207,588.32	- Total Credits	\$0.00	- Total Credits	\$14,047.45	- Total Credits	\$179,753.78	- Total Credits	\$13,787.09		
Credit Memo:	\$3,691.78	Credit Memo:	\$0.00	Credit Memo:	\$331.69	Credit Memo:	\$3,230.26	Credit Memo:	\$129.83		
Advance Deposits:	\$120.74	Advance Deposits:	\$0.00	Advance Deposits:	\$0.00	Advance Deposits:	\$120.74	Advance Deposits:	\$0.00		
Unapplied Cash:	\$203,775.80	Unapplied Cash:	\$0.00	Unapplied Cash:	\$13,715.76	Unapplied Cash:	\$176,402.78	Unapplied Cash:	\$13,657.26		
- Service/Inspections	1368	- Service/Inspections	6	- Service/Inspections	107	- Service/Inspections	1143	- Service/Inspections	112		
Open Service Tickets:	653	Open Service Tickets:	6	Open Service Tickets:		Open Service Tickets:	515	Open Service Tickets:			
Unbilled Service:	\$21,733.25	Unbilled Service:	\$503.50	Unbilled Service:	\$228.50	Unbilled Service:	\$18,197.25	Unbilled Service:	\$2,804.00		
Open Inspections:	715	Open Inspections:	0	Open Inspections:		Open Inspections:	628	Open Inspections:			
Unbilled Inspections:	\$20,013.50	Unbilled Inspections:	\$0.00	Unbilled Inspections:	\$0.00	Unbilled Inspections:	\$19,863.50	Unbilled Inspections:	\$150.00		
- Open Jobs:	1676	- Open Jobs:	0	- Open Jobs:		- Open Jobs:	1611	- Open Jobs:			
Pending Install:	\$4,388,768.95	Pending Install:	\$0.00	Pending Install:	\$2,509.37	Pending Install:	\$4,289,488.45	Pending Install:	\$96,771.13		
Pending Parts:	\$0.00	Pending Parts:	\$0.00	Pending Parts:	\$0.00	Pending Parts:	\$0.00	Pending Parts:	\$0.00		
Unbilled Jobs:	\$1,782,736.54	Unbilled Jobs:	\$0.00	Unbilled Jobs:	\$2,509.37	Unbilled Jobs:	\$1,734,940.80	Unbilled Jobs:	\$45,286.37		
Pending RMR:	\$10,085.20	Pending RMR:	\$0.00	Pending RMR:	\$0.00	Pending RMR:	\$9,672.25	Pending RMR:	\$412.95		
Unbilled Job RMR:	\$5,618.60	Unbilled Job RMR:	\$0.00	Unbilled Job RMR:	\$0.00	Unbilled Job RMR:	\$5,416.10	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.

PT /	Branch Numbe Branch Status: Branch RMR:	r:	4 Active \$95,357.28	Cust	ch Name: omer Count: n Balance:		Dealers 16127 \$329,901.37			
ranch KPIs	▲ × Drag a	column header and	l drop it here to grou	up by that column						S Refrest
Dealers	_	Customer	Customer_Name	Customer_Status	Customer_Since	AutoPay_Cycle	AutoPay_Other	RMR	AutoPay_RMR	Site Count
Active Customers: 16127					. T					
RMR Customers:         14249           AutoPay Customers:         11		<u>XXX049</u>	Scotland Yard Security, Inc.		12/30/1899 12:00:00 AM					
Other AutoPay Customers: 0 Total RMR: \$95,357	.28	<u>XXX053</u>	Total Pro		12/30/1899 12:00:00 AM					
AutoPay RMR: \$0.00 +Total Open \$329,90	11 27	<u>XXX089</u>			12/30/1899 12:00:00 AM					
+ <u>Total Credits</u> \$16,386		<u>XXX113</u>	Fd Security Systems		12/30/1899 12:00:00 AM					
+ <u>Service/Inspections</u> 112 + <u>Open Jobs:</u> 8		<u>XXX116</u>			12/30/1899 12:00:00 AM					
		<u>XXX132</u>	Televator		12/30/1899 12:00:00 AM					
otal Profit	▲ X	<u>XXX141</u>	Technical Systems		12/30/1899 12:00:00 AM					
1/16/2016 thru 1/16/2017 Apply		<u>XXX142</u>	Sentinel Diversified Ind	ANR	12/30/1899 12:00:00 AM					
- Total Profit \$1,168,331.8		<u>XXX157</u>	Telecom Tech Services LLC		12/30/1899 12:00:00 AM					
Total Income: \$1,263,004.6		<u>XXX169</u>	Vast Horizons Communications	ANR	12/30/1899 12:00:00 AM					
Total Expenses:         \$94,672.78           Total GPP:         \$0.93           Current RMR:         \$95,357.28		<u>XXX179</u>	Empire State Sec Systems		11/12/2009 12:00:00 AM					
ustom Links	▲ ×									
Link Name Active Customer RMR Analysis										
Active Customer RMR Analysis Top RMR Customers										
Event Menu	<								_	

## **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

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 <u>Bill Pay</u> 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 <u>Service@AnyCompany.com</u> 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 conying 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?
	ou for giving us the opportunity to serve you. Please take a moment to answer the r if you prefer speaking to us you may call (727) 258-7229.
Your Name	Email
Steven James	steven@james.com
🕤 0 - Very Unlikely 💿 1 💿	2 3 4 5 6 9 10 - Very Likely Additional Feedback
Thank you for your respons	Additional Feedback
	Additional Feedback
Thank you for your respons you, please feel free to let u	Additional Feedback
Thank you for your respons you, please feel free to let u	Additional Feedback
Thank you for your respons you, please feel free to let u Additional Feedback	Additional Feedback e. If you would like to provide us any additional feedback that will help us better serve s know below. Interpretation of the serve of the se
Thank you for your respons you, please feel free to let u Additional Feedback	Additional Feedback

# **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.



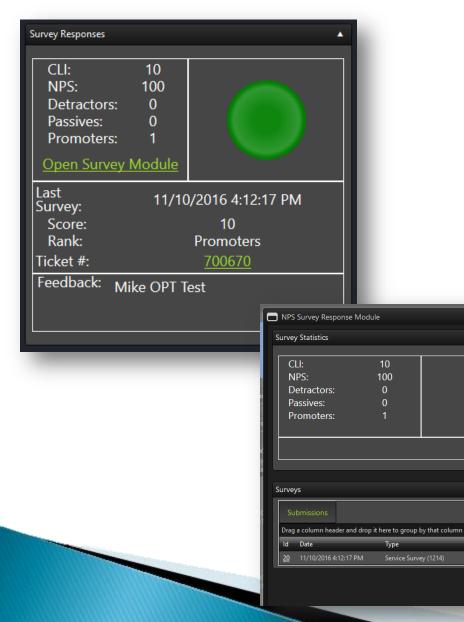
## **OPT Web Services – Survey Module**



## **OPT Web Services – Survey Module**

Email

Score



ig a column he	ader and drop it here to group by that colu	umn	
			🐼 Refresh
	Question	Answer	
	T		T
	Response Date	11/10/2016 4:12 PM	
		700670	
	Tech	Thomas Chebuske	
	Ticket Number	<u>700670</u>	
	System Number	C0200942	
	Customer Number	005827	
	Customer Name	Art Faverio	
	Your Name	Mike OPT Test	
	Email	ciaoaf@gmail.com	
		10 - Very Likely	
	Additional Feedback	Mike OPT Test	
	Would you like this survey to be anonymous?		
	Testimonial Option	Sure I would love to	
	Testimonial	Mike OPT Test	
	Name	Mike OPT Test	
	Company	Mike OPT Test	

Dr

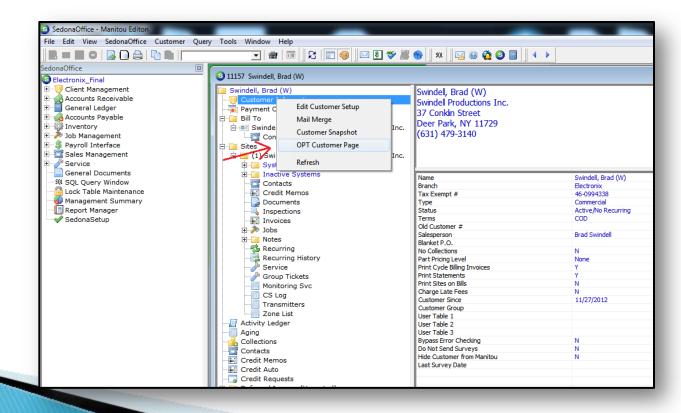
## **OPT Web Services – Data API**

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

		Servic	e Ticket Detai	8			Ticket		I			Tick	et #642746						ŀ	×
Customer	11157 Swindell, Bra Swindell, B 37 Conklin S Deer Park, NY	irad Status	642746 9/23/2014 10:07:16 AM CL - Closed 10/21/2014 3:16:55 PM	Contact Phone Email		Service Ticket	Custom Fields	Appointments and Labor	\$ Billing	Documents (0)	Equipment and Parts Go Te		Notes (5)		Service				al Messages tifications	(2)
	Site/Syst	tem Detail		Ticket Detail		- L					GUII	U						NUC	uncacions	
	ccount	00I11122	Problem	SVC - General / Unknown Prof		Custome	11157			Cre	ated g	23/2014 10	:07:16 AM	Co	ontact	Sarah 9	Swindell		-	
	tem Type nel Type	Fire & Burglary System LYNX5100	Sec Problem Ticket Type	VOID - VOID - Complete Service		Site		dell, Brad (W)		C	-t-d D., b.					(631) 45	e eooo			
	l Location	Kitchen	Route Code	Undefined Route		Site		dell, Brad			ated By br	rads		Fr	hone	J		Ext		
	Inspection	Intellen	Expertise	3		-		icket #642746 ·								<u>- 0 ×</u>	electronixsys	tems.com		
Site	e Phone	6314793140	Priority	Medium		L		ated by brad						stricted)						
Ma	ap Code	*I11122	Estimated	30			This	is a test ticket	for the S	edonaOffice	demo. D	o not dete	e							
Cro	ss Street	Seaman Place	Length	This is a test ticket for the SedonaOffice	demo. Do not	AL -1	Crow	ated by Sed	onoQue	- CA 10/14	901 <i>4 4</i> -5	2-97 AM	9 - Cueto	mor Doctriv	ctod)		Edited		Edited By	
	arranty	1-Year P & L	Comments	delete.	demo. Do not	Notes	Surv	ey Submission	n from Br	ad Swindell	/hrads@r	onthusines	sservices r	nei nesuu romì	cieuj					
	ranty End Memo	This is a Memo	Technician	Brad Swindell							(2.220.00						1	D14 3:16 PM		
	mments	1 ms is a Memo	PO #			nr∥ Surv	lecr	h: Brad Swinde									3/13/2015		brads	
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Appointments						e l			_											
Name	Appointment	Dispatched A	rrived Departed	Est Len Act Len Bi	illable Len	ċ		<b>ated by patty</b> I per Brad	/v @ 10	/21/2014 3	:16:51 PI	vi (2 - Cus	tomer Re	stricted)						
Ticket Notes	Resolution	Entered		Edited	Edited By		Crea	ated by Sede	onaSvn	c @ 6/10/2	015 2:51	:44 PM (1	- No Res	triction)						
Level	Resolution	Entered	Ву	Edited	Edited By			onaSynchas s							ket#:{64	42746}.				
This is a test ti	cket for the SedonaOf	ffice demo. Do not detele																		
2	N	9/23/2014 10:07:16 AM	brads	10/21/2014 3:16:41 PM	pattyv															
Survey Submis project Would	ssion from Brad Swin you like this survey to	dell (brads@electronixsystems o be anonymous?: No	.com). Tech: Brad Swindell	score: 10 - Very Likely Additional Feedba	ck: test new															<u>^</u>
2	N	10/14/2014 4:53:27 AM	SedonaSync	10/14/2014 4:53:27 AM S	edonaSync	-									OK					
test						H											1			
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Void per Brad						Access L	evel 2.	Customer Restric	ted 💌	Resolutio	n Note			49	List	🐻 Ins	tructions	🛃 New		Save
2	N	10/21/2014 3:16:51 PM	pattyv	10/21/2014 3:16:51 PM	pattyv															
	11111111	1000	Constant														-			

# **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

PT	)	Customer Number Customer Status: Customer RMR:		rring Custon	ner Name: ner Since: <u>ner Net Due:</u>		dell, Brad (W 7/2012 00	0			
ey Account Pac	kage	*	OPT Connection Info			•	Customer At Ris	k (CAR)			
		Key Accounts:	Profit/Loss			•		CAR Level: 9	5 - <u>Closed</u>	Cases	
KAP Group	Add Group			Profit/Loss Analysis 22/2016 🔳 thru 1/22/201			Open Cas Last Activi CAR Since First CAR:	ty: 1/	4 21/2017 8:15 19/2017 7:24 <u>CUB (21)</u>		
OPT Business	Services, Inc	<u>Remove</u>		Apply Reset					Ý	Create CAF	R Case
donaSync Log				View Details			Case	Details	Entered	Follow Up	Risk
Date 🗸	Туре	Details	Current RMR:				<u>CUS (29)</u> C		ce 1/19/2017 5:20:16 PM		
1/21/2017 8:22:43 AM	Invoice: <u>67647</u>	Invoice Number 67647 for Sarah Swindell (brads@optbusinessservices.com) was approved.	Income vs Expe	\$0.00			MGB (28)	Multiple Go Backs	1/19/2017 5:16:41 PM	1/25/2017 7:00 AM	
1/21/2017 8:22:43 AM	Invoice: <u>67647</u>	Invoice Number 67647 for Swindell, Brad (W) (bkswindell@me.com) was approved.	Total Income:	\$1,107.03			<u>JNS (24)</u>		1/19/2017 12:52:37 PM		
1/21/2017 B:21:53 AM	Invoice: 67647	Invoice Number 67647 for Swindell, Brad (W) (bkswindell@gmail.com) was approved.	Total Expenses:	\$114.99							
	Invoice:	Invoice Number 185418 was added to the	Labor Hours:	0.00			Survey Response	s			
10:42:35 AM	<u>185418</u>	SedonaSync email queue for recipient: brads@optbusinessservices.com	Labor Cost:	\$0.00			Equipment Docu	iments			
1/20/2017 10:42:35 AM	Invoice: <u>185418</u>	Invoice Number 185418 was added to the SedonaSync email queue for recipient: bkswindell@me.com	Totals Profit/Loss:	\$992.04			Email: +	User Manuals 🔸	Install Manuals	+ Datashee	ets
		View All					Тур	e Descriptic	on Use	r Install Da	tasheet
			Custom Links			•	~ Swinde				
			Link Name		_			1122 - Fire/Burg - VISTA		r Install Da	tasheet
			Customer Analysis				5821	Wireless Low Temp/Fl			itasheet
			Event Menu				Vista-	Honeywell 211P Alarm			

## **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

	Open Invoices for 1159	99 (Matrix Crest	LLC) - 3159										•	
Bill	LTo ~ 🐹													
												Ş	Refres	h
~	Invoice_Number	Invoice_Type	Description	Issue_Date	Invoice_Date	Due_Date	Days_Past_Due	Bucket	Total	Payments	Balance	Email		
					r 📃 T									
~	Bill_To: Matrix Crest L	LC (1393 Vetera	ns Memorial Hw	y , Hauppauge, I	NY, 11788); Balan	ce - Sum: <b>6.6600</b>								
	<u>183411</u>											<u>Email</u>		

Open Invoices for 11157 (Swindell, Brad (W)	/) - 3159	a >
Run Action		e x
	▶ · 📓 🔮 🔗 🗟 🗞 🐮 🛪 ×, ¶• 📸 ☴ 菌 🕑 🚋 Normal 🔹 serif 🔹 22px*	
$\square  \mathbf{B}  I  \underline{\mathbf{U}}  \text{abc}  \Xi  \Xi  \Xi  \overline{\Xi}  \overline{\Xi}$	左 信 注 注 😳 🌚 A * の * Apply CSS* ダ * Ω * 冊 * 四 * 四 * 盟 Custom Lin* Aa aA Zoom * 🏞 * 🖉 🗩	
		_
Reference Data		^ _
Customer Number	11157	
Bill To	Swindell, Brad (W) (78 E 1st Street, Deer Park, NY, 11729)	
——— Auto Populated Data —		
Invoice Number		
SedonaSync User Id	Brad Swindell (brads) 🗸	
——— Required Data Entry —		
From Email	brads@electronixsystems.com	
Email	bkswindell@me.com;bkswindell@gmail.com	
Subject	Electronix has Posted a New Invoice (Invoice_Number) for Account Number (Customer_Number)	
Header	Invoice #{Invoice_Number} for {Amount\$} was posted to your account on {Invoice_Date} for {Description}.	
	{OPT_Payment_Message}	
	If you have any questions, please call our billing department at {BranchPhone}.	
	Design	aracters: 205
Footer		
	Brad Swindell	
	Systems Integration / IT Manager DBA, Software Engineer, Network Specialist	
	(631) 271-4000 x 155 (631) 470-7155 Direct	
	(631) 470-7135 Direct	
	Submit Action Cancel	

## **OPT Web Services – Customer Page**

Customer Name

Swindoll Brad (M

	Customer St	tatus: Active	e/Recurring Cu	stomer Since:	11/27/2012						
	Customer R		<u> </u>		\$999.00						
	Custom Links										
rvey Responses				RMR Details							• •
	Link Name					RMR Type		RMR		RAR	
CLI: 10	Customer Analysis			Current RMR: \$138	83	Other Recurrin Monitoring		\$34.95 \$37.00		\$419.40 \$444.00	
NPS: 100	Event Menu					Service Agreer	aentr			\$444.00 \$420.00	
Detractors: 0	-					Inspections		\$31.88		\$382.56	
Passives: 0 Promoters: 1	Equipment Documents		<b>▲</b>			Totals:		\$138.83		\$1,665.96	
	Email: 🕂 User Man	uals 🕂 Install Mar	nuals + Datasheets	Income vs Expens	es						
<u>Open Survey Module</u>	Туре	Description	User Install Datasheet			Account	Category Expense It	em Type Segr	ment		
ast 11/10/2016 4:12:17 PM	<ul> <li>Swindell, Brad</li> </ul>					Account Code	Account	Account Type	Income	Expense	Balance
Score: 10		re/Burg - VISTA21IP				40400	Income - Late Fees	Income	\$0.00	\$0.00	\$0.00
Rank: Promoters	VISTA21IP VISTA		<u>User Install Datasheet</u>	Total Income: \$21.0	09.63		Income - Monitoring			\$0.00	
ket #: 700670		less Low Temp/Flood Sensor	Install Datasheet	proton meconic. \$21,0							
	Vista-21IP Pane	eywell 211P Alarm Control el	<u>User</u>				Income - Service Equip/Materials				
edback: Mike OPT Test		ire/Burg - VISTA21IP									
	VISTA21IP VISTA		<u>User</u> <u>Install</u> <u>Datasheet</u>				Income - Service Agreements				
	Profit/Loss		*				Income - CCTV Installation				
Contraction of the local distance of the loc											
ccount Package	P	rofit/Loss Analysi	s for:				Income - Approved Fire Installation				
Key Accounts:							Income - Installation Labor				
Key Accounts.	1/22	/2016 🛄 thru 1/22/20	017 🛄	Total Expenses: \$13,6	19.45	50000	COS - Materials		\$0.00	\$4,702,55	(\$4.702.55)
Add Group Add Group/Contacts		Apply Reset				50000	COS - Materials	Sold		\$4,702.55	(\$4,702.55)
							COS - Labor (Payroll Suspense)	Cost of Goods Sold		\$8,948.90	(\$8,948.90)
Group		<u>View Details</u>				69999		Expense	\$0.00		
Business Services, Inc. Remove	Current RMR:	\$0.00				Totals:	Fulchase Frice valiance	expense		\$13,619.45	
	Income vs Exper			Labor		Totals.			\$21,005.05	313,013,43	\$1,550.10
	Total Income:	\$1,107.03		Lubor		Туре		Hours		Cost	
ner At Risk (CAR)	Total Income			Labor Hours: 151.3		Inspection		0.77		\$53.66	
		\$114.99								\$1,884.08	
CAR Level: 95 - Closed Cases	Total Expenses:	\$114.55				Service		26.52			
CAR Level: 95 - <u>Closed Cases</u> Cases	Total Expenses: Labor	\$114.55		Labor Costs \$2.04	0.00						
en Cases: 4		0.00		Labor Cost: \$8,94	8.90	Service Job Totals:					
en Cases: 4 t Activity: 1/21/2017 8:15 AM	Labor	0.00			8.90						
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM	Labor Labor Hours: Labor Cost:			Totals		Job Totals:	Take a deeper dive	124.02 151.31	e insights usin	\$7,011.16 <b>\$8,948.90</b>	
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: <u>CUB (21)</u>	Labor Labor Hours: Labor Cost: Totals	0.00 \$0.00					Take a deeper dive Please contact Astute Fina	124.02 151.31 and gain valuable		\$7,011.16 \$8,948.90 g Vivid Flex.	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: <u>CUB (21)</u> Create CAR Case	Labor Labor Hours: Labor Cost:	0.00		Totals		Job Totals:		124.02 151.31 and gain valuable		\$7,011.16 \$8,948.90 g Vivid Flex.	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case ase Details Entered Follow Up Risk	Labor Labor Hours: Labor Cost: Totals	0.00 \$0.00		Totals		Job Totals:		124.02 151.31 and gain valuable		\$7,011.16 \$8,948.90 g Vivid Flex.	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM t Since: 1/19/2017 7:24 AM t CAR: <u>CUB (21)</u> Create CAR Case se Details Entered Follow Up Risk 1/18/2017	Labor Labor Hours: Labor Cost: Totals	0.00 \$0.00 \$992.04	tem Type Segment	Totals		Job Totals:	Please contact Astute Fina	124.02 151.31 e and gain valuable ncial or OPT Busin	iess Services fi	\$7,011.16 \$8,948.90 g Vivid Flex.	mation.
en Cases: 4 A Ctivity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: <u>CUB (21)</u> © Create CAR Case use Details Entered Follow Up Risk (22) Customer Unhappy with Service //19/2017 50 522016 PM 50	Labor Labor Hours: Labor Cost: Totals Profit/Loss: Account Catego	0.00 \$0.00 \$992.04	tem Type Segment	Totals Profit/Loss: \$7,39	0.18 Accc	Job Totals:	Please contact Astute Fina	124.02 151.31 e and gain valuable ncial or OPT Busin	ness Services fo	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor	mation.
en Cases: 4 A Crivity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case see Details Entered Follow Up Risk 1/19/2017 522.16 PM 522.16 PM 1/19/2017 1/25/2017 30 515:41 PM 7200 AM 30	Labor Labor Hours: Labor Cost: Totals Profit/Loss: Account Catego Segment	0.00 \$0.00 \$992.04	Expense	Totals Profit/Loss: \$7,39	0.18	Job Totak: Open in Flex unt Categ pe	Please contact Astute Fina ory Expense Item T Income	124.02 151.31 e and gain valuabl ncial or OPT Busin ype Segme Expense	ness Services fr	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance	mation.
en Cases: 4 4 Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case see Details Entered Follow Up Risk 520:16 PM 520:16 P	Labor Labor Hours: Labor Cost: Totals Profit/coss Account Catego Segment Customer	0.00 \$0.00 \$992.04 ory Expense It Income \$1,174.95	Expense \$0.00	Totals Profit/Loss: \$7,39 Balance \$1,174.95	0.18 Acco Item Tr Inspec	Job Totals: Open in Flex unt Categ pe ions (R)	Please contact Astute Fina ory Expense Item T Income \$350.68	124.02 151.31 e and gain valuable noial or OPT Busin ype Segme Expense \$0.00	ness Services fr	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. or more infor Balance \$350.68	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: <u>CUB (21)</u> <u>Create CAR Case</u> ase <u>Details Entered</u> Follow Up Risk <u>5(22)</u> Customer Unhappy with Service <u>1/19/2017</u> 50 <u>51641 PM</u> 7200 AM 30 <u>51644 PM</u> 7200 AM 30	Labor Labor Hours: Labor Cost: Totals Profit Loss: Account Catego Segment Customer Finance Charges	0.00 \$0.00 \$992.04 ory Expense II Income \$1,174.95 \$127.18	Expense \$0.00 \$0.00	Totals           Profit/Loss:         \$7,39           Balance         \$1,174.95           \$127.18         \$127.18	0.18 Acco Item T Inspec	Job Totak: Open in Flex unt Categ pe	Please contact Astute Fina ory Expense Item T Income \$350.68 \$1,070.00	124.02 151.31 e and gain valuable noial or OPT Busin ype Segme Expense \$0.00 \$0.00	nt	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance \$350.68 \$1,070.00	mation.
en Cases: 4 4 Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case see Details Entered Follow Up Risk 520:16 PM 520:16 P	Labor Hours: Labor Cost: Totals Profit/Loss: Account Catego Segment Customer Finance Charges Inspection	0.00 \$0.00 \$992.04 ory Expense II Income \$1,174.95 \$127.18 \$127.18	Expense \$0.00 \$0.00 \$53.66	Balance         \$7,390           81,174,95         \$127,18           (\$53,66)         \$5127,18	0.18 Acco Item Ty Inspec Invente Labor	Job Totals: Open in Flex unt Categr pe ions (R) ny Part	Please contact Astute Fina           ory         Expense         Item T           Income         \$350.68         \$1,070.00           \$6,927.75         \$6,927.75         \$1000	124.02 151.31 and gain valuable noial or OPT Busin ype Segme Expense \$0.00 \$0.00 \$0.00	nt	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75	mation.
en Cases: 4 A Activity: 1/21/2017 8:15 AM X Since: 1/19/2017 7:24 AM CAR: CUB (21) Customer Unhappy with Service 1/19/2017 (22) Customer Unhappy with Service 1/19/2017 520:16 PM 50 1/19/2017 1/25/2017 30 516:16 PM 7:20 AM 30 (24) Job Net Scheduled 1/19/2017 1/27/2017 15	Labor Hours: Labor Hours: Labor Cost: Totals Profit/Loss: Account Catego Segment Customer Finance Charges Inspection Job	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25	Expense \$0.00 \$0.00 \$53.66 \$11,257.28	Balance         \$7,39           Bilance         \$1,174.95           \$1,27.18         (\$33.66)           \$5,890.97         \$5,890.97	0.18 Acco Item Ty Inspec Invente Labor Monite	Job Totals: Open in Flex unt Categy pe ions (R) ry Part ring (R)	Please contact Astute Fina           ory         Expense         Item T           Income         5350.68         \$1,070.00           \$6,927.75         \$407.00         \$6,927.75	124.02 151.31 and gain valuable and gain valuable or OPT Busin ype Segme Expense \$0.00 \$0.00 \$0.00 \$0.00	nt	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407.00	mation.
en Cases: 4 & Activity: 1/21/2017 8:15 AM & Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case rse Details Entered Follow Up Risk (22) Customer Unhappy with Service 1/19/2017 50 5:2021 BPM 500 Find (22) Multiple Go Backs 1/19/2017 1/25/2017 10 5:2021 BPM 7:20 AM 30 5:1041 PM 7:20 AM 30 5:2027 PM 1/25/2017 15 30 5:2027 PM 1/25/2017 15 30 5:2027 PM 1/25/2017 15 30 5:2027 PM 1/25/2017 15 4:2020 PM 1/25/2017 15 5:2021 PM 1/25/2017 15 5:	Labor Labor Hours: Labor Cost: Totals Profit/Loss Segment Customer Finance Charges Inspection Job Service	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$127.18	Expense \$0.00 \$53.66 \$11,257.28 \$2,308.51	Balance         \$7,39           Bilance         \$1,174.95           \$127.18         \$3,66)           \$5,800.077         \$250.74	0.18 Accc Item Ty Inspec Invent Labor Monite Non-R	Job Totals: Open in Flex unt Categr pe ions (R) ny Part	Please contact Astute Fina pry Expense Item T Income \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43	124.02 151.31 e and gain valuable and gain valuable noil or OPT Busin ype Segme Expense \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	nt	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43	mation.
en Cases:         4           A Ctivity:         1/21/2017 8:15 AM           R Since:         1/19/2017 7:24 AM           t CAR:         CUB (21)           v         Create CAR Case           sse         Details           Entered         Follow Up           Sizes:         Details           Entered         Follow Up           Sizes:         Details           II/19/2017         50           Sizes:         Details           Multiple Go Backs         1/19/2017           1/25/2017         30           1/19/2017         1/25/2017           Job Net Scheduled         1/19/2017           sSyncLog         A           Ster v         Type	Labor Hours: Labor Hours: Labor Cost: Totals Profit/Loss: Account Catego Segment Customer Finance Charges Inspection Job	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25	Expense \$0.00 \$0.00 \$53.66 \$11,257.28	Balance         \$7,39           Bilance         \$1,174.95           \$1,27.18         (\$33.66)           \$5,890.97         \$5,890.97	0.18 Item Ty Insert Labor Monitt Non-R	Job Totale: Qpen in Flex unt Categ pe roms (R) ry Part ring (R) scurring	Please contact Astute Fina           ony         Expense         Item T           Income         \$350.68         \$1,070.00         \$6,927.75           \$407.00         \$15,523.43         \$(\$4,038.68)	124.02 151.31 and gain valuablin neial or OPT Busin Expense 50.00 \$0.00	nt	\$7,011.16 <b>\$8,948.90</b> <b>g</b> Vivid Flex. or more infor <b>Balance</b> \$350.68 \$1,070.00 \$15,027.75 \$407.00 \$15,523.43 (\$17,658.13)	mation.
en Cases:         4           t Activity:         1/21/2017 8:15 AM           t Activity:         1/19/2017 8:15 AM           R Since:         1/19/2017 8:15 AM           t CAR:         CUB (21)           CuB (21)         Create CAR Case           see         Details         Entered           520:         Customer Unihappy with Service         1/19/2017           30:         Stick IPM         200 AM           30:         Stick IPM         7:00 AM           31:20         Job Not Scheduled         1/19/2017           30:50         Job Not Scheduled         1/19/2017           30:50         Job Not Scheduled         1/25/2017           30:50         Job Not Scheduled         1/27/2017	Labor Labor Hours: Labor Cost: Totals Profit/Loss Segment Customer Finance Charges Inspection Job Service	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$127.18	Expense \$0.00 \$53.66 \$11,257.28 \$2,308.51	Balance         \$7,39           Bilance         \$1,174.95           \$127.18         \$3,66)           \$5,800.077         \$250.74	D.18 Accc Inventu Labor Other Other	Job Totats: Open in Fiex unt Categ pe nors (R) ry Part ccurring (R) recurring (R)	Please contact Astute Fina           pry         Expense         Item 1           Income         \$330.68         \$1,070.00         \$6,927.75           \$407.00         \$15,523.43         \$15,523.43           \$14,630.68)         \$384.45         \$384.45	124.02 151.31 and gain valuable ndial or OPT Busin ype Segme Expense 50.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$13,619.45 \$0.00	nt	\$7,011.16 <b>\$8,948.90</b> <b>g</b> Vivid Flex. or more infor <b>Balance</b> <b>\$350.68</b> \$1,070.00 <b>\$6,927.75</b> <b>\$407.00</b> <b>\$15,523.43</b> (\$17,658.13) <b>\$384.45</b>	mation.
en Cases:         4           t Activity:         1/21/2017 8:15 AM           t Activity:         1/19/2017 7:24 AM           t CAR:         CUB (21)           v         Create CAR Case           see         Details           E020         Customer Unhappy with Service           5/201         FR AM           6/201         Customer Unhappy with Service           1/19/2017         50           B.028         Multiple Go Backs           1/19/2017         7:00 AM           51641         PM           Job Not Scheduled         1/19/2017           1/25/2017         15           suSync Log            Vas v         Type           Data Scheduled         7547 for Sarah Swindell           1/2017         Invoice:         Invoice: Number 67547 for Sarah Swindell           1/2017         Invoice:         Invoice:	Labor Labor Hours: Labor Cost: Totals Profit/Loss Segment Customer Finance Charges Inspection Job Service	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$2,559.25 \$21,009.63	Expense \$0.00 \$53.66 \$11,257.28 \$2,308.51	Balance         \$7,39           Bilance         \$1,174.95           \$127.18         \$3,66)           \$5,800.077         \$250.74	0.18 Accc Item T Inspec Invent Labor Monit Non-R Other Service	Jeb         Torlate:           Open in Flex         Image: Comparison of the second secon	Piesse contact Astute Fina           Income           \$350.68           \$1,070.00           \$6,927.75           \$407.00           \$13,523.43           (\$4,038.68)           \$384.45           \$385.00	124.02 131.31 and gain valuable noial or OPT Busin Expense \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$13,619.45 \$0.00 \$0.00 \$0.00	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. pr more infor <b>Balance</b> \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$15,523.43 \$15,523.43 \$15,75,523.43	mation.
en Cases:         4           t Activity:         1/21/2017 8:15 AM           R Since:         1/19/2017 7:24 AM           t CAR:         CUB (21)           CuB (21)         Create CAR Case           see         Details         Entered           5221 (2000)         Follow Up         Risk           5221 (2000)         Sold (2000)         Sold (2000)           6281 (2000)         Multiple Go Backs         1/19/2017 1/25/2017 15           5261 (2000)         Sold (2000)         Sold (2000)           6281 (2000)         Job Not Scheduled         1/19/2017 1/25/2017 15           5262 (2000)         Sold (2000)         Sold (2000)           6291 Job Not Scheduled         1/19/2017 1/25/2017 15         Sold (2000)           6292 (2000)         Type         Details         Sold (2000)           6214 Job Not Scheduled         1/19/2017 1/25/2017 15         Sold (2000)         Sold (2000)           6214 Job Not Scheduled         Tops:         Details         Sold (2000)         Sold (2000)           6214 Job Not Scheduled         Tops:         Invoice Number (75/47 for Sond (2000)         Sold (2000)         Sold (2000)           6214 Job Mot Scheduled         Tops:         Invoice Number (75/47 for Sond (2000)         Sold (2000	Labor Labor Hours: Labor Cost: Totals ProfitCoss: Segment Customer Finance Charges Inspection Job Service Totals: Account Catego	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,142.25 \$2,559.25 \$21,009.63	Expense           \$0.00           \$0.00           \$53.66           \$11,357.28           \$2,308.51           \$13,619.45           em Type         Segment	Balance         \$7,39           Bilance         \$1,174.95           \$1,27.18         (53.66)           \$53.600,977         \$250.74           \$7,390.18         \$1,390.18	D.18 Accc Inventu Labor Other Other	Jeb         Torlate:           Open in Flex         Open in Flex           unt         Categ           pe         Open in Flex           ions (R)         open in Flex           ring (R)         scurring           accurring (R)         Agreements (R)	Please contact Astute Fina           pry         Expense         Item 1           Income         \$330.68         \$1,070.00         \$6,927.75           \$407.00         \$15,523.43         \$15,523.43           \$14,630.68)         \$384.45         \$384.45	124.02 151.31 and gain valuable ndial or OPT Busin ype Segme Expense 50.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$13,619.45 \$0.00	nt	\$7,011.16 <b>\$8,948.90</b> <b>g</b> Vivid Flex. or more infor <b>Balance</b> <b>\$350.68</b> \$1,070.00 <b>\$6,927.75</b> <b>\$407.00</b> <b>\$15,523.43</b> (\$17,658.13) <b>\$384.45</b>	mation.
en Cases:         4           t Activity:         1/21/2017 8:15 AM           R Since:         1/19/2017 7:24 AM           t CAR:         CUB (21)           CuB (21)         Create CAR Case           see         Details         Entered           5221 (2000)         Follow Up         Risk           5221 (2000)         Sold (2000)         Sold (2000)           6281 (2000)         Multiple Go Backs         1/19/2017 1/25/2017 15           5261 (2000)         Sold (2000)         Sold (2000)           6281 (2000)         Job Not Scheduled         1/19/2017 1/25/2017 15           5262 (2000)         Sold (2000)         Sold (2000)           6291 Job Not Scheduled         1/19/2017 1/25/2017 15         Sold (2000)           6292 (2000)         Type         Details         Sold (2000)           6214 Job Not Scheduled         1/19/2017 1/25/2017 15         Sold (2000)         Sold (2000)           6214 Job Not Scheduled         Tops:         Details         Sold (2000)         Sold (2000)           6214 Job Not Scheduled         Tops:         Invoice Number (75/47 for Sond (2000)         Sold (2000)         Sold (2000)           6214 Job Mot Scheduled         Tops:         Invoice Number (75/47 for Sond (2000)         Sold (2000	Labor Labor Heurs: Labor Cost: Totals Profit.Loss: Segment Customer Finance Charges Inspection Job Service Totals: Account Category	0.00 \$0.00 \$992.04 Income In \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$2,559.25 \$21,009.63	Expense \$0.00 \$0.00 \$33.66 \$11,257.28 \$2,308.51 \$13,619.45 em Type Segment Expense	Balance         \$7,39           Balance         \$1,174.95           \$127.18         (\$33.66)           \$5,800.97         \$250.74           \$7,390.18         \$30.18	0.18 Accc Item T Inspec Invent Labor Monit Non-R Other Service	Jeb         Torlate:           Open in Flex         Open in Flex           unt         Categ           pe         Open in Flex           ions (R)         open in Flex           ring (R)         scurring           accurring (R)         Agreements (R)	Piesse contact Astute Fina           Income           \$350.68           \$1,070.00           \$6,927.75           \$407.00           \$13,523.43           (\$4,038.68)           \$384.45           \$385.00	124.02 131.31 and gain valuable noial or OPT Busin Expense \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$13,619.45 \$0.00 \$0.00 \$0.00	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. pr more infor <b>Balance</b> \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$15,523.43 \$15,523.43 \$15,75,523.43	mation.
A         A           A Activity:         1/21/2017 8:15 AM           R Since:         1/19/2017 7:24 AM           L CAR:         CUB (21)           Image: Comparison of the second s	Labor Hours: Labor Cost: Totals ProfitLoss Account Catego Segment Customer Finance Charges Inspection Job Service Totals: Category CCTV	0.00 \$0.00 \$992.04 cory Expense II income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$2,559.25 \$21.009.63 221.009.63	Expense \$0.00 \$33.66 \$11,257.28 \$13,619.45 em Type Segment Expense \$5,451.59	Balance         \$7,39           Bilance         \$1,174.95           \$1,174.95         \$127.18           (\$33.66)         \$5,890.97           \$250.74         \$7,390.18           Balance         \$1,655.41	0.18 Accc Item T Inspec Invent Labor Monit Non-R Other Service	leb Torate: Torate: Quern In Flex unt Catego per tring (R) scurring (R) scurrin	Please contact Astute Fina bry Expense Item 1 Income \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 (\$4,038.68) \$384.45 \$385.00 \$21,009.63	124.02 151.31 and gain valuable noial or OPT Busin S0.00 S0.	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. pr more infor <b>Balance</b> \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$15,523.43 \$15,523.43 \$15,75,523.43	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: CUB (21) Customer Unhappy with Service U19/2017 50 action 1/19/2017 1/25/2017 50 action 1/19/2017 1/25/2017 50 action 1/19/2017 1/25/2017 15 action 1/19/2017 Invoice: Invoice Number 678/T for Sanda Sindell 1/2017 Invoice: Invoice Number 678/T for Sanda U(W) Clavitin dellipmail.com) was approved. 1/2017 Invoice: Invoice Number 678/T for Sandell Brad (W) Clavitin dellipmail.com) was approved. 1/2017 Invoice: Invoice Number 678/T for Sandell Brad (W) Clavitin dellipmail.com) was approved. 1/2017 Invoice: Invoice Number 678/T for Sandell Brad (W) Clavitin dellipmail.com) was approved. 1/2017 Invoice: Invoice Number 678/T for Sandell Brad (W) 20207 Invoice: Invoice Number 678/T for	Labor Labor Hours: Labor Cost: Totals: Profit/Loss Segment Customer Finance Charges Inspection Job Service Totals: Account Category Category CCCTV Cycle Billing	0.00 \$0.00 \$992.04 income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$25,559.25 \$21,009.63 pty Expense It Income \$7,117.00 \$791.45	Expense \$0.00 \$0.00 \$53.66 \$11,257.28 \$2,308.51 <b>\$13,619.45</b> em Type Expense \$5,451.59 \$0.00	Balance           \$1,174.95           \$127.18           (\$53.66)           \$53.800.77           \$250.74           \$7.390.18           Balance           \$1,655.41           \$791.45	0.18 Acco Item T Inspec Inventu Abor Moniti Non-R Other Service Total	Jeb Torate Torate International Catego Periods (R) ry Part ring (R) Agreements (R) eurot (R) Agreements (R) eurot (R)	Piesse contact Astute Fina           Income           \$350.68           \$1,070.00           \$6,927.75           \$407.00           \$15,523.43           \$(40,38.68)           \$384.45           \$385.00           \$21,009.63	124.02 151.31 and gain valuable noial or OPT Busin S0.00 S0.	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$17,658.13) \$384.45 \$385.00 <b>\$7,390.18</b>	mation.
en Cases: 4 t Activity: 1/21/2017 8:15 AM R Since: 1/19/2017 7:24 AM t CAR: CUB (21) Create CAR Case see Details Entered Follow Up Risk 5201 Customer Unhappy with Service 1/19/2017 50 ECB Multiple Go Backs 1/19/2017 1/25/2017 50 ECB Multiple Go Backs 5:1641 PM 7200 AM 30 5201 Job Not Scheduled 1/19/2017 1/25/2017 15 ECB Multiple Go Backs 5:1641 PM 7200 AM 30 5202 Variable Control Cont	Labor Labor Hours: Labor Cost: Totals ProfitCoss: Segment Cuttomer Finance Charges Inspection Job Service Totals: Category CCTV Cycle Billing G & A	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,142.25 \$2,59.25 \$21,009.63 Ory Expense It Income \$7,117.00 \$791.45 \$0.00	Expense           \$0.00           \$0.00           \$53.66           \$11,257.28           \$2,308.51           \$13,619.45	Balance         \$7,39           Bilance         \$1,174.95           \$1,27.18         (53.66)           \$5,800.97         \$250.74           \$7,390.18         \$7,390.18           Balance         \$1,65.41           \$7,14.5         \$0.00	0.18 Rem Ty Inspec Inventu Labor Monitik Non-R Other Service Total	Jeb Torate Torate International Catego Periods (R) ry Part ring (R) Agreements (R) eurot (R) Agreements (R) eurot (R)	Piesse contact Astute Fina           Income         Item 1           5350.68         \$1,070.00           51,070.00         \$6,927.75           \$407,00         \$15,523.43           (\$4,038.48)         \$384.45           \$385.00         \$21,009.63           ory         Expense         Item 1           Income         Item 1	124.02 151.31 and gain valuable noial or OPT Busin S0.00 S0.	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$17,758.13) \$384.45 \$385.00 <b>\$7,390.18</b> Balance	mation.
en Cases:         4           th Activity:         1/21/2017 8:15 AM           th Since:         1/19/2017 7:24 AM           st CAR:         CUB (21)           State:         Follow Up           RL2D:         Customer Unhappy with Service           State:         The Yang           State:         The Yang           State:         The Yang           State:         The Yang           State:         Invoice:           Invoice:         Invoice:           Invoice:         Invoice:           Invoice:         Invoice:           State:         State:           State:         CuB (20)           State:         CuB (20)           State:         CuB (20)           State:         CuB (20)	Labor Labor Heurs: Labor Cost: Totals Profit.loss: Segment Cuttomer Finance Charges Inspection Job Service Totals: Category CCTV Cycle Billing G & A Inspections	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,148.25 \$2,559.25 \$21.009.63 Expense It Income \$7,117.00 \$791.45 \$0.00 \$350.68	Expense \$0.00 \$33.66 \$11,257.28 \$2,308.51 \$13,619.45 em Type Segment Expense \$5,451.59 \$0.00 \$30.00 \$33.66	Balance         \$7,39           Balance         \$1,174.95           \$127.18         (\$33.66)           \$5800.97         \$250.74           \$7,390.18         \$7390.18           Balance         \$1,65.41           \$71.45         \$0.00           \$297.02         \$297.02	0.18 Accc Item T; Inspec Inventu Labor Other Other Other Expensible Labor	jeb Totale:	Please contact Astute Fina           pry         Expense         Item T           income         \$330.68         \$1,070.00         \$6,927.75           \$407.00         \$6,927.75         \$447.00           \$15,523.43         \$445.538.68         \$338.68           \$338.68         \$338.69         \$384.45           \$385.00         \$538.00         \$305.00           \$380.66.3         \$305.00         \$50.68	124.02 151.31 and gain valuable noial or OPT Busin S0.00 S0.	nt	\$7,011.16 \$8,948.90 g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407,00 \$5,522.43 (\$17,658.13) \$384.45 \$385.00 <b>57,390.18</b> Balance (\$8,948.90)	mation.
pen Cases:         4           stst Activity:         1/21/2017 8:15 AM           AR Since:         1/19/2017 8:15 AM           stst Activity:         1/19/2017 8:15 AM           stst CAR:         CUB (21)           Cost         Create CAR Case           Case         Details           Entered         Follow Up           State (22)         Customer Unhappy with Service         1/19/2017           State (23)         Multiple Go Backs         1/19/2017           State (24)         Job Not Scheduled         1/19/2017           NSI2(23)         Job Not Scheduled         1/19/2017           OnsSymcLog         Case         0           Case         Type         Details           Chard (27)/2017         Invoice         Nonice Number 67647 for Sarah Swindell           2243 AM         67267         (bravice Number 67647 for Sarah Suproved.           (27)2017         Invoice         Invoice Number 67647 for Sarah Suproved.           (27)2017         Invoice         Invoice Number 67647 for Sarah Suproved.           (21)2017         Invoice         Invoice Number 67647 for Sarah Suproved.           (21)2017         Invoice         Invoice Number 67647 for Sarah Suproved.           (21)2017         In	Labor Labor Hours: Labor Cost: Totals ProfitCoss: Segment Cuttomer Finance Charges Inspection Job Service Totals: Category CCTV Cycle Billing G & A	0.00 \$0.00 \$992.04 Income \$1,174.95 \$127.18 \$0.00 \$17,142.25 \$2,59.25 \$21,009.63 Ory Expense It Income \$7,117.00 \$791.45 \$0.00	Expense           \$0.00           \$0.00           \$53.66           \$11,257.28           \$2,308.51           \$13,619.45	Balance         \$7,39           Bilance         \$1,174.95           \$1,27.18         (53.66)           \$5,800.97         \$250.74           \$7,390.18         \$7,390.18           Balance         \$1,65.41           \$7,14.5         \$0.00	0.18 Rem Ty Inspec Inventu Labor Monitik Non-R Other Service Total	jeb Totale:	Piesse contact Astute Fina           Income         Item 1           5350.68         \$1,070.00           51,070.00         \$6,927.75           \$407,00         \$15,523.43           (\$4,038.48)         \$384.45           \$385.00         \$21,009.63           ory         Expense         Item 1           Income         Item 1	124.02 151.31 and gain valuable noial or OPT Busin S0.00 S0.	nt	\$7,011.16 <b>\$8,948.90</b> g Vivid Flex. or more infor Balance \$350.68 \$1,070.00 \$6,927.75 \$407.00 \$15,523.43 \$17,758.13) \$384.45 \$385.00 <b>\$7,390.18</b> Balance	mation

Totals:

\$21,009.63

\$13,619.45

\$7,390.18

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

Home Dashboards	✓ OPT Sync Inte	erface 🗸 Tools	✓ Resource	es 🗸 O	PT Business	Services 🗸					3	/ 4 Open Item	is Logout f	Brad Swindell
PT					Brad S	Swindel	l's Dashb	oard						
Account		Tasks (2 / 2)		Ca			Jobs	(3)	Tickets (3)			Pro	spects (8 / 8)	
ag a column header and dro	op it here to group by th	at column				S Refresh	Customer: Name:		<u>11157</u> Swindell, Brad (W)	<u>Open J</u> Open 1			1 24	
Customer	Name	Customer Type	Branch	Total Risk		Touched	Total RMR:		\$0.00	Open (			4	
● <u>11157</u>	Swindell, Brad (W)	Employee	Electronix	95	1/25/2017 7:00:00 AM	1/21/2017 8:15:15 AM	Site Count: System Cor		2 3	At Risk Last Ac			1/19/2017 1/21/2017	
							<u>system co</u>	<u></u>	Brad Swindell's Ca				1/21/2011	
							Drag a column he	eader and drop it	here to group by that column					
												_	_	S Refres
							Case	Туре			Risk		Last Touched	Follow Up
							<u>MGB (28)</u>	Multiple Go Ba	acks			1/19/2017 5:16:41 PM	1/21/2017 8:15:15 AM	1/25/2017 7:00:00 AM
							<u>CUS (29)</u>	Customer Unh	nappy with Service			1/19/2017 5:20:16 PM	1/19/2017 5:20:16 PM	

## **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.

Custome	r At Risk - Case	Custo	omer Info
Case Number: Case Code:	CUS (29) CUS - Customer Unhappy with Service	Branch: Customer Number:	Electronix <u>11157</u>
Case Code:	50	Customer Number: Customer Name:	Swindell, Brad (W)
Entered Date:	1/19/2017 5:20 PM	Customer Since:	11/27/2012
Case Type:	Manual	Master Account:	11/2//2012
Case Status:	Open	Salesperson:	Brad Swindell
Follow-Up Date:		Customer RMR:	\$0.00
Case Details Customer Activity Log	Service Ticket Prospects Tasks User Assignment	Audit Log	
Task Code Description Call Customer Call Customer	Created Assigned To Due Date 1/22/2017 breds 3:27:55 AM	Created on 1/22/2017 3:27:55 AM by brads Assigned To Brad Swindell (brads) Due Date Instructions: Call Customer	
		Notes call mr smith at 4pm Add a Note Completed?	Date User 1/22/2017 3:27:55 AM brads Add Note

AR Reports 🔍					
	Description				_
ACH Payments About to Post	Email to customer reminding them of future A	CH payment post in X days.			ync Events
ACH Payments Posted	Email to customers when ACH payments post				lia a lia ata
New Invoice Posted with Bank Draft Attached	Email to customers when invoice is created w				
New Invoice Posted with CC Attached	Email to customers when Invoice is created w				
New Invoice Posted without AutoPay	Email to customers when invoice is created w	ithout payment method attached for AutoPay.			
New Invoice Posted with Invoice Detail	Email to customers when invoice details to cu	stomer when posted.			
Customers Past Due	Internal list of customers with unpaid invoices				
Invoices Past Due	Internal list of unpaid invoices over \$x.xx, can				
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 cre	<u> </u>			
CC About to Expire Report	Internal list of expiring credit cards, with ema	Dashboards	Description		
/IP Added to Collections	Internal list of VIP customers added to a colle		Master Dashboard Interface, combines dynamic dashboards in	nto one web service. Uses tabbed design to	
/IP Added to Cancellation Queue	Internal list of VIP customers added to the car	Dashboard - Unified Dashboard Master	access multiple dashboards from one location. Includes confi		
arge Customer added to Collections	Internal list of customers with more than \$x.x		the master. Individual dashboards are below.	8	
arge Customer added to Cancellation Queue	Internal list of customers with more then \$x.x		A series of dashboards showing the a list of inspections that a	re not currently linked and what must be done	
Past Due Service Ticket Alert	Alert to AR when service ticket is created/sch	Dashboard - Inspections, RMR Linking	to correct the link.	e not carrenti y iniked and what mast be done	
RMR Dropped below Threshold	Internal list of customers whose RMR has drop	Dashboard - Inspections, Listing	Dashboard showing the a list of the inspections for the next y		Description
New Invoice Posted with Details	Email to customers when invoice is created, in	Dashboard - Inspections, Listing	Dashboard showing the total sales (Jobs Sold) for this month,	inventory reports	Description
New Invoice Posted for Dealers	Email to dealers when cycle invoice is created	Dashboard - Sales, Total Sales	salesmen and breaking out RMR.	Low Stock Count	Internal list of products that have met their low stock threshold.
	<i>//</i>	Dashboard - Service, GoBack Queue		POs Open for More Than x Days	Internal list of purchase orders that have not been closed.
			Dynamic Dashboards showing all the tickets in the GoBack Qu		Internal report detailing any changes to the Purchase Price Variance account.
		Dashboard - Service, Onsite Tickets	Dynamic Dashboards showing all the tickets that where a tech	Jobs without PO created after x Days	Internal list of jobs that are waiting on a Purchase Order(s) to be generated.
	-	Dashboard - Service, Unclosed Tickets	Dynamic Dashboards showing all the tickets that are not close	O bachave been bervicea. This dashboard	
Service Reports	Description		using the RTI and RTC sub-problem code logic. Dashboards an		
Aissed Service Appointment	Internal list of service appointments that have		Dynamic Dashboards showing the list of service tickets for tor		
ervice Tickets Arrived but not Departed	Internal list of service appointments that have	Dashboard - Service, Tomorrows Tickets	dashboard will show the customer and towns. Can be configu		Description
ervice Tickets Related To Radios	Internal list of service tickets arrived but not		Additional dashboards may be added for additional days for \$	2	
ervice Tickets Related To Install Issues	Internal list of service tickets relating to hadd	Dashboard - Service, Unbilled Tickets	Dynamic Dashboards showing the list of service tickets for the	at Daily Service Flash	Internal Flash Report of service data for the day, includes open tickets, closed tickets, invoiced tickets,
Panels that Need to be Unlocked	Internal list of service tickets relating to instal		correctly.		appointments, follow-ups, reschedules and inspections. Data is sorted by service company.
		Dashboard - Job, Queues	Dashboard showing the list of jobs in a specific job queue.	Monthly Service Statistics	Internal Flash Report of service data for the month, includes open tickets, closed tickets, invoiced ticket
Reminder of Service Call	Email to customer reminding them of future s	Dashboard - Job, Statuses	Dashboard showing the list of jobs at a specific job status.		totals and go backs sorted by company.
Dispatched Tech Dispatched Tech With Photo	Email to customer notifying that tech is in rou	Dashboard - Web, Account List	Dashboard showing the list of current and pending SedonaWe	21	Internal Flash Report outlining daily and monthly service and installation billing, open tickets and jobs,
	Email to customer notifying that tech is in rou	e, metadea tean photo.		Daily Operations Flash	financials based on those open jobs, now with added service ticket contact counts and jobs ready to close
omorrow's Service Tickets	Internal list of tomorrows service calls. Can be				counts
Auto Email Service Details to Tech	Email to technician of new service call is schere				Internal Flash Report outlining all financial happenings in the company: Deposits, payments, account car
ervice Ticket Created	Email to customer when new service ticket is	entered.		Daily Financial Flash	MTD (with balance of contract) and account adds MTD (with RMR)
ervice Ticket Follow-up Email	Email to manager when service call is resolved	Manitou Actions	Description		Internal Flash Report detailing accounts added to the cancellation queue. Including the RMR, contract
ervice Ticket Follow-up Report	Internal list of service tickets needing a Go Ba	Raise Threat Level		Daily Cancellation Flash	balance, reason, effective date and any additional memos.
iervice Call Survey	Email to customer a satisfaction survey link to		Action, Raise threat level by X if X incidents are received with		Internal Flash Report of inspection data for the month, includes open tickets, closed tickets, invoiced tic
nactive Part Was Used	Internal list of service tickets where an inactiv	Lower Threat Level	Action, Lower threat level by X if no incidents received within	<sup>12</sup> Monthly Inspection Statistics	w/ totals and go backs sorted by company.
Part Discounted Beyond Threshold	Internal list of service tickets where a part wa	Restore Threat Level	Action, Set threat level to X if receive X alarms receive	Monthly Service/Inspections Statistics	Combined Flash Report for Service/Inspections, distributed by service company.
Service Tickets Ready to be Closed	Internal list of service tickets that have been of	Access Trouble Notification	Create, "Access Trouble" signal, If X bad reads received in X m		combined rush hepore of service/inspections, distributed by service company.
Closed Service Tickets by Service Level	Internal list of service tickets closed for billing	Alarm Verified Notification	Create, "Alarm Verified" if receive alarms on more then x zon		
Service Contact Profitability Warning	Internal list of RAR where total amount of ser	Auto Generate Service Ticket Action Pattern	Action, Create service ticket automatically using the auto clie		
SedonaWeb Service Tickets Report	Internal list of service tickets generated via Se	Update Service ticket When Signals Tested	Action, Updates service ticket if tech sends signals while onsi	System Reports	Description
edonaWeb Service Tickets Action	Action, Changes Problem Codes on tickets ger	erated via SedonaWeb.		New SedonaOffice User	Internal list of new generated SedonaOffice users and their access levels.
Service Tickets Missing Contact Info	Internal list of service tickets generated without	ut contact information.		New SedonaOffice Employee	Internal list of new generated SedonaOffice users and their access revers.
nspections Not Linked to RMR					Internal list of new generated sedonaorrice employees and their user assignment.
Dispatched Tech With Photo (Key)	Internal list of inspections that are not linked				
	Internal list of inspections that are not linked Email to Key Account Manager notifying that t	Job Reports	Description	Sedona Documents Entered	Internal list of new attached customer documents to SedonaDocs.
	Internal list of inspections that are not linked Email to Key Account Manager notifying that t Email to Key Account Manager with list of curr	Job Reports	Description	Email Blast to Dealers	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your dealers.
aily Open Service Ticket Snapshot (Key)	Email to Key Account Manager notifying that t Email to Key Account Manager with list of curr	Job Reversals Preformed	Internal list of job reversals.	Email Blast to Dealers Email Blast to Customers	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your dealers. Customizable Email that can be sent out your customers.
aily Open Service Ticket Snapshot (Key) ervice Tickets Created (Key)	Email to Key Account Manager notifying that t Email to Key Account Manager with list of curr Email to Key Account Manager with list of new	Job Reversals Preformed Jobs Ready to be Closed	Internal list of job reversals. Internal list of jobs ready to be closed.	Email Blast to Dealers Email Blast to Customers New SedonaOffice Tech	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your customers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice.
aily Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key)	Email to Key Account Manager notifying that t Email to Key Account Manager with list of curr Email to Key Account Manager with list of new Email to Key Account Manager with list of reso	Job Reversals Preformed Jobs Ready to be Closed Jobs Dispatched but not Arrived	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived	Email Blast to Dealers Email Blast to Customers New SedonaOffice Tech Income Statement by Branch	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your dealers. Customizable Email that can be sent out your customers.
aily Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key) ervice Tickets Scheduled (Key)	Email to Key Account Manager notifying that t Email to Key Account Manager with list of curr Email to Key Account Manager with list of new Email to Key Account Manager with list of ress Email to Key Account Manager with list of sch	Job Reversals Preformed Jobs Ready to be Closed Jobs Dispatched but not Arrived Jobs Arrived but not Departed	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived Internal list of jobs that have been arrived but not departed a	Email Blast to Dealers Email Blast to Customers New SedonaOffice Tech Income Statement by Branch	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your customers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice.
iaily Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key) ervice Tickets Scheduled (Key) echnician Stop Summary	Email to Key Account Manager notifying that t Email to Key Account Manager with list of cure Email to Key Account Manager with list of new Email to Key Account Manager with list of rese Email to Key Account Manager with list of rese Internal list of tech's start/stop/travel and job	Job Reversals Preformed Jobs Ready to be Closed Jobs Sispatched but not Arrived Jobs Arrived but not Departed Job Task Completed	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived Internal list of jobs that have been arrived but not departed a Internal list of jobs that have had a specific task completed.	Email Blast to Dealers Email Blast to Customers New SedonaOffice Tech Income Statement by Branch	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your customers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice.
aily Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key) ervice Tickets Scheduled (Key) echnician Stop Summary ustomers having x Tickets in y Days.	Email to Key Account Manager notifying that the Email to Key Account Manager with list of currue Email to Key Account Manager with list of new Email to Key Account Manager with list of sche Internal list of tech's start/stop/travel and job Internal list of Customers with having multiple	Job Reversals Preformed Jobs Ready to be Closed Jobs Dispatched but not Arrived Jobs Arrived but not Departed Job Task Completed Job Task Completed - Customer Email	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived Internal list of jobs that have been arrived but not departed a Internal list of jobs that have had specific task completed. Email to customer based on completion of job task.	Email Blast to Dealers Email Blast to Customers New SedonaOffice Tech Income Statement by Branch fter threshold.	Internal list of new attached customer documents to SedonaDocs. Customizable Email that can be sent out your clealers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice. Internal Report showing Income and Expense GLs per Branch at the EOM.
aliy Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key) ervice Tickets Scheduled (Key) echnician Stop Summary ustomers having x Tickets in y Days. uto Email Service Details to Tech (Requested)	Email to Key Account Manager notifying that ta Email to Key Account Manager with list of curn Email to Key Account Manager with list of reserved Email to Key Account Manager with list of reserved Internal list of extra count Manager with list of reserved Internal list of tech's start/stop/travel and job Internal list of Customers with having multipli Email to technician of new service call when rule	Job Reversals Preformed Jobs Ready to be Closed Jobs Dispatched but not Arrived Job Sartived but not Departed Job Task Completed Job Task Completed - Customer Email Job Status Report	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived Internal list of jobs that have been arrived but not departed a Internal list of jobs that have had a specific task completed. Email to customer based on completion of job task. Internal list of jobs that have a specific status.	Email Blast to Dealers Email Blast to Customers New SedonaOffler Tech Income Statement by Branch fererthreshold. Sales Reports	Internal list of new attached customer documents to Sedonabocs. Customizable Email that can be sent out your dealers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice. Internal Report showing income and Expense GLs per Branch at the EOM.  Description
ally Open Service Ticket Snapshot (Key) ervice Tickets Created (Key) ervice Tickets Resolved (Key) ervice Tickets Scheduled (Key) ervice Tickets Summary ustomers having x Tickets in y Days. uto Ernal Service Details to Tech (Requested) ervice Tickets Onsite Longer then x Min.	Email to Key Account Manager notifying that the Email to Key Account Manager with list of curre Email to Key Account Manager with list of new Email to Key Account Manager with list of reset Email to Key Account Manager with list of sche Internal list of tech's start/stop/travel and job Internal list of Customers with having multipli Email to technician of new service call when r Email to technician when they are on site longhase.	Job Reversals Preformed Jobs Ready to be Closed Jobs Dispatched but not Arrived Jobs Arrived but not Departed Job Task Completed Job Task Completed - Customer Email Job Status Report Installation Customer Survey	Internal list of job reversals. Internal list of jobs ready to be closed. Internal list of jobs that have been dispatched but not arrived Internal list of jobs that have been arrived but not departed a Internal list of jobs that have been arrived but not departed. Email to customer based on completion of job task. Internal list of jobs that have a specific tastus. Email to customer a link to take a customer satisfaction surve	Email Blast to Dealers Email Blast to Customers New Sedano20ffler Erch Income Statement by Branch fer threshold. Sales Reports New Sales Lead Email to Customer	Internal list of new attached customer documents to Sedonabocs. Customizable Email that can be sent out your dealers. Customizable Email that can be sent out your customers. Internal list of newly added technications to SedonaOffice. Description Email to customer to thank them for the new prospect.
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## **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



















