



SedonaDashboard

Reference Guide

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About this Document

This Reference Guide is for use by SedonaOffice customers only. Its purpose is to provide an overview of the content contained within and is to be used for reference purposes only.

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The screenshots in this document reflect version 5.7.31. This document may be updated periodically. Please check our website at www.sedonaoffice.com for the most current version.

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Overview

SedonaDashboard is a real-time, web-based, data visualization and analysis tool that displays the current status of metrics and key performance indicators within SedonaOffice. Each user can individually design their panel preferences for their dashboard.

This tool can be run outside of SedonaOffice. At the time of installation, SedonaOffice Support will provide a website address where users may remotely log into their dashboards using their SedonaOffice usercode and password. SedonaDashboard can be run from mobile devices and is compatible with Android phones, iPhones and other types of computing devices. The dashboard may be created for viewing on a computer screen in horizontal format. It may also be created in a vertical format for easy viewing on a mobile device.

Charts and graphs may be drilled into to analyze the totals presented. Some panels may also be drilled through to reach an analysis grid where filtering, sorting, additions of columns, mathematical formulas and additional functions may be used to further analyze data. Analysis grids may be exported into Excel, .csv or .pdf formats.

SedonaOffice customers must request the installation of SedonaDashboard from SedonaOffice Support. The system requirements for SedonaDashboard may be found on our website at <http://www.sedonaoffice.com/wp-content/uploads/SedonaDashboard-Analytics-System-Rgmts.pdf> . At the time of installation, customers should be prepared to provide Sedona Support personnel with their targeted goals for monthly, quarterly, and annual RMR sales and jobs so that correct goal gauges may be set.

SedonaDashboard is available for use on SedonaOffice versions 5.7.31 or higher.

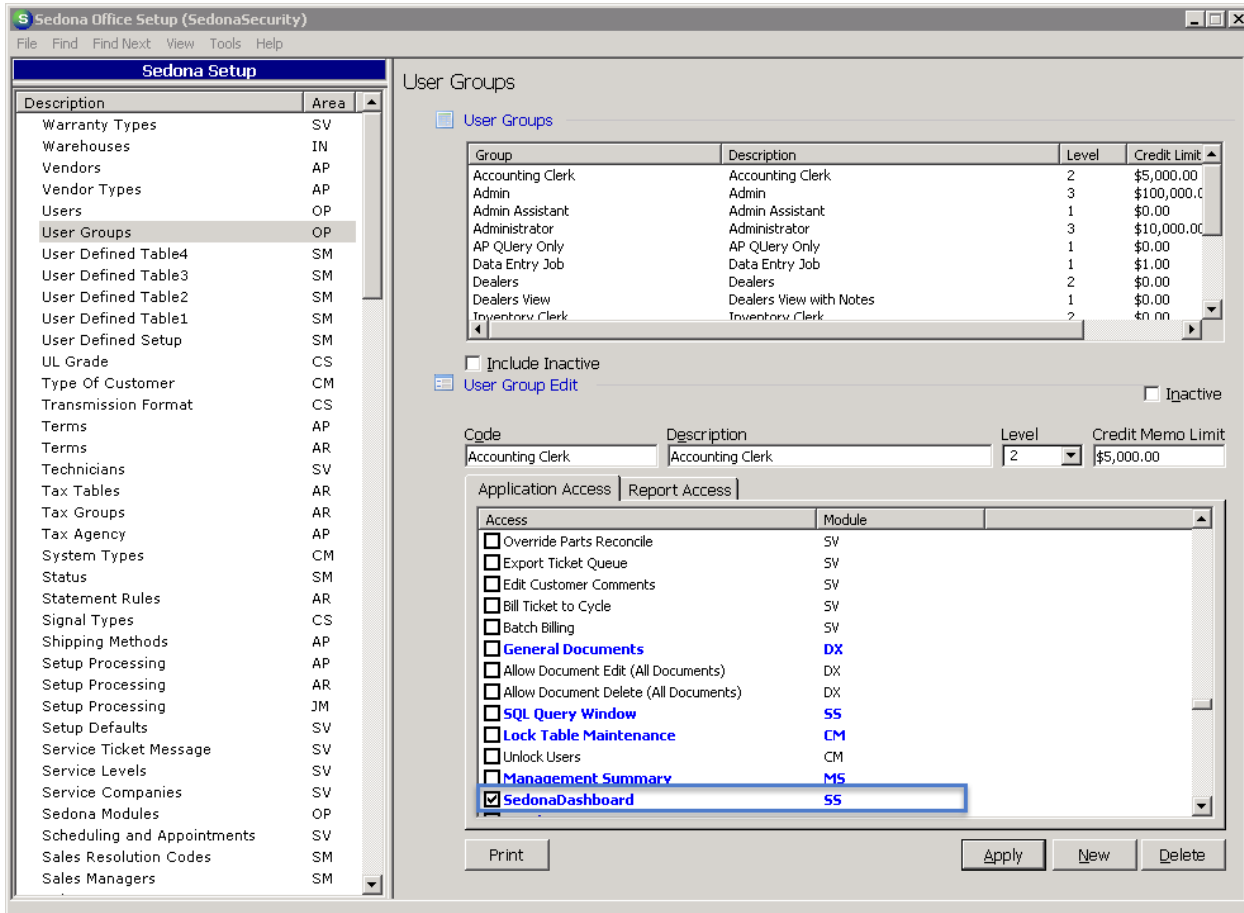
Which Users Should Be Given Access To SedonaDashboard?



Unlike the main SedonaOffice application, SedonaDashboard does not look at specific functional permissions within the Usergroup table in SedonaSetup to determine what access a user should be given. As long as a user has **one** permission in a module (which could be a very restrictive one such as Customer Tree View Only or only the Chart of Accounts), they will receive **unrestricted access** to dashboard panels and reports involving those modules seeing information that otherwise would not be available to them through the main SedonaOffice module. SedonaDashboard does not look at Customer Group security, Report access security, or the ability to export data. **Users that have been given access limitations in their Usergroups for any of the reasons stated above should not receive access to the SedonaDashboard module.**

Usergroup Table

Users that need access to SedonaDashboard must be given access to the module within their Usergroup table in SedonaSetup.



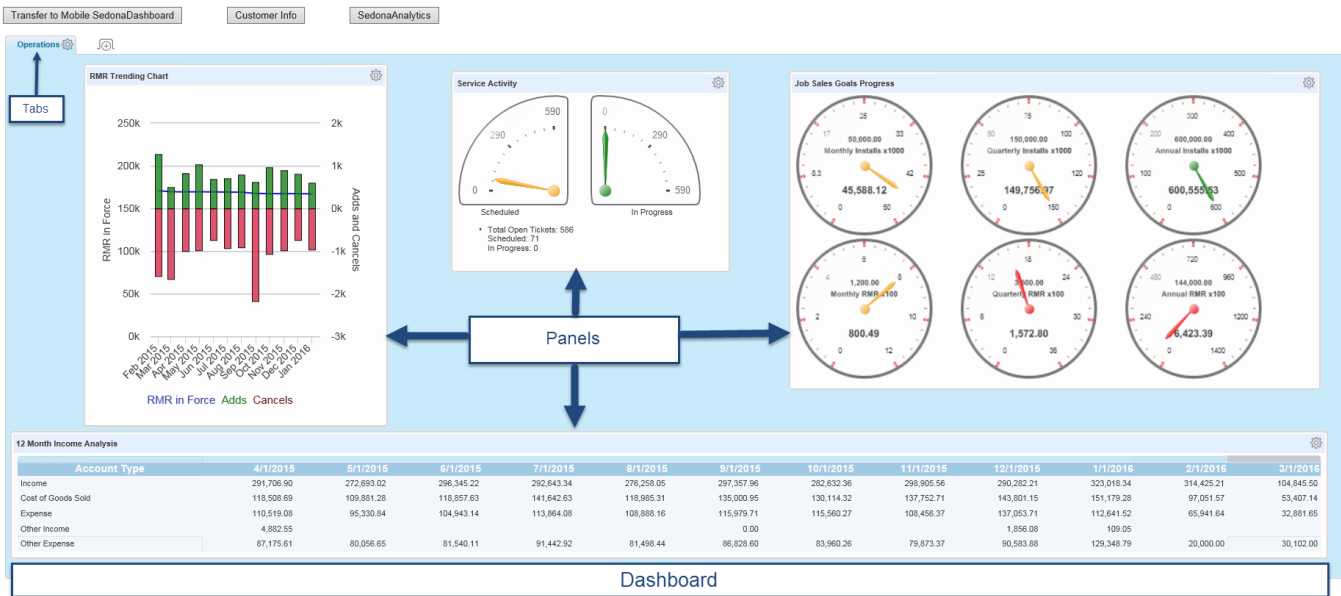
Once access to the application has been provided, a new icon will appear on the Application Menu entitled



Concepts and Terms

Dashboard, Panels, and Tabs

The **dashboard** is a single horizontal screen on which information is placed in the form of **panels**. **Panels** may depict information visually (charts and graphs) or by text (counts, dollar amounts, etc.). Folder **tabs** may be used to organize data by subject matter or to otherwise label different views. When users define their dashboard, their preferences are automatically saved. Each time a user opens their dashboard, panel information is automatically updated.



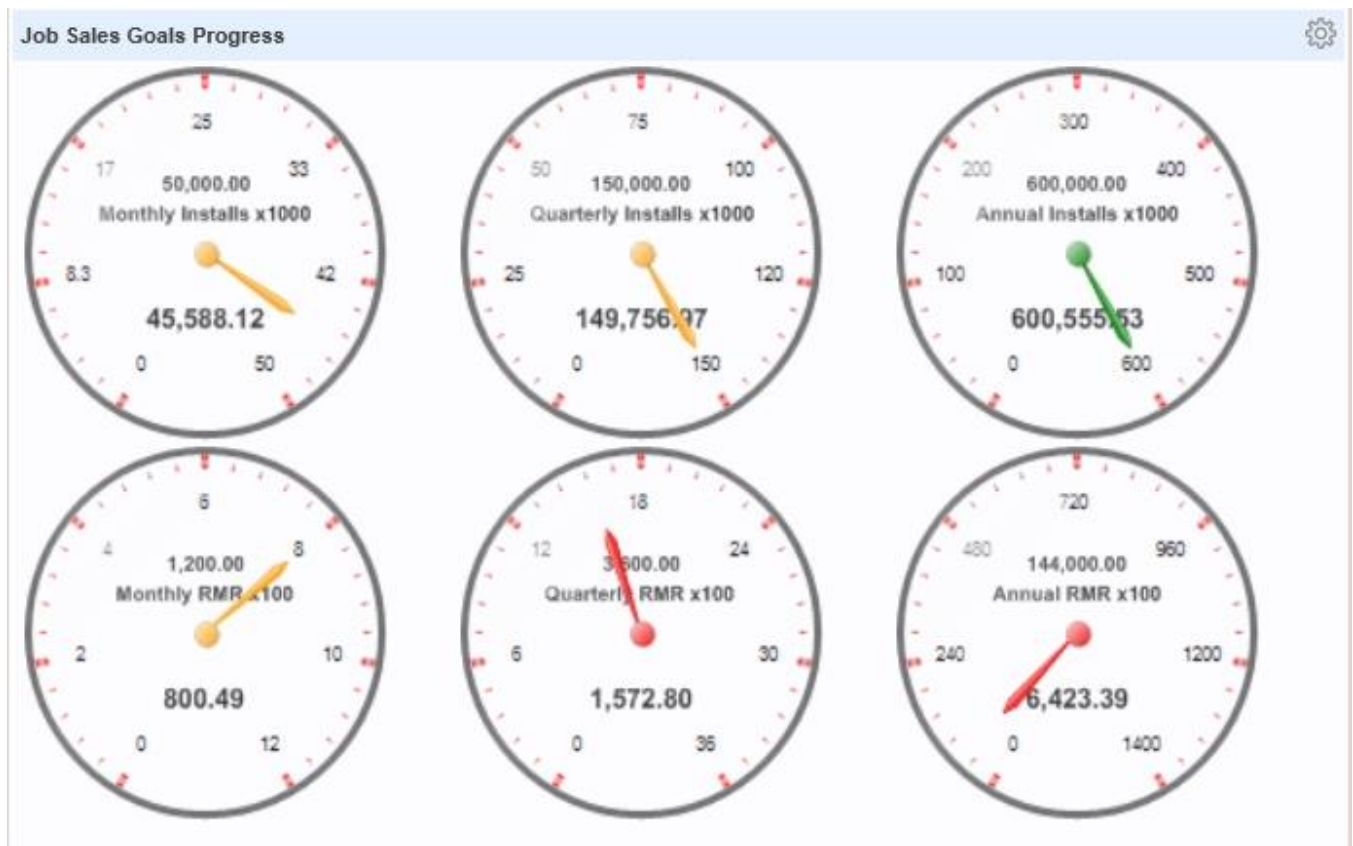
Hovering the mouse over a specific area of a chart or graph enables totals to appear in a pop-up window representing the area selected.



Gauges

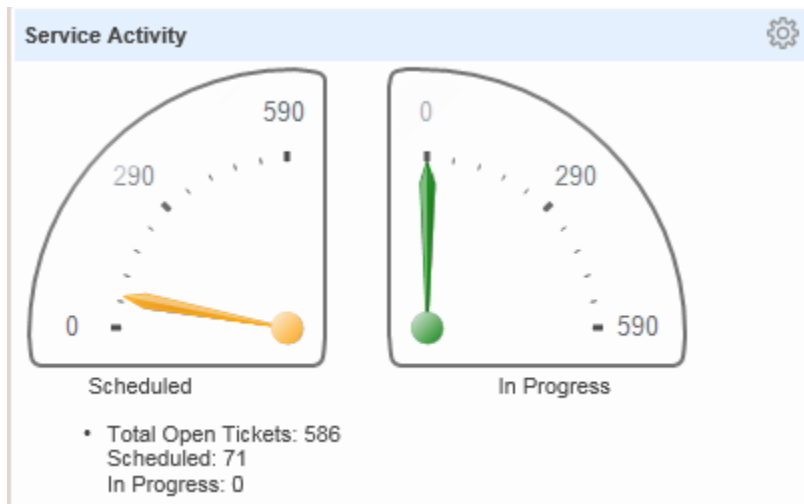
Gauges measure sales performance against a targeted goal. The six gauges below are available through the Job Sales Goal Progress panel. SedonaOffice customers need to provide SedonaOffice Support personnel with their monthly, quarterly and annual sales goals for install dollars and RMR within jobs broken down by monthly, quarterly, and annual dollars. Unless goals are provided, the default for each gauge will be \$1.00.

When goals are set behind the scenes, the colors on the needles will represent progress toward those goals. Green indicates that the company has met or exceeded its goal, yellow means that it is more than ½ way to reaching the goal, and red indicates that the company is under ½ way to meeting its goal.

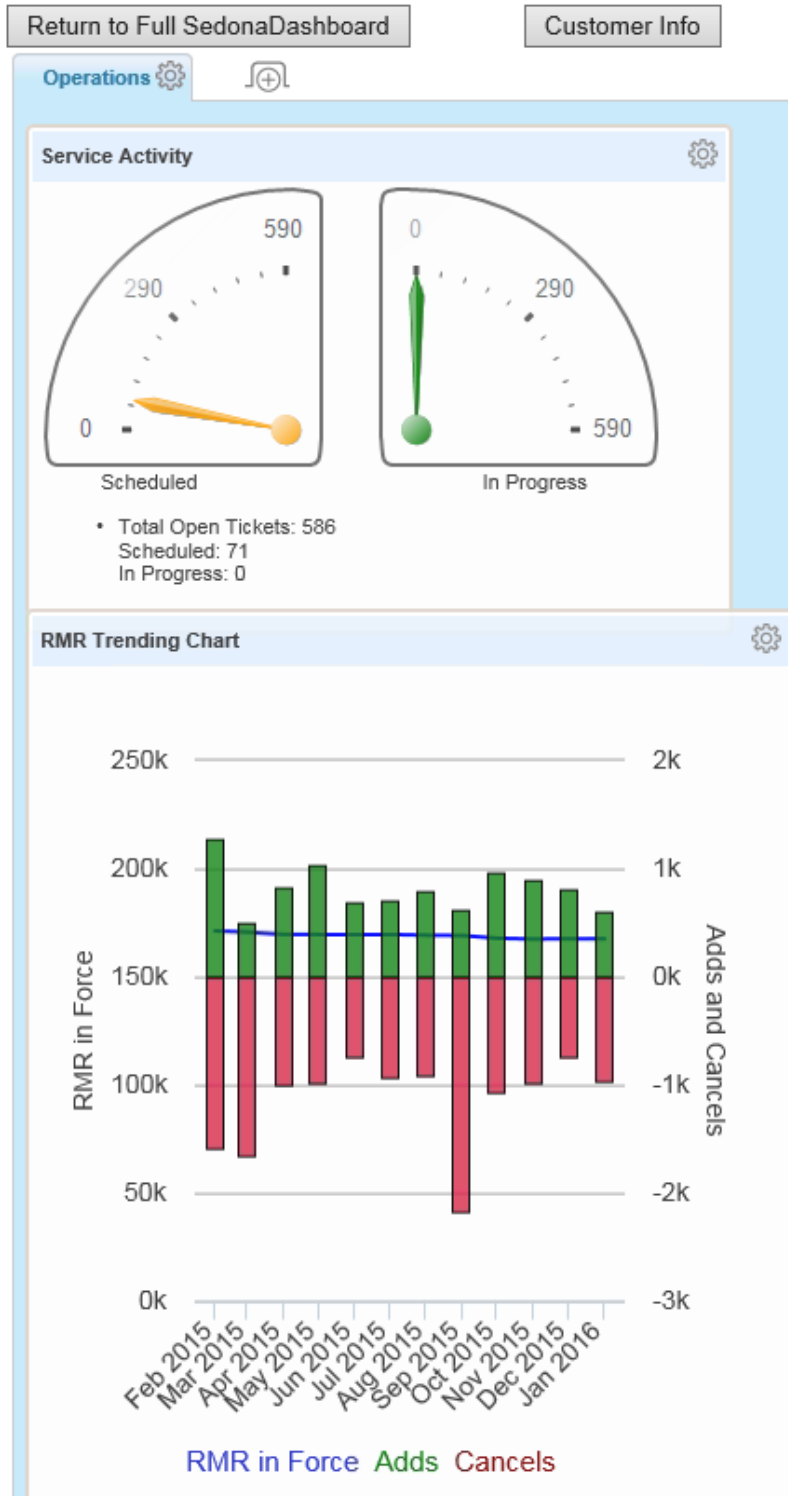


Meters

Meters show performance progress. Unlike gauges, the needles colors do not carry significance. In the example below, the yellow needle indicates that only 71 out of 586 service tickets have been scheduled. The green needle indicates that 0 are in progress. Meters are a great way for management to know when to respond when performance is not as anticipated.



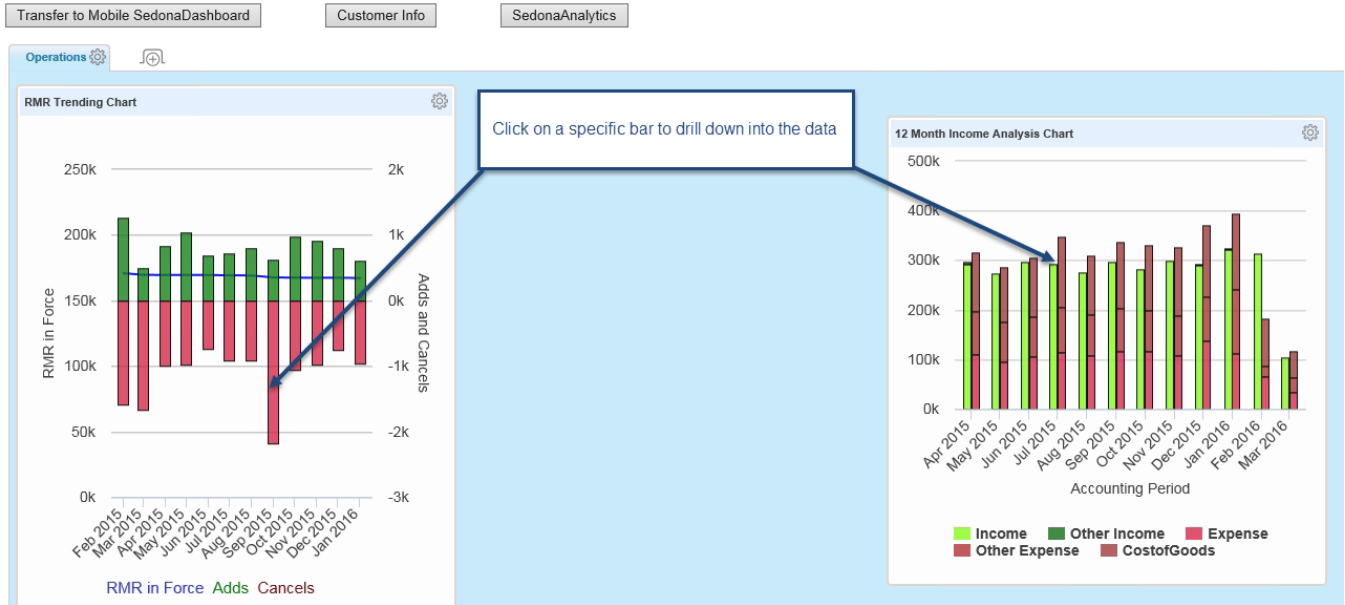
Mobile Dashboard



The regular dashboard is designed to appear in a horizontal format. Users may elect to arrange their panels in a vertical format for easier viewing on cell phones and other mobile devices. Creating the dashboard design for mobile devices is accomplished through the **Transfer to Mobile Dashboard** button. Users may return to the full dashboard at any time by clicking on the Return to Full SedonaDashboard button

Drill Down

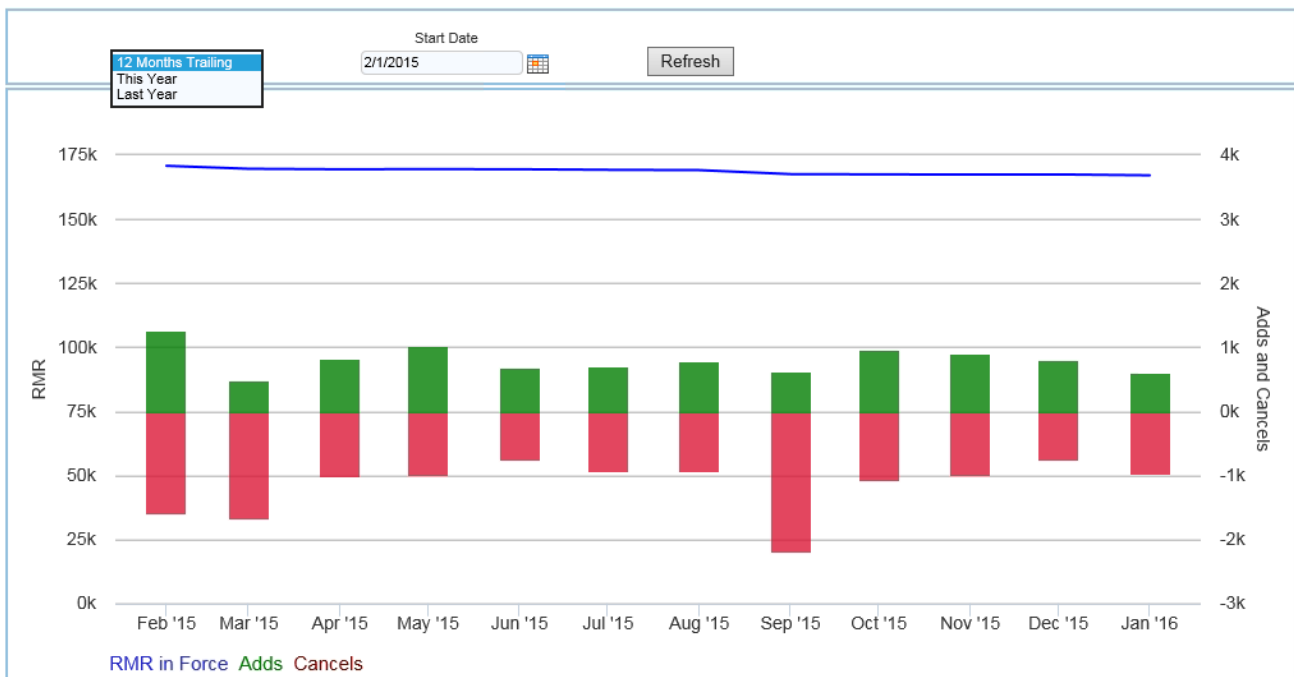
Users can **drill down** into chart data by clicking on a specific area to further analyze the information.



The chart will re-open in a new window offering filtering options to further granulate the data.

Depending upon the subject matter of the panel, filters such as branches, types of invoices, range of dates, etc. will be provided.

RMR Trending



Depending upon the subject of the panel, further drill-down may lead to an analysis grid. The list of panel definitions in this reference guide include information on whether an Analysis Grid is available for each panel.

Analysis Grid

An **analysis grid** enables the creation of new columns with custom calculations, ability to hide/sort columns, filter data, add new groupings, add charts, and perform aggregations using advanced functions. Analysis grids are a powerful tool. Analysis grids may be exported to Excel, .csv, or .pdf format.

Cancels

Return to Trending Show RMR Show Adds Refresh Data Save Layout Restore Layout Reset Layout

Formula Filter Add Chart

Table

Page 1 of 2



Export: Excel CSV PDF


Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yeary, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yeary, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch
7001449	Barry, Fred	2 Music School Rd	1		-66.64	8/24/2015	Site/System Change	Partial	Ranier Branch
7002356	Stryker, Fred	176 Fairway Dr	1	RMCA2622	-46.41	8/25/2015	Moved	Full	Ranier Branch
7003140	Kennedy, Tom	45 Protector Place	1	RMCB1470	-37.63	8/27/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aapen Ln	1	RMCA2696	-39.52	8/28/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aapen Ln	1	RMCA2696	-4.44	8/28/2015	Moved	Full	McKinley Branch

Reports

Several of the dashboard panels are also available in the form of a **report**. The advantages of a report over a panel is saving space on the dashboard as well as the ability to immediately drill down into filtered data. When a report is selected, a new window will open containing the graphical depiction (if available) and the ability to immediately drill into the data. Some reports display the graph and a list of customers making up the totals while others go immediately to an analysis grid. The *list of reports* may be displayed as a panel on the dashboard to easily launch a report.

Transfer to Mobile SedonaDashboard Customer Info SedonaAnalytics

Operations  

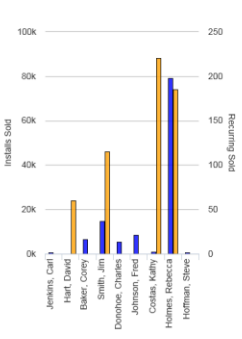
Available Reports 

- 12 Month Income Analysis
- AR Aging
- Credits by Reason
- RMR Analysis
- RMR By Key Data
- RMR Trending
- Sales by Item Type
- Sales by Salesperson

Report Filtering Options: Last Month, Start Date: 12/1/2015, End Date: 12/31/2015, Refresh

Sales by Salesperson

Graphical Depiction



Analysis Grid

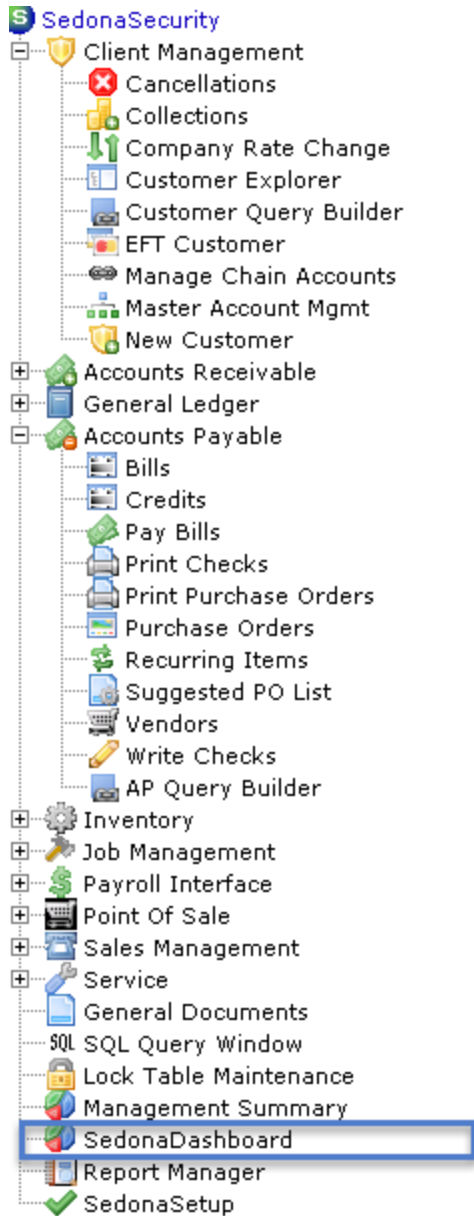
Salesperson	Employee_Code	Job Number	Install	Recurring	Percentage	Branch	Customer Number	Site Name	Address	City	State	Zipcode
Jenkins, Carl	AE	6815-1	545,740.0	0.0000	100.0000	Ranier Branch	7002442	Tredwell, Fred	433 Running Mares Rd	Monticello	AR	71656
Hart, David	AJS	32481	0.0000	60.0000	100.0000	Ranier Branch	7200915	Hibb, John	32 Thunderstorm	Pine Bluff	AR	71613
Baker, Corey	CB	6665-1	1606,500.0	0.0000	100.0000	Ranier Branch	7200654	Kenraugh, John	111 Trentaz Dr	Pine Bluff	AR	71611
Baker, Corey	CB	6785-1	3421,710.0	0.0000	100.0000	Ranier Branch	700444	Kasten, Fred	76 Exhibition Ln	Pine Bluff	AR	71611
Baker, Corey	CB	6792-1	1514,830.0	0.0000	100.0000	Ranier Branch	7007420	Bakalar, Fred	1000 Stake Ave	Pine Bluff	AR	71601
Smith, Jim	CS	6777-1	1354,110.0	45.0000	100.0000	Ranier Branch	7003229	McCarmon, Fred	106 Blake	Pine Bluff	AR	71613
Smith, Jim	CS	6794-1	10976,730.0	0.0000	100.0000	Ranier Branch	7201304	Dalby, John	110 County Rd 121	Pine Bluff	AR	71613
Smith, Jim	CS	6641-1	640,000.0	35.0000	100.0000	Ranier Branch	7201304	Dalby, John	110 County Rd 121	Pine Bluff	AR	71613
Smith, Jim	CS	6634-1	338,480.0	0.0000	100.0000	Ranier Branch	7201101	Flom, John	18 Buckskin Cir	Herritage	AR	71647
Smith, Jim	CS	6640-1	250,000.0	35.0000	100.0000	Ranier Branch	7201304	Dalby, John	110 County Road 121	Pine Bluff	AR	71613
Smith, Jim	CS	6632-1	68,320.0	0.0000	100.0000	Ranier Branch	4011436	Flon/Alca Wagers	235 Silverlode Dr	Pine Bluff	AR	71611
Smith, Jim	CS	32467	1153,300.0	0.0000	100.0000	McKinley Branch	7002666-1	ZIF, Fred	85 Willis Place	Pine Bluff	AR	71613
Donohoe, Charles	DD	6750-1	2635,040.0	0.0000	100.0000	Ranier Branch	7004483	Bright, Tom	5307 Owl Creek Rd	Pine Bluff	AR	71613
Donohoe, Charles	DD	6697-1	2812,660.0	0.0000	100.0000	Ranier Branch	7004310	Fedor, Tom	520 S Original St	Pine Bluff	AR	71611
Johnson, Fred	KH	6631-1	498,150.0	0.0000	100.0000	Ranier Branch	7006309	Schreiner, Tom	1103 Walters Ave	Pine Bluff	AR	71611
Johnson, Fred	KH	6605-1	670,180.0	0.0000	100.0000	Ranier Branch	7005217	Molmers, Tom	1313 W Dufrenoy Rd	Pine Bluff	AR	71611
Johnson, Fred	KH	6752-1	4023,330.0	0.0000	100.0000	Ranier Branch	7002495	Van Straaten, Fred	230 Lake Ave	Pine Bluff	AR	71611
Johnson, Fred	KH	6606-1	2296,360.0	0.0000	100.0000	Ranier Branch	7201036	Durgan, John	200 Duffield Ln	Pine Bluff	AR	71611
Coates, Kathy	PB	32462	235,200.0	45.0000	100.0000	Ranier Branch	7201296	Crystal, John	219 W. Wheeler St.	Pine Bluff	AR	71611
Coates, Kathy	PB	32466	235,000.0	40.0000	100.0000	McKinley Branch	7201302	Dragnits, John	41 Fowl Cir	Banka	AR	71601
Coates, Kathy	PB	32460	235,000.0	45.0000	100.0000	Ranier Branch	7201292	Cowan, John	33 Fall Creek Rd	Pine Bluff	AR	71611
Coates, Kathy	PB	32468	235,000.0	45.0000	100.0000	Ranier Branch	7201306	Damaso, John	101 Bunt Mountain Dr	Pine Bluff	AR	71613
Coates, Kathy	PB	32469	0.0000	45.0000	100.0000	Ranier Branch	7201308	Daniel, John	255 Gold River Ct	Pine Bluff	AR	71613
Holmes, Rebecca	RD	6746-1	10947,630.0	0.0000	100.0000	Ranier Branch	7000947	Differbaugh, Fred	32 E. Pasture Lane	Monticello	AR	71656
Holmes, Rebecca	RD	6789-1	3471,040.0	0.0000	100.0000	Ranier Branch	7000679	Gillanders, Fred	1419 Crystal Lake Rd	Pine Bluff	AR	71611
Holmes, Rebecca	RD	6803-1	9190,410.0	0.0000	100.0000	Ranier Branch	7201253	Coates, John	255 Hunter Creek Rd	Pine Bluff	AR	71611
Holmes, Rebecca	RD	6807-1	2085,100.0	49.9900	100.0000	Ranier Branch	7200957	Guth, John	0531 County Rd 153	Pine Bluff	AR	71613
Holmes, Rebecca	RD	6811-1	580,850.0	45.0000	100.0000	Ranier Branch	7201299	Cummins, John	110 E. 9th St	Pine Bluff	AR	71611
Holmes, Rebecca	RD	5777-1	407,150.0	0.0000	100.0000	Ranier Branch	7200576	Harwell, John	1640 High Aspen Dr	Pine Bluff	AR	71601
Holmes, Rebecca	RD	6775-1	4888,400.0	0.0000	100.0000	Ranier Branch	7000947	Differbaugh, Fred	130 Aspen Valley Ranch	Monticello	AR	71656

Unlike panels, reports can also contain **hotspots** where data appears in dark blue indicating that it can be drilled into further:



Launching SedonaDashboard Within SedonaOffice

SedonaDashboard may be launched by-clicking on the icon for SedonaDashboard from the Main Application Menu Tree. SedonaDashboard will take up to one minute to initially load.



Remotely

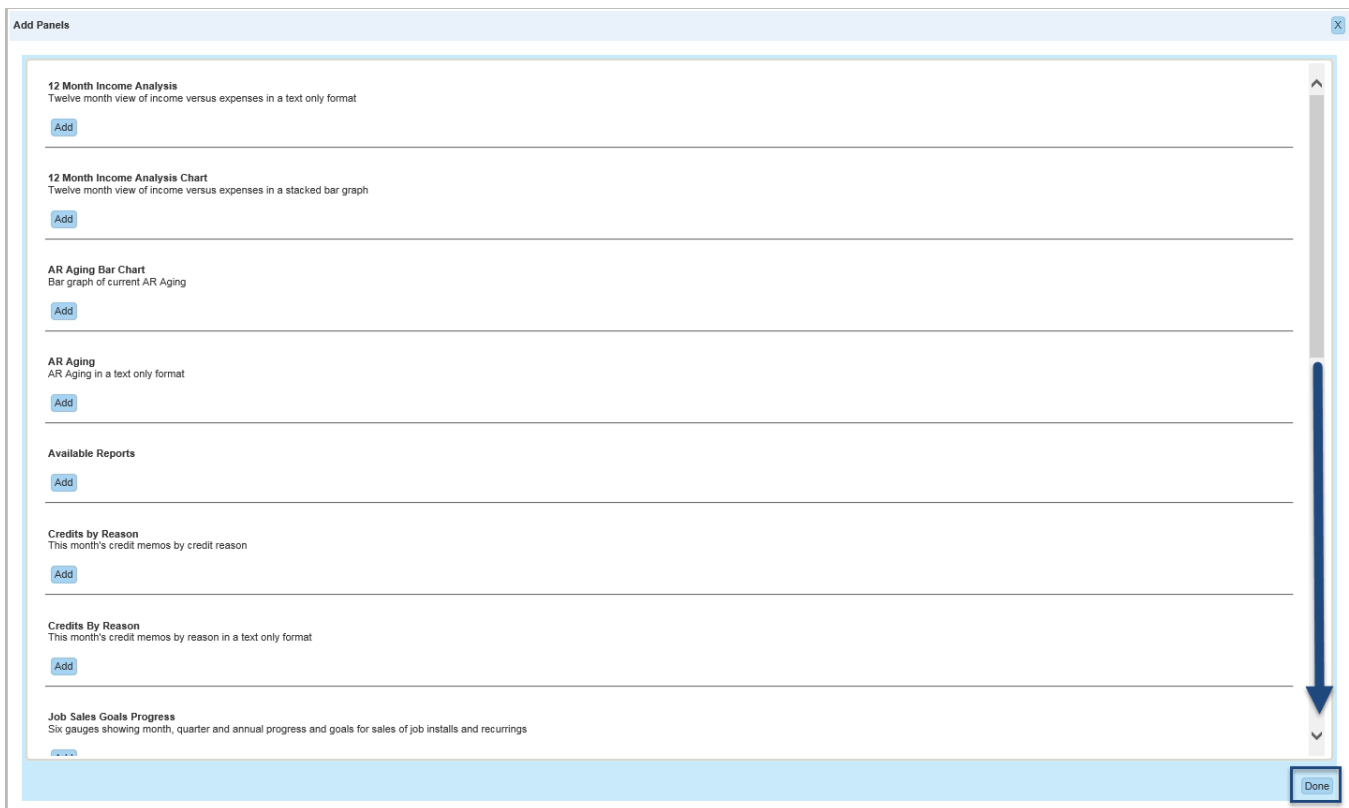
At the time of installation, SedonaOffice Support will provide information on the specific website to be used to gain remote access to SedonaDashboard. Users will login to the website provided using their SedonaOffice username and password. This will bring them directly into their dashboard.



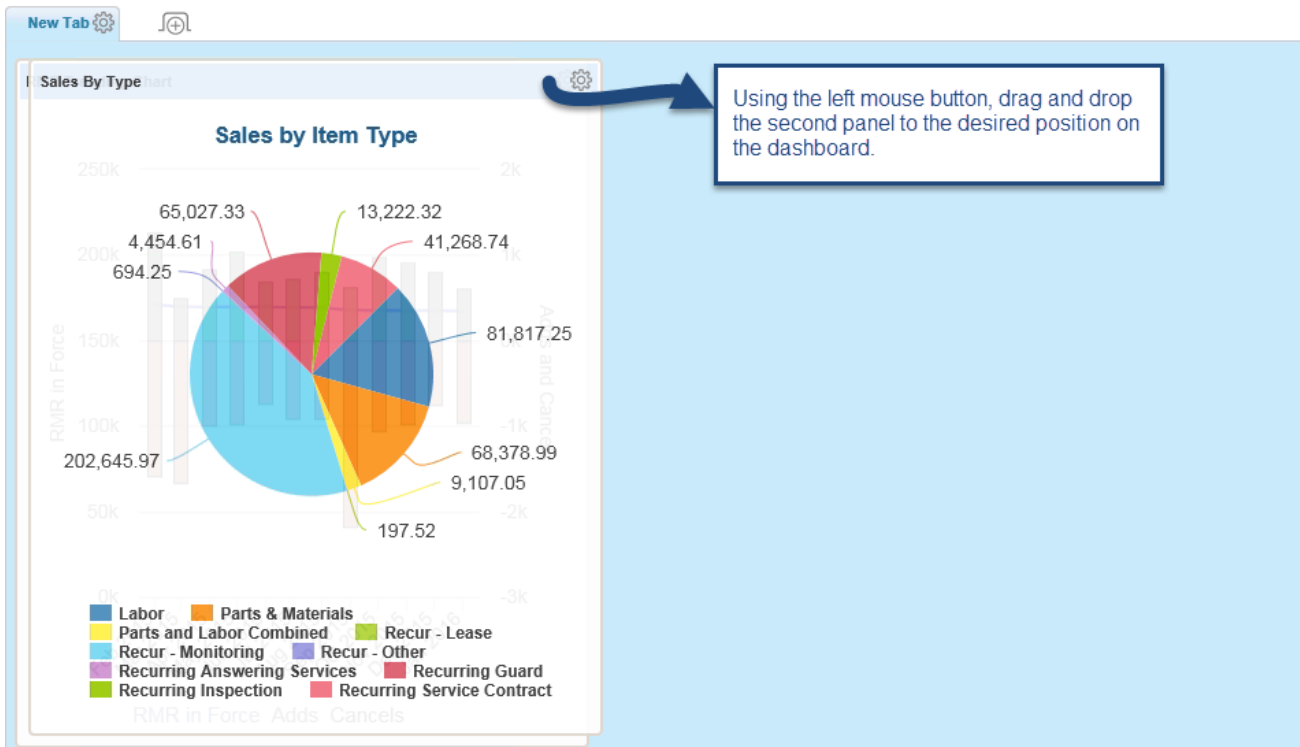
Designing the Dashboard

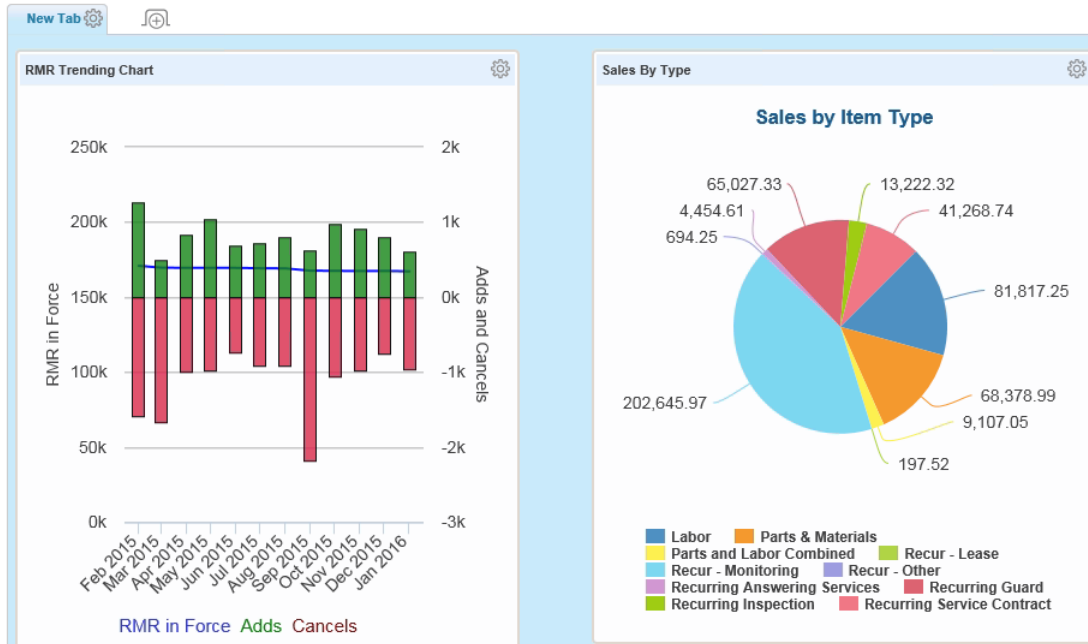
Adding Panels

SedonaDashboard offers pre-defined panels depicting specific metrics in the form of charts, graphs, and reports... When the dashboard is launched for the first time, a list of panels will be available for selection. Scroll through the list to find the specific panels for your dashboard. Click the “Add” button next to each panel which should be displayed under the first tab. Once these panels have been selected, press the Done key in the bottom right-hand corner of the screen. The number of panels chosen will dictate how long it will take to load and display the panels due to the number of calculations being done simultaneously.

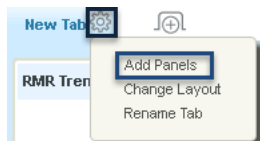


In the example below, the RMR Trending Chart and the Sales By Type This Month Charts are selected for display. The Sales By Type Chart automatically overlaps the RMR Trending Chart in the first position. Position the cursor in the blue title bar and (using the left mouse button) drag the panel to the right and drop it to appear in a new position on the dashboard. This step must be repeated for each new panel added.

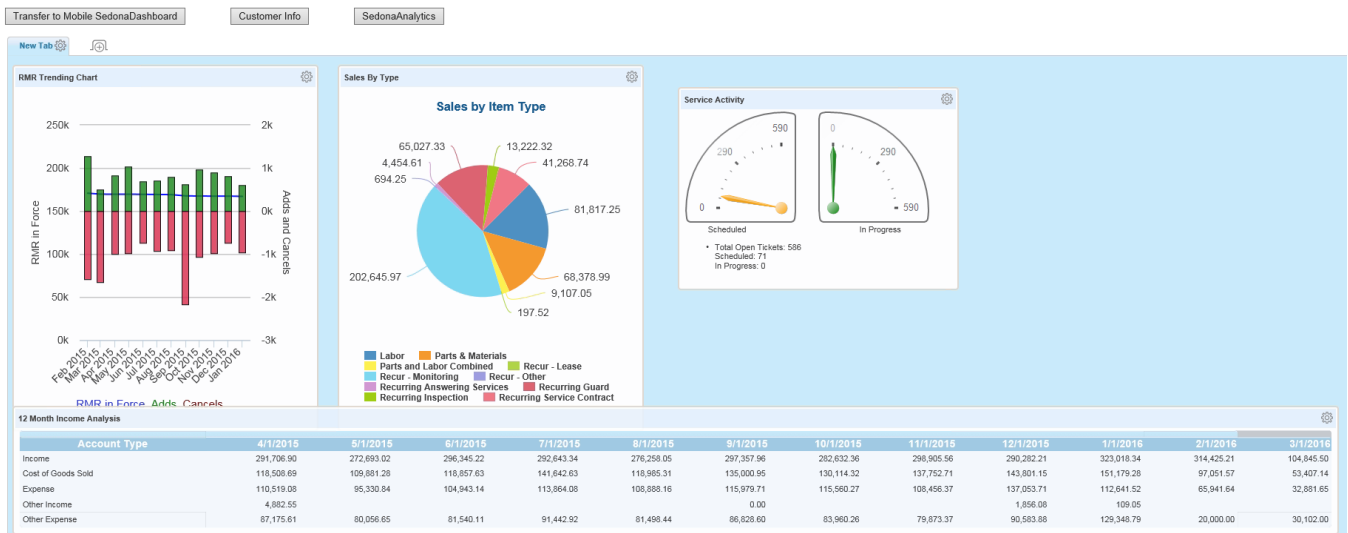




More panels may be added by clicking on the cog within the folder tab and selecting Add Panels.

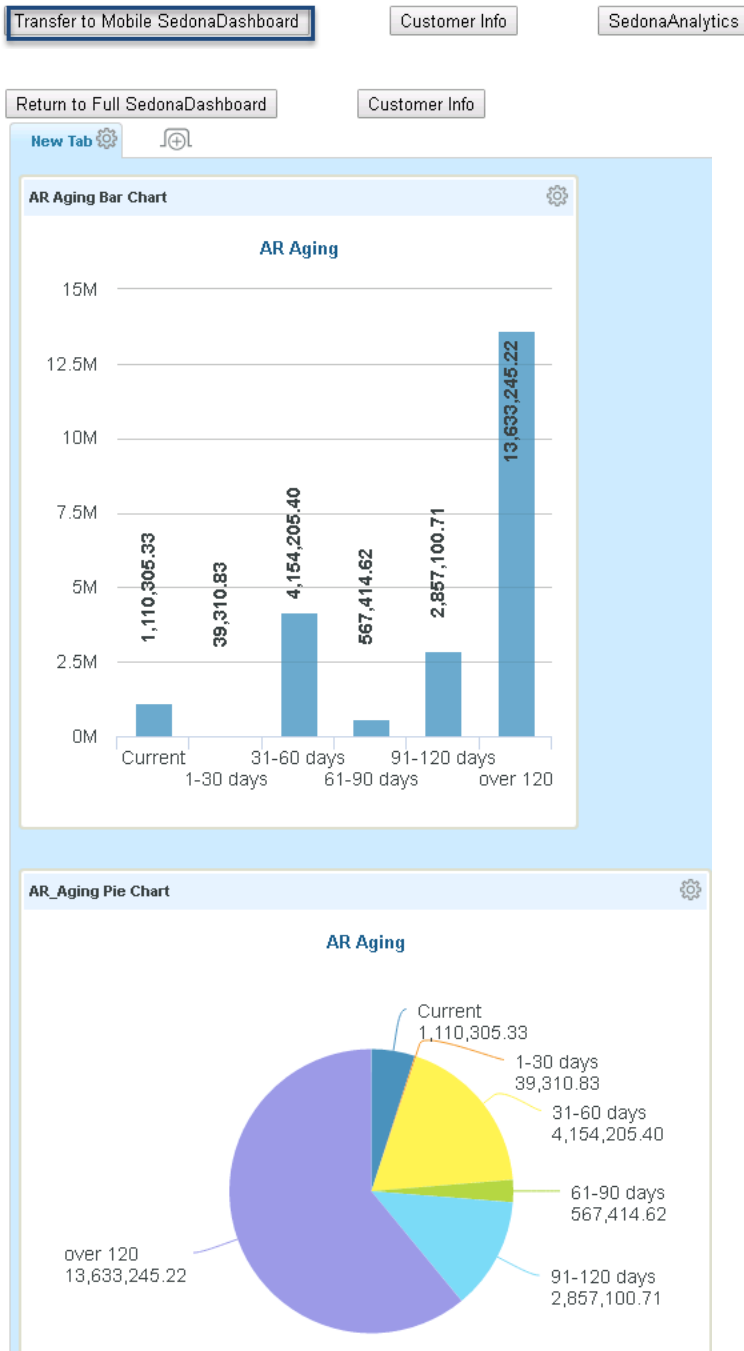


Drag and drop more panels onto the dashboard under this first tab. Position the new panels by dragging and dropping them into the proper locations.




Mobile Dashboard


The regular dashboard enables panel views in a horizontal format. Mobile users might prefer to see panels in a vertical format on the mobile dashboard. To add panels in a vertical format, press the Transfer to Mobile SedonaDashboard button at the top of the display. Users may return to the horizontal dashboard format at any time by pressing the Return to Full SedonaDashboard button.




Removing Panels


Individual panels may be removed by clicking on the  next to the title of the panel and selecting the option Remove.

Transfer to Mobile SedonaDashboard Customer Info SedonaAnalytics

New Tab 

RMR Trending Chart 

RMR in Force Adds and Cancels

Sales By Type 


Sales by Item Type

65,027.33 13,222.32 41,268.74

81,817.25 68,378.99 9,107.05


197.52 202,645.97 694.25

■ Labor ■ Parts & Materials
■ Parts and Labor Combined ■ Recur - Lease
■ Recur - Monitoring ■ Recur - Other
■ Recurring Answering Services ■ Recurring Guard
■ Recurring Inspection ■ Recurring Service Contract

Service Activity 


Scheduled In Progress

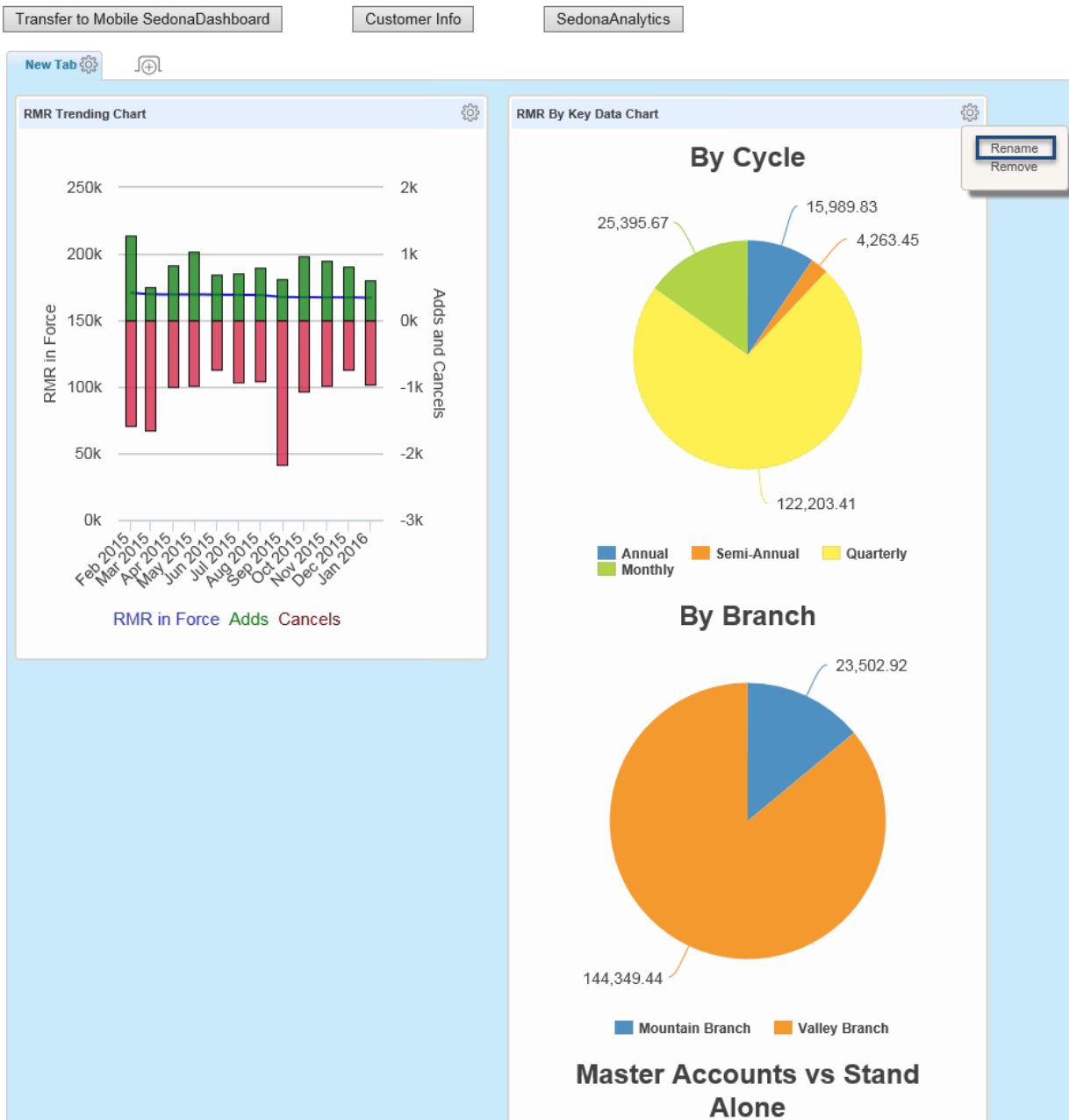
• Total Open Tickets: 586
Scheduled: 71
In Progress: 0

12 Month Income Analysis 

Account Type	4/1/2015	5/1/2015	6/1/2015	7/1/2015	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016	2/1/2016	3/1/2016
Income	201,708.90	272,693.02	296,345.22	292,643.34	276,259.05	297,357.96	282,632.38	298,905.59	290,282.21	323,018.34	314,425.21	104,845.50
Cost of Goods Sold	118,598.69	109,881.26	118,857.63	141,642.63	118,685.31	135,000.95	130,114.32	137,752.71	143,801.15	151,179.28	97,051.57	53,407.14
Expense	110,519.08	95,330.84	104,943.14	113,864.08	108,888.16	115,979.71	115,560.27	108,456.37	137,053.71	112,641.52	65,941.64	32,881.65
Other Income	4,882.55					0.00		1,856.06		109.05		
Other Expense	87,175.61	80,056.65	81,540.11	91,442.92	81,498.44	86,828.60	83,960.26	79,873.37	90,583.68	129,348.79	20,000.00	30,102.00


Renaming Panels

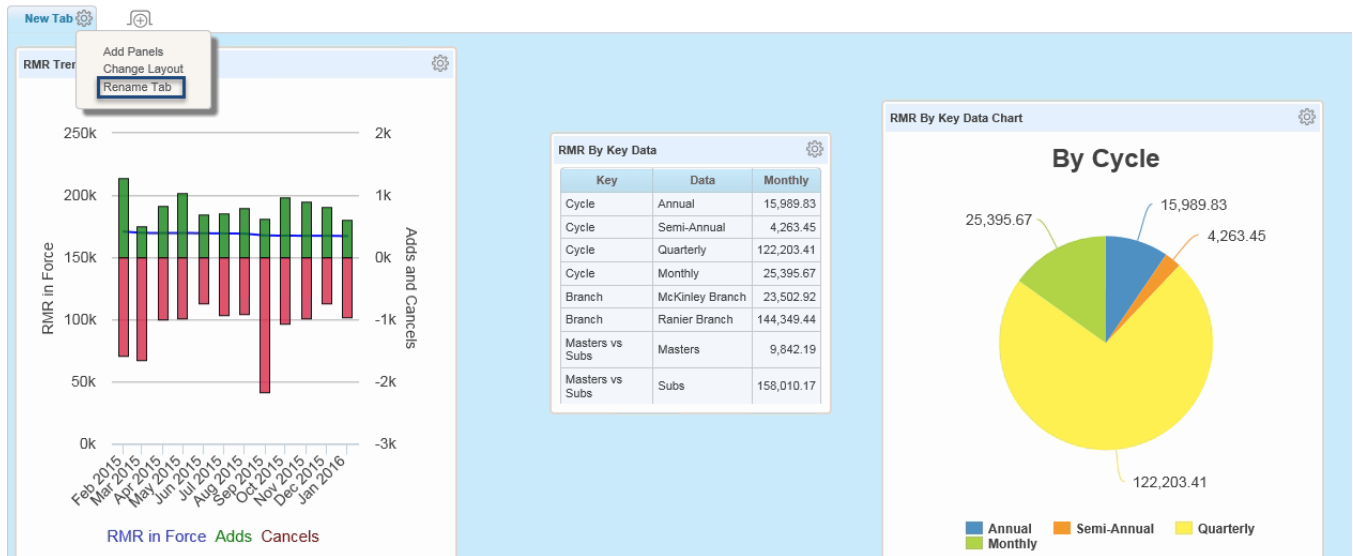
The pre-defined panels that come with SedonaDashboard have already been given names. The user, however, may choose to name a specific panel differently on their dashboard. To rename a panel, click on the  next to the title and select Rename. Enter the new name of the panel in the title and press Enter.



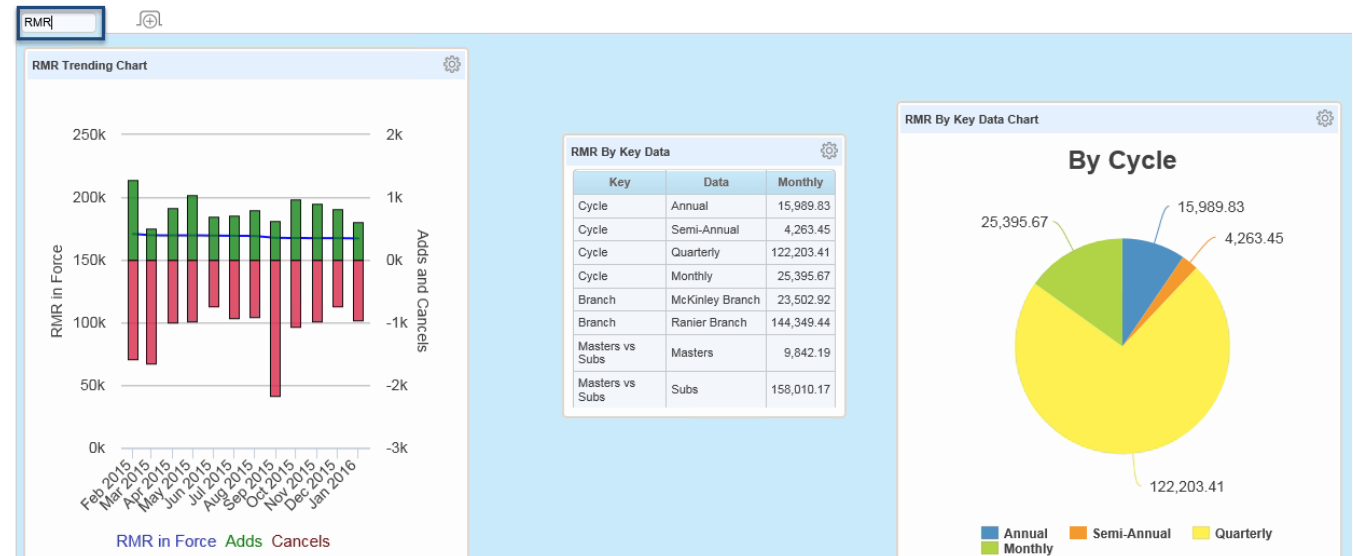
Tabs

Renaming A Tab

Folder tabs are used to organize panels or otherwise define a view. For example, the RMR Trending Chart and RMR By Key Data Chart might be held on the tab entitled “RMR” whereas panels depicting sales would be found under a different tab name. To rename a tab, click on the  in the tab and select the option “Rename Tab.” Type the new name of the tab in the space provided and press Enter.



The screenshot shows the 'RMR Trending Chart' panel with a context menu open. The menu options are 'Add Panels', 'Change Layout', and 'Rename Tab'. The chart displays 'RMR in Force' (green bars) and 'Adds and Cancels' (red bars) from February 2015 to January 2016. The y-axis ranges from -3k to 250k.




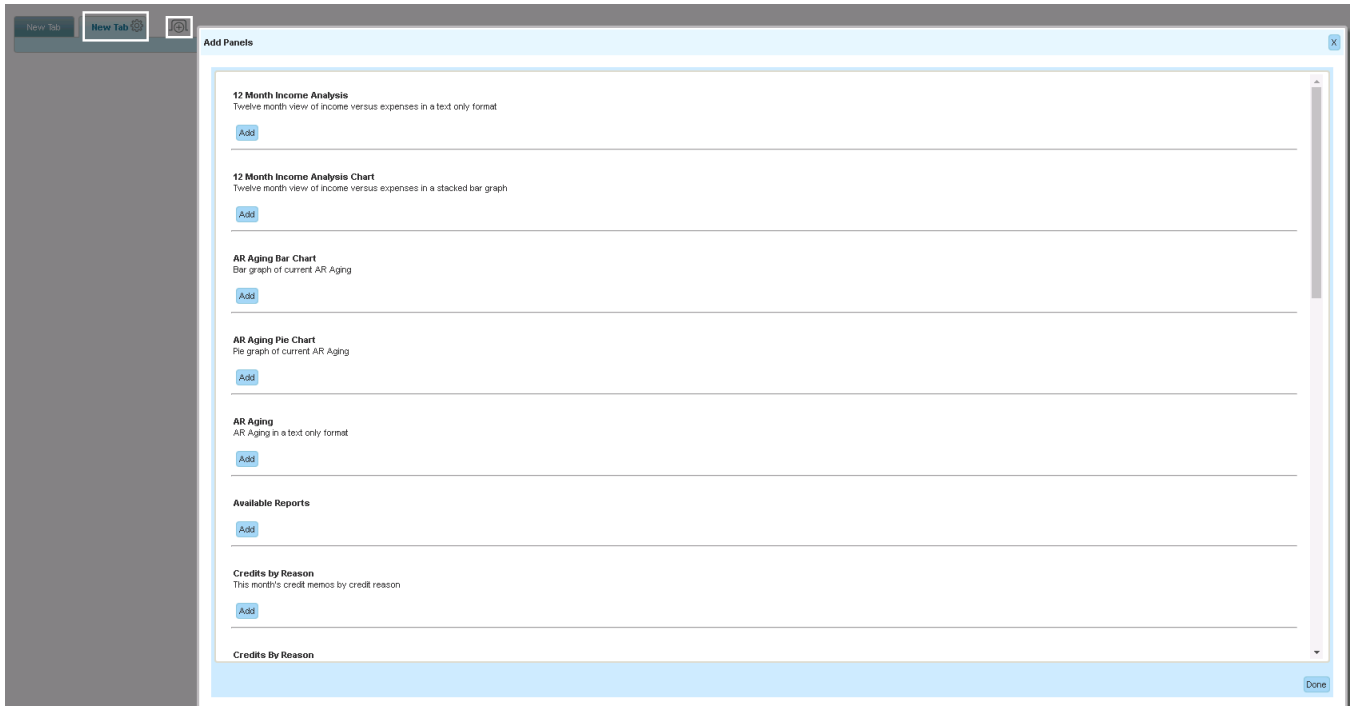
The screenshot shows the 'RMR' tab selected. The dashboard contains three panels:

- RMR Trending Chart:** A bar chart showing 'RMR in Force' (green bars) and 'Adds and Cancels' (red bars) from February 2015 to January 2016. The y-axis ranges from -3k to 250k.
- RMR By Key Data:** A table with the following data:

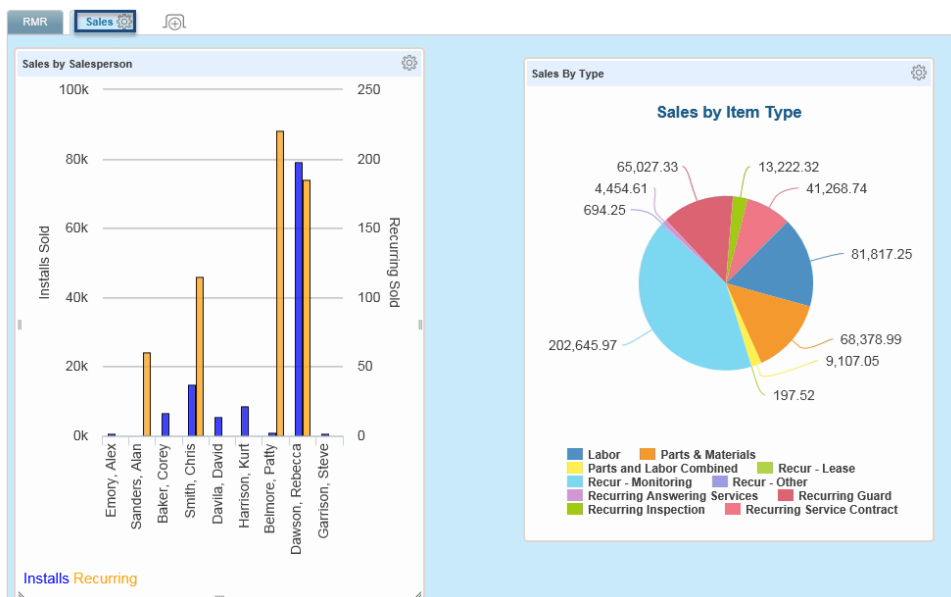
Key	Data	Monthly
Cycle	Annual	15,989.83
Cycle	Semi-Annual	4,263.45
Cycle	Quarterly	122,203.41
Cycle	Monthly	25,395.67
Branch	McKinley Branch	23,502.92
Branch	Ranier Branch	144,349.44
Masters vs Subs	Masters	9,842.19
Masters vs Subs	Subs	158,010.17
- RMR By Key Data Chart:** A pie chart titled 'By Cycle' showing the distribution of RMR by cycle: Annual (15,989.83), Semi-Annual (4,263.45), Quarterly (122,203.41), and Monthly (25,395.67).

Adding A New Tab


To add additional tabs, press the  button next to the first tab. A new tab is added (in the shaded background) and the Add Panels list appears for the selection of panels to be added under the new tab.

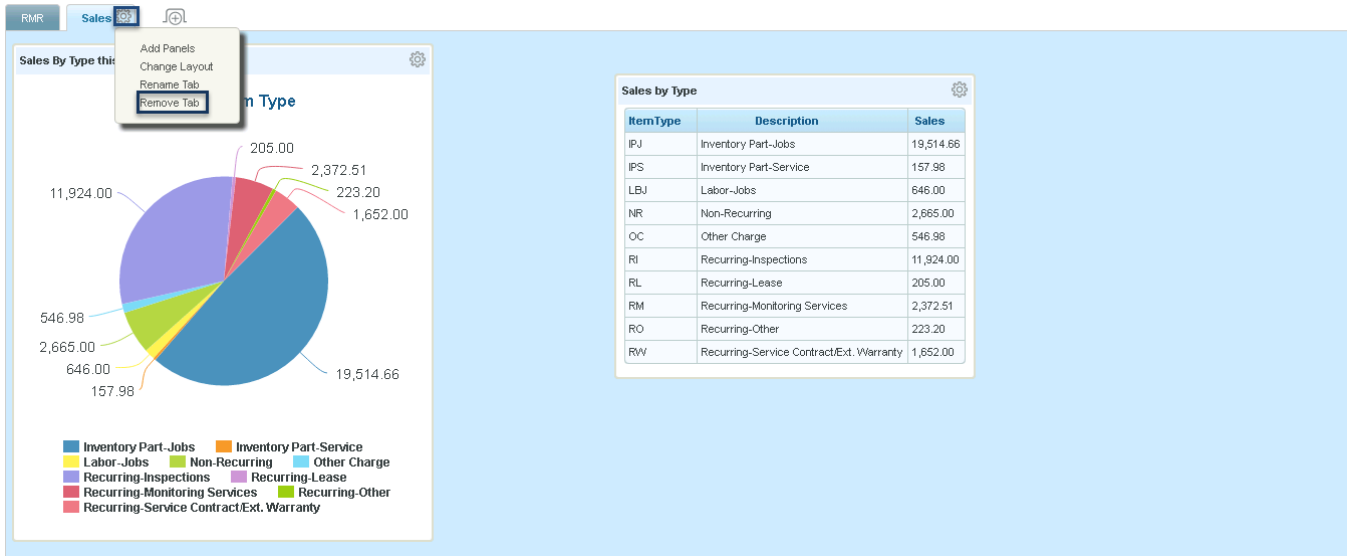


Rename the tab to explain the desired view and press Enter.



Removing a Tab

To remove a tab (and all of the panels within it), click on the  next to the name of the tab and select the option Remove Tab.




The screenshot shows the 'Sales By Type' dashboard. On the left is a pie chart with segments for various item types and their sales values. On the right is a table with columns 'Item Type', 'Description', and 'Sales'. A context menu is open over the 'Sales By Type' tab, listing options: 'Add Panels', 'Change Layout', 'Rename Tab', and 'Remove Tab' (which is highlighted).

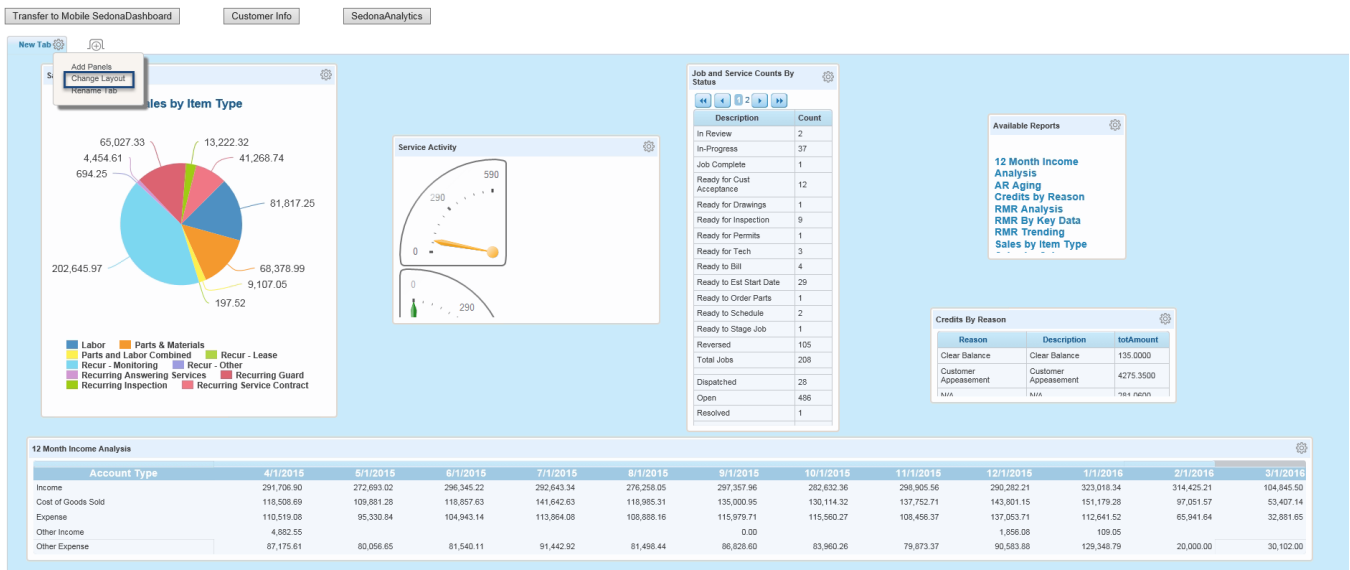
Item Type	Description	Sales
IPJ	Inventory Part-Jobs	19,514.66
IPS	Inventory Part-Service	157.98
LBJ	Labor-Jobs	646.00
NR	Non-Recurring	2,665.00
OC	Other Charge	546.98
RI	Recurring-Inspections	11,924.00
RL	Recurring-Lease	205.00
RM	Recurring-Monitoring Services	2,372.51
RO	Recurring-Other	223.20
RWV	Recurring-Service Contract/Ext. Warranty	1,652.00

The user will be asked to confirm their intention to remove the tab. Once the OK button is clicked, the tab will be removed.



Changing the Layout of Panels

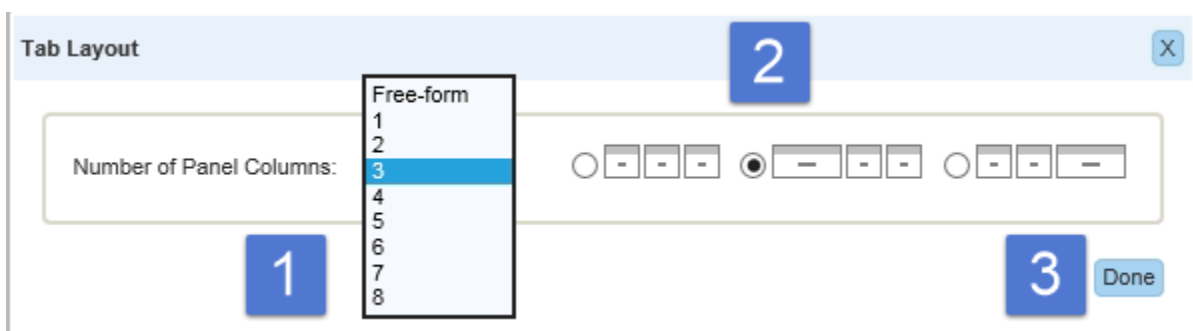
The default panel layout is free-form enabling the user to place panels anywhere within the dashboard. In the event that columns are needed, instead of the free-form format, the layout of the dashboard may be changed. To change the layout, click on the  next to the name of the tab and select Change Layout.



The screenshot displays the SedonaDashboard interface with several panels. At the top, there are navigation tabs: 'Transfer to Mobile SedonaDashboard', 'Customer Info', and 'SedonaAnalytics'. Below these, a 'New Tab' dropdown menu is open, showing options: 'Add Panels', 'Change Layout', and 'Rename Tab'. The main dashboard area contains several panels:

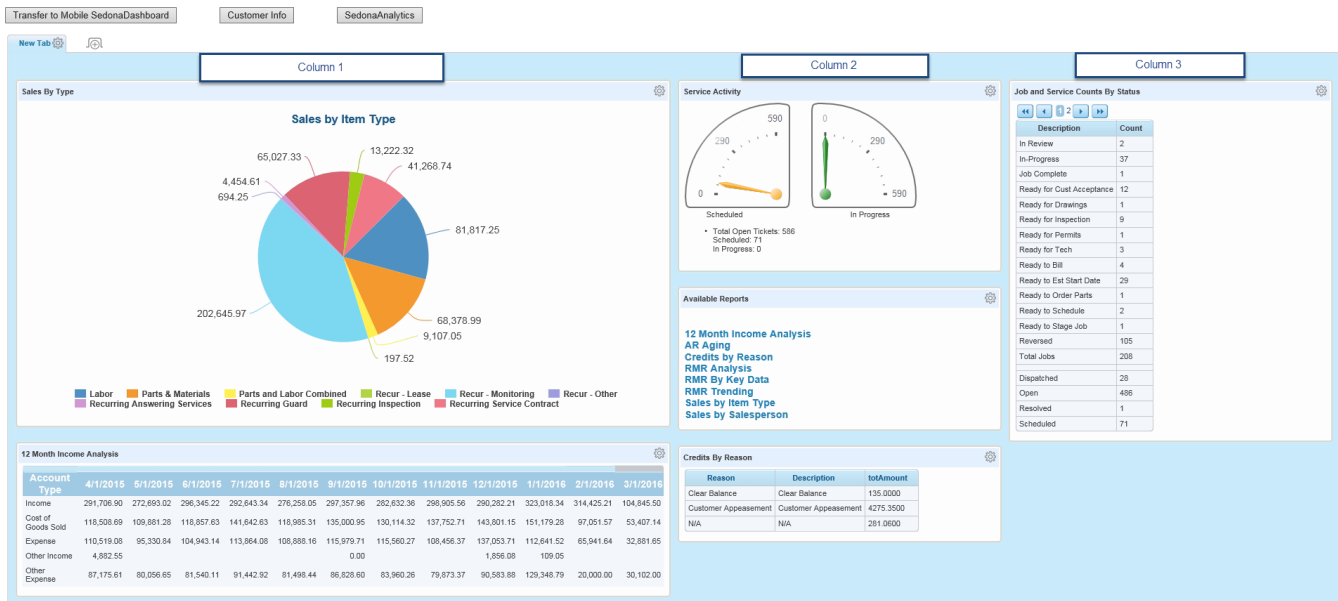
- Items by Item Type:** A pie chart showing various categories with values like 65,027.33, 4,454.61, 694.25, 13,222.32, 41,268.74, 81,817.25, 68,378.99, 9,107.05, 197.52, and 202,645.97. A legend below lists categories like Labor, Parts & Materials, Recur - Lease, etc.
- Service Activity:** A gauge chart showing activity levels.
- Job and Service Counts By Status:** A table listing job statuses and their counts.
- Available Reports:** A list of reports such as '12 Month Income Analysis', 'AR Aging', etc.
- Credits By Reason:** A small table showing credit reasons and amounts.
- 12 Month Income Analysis:** A large table with columns for months from 4/1/2015 to 3/1/2016 and rows for Income, Cost of Goods Sold, Expense, Other Income, and Other Expense.

The user may select to have up to 8 columns of panels per tab. Select the appropriate number of columns for display within the tab. Select the radio button indicating whether uniform column widths should be set for all columns, a wider column should appear in the first column, or the last column should be the widest. After the appropriate selections are made, press the Done key.



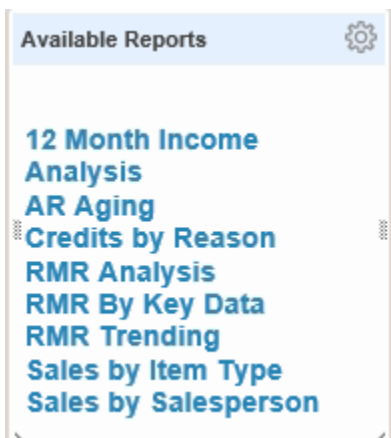
The 'Tab Layout' dialog box is shown with a close button (X) in the top right corner. It features a 'Number of Panel Columns:' label with a dropdown menu currently set to '2'. The dropdown menu is open, showing options from 1 to 8, with '3' highlighted. To the right of the dropdown are three radio buttons and three minus sign buttons. The first radio button is selected. At the bottom right, there is a 'Done' button. A large blue number '1' is overlaid on the left side of the dialog, and a large blue number '3' is overlaid on the right side.

The panels are now depicted in defined columns and the width is determined by the radio button selected. The user may drag and drop the panels into any of the columns.



Adding Available Reports Panel

A listing of available reports may also be added as a panel for easy launching.



Clicking on any of these reports will open a new window offering the user filtering capabilities and full drill-down to the data.

Panel Descriptions and Drill Downs

The following is a brief description of the information contained in each panel. Notations have been made for each panel on the availability of drill down, full explanation of the information contained by drilling down, whether an Analysis Grid is offered, and whether the panel is designed to tie to a specific SedonaOffice report. Please refer to the Analysis Grid section for detailed information on using that analysis tool.

Drill Down	Analysis Grid	Ties to SO Reports
√		√

12 Month Income Analysis (Text)

The 12 Month Income Analysis panel consists of live data showing the previous 12 months (12 month trending) of Income, Cost of Goods Sold, Expenses, Other Income, and Other Expenses. While this is not meant to replace an Income Statement, it does enable analysis to be done on the numbers recorded as of the end of each month.

Account Type	4/1/2015	5/1/2015	6/1/2015	7/1/2015	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016	2/1/2016	3/1/2016
Income	291,706.90	272,693.02	296,345.22	292,643.34	276,258.05	297,357.96	282,632.36	298,905.56	290,282.21	323,018.34	314,425.21	104,845.50
Cost of Goods Sold	118,508.69	109,881.28	118,857.63	141,642.63	116,985.31	135,000.95	130,114.32	137,752.71	143,801.15	151,179.28	97,051.57	53,407.14
Expense	110,519.08	95,330.84	104,943.14	113,864.08	108,888.16	115,979.71	115,560.27	108,456.37	137,053.71	112,641.52	65,941.64	32,881.65
Other Income	4,882.55				0.00				1,856.08	109.05		
Other Expense	87,175.61	80,056.65	81,540.11	91,442.92	81,498.44	86,828.60	83,960.26	79,873.37	90,583.88	129,348.79	20,000.00	30,102.00

Drilling Into the Data

Click anywhere on the panel to begin drilling into the data. A new window will open enabling the user to select the 12 months ending with a specific period (which goes back to the beginning of when the company went live with SedonaOffice), a selection of all or single branches and a selection of one or all categories. After all sections have been made, press the Refresh key.

Account Type	4/1/2015	5/1/2015	6/1/2015	7/1/2015	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016	2/1/2016	3/1/2016
Income	291,706.90	272,693.02	296,345.22	292,643.34	276,258.05	297,357.96	282,632.36	298,905.56	290,282.21	323,018.34	314,425.21	104,845.50
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Expense	110,519.08	95,330.84	104,943.14	113,864.08	108,888.16	115,979.71	115,560.27	108,456.37	137,053.71	112,641.52	65,941.64	32,881.65
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The user may now click into a specific period based on the newly filtered data.

12 Month Income Analysis

12 Accounting periods ending with period: 12/01/2015 Branch: Category:

Account Type	1/1/2015	2/1/2015	3/1/2015	4/1/2015	5/1/2015	6/1/2015	7/1/2015	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015
Income	281,956.05	274,720.90	278,061.54	291,706.90	272,693.02	296,345.22	292,643.34	276,258.05	297,357.96	262,632.36	296,905.56	290,282.21
Cost of Goods Sold	117,682.19	113,412.46	115,897.22	118,508.69	109,881.28	118,857.63	141,642.63	118,985.31	135,000.95	130,114.32	137,752.71	143,801.15
Expense	112,302.22	107,171.41	104,370.40	110,519.08	95,330.84	104,943.14	113,864.08	108,888.16	115,979.71	115,560.27	108,456.37	137,053.71
Other Expense	81,183.13	79,683.14	84,979.15	87,175.61	80,056.65	81,540.11	91,442.92	81,498.44	86,828.60	83,960.26	79,873.37	90,583.88
Other Income			67.98	4,882.55					0.00			1,856.08

A new window will open showing the account type, the subtotal for each account type, and a scrollable list of the GL numbers which makeup each account type. The GL account numbers have been setup as hot keys for further drill-down.

Account Type	Account Type Sub Total	Detail																																																																											
Income	290,282.21	<table border="1"> <thead> <tr> <th>Account Code</th> <th>Account Description</th> <th>Account Sub Total</th> </tr> </thead> <tbody> <tr><td>430210</td><td>Answering Recurring</td><td>4,454.61</td></tr> <tr><td>440111</td><td>Guard - Billable Response</td><td>1,235.00</td></tr> <tr><td>440110</td><td>Guard & Key Recurring</td><td>31,588.76</td></tr> <tr><td>490841</td><td>Guard Adjustments</td><td>-45.00</td></tr> <tr><td>490813</td><td>Inspection Adjustments</td><td>-0.02</td></tr> <tr><td>420340</td><td>Inspection Contracts</td><td>6,975.64</td></tr> <tr><td>420341</td><td>Inspection T&M</td><td>7,210.00</td></tr> <tr><td>410101</td><td>Installations</td><td>64,751.92</td></tr> <tr><td>480110</td><td>Lease Recurring</td><td>65.84</td></tr> <tr><td>430110</td><td>Monitoring - Retail</td><td>108,340.49</td></tr> <tr><td>490831</td><td>Monitoring Adjustments</td><td>-882.20</td></tr> <tr><td>490900</td><td>Other Revenue</td><td>105.00</td></tr> <tr><td>490811</td><td>Sales Adjustments</td><td>-145.01</td></tr> <tr><td>490812</td><td>Service Adjustments</td><td>-297.57</td></tr> <tr><td>420330</td><td>Service Contracts</td><td>16,422.56</td></tr> <tr><td>420331</td><td>Service T&M</td><td>50,502.19</td></tr> </tbody> </table>	Account Code	Account Description	Account Sub Total	430210	Answering Recurring	4,454.61	440111	Guard - Billable Response	1,235.00	440110	Guard & Key Recurring	31,588.76	490841	Guard Adjustments	-45.00	490813	Inspection Adjustments	-0.02	420340	Inspection Contracts	6,975.64	420341	Inspection T&M	7,210.00	410101	Installations	64,751.92	480110	Lease Recurring	65.84	430110	Monitoring - Retail	108,340.49	490831	Monitoring Adjustments	-882.20	490900	Other Revenue	105.00	490811	Sales Adjustments	-145.01	490812	Service Adjustments	-297.57	420330	Service Contracts	16,422.56	420331	Service T&M	50,502.19																								
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620725	Facilities - Janitorial	140.00																																																																											
620730	Facilities - Rent	4,354.41																																																																											

Select a specific GL number for further information. This will open the account detail. The user can return to a single period at any time by pressing the Return to Single Period button at the top of the screen. Column sorts may also be performed by clicking on the Register Number, Date, Type Code, Debit, Credit, Branch Code, or Category Code:

Account Detail 420331							
Return to Single Period							
For Branches: McKinley,Ranier							
For Categories: Central,Engineering,Executive,G&A,Guard,Install,Sales,Service,Tech							
Register_Number	Date	Type_Code	Debit	Credit	Branch_Code	Category_Code	Account Balance
368062	1/5/2015	CRMEMO	134.50	0.00	Ranier	Service	134.50
368169	1/6/2015	CRMEMO	170.00	0.00	Ranier	Service	304.50
368240	1/7/2015	CRMEMO	1.00	0.00	Ranier	Service	305.50
368543	1/4/2015	INV	0.00	297.00	Ranier	Service	8.50
368546	1/2/2015	INV	0.00	49.50	Ranier	Service	-41.00
368973	1/7/2015	INV	0.00	419.56	Ranier	Service	-460.56
368983	1/7/2015	INV	0.00	134.50	Ranier	Service	-595.06
369002	1/7/2015	INV	0.00	134.50	Ranier	Service	-729.56

Click on the register number to see the specific GL journal entry. Once viewing is completed, the user can return to the register by clicking on the account.

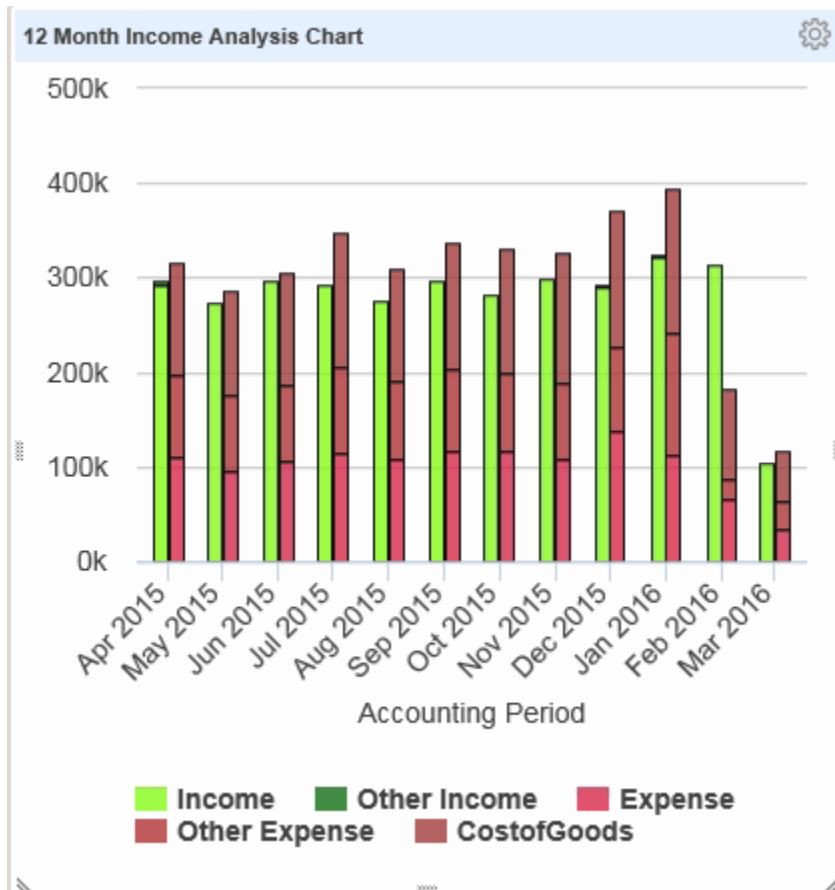
Account Detail 420331							
Return to Single Period							
For Branches: McKinley,Ranier							
For Categories: Central,Engineering,Executive,G&A,Guard,Install,Sales,Service,Tech							
Register_Number	Date	Type_Code	Debit	Credit	Branch_Code	Category_Code	Account Balance
368062	1/5/2015	CRMEMO	134.50	0.00	Ranier	Service	134.50
368169	1/6/2015	CRMEMO	170.00	0.00	Ranier	Service	304.50
368240	1/7/2015	CRMEMO	1.00	0.00	Ranier	Service	305.50
368543	1/4/2015	INV	0.00	297.00	Ranier	Service	8.50
368546	1/2/2015	INV	0.00	49.50	Ranier	Service	-41.00
368973	1/7/2015	INV	0.00	419.56	Ranier	Service	-460.56
368983	1/7/2015	INV	0.00	134.50	Ranier	Service	-595.06
369002	1/7/2015	INV	0.00	134.50	Ranier	Service	-729.56

Journal Entry 368973											
Choose an account to return to account detail for that account.											
Click on Account to return to Account Detail											
Account	Account	Date	Type_Code	Reference	Linked to	Reference 2	Debit	Credit	Branch_Code	Category_Code	Memo
110110	Accounts Receivable	1/7/2015	INV	494165	Customer	7006190 - Richardson, Tom	441.46	0.00	Ranier	NIA	Service Call
420331	Service T&M	1/7/2015	INV	494165	Customer	7006190 - Richardson, Tom	0.00	419.56	Ranier	Service	
232800	Sales Tax Payable	1/7/2015	SALETAX	494165	Customer	7006190 - Richardson, Tom	0.00	16.25	Ranier	NIA	
232800	Sales Tax Payable	1/7/2015	SALETAX	494165	Customer	7006190 - Richardson, Tom	0.00	5.65	Ranier	NIA	

12 Month Income Analysis Chart

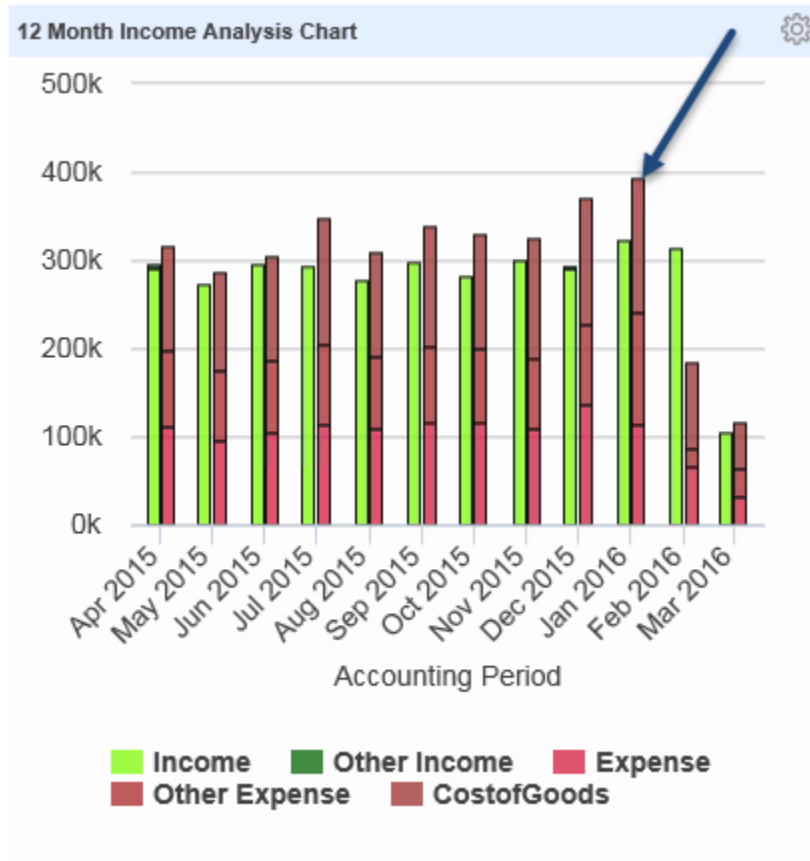
Drill Down	Analysis Grid	Ties to SO Reports
√		√

This stacked bar chart shows the end of month totals taken from the Income Statement over the past 12 months (12 months trending). The totals on this chart tie to the end of months totals taken from the Income Statement over the past 12 months.



Drilling Into the Data

Click anywhere in panel to begin drilling into the data.



The 12 Month Income Analysis window will open.

12 Month Income Analysis

12 Accounting periods ending with period: 03/01/2016 Branch: McKinley - McKinley Branch Category: Central - Central Station

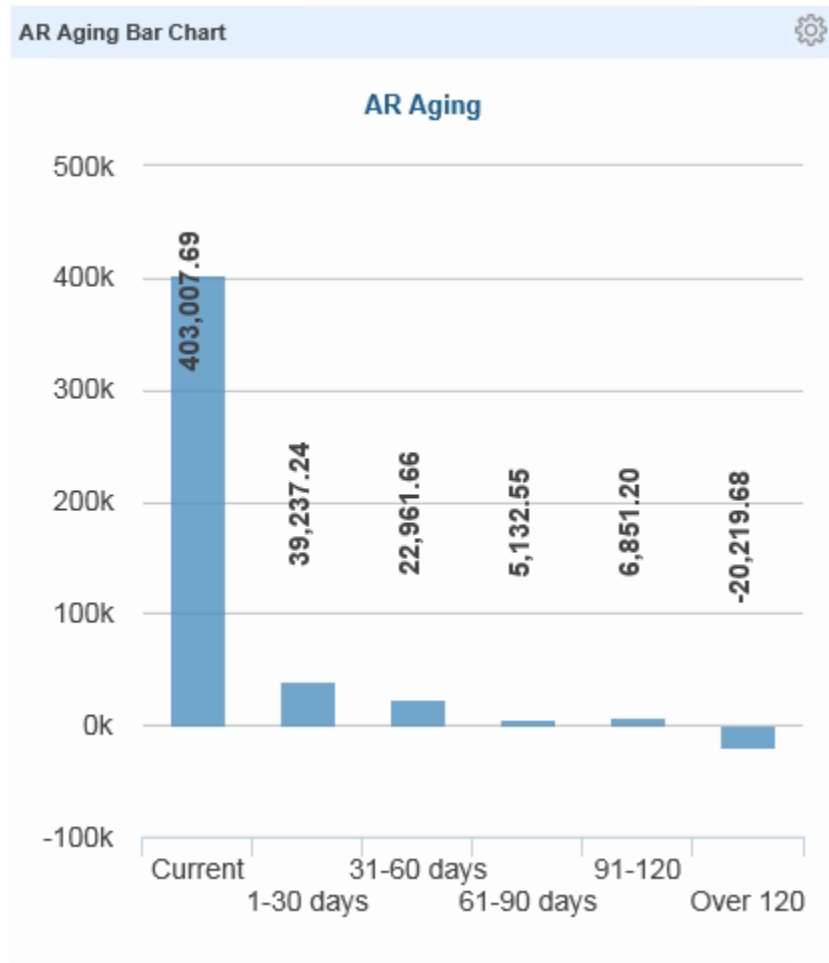
Account Type	4/1/2015	5/1/2015	6/1/2015	7/1/2015	8/1/2015	9/1/2015	10/1/2015	11/1/2015	12/1/2015	1/1/2016	2/1/2016	3/1/2016
Income	291,706.90	272,693.02	296,345.22	292,643.34	276,258.05	297,357.96	282,632.36	286,905.56	290,282.21	323,018.34	314,425.21	104,845.50
Cost of Goods Sold	118,508.69	109,881.28	118,857.63	141,642.63	118,985.31	135,000.95	130,114.32	137,752.71	143,801.15	151,179.28	97,051.57	53,407.14
Expense	110,519.08	95,330.84	104,843.14	113,864.08	108,888.16	115,979.71	115,560.27	108,456.37	137,053.71	112,641.52	65,941.64	32,881.65
Other Income	4,882.55					0.00			1,856.08	109.05		
Other Expense	87,175.61	80,056.65	81,540.11	91,442.92	81,498.44	86,828.60	83,960.26	79,873.37	90,583.88	129,348.79	20,000.00	30,102.00

The user should follow the Drill into the Data section for the 12 Month Income Analysis (Text) panel for full directions on drilling into the data from this window.

AR Aging Bar Chart

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This bar chart reports totals in the aging buckets for Current ,1-30, 31-60, 61-90, 91-120, and over 120 days **as of the last date that the customer was aged**. These totals are for invoices at the customer level. When the database has been aged prior to adding this panel, the totals on this first bar chart will tie to the Current Aging Report when run by showing summary totals only.



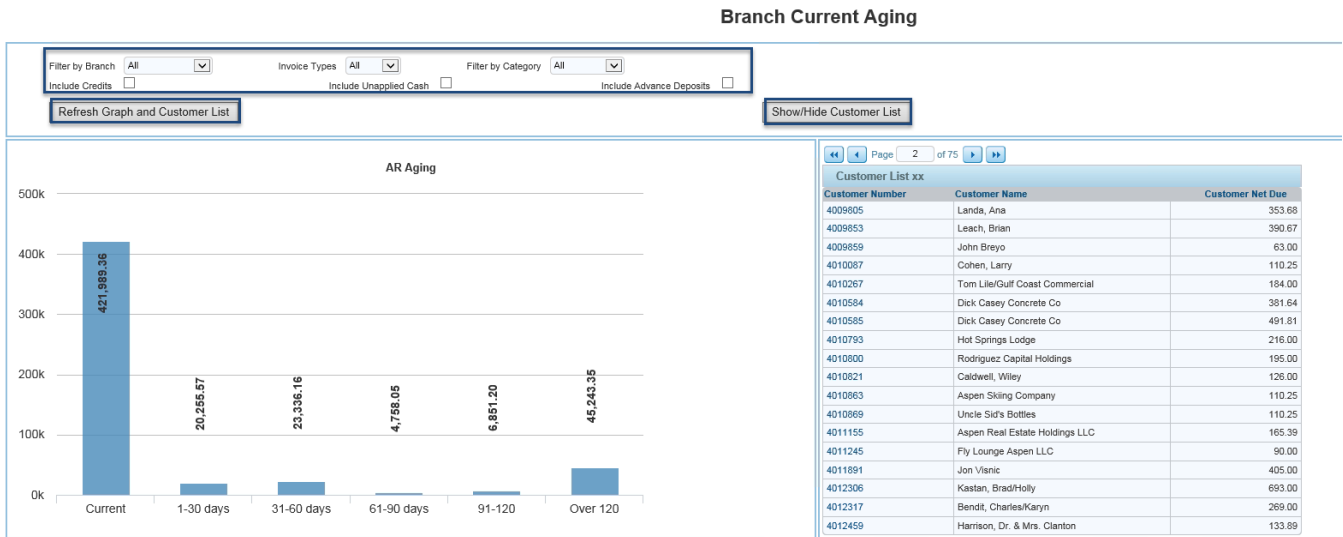
AR Current Aging

SedonaOffice Conference AP

All Branches Customer Customer						Total	Credits	Cash	Adv Dep	Net Due
Current	1-30 days	31-60 days	61-90 days	91-120	Over 120					
403,007.69	39,000.41	22,961.66	5,132.55	6,851.20	(20,219.68)	456,733.83	(12,692.56)	(61,640.34)	65,413.57	447,814.50

Drilling Into the Data

Click on any area in the chart to open up the chart for drill-down. A new window will open showing a **different bar chart** from the one previously displayed. The totals displayed on this bar chart look at aging of invoices by **branch** and will tie to the Branch Current Aging Report when run by totals. The Branch Current Aging window will enable filtering to be done by branch, invoice type, and category. The user can further choose to include credits, unapplied cash, and/or advance deposits into the totals. After making filtering selections, press the Refresh Graph and Customer List button. To view the customers making up these totals, press the Show/Hide Customer List.



January 29, 2016
12:25 PM

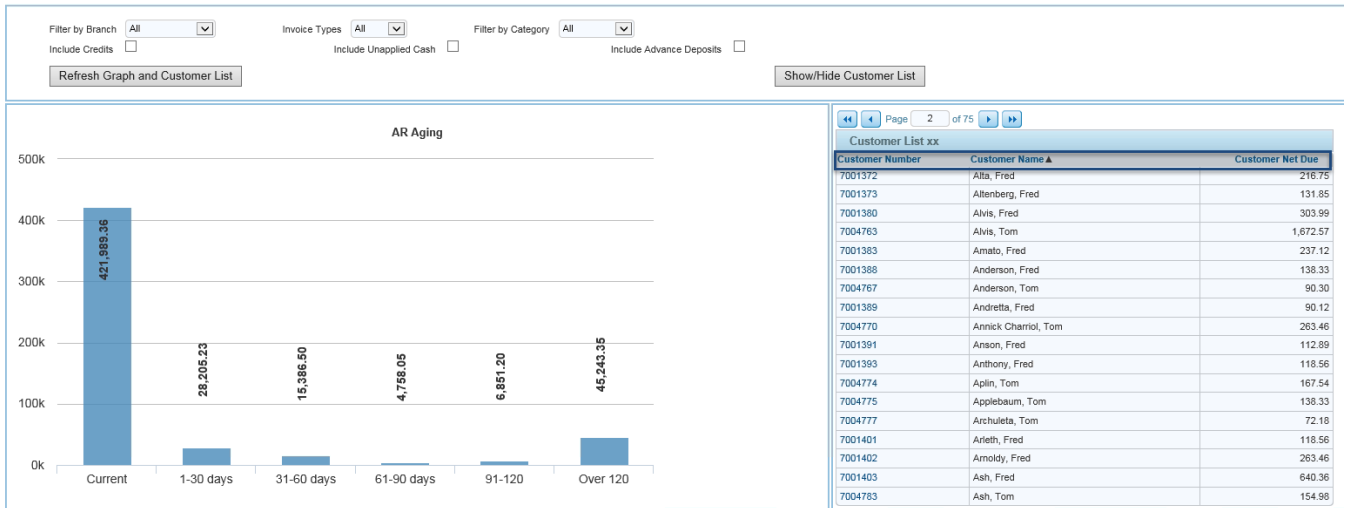
Current Aging by Branch

Page # 1

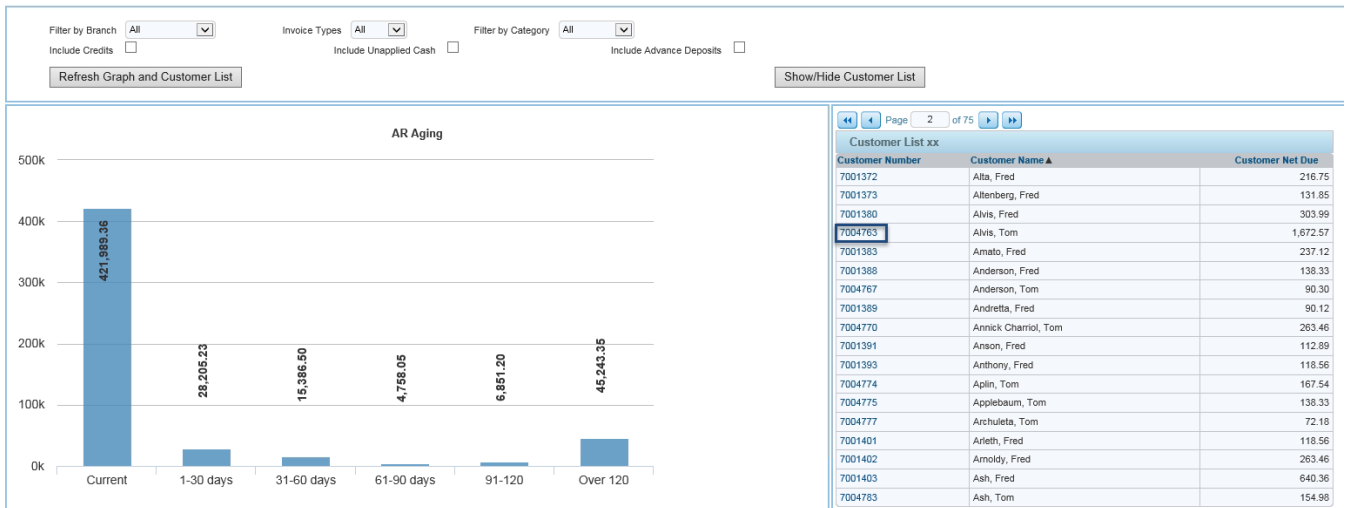
All Branches
All aged customers
All Invoice Types
Balance Due > 0

<u>Branch</u>	<u>Current</u>	<u>1-30 days</u>	<u>31-60 days</u>	<u>61-90 days</u>	<u>91-120</u>	<u>Over 120</u>	<u>Total</u>
McKinley, McKinley Branch	66,244.47	3,478.41	1,694.46	446.25	1,557.13	10,155.77	83,576.49
Ranier, Ranier Branch	355,744.89	24,726.82	13,692.04	4,311.80	5,294.07	35,087.58	438,857.20
Totals	<u>421,989.36</u>	<u>28,205.23</u>	<u>15,386.50</u>	<u>4,788.05</u>	<u>6,851.20</u>	<u>45,243.35</u>	<u>522,433.69</u>

The customer list is a multi-page list and may be sorted by customer number, customer name or customer amount due.



To review the balance of a specific customer, click on the customer number hot spot.



A new window will open showing a history of invoices in the top section, as well as current recurring in the bottom section:

Customer Detail

Page 1 of 1

Customer 7004763 Aging Detail

Site Name	Address	Site Number	Invoice Number	Aging Date	Amount	Net Due	Branch	Category	Invoice Type	Aging Bucket	Aging Days
Alvis, Tom	202 Danielson Dr	1	507454	1/1/2016	1,672.57	1,672.57	Ranier	G&A	C	1-30 days	28

Customer 7004763 RMR

Site Name	Address	Site Number	System Code	Description	Account	Item	Cycle	Monthly Amount	Start Date	End Date	User Description
Alvis, Tom	202 Danielson Dr	1	Burglar	Burglar Alarm	APXW6033	Monitoring	A	43.64	1/1/2008	12/30/1999	Monitoring Services
Alvis, Tom	202 Danielson Dr	1	Burglar	Burglar Alarm	APXW6033	Monitoring	A	45.56	1/1/2008	12/30/1999	Monitoring Services

AR Aging (Text Only)

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This panel reports totals in the aging buckets for Current ,1-30, 31-60, 61-90, 91-120, and over 120 days **as of the last date that the customer was aged**. These totals are for invoices at the customer level. When the database has been aged prior to adding this panel, the totals on this panel will tie to the Current Aging Report when run by showing summary totals only.

Bucket	Amount
Current	403,007.69
1-30 days	39,237.24
31-60 days	22,961.66
61-90 days	5,132.55
91-120	6,851.20
Over 120	-20,219.68

AR Current Aging

SedonaOffice Conference AP

All Branches Customer Customer										
Current	1-30 days	31-60 days	61-90 days	91-120	Over 120	Total	Credits	Cash	Adv Dep	Net Due
403,007.69	39,000.41	22,961.66	5,132.55	6,851.20	(20,219.68)	456,733.83	(12,692.56)	(61,640.34)	65,413.57	447,814.50

Drilling Into the Data

Click on any aging bucket to open the Branch Current Aging display. A new window will open showing a bar chart representing aging from the branch level. The totals displayed on this bar chart look at aging of invoices by branch and will tie to the Branch Current Aging Report when run by totals. The Branch Current Aging window will enable filtering to be done by branch, invoice type, and category.

Detailed directions on drilling into this data may be found in the AR Aging Bar Chart panel description in this reference guide.

Available Reports

Drill Down	Analysis Grid	Ties To SO Reports
√		

Several of the dashboard panels are also available in the form of a **report**. The advantages of a report over a panel is saving space on the dashboard as well as the ability to immediately drill down into filtered data. When a report is selected, a new window will open containing the graphical depiction (if available) and the ability to immediately drill into the data. Some reports display a graph and a list of customers making up the totals while others go immediately to an analysis grid. All reports will tie to a specific SedonaOffice report in Report Manager. Please refer to the panel descriptions to find to which SedonaOffice report the numbers should tie against.



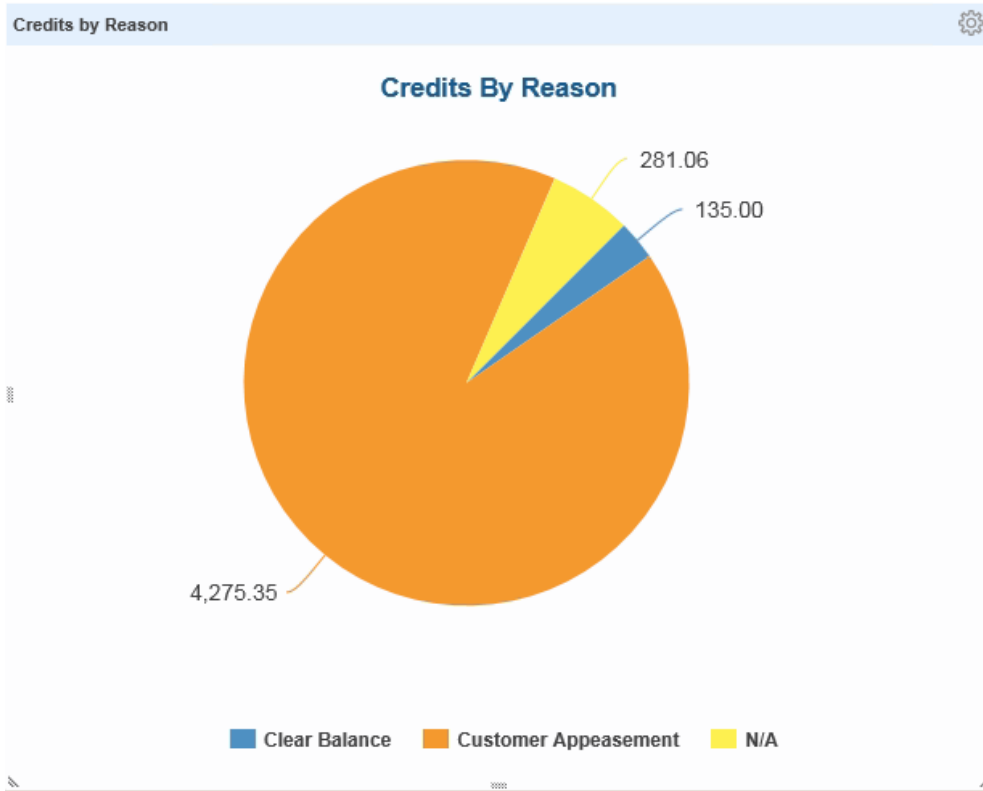
Drilling Into the Data

All reports may be drilled into. Click on the specific report to begin the drill down process. Please refer to the panel descriptions of the report names for directions on how to drill into the data.

Credits By Reason

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This panel breaks down credit memos by Credit Reason. The totals on this report tie by reason code to the AR Credit Reason Report* when grouped by credit reason and using summary as the type.



Credit Reason Report

SedonaOffice Conference AP

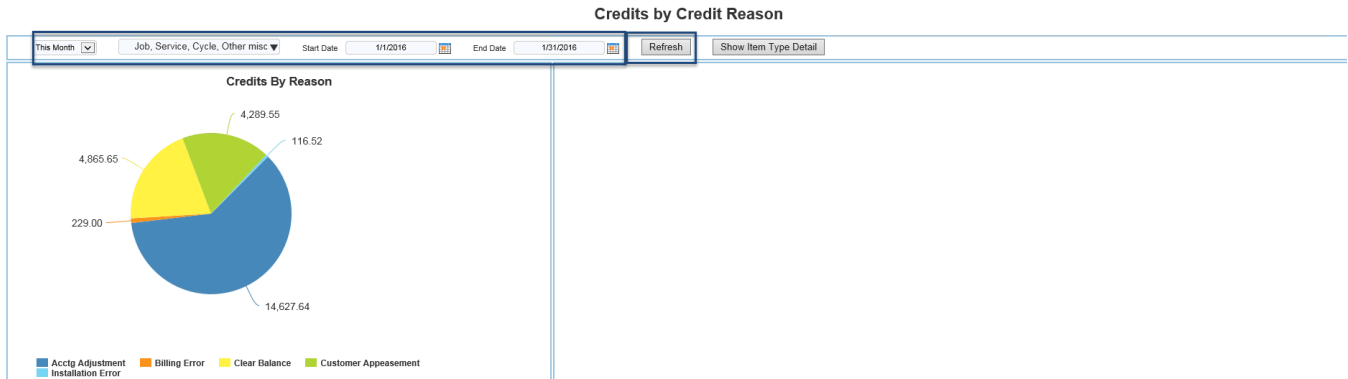
January 2016

Credit #	Credit Date	Credit Type	Description	Credit Reason	Req Num	Req By	Approved By	Approval Date
Customer #	Site Name		Site Address	Items Amt	Parts Amt	Sales Tax	Total Credit	Open Amt
Clear Balance								
			Clear Balance	Totals: 135.00	0.00	0.00	135.00	0.00
Customer Appeasement								
			Customer Appeasement	Totals: 4,090.38	132.75	52.22	4,275.35	281.56
'No Reason'								
			'No Reason'	Totals: 134.50	132.75	13.81	281.06	0.00
			Grand Total:	4,359.88	265.50	66.03	4,691.41	281.56

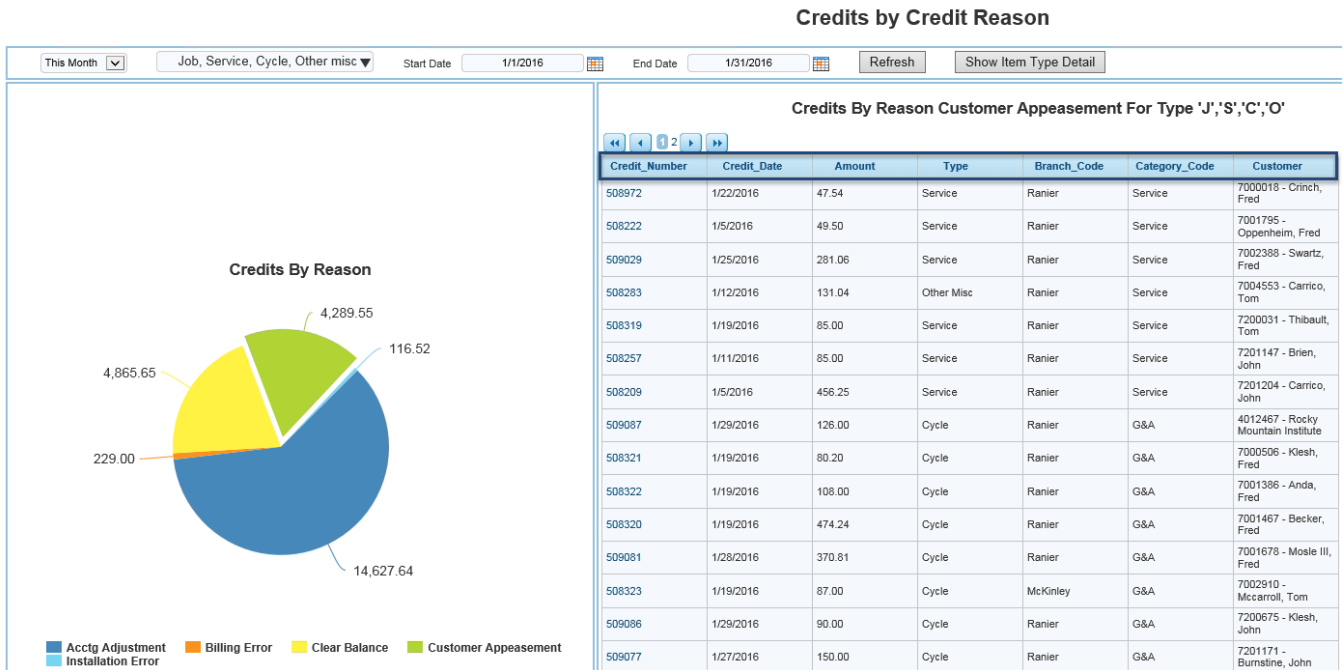
- Report Selection Criteria**
- All Branches
 - All Credit Types
 - All Credit Reasons
 - All Descriptions
 - All Requested By

Drilling Into the Data

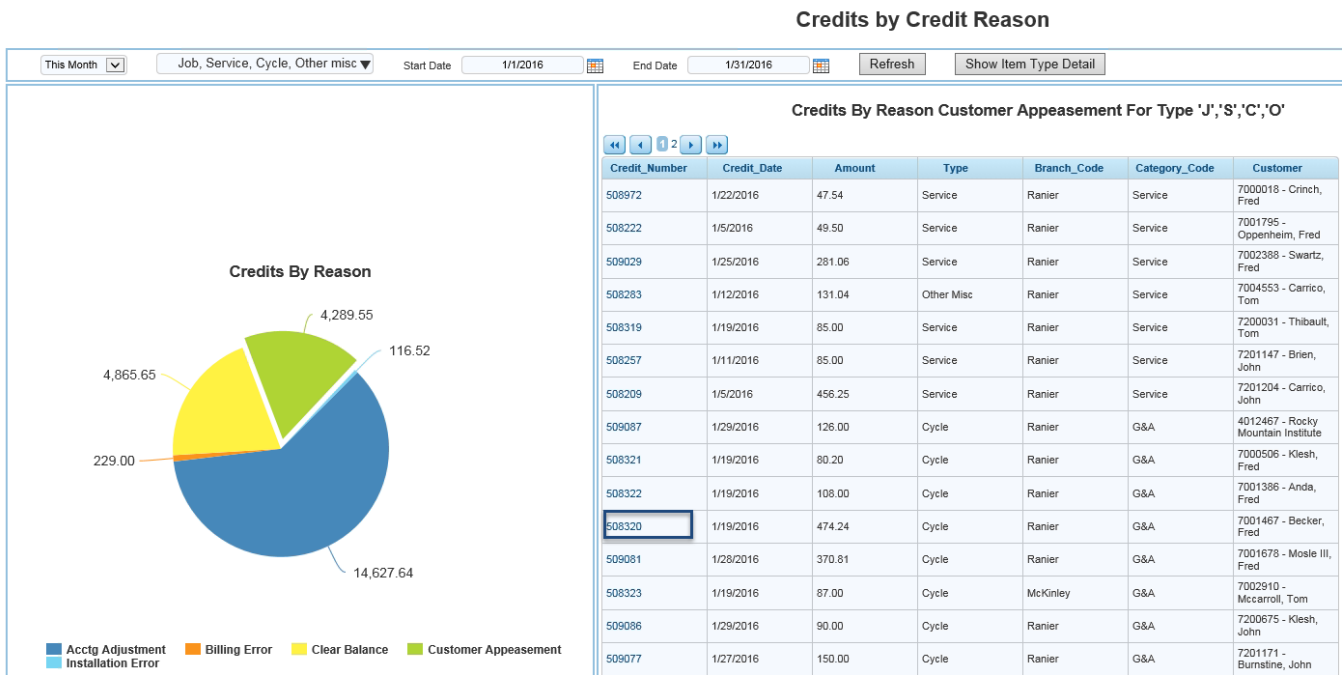
Click on any area in the chart to open it for drill-down. The Credits by Credit Reason window will open displaying totals for each credit reason. Filtering may be done by time period, type of invoice, and/or a range of dates. After making filtering selections, press the Refresh button.



Click into any area of this new pie chart to see item type detail information and click on the Show Item Type Detail button. A multi-page window will open showing specific information on the credit type selected. This table may be sorted by credit number, credit date, amount, type, branch code, category code or customer number.



To review a specific credit memo, click on the credit number hot spot.



The credit detail will be displayed. If users are required to utilize credit requests for the creation of a credit memo, the name of the user requesting the credit will be displayed in the Requested By column.

Credit_Number	Reason	Credit_Date	Amount	Used_Amount	Branch_Code	Category_Code	Customer	Type	Requested_By
508320	Customer Appeasement Customer Appeasement	1/19/2016	474.2400	474.2400	Ranier	G&A	7001467 - Becker, Fred	Cycle	

Credits By Reason (Text)

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This panel breaks down credit memos by Credit Reason. The totals on this report tie by reason code to the AR Credit Reason Report* when grouped by credit reason and using summary as the type. If credit reasons are not required to be entered for the creation of credit memos on your system, any credits created without a reason code will appear as N/A on this panel.

Credits By Reason 		
Reason	Description	Total Amount
Clear Balance	Clear Balance	135.00
Customer Appeasement	Customer Appeasement	4,275.35
N/A	N/A	281.06

Credit Reason Report

SedonaOffice Conference AP

January 2016

Credit #	Credit Date	Credit Type	Description	Credit Reason	Req Num	Req By	Approved By	Approval Date
Customer #	Site Name		Site Address	Items Amt	Parts Amt	Sales Tax	Total Credit	Open Amt
Clear Balance								
			Clear Balance	Totals: 135.00	0.00	0.00	135.00	0.00
Customer Appeasement								
			Customer Appeasement	Totals: 4,090.38	132.75	52.22	4,275.35	281.56
'No Reason'								
			'No Reason'	Totals: 134.50	132.75	13.81	281.06	0.00
			Grand Total:	4,359.88	265.50	66.03	4,691.41	281.56

- Report Selection Criteria**
- All Branches
 - All Credit Types
 - All Credit Reasons
 - All Descriptions
 - All Requested By

Drilling Into the Data

Click on any area in the chart to open it for drill-down. The Credits by Credit Reason window will open displaying totals for each credit reason. Filtering may be done by time period, type of invoice, and/or a range of dates. Details on drilling down into this data may be found in the panel description entitled Credits By Reason. This will be the pie chart panel.

Job Sales Goals and Progress

Drill Down	Analysis Grid	Ties To SO Reports

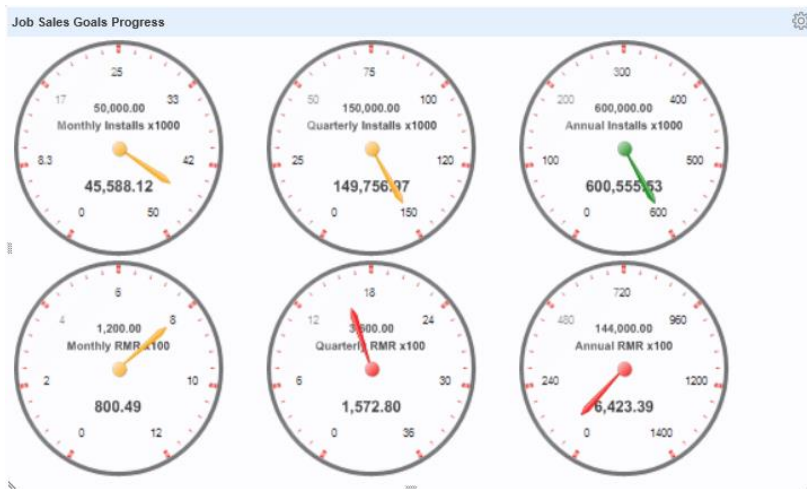
These six gauges measure the progress toward meeting specific dollar amount totals within jobs. At the time of installation, each company was asked to provide the following information to SedonaOffice Support so that goals could be set behind the scenes.

1. Target \$ goal for RMR generated within one month within jobs. (This is **not** related to cycle frequency)
2. Target \$ goal for RMR generated within 3 months within jobs (This is **not** related to cycle frequency)
3. Target \$ goal for RMR generated annually within jobs. (This is **not** related to cycle frequency)
4. Total install \$ to be generated within one month within jobs
5. Total install \$ to be generated within 3 months within jobs
6. Total install \$ to be generated within 1 year within jobs

If target goals were not provided to SedonaOffice Support at the time of installation, the default for each of these gauges has a default value of \$1.00.

When goals are set behind the scenes, the colors on the needles will represent progress toward those goals. Green indicates that the company has met or exceeded its goal, yellow means that it is more than ½ way to reaching the goal, and red indicates that the company is under ½ way to meeting its goal.

These gauges cannot be drilled into for data analysis.



Jobs and Service Counts By Status
(Text)

Drill Down	Analysis Grid	Ties To SO Reports

This multi-page text panel provides the number of jobs and service tickets that are in a specific status. Job statuses are found in the top portion of the panel and service tickets underneath.

Job and Service Counts By Status

⏪
⏩
1
2
⏪
⏩

Description	Count
In Review	2
In-Progress	37
Job Complete	1
Ready for Cust Acceptance	12
Ready for Drawings	1
Ready for Inspection	9
Ready for Permits	1
Ready for Tech	3
Ready to Bill	4
Ready to Est Start Date	29
Ready to Order Parts	1
Ready to Schedule	2
Ready to Stage Job	1
Reversed	105
Total Jobs	208
Dispatched	28
Open	486
Resolved	1
Scheduled	71

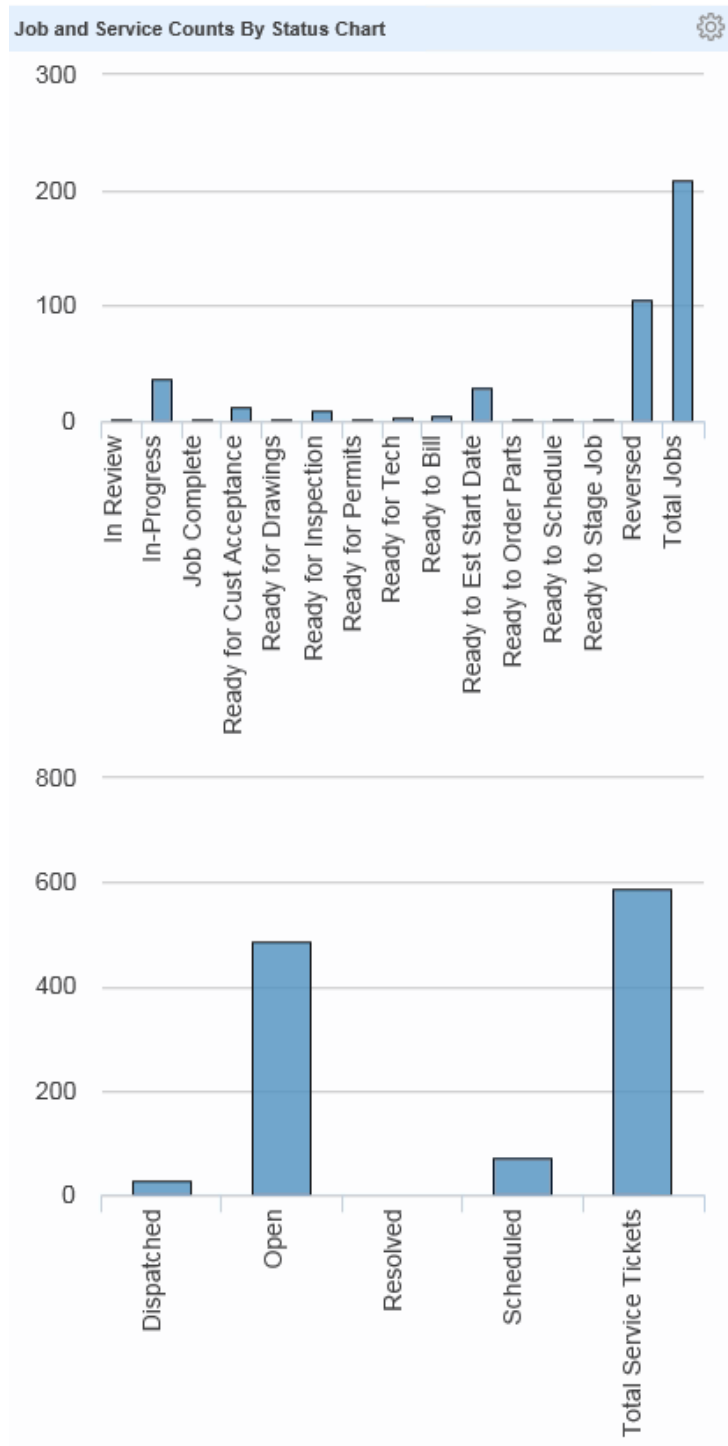
Jobs

Service Tickets

This panel does not have drill-down capability.

Jobs and Service Counts By Status Chart

Drill Down	Analysis Grid	Ties To SO Reports




This bar chart provides the number of jobs and service tickets that are in a specific status. Job statuses are found in the top portion of the panel and service tickets underneath.

This panel does not have drill down capability.

RMR By Key Data (Text)

Drill Down	Analysis Grid	Ties To SO Reports
√	√	√

This panel reports on monthly RMR based on cycle frequency, branches, cycle amounts sent to master accounts vs. the amount billed directly to subaccounts, as well as the central station companies (both internal and third party) that monitor your customer systems. When a system does not have an entry made in the Monitored By field, it will appear as N/A on this panel. . The numbers displayed for Cycle frequency tie to the RMR Customer Detail Report as of the last day of the month. The branch totals tie to the last page of the Customer RMR List report when run individually by branch. The Masters data column on Masters vs. Subs ties to the Master Account RMR Summary Listing* Report as of the last day of the month. The amounts for Subs and Alarm Companies do not have corresponding SedonaOffice reports.

RMR By Key Data 		
Key	Data	Monthly
Cycle	Annual	15,989.83
Cycle	Semi-Annual	4,263.45
Cycle	Quarterly	122,203.41
Cycle	Monthly	25,395.67
Branch	McKinley Branch	23,502.92
Branch	Ranier Branch	144,349.44
Masters vs Subs	Masters	9,842.19
Masters vs Subs	Subs	158,010.17
Alarm Company	CSI	128,814.35
Alarm Company	N/A	38,993.01
Alarm Company	Sedona Security	45.00

Masters:

1/30/2016

Master Account RMR Summary Listing

Page 3

February 2015

Number	Name	Beginning RMR	Additions to RMR	Decreases to RMR	Ending RMR
7201265	Kaegebein Fine Homebuilding LLC	0.00	0.00	0.00	0.00
7201270	MM-Eight Construction	0.00	0.00	0.00	0.00
7201271	Vail Custom Builders	0.00	0.00	0.00	0.00
7201272	Sherlock Homes	0.00	0.00	0.00	0.00
7201295	Paragon Aspen	0.00	0.00	0.00	0.00
7201321	Regan Construction	0.00	0.00	0.00	0.00
		<u>9,371.02</u>	<u>0.00</u>	<u>0.00</u>	<u>9,371.02</u>

Drilling Into the Data

Click on any area of the panel to open the analysis grid. A multi-page analysis grid will be displayed. The user has the ability to select the specific “as of” date in which to display the information as well as choosing whether or not to include future RMR in the totals. The Refresh Data button should be clicked after a new date is chosen.

As Of: 1/30/2016
Include Future RMR:
Refresh Data
Save Layout
Restore Layout
Reset Layout

Formulas
Filter
Add Chart

Table Export: [Excel](#) [CSV](#) [PDF](#)

Page 1 of 444

Customer_Number	Bill_To_Name	Bill_To_Address	Bill_To_City	Bill_To_State	Bill_To_Zip	Site_Name	Site_Address	Site_City	Site_State	Site_Zip	Site_County	Site_Township	Branch	Site_Bill_To_Name	Site_Bill_To_Address
7001962-11	Reyes, Fred	PO Box 1748	Amite	LA	70422	Reyes, Fred	29 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-11	Reyes, Fred	PO Box 1748	Amite	LA	70422	Reyes, Fred	29 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-12	Reynolds, Fred	PO Box 1748	Amite	LA	70422	Reynolds, Fred	19 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-13	Rhodes, Fred	PO Box 1748	Amite	LA	70422	Rhodes, Fred	38 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-14	Rice, Fred	PO Box 1748	Amite	LA	70422	Rice, Fred	53 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-15	Rich, Fred	PO Box 1748	Amite	LA	70422	Rich, Fred	58 Bluff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-16	Richards, Fred	PO Box 1748	Amite	LA	70422	Richards, Fred	42 & 46 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-17	Richardson, Fred	PO Box 1748	Amite	LA	70422	Richardson, Fred	41 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-18	Richert, Fred	PO Box 1748	Amite	LA	70422	Richert, Fred	56 Bluff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-19	Riedel, Fred	PO Box 1748	Amite	LA	70422	Riedel, Fred	62 Iff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-21	Rifkin, Fred	PO Box 1748	Amite	LA	70422	Rifkin, Fred	90 Bluff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7001962-22	Rigel, Fred	PO Box 1748	Amite	LA	70422	Rigel, Fred	71 Bluff Ct	Amite	LA	70422	Summit		McKinley Branch	Resort Quest	RE: Saddlewood
7002686-1	Ziff, Fred	PO Box 5460	Pine Bluff	AR	71613	Ziff, Fred	85 Willis Place	Pine Bluff	AR	71613			McKinley Branch	Ridgepoint Office	PO Box 5460
7002686-1	Ziff, Fred	PO Box 5460	Pine Bluff	AR	71613	Ziff, Fred	85 Willis Place	Pine Bluff	AR	71613			McKinley Branch	Ridgepoint Office	PO Box 5460



Unlike the standard Analysis Grid, this grid will require multiple horizontal scrolls to display all fields of information. Since many of the fields offered for analysis may not be needed, the user may choose to filter the table and hide columns not pertinent to the data being analyzed. Information on how to hide columns, create formulas, filters, and charts within an Analysis Grid may be found in the section on Analysis Grids in this reference guide.

Layout buttons are available at the top of the screen to save the columns chosen for analysis. Press the Save Layout button to save the new layout designed. At any point, the user may also select Reset Layout to place the columns back into analysis that may have previously been hidden.

As Of: 1/30/2016 Include Future RMR Refresh Data Save Layout Restore Layout Reset Layout

Formula Filter Add Chart

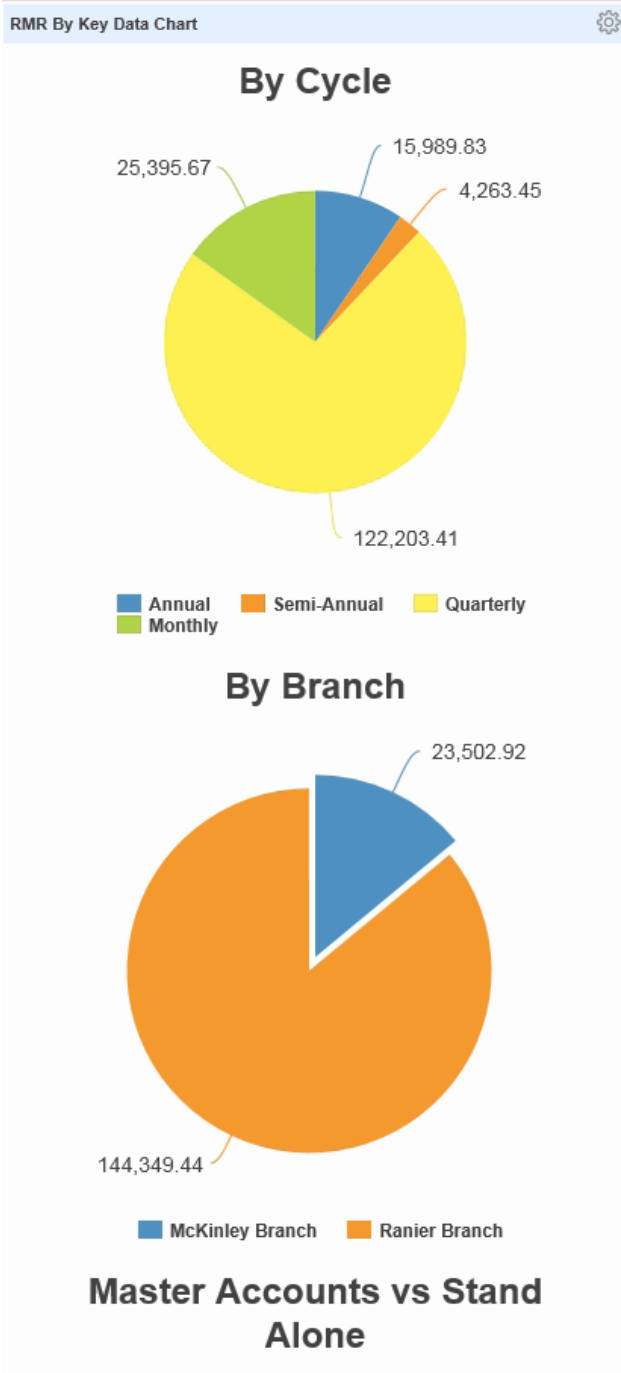
Table Export: [Excel](#) [CSV](#) [PDF](#)

Page: 1 of 47

Customer_Number	Bill_To_Name	Bill_To_Address	Bill_To_City	Bill_To_State	Bill_To_Zip	Site_Name	Site_Address	Site_City	Site_State	Site_Zip	Site_County	Site_Township	Branch	Site_Bill_To_Name	Site_Bill_To_Address
4007025	Richard Filippini	680 Picacho Ln	Kemperer	WV	63101	Richard Filippini	2688 Old Haron Rd	Pine Bluff	AR	71613	Eagle		Ranier Branch	Richard Filippini	680 Picacho Ln
4008150	Glenwood Partnership LLP	214 Center Dr	Pine Bluff	AR	71601	Glenwood Partnership LLP	250 Center Dr	Pine Bluff	AR	71601	Garfield		Ranier Branch	Glenwood Partnership LLP	214 Center Dr
4008150	Glenwood Partnership LLP	214 Center Dr	Pine Bluff	AR	71601	Glenwood Partnership LLP	202 Center Dr	Pine Bluff	AR	71601			Ranier Branch	Glenwood Partnership LLP	214 Center Dr
4009559	John Breyo	51 Winding Brook Dr	Sanatoga Springs	NY	2866	John Breyo	625 W Gillespie St	Pine Bluff	AR	71611	Pekin		Ranier Branch	John Breyo	51 Winding Brook Dr
4009559	John Breyo	51 Winding Brook Dr	Sanatoga Springs	NY	2866	John Breyo	625 W Gillespie St	Pine Bluff	AR	71611	Pekin		Ranier Branch	John Breyo	51 Winding Brook Dr
7000004	David Evans	972 E Hopkins Ave	Pine Bluff	AR	71611	David Evans	1000 E Hopkins Ave	Pine Bluff	AR	71611			Ranier Branch	David Evans	972 E Hopkins Ave
7000005	Laurelwood Condomin	PO Box 5600	Pine Bluff	AR	71613	Laurelwood Condomin	640 Carnegie Way	Pine Bluff	AR	71613			Ranier Branch	Laurelwood Condomin	PO Box 5600
7000007	Jones, Fred	PO Box 2955	White Hall	AR	71612	Jones, Fred	278 Larkspur Lane	Pine Bluff	AR	71611			Ranier Branch	Jones, Fred	PO Box 2955
7000134	Maccaskill, Fred	PO Box 1579	Pine Bluff	AR	71613	Maccaskill, Fred	55 Sunset Dr	Pine Bluff	AR	71613			Ranier Branch	Maccaskill, Fred	PO Box 1579
7000160	Makoff, Fred	PO Box 6700	Pine Bluff	AR	71613	Makoff, Fred	598 Fox Run Dr	Pine Bluff	AR	71613			Ranier Branch	Makoff, Fred	PO Box 6700
7000223	Mcarthur, Fred	PO Box 6398	Pine Bluff	AR	71613	Mcarthur, Fred	844 Choze Cherryln	Pine Bluff	AR	71613			Ranier Branch	Mcarthur, Fred	PO Box 6398
7000223	Mcarthur, Fred	PO Box 6398	Pine Bluff	AR	71613	Mcarthur, Fred	844 Choze Cherryln	Pine Bluff	AR	71613			Ranier Branch	Mcarthur, Fred	PO Box 6398
7000285	Misael, Fred	11621 Wilshire Blvd, Suite 1540	Eldorado Springs	CO	80025	Misael, Fred	115 Johnson Dr	Pine Bluff	AR	71611			Ranier Branch	Misael, Fred	11621 Wilshire Blvd, Suite 1540
7000325	Kospeke, Fred	PO Box 487	Monticello	AR	71656	Kospeke, Fred	207 S West End St	Pine Bluff	AR	71611			Ranier Branch	Kospeke, Fred	3 Netherfield Way

RMR By Key Data Chart

Drill Down	Analysis Grid	Ties To SO Reports
√	√	



This panel reports on monthly RMR based on cycle frequency, branches, cycle amounts sent to master accounts vs. the amount billed directly to subaccounts, as well as the central station companies (both internal and third party) that monitor your customer systems. When a system does not have an entry made in the Monitored By field, it will appear as N/A on this panel.

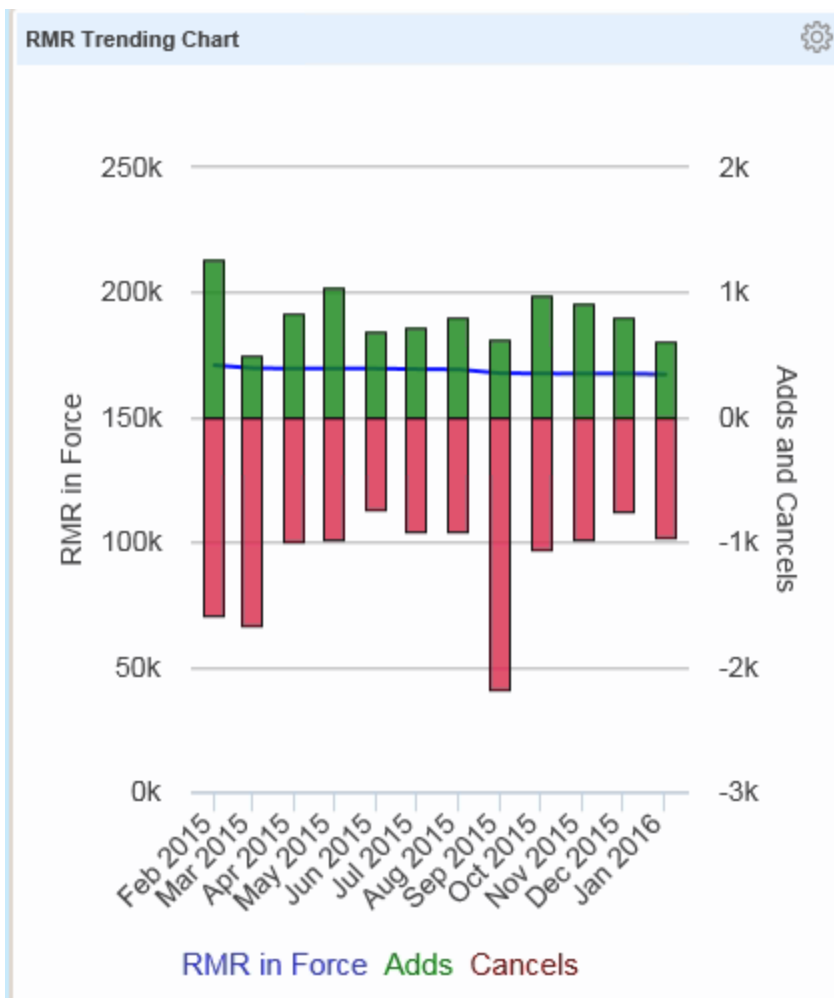
Drilling Into the Data

Click on any area of the panel to open the analysis grid. A multi-page analysis grid will be displayed. The user has the ability to select the specific “as of” date in which to display the information as well as choosing whether or not to include future RMR in the totals. Full directions on drilling into this data may be found in the Panel Description for RMR By Key Data Chart (Text).

RMR Trending Chart

Drill Down	Analysis Grid	Ties To SO Reports
√	√	√

This bar chart shows the amount of RMR (on the customer level) that was added (green) and cancelled (red) each month over the past year. The blue line represents the RMR In Force as of the last calendar day of each period. The addition and cancellation amounts tie to the RMR Increase Summary and the RMR Cancellations Summary within Report Manager. The RMR In Force column (blue) is calculated as of the last calendar day of the month as reported using the Customer (Commercial/Residential) Report Style from the drop-down list and Active RMR in the first column in the Summary of RMR In Force – User Columns Report.



Reconciling to Sedona Office Reports

Click into any area of the panel to begin drilling into the data. A new window will open showing a larger view of the graph. Using the mouse, hover over an area for which totals are needed. In the example below, the RMR In Force as of March 31, 2015 is displayed:

RMR In Force for March 2015:



Summary of RMR In-Force

SedonaOffice Conference AP

By Branch - RMR as of 3/31/2015
All Active Branches

Revenue Level	Active RMR
McKinley	25,024.30
Ranier	144,631.68
	169,655.98



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RMR Increase Summary

Page # 1

All Branches
Effective March 2015
All Customers
Reporting, Non-Reporting RMR Items

	<u>Item Count</u>	<u>Item %</u>	<u>RMR Increase</u>	<u>Rate%</u>
Commercial Increases				
<u>Increase Reason</u>				
Exist-Upgrade System	1	33.33%	34.37	53.39%
New-Installation	2	66.67%	30.00	46.61%
	3	100.00%	64.37	100.00%
Residential Increases				
<u>Increase Reason</u>				
(A) Branch Change	2	10.00%	37.00	8.62%
(D) RMR Adjustment	2	10.00%	42.00	9.78%
Exist-Add Service	1	5.00%	20.00	4.66%
Exist-Upgrade System	6	30.00%	148.33	34.55%
New-Installation	6	30.00%	125.00	29.12%
New-Rollover	2	10.00%	37.00	8.62%
Other-Acctg Correction	1	5.00%	20.00	4.66%
	20	100.00%	429.33	100.00%



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RMR Cancellations Summary

Page # 1

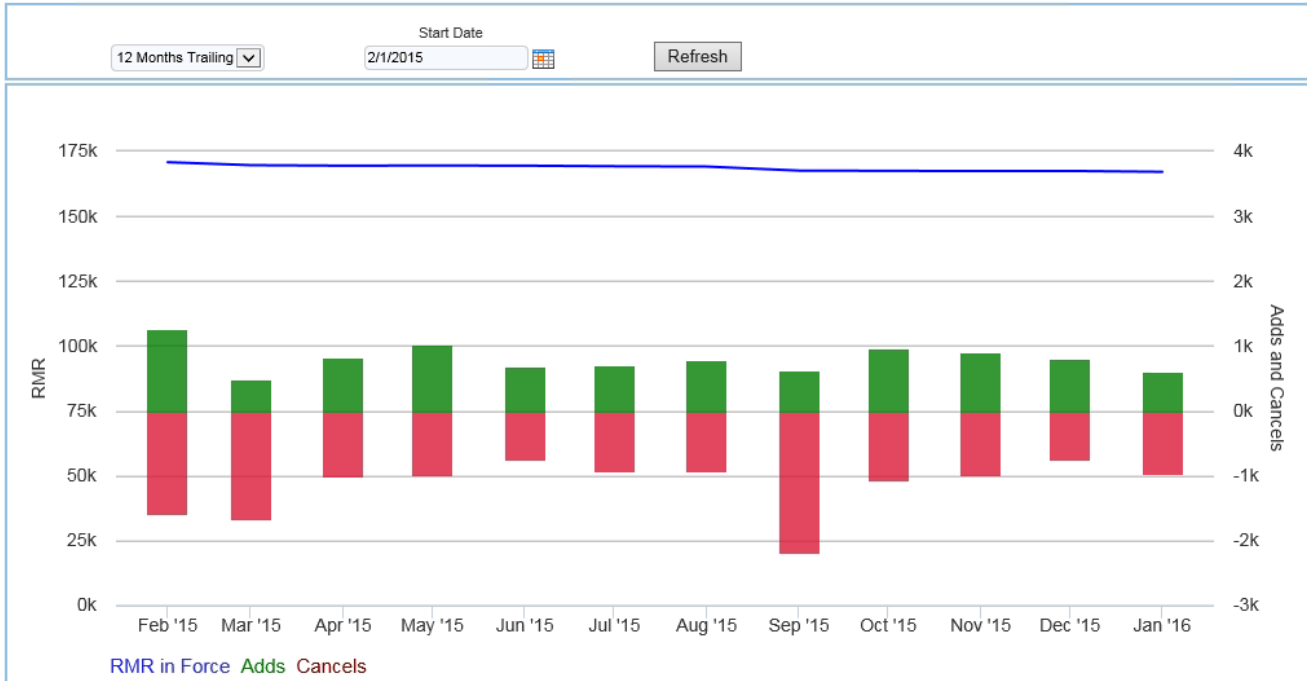
All Branches
Effective March 2015
All Customers
Reporting, Non-Reporting RMR Items

	<u>Item Count</u>	<u>Item %</u>	<u>RMR Cancellation</u>	<u>Rate%</u>
Commercial Cancellations				
Cancel Reason				
Can-Competition	6	27.27%	(205.62)	26.61%
Can-Dissatisfied	5	22.73%	(80.43)	10.41%
Can-Major Remodel	2	9.09%	(50.55)	6.54%
Can-Moved	8	36.36%	(401.69)	51.99%
Exist-Upgrade System	1	4.55%	(34.37)	4.45%
	22	100.00%	(772.66)	100.00%
Residential Cancellations				
Cancel Reason				
(A) Branch Change	2	6.45%	(37.00)	4.16%
Can-Comm/Equip. Fail	3	9.68%	(112.11)	12.59%
Can-Competition	1	3.23%	(43.90)	4.93%
Can-Dissatisfied	2	6.45%	(43.68)	4.91%
Can-Moved	13	41.94%	(391.13)	43.93%
Can-Temporary	3	9.68%	(94.14)	10.57%
Exist-Rate Decrease	1	3.23%	(20.00)	2.25%
Exist-Upgrade System	6	19.35%	(148.33)	16.66%
	31	100.00%	(890.29)	100.00%

Drilling Into the Data

Click into any area of the main panel to begin drilling into the data. A new window will open showing a larger view of the graph.

RMR Trending



This view offers three period options:



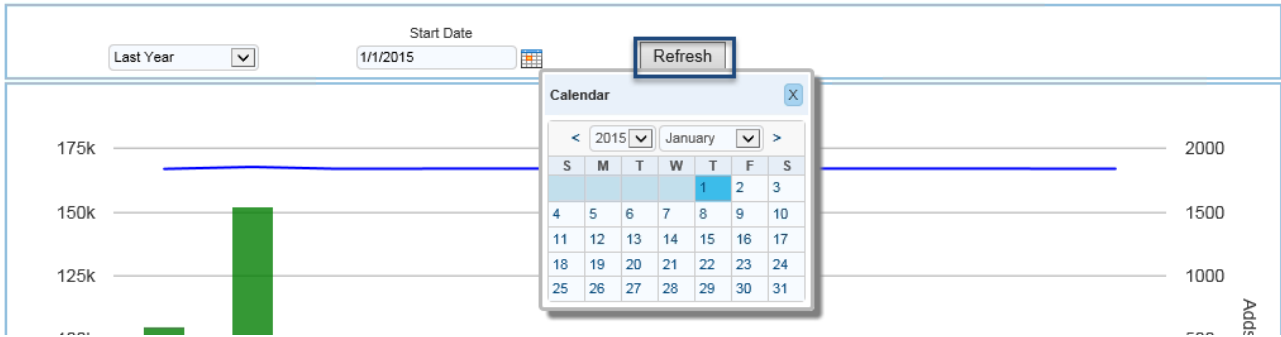
12 Months Trending – Previous 12 months from the current month

This Year – Calendar Year January-December

Last Year – Calendar Year January-December of previous year

Select a start date within the specific period chosen. Press the Refresh button so that the new period may be reflected.

RMR Trending



The chart refreshes to show the newly filtered dates. Click on either the blue RMR line, the red cancels or the green additions to analyze data within the period chosen. In the example below, cancellations for August 2015 will be chosen.

RMR Trending



An Analysis Grid will open showing multiple pages of data involving cancelled data for August 2015 enabling in-depth analysis to begin. At any point, the user may return to the trending chart by pressing the Return to Trending button at the top of the screen. Using wishing to view RMR in Force may press the Show RMR button. Users wanting to display the addition of RMR can press the Show Adds button.

Please refer to the section on Analysis Grids within this Reference Guide for detailed information on using this powerful tool.

Cancels

Return to Trending Show RMR Show Adds Refresh Data Save Layout Restore Layout Reset Layout

Formula Filter Add Chart

Table

Page 1 of 2

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yearly, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yearly, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch
7001449	Barry, Fred	2 Music School Rd	1		-68.64	8/24/2015	Site/System Change	Partial	Ranier Branch
7002356	Stryker, Fred	176 Fairway Dr	1	RMCA2622	-46.41	8/25/2015	Moved	Full	Ranier Branch
7003140	Kennedy, Tom	45 Protector Place	1	RMCB1470	-37.63	8/27/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-39.52	8/28/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-4.44	8/28/2015	Moved	Full	McKinley Branch

RMR Trending (Text)

Drill Down	Analysis Grid	Ties To SO Reports
√	√	√

This panel displays the monthly amount of RMR (on the customer level) that was added, and cancelled each month over the past year. The addition and cancellation amounts tie to the RMR Increase Summary and the RMR Cancellation Summary within Report Manager. The RMR In Force column (RMR) is calculated as of the last calendar day of the month as reported using the Customer (Commercial/Residential) Report Style from the drop-down list and Active RMR in the first column in the Summary of RMR In Force – User Columns Report.

Month	RMR	Adds	Cancel
Feb 2015	170,825.23	1,268.69	-1,593.13
Mar 2015	169,655.98	493.70	-1,662.95
Apr 2015	169,480.62	823.36	-998.72
May 2015	169,526.62	1,030.74	-984.74
Jun 2015	169,466.86	687.15	-746.91
Jul 2015	169,256.09	712.89	-923.66
Aug 2015	169,134.13	799.10	-921.06
Sep 2015	167,584.38	627.42	-2,177.17
Oct 2015	167,488.75	967.79	-1,063.42
Nov 2015	167,376.49	903.25	-980.51
Dec 2015	167,467.47	804.56	-748.58
Jan 2016	167,110.26	606.18	-963.39

RMR In Force for March 2015:

Summary of RMR In-Force

SedonaOffice Conference AP

By Branch - RMR as of 3/31/2015
All Active Branches

Revenue Level	Active RMR
McKinley	25,024.30
Ranier	144,631.68
	169,655.98

Adds:

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RMR Increase Summary

Page # 1

All Branches
Effective March 2015
All Customers
Reporting, Non-Reporting RMR Items

	<u>Item Count</u>	<u>Item %</u>	<u>RMR Increase</u>	<u>Rate%</u>
Commercial Increases				
Increase Reason				
Exist-Upgrade System	1	33.33%	34.37	53.39%
New-Installation	2	66.67%	30.00	46.61%
	3	100.00%	64.37	100.00%
Residential Increases				
Increase Reason				
(A) Branch Change	2	10.00%	37.00	8.62%
(I) RMR Adjustment	2	10.00%	42.00	9.78%
Exist-Add Service	1	5.00%	20.00	4.66%
Exist-Upgrade System	6	30.00%	148.33	34.55%
New-Installation	6	30.00%	125.00	29.12%
New-Rollover	2	10.00%	37.00	8.62%
Other-AcctgCorrection	1	5.00%	20.00	4.66%
	20	100.00%	429.33	100.00%

Cancel:

May 19, 2016
12:29 PM

RMR Cancellations Summary

Page # 1

All Branches
Effective March 2015
All Customers
Reporting, Non-Reporting RMR Items

	<u>Item Count</u>	<u>Item %</u>	<u>RMR Cancellation</u>	<u>Rate%</u>
Commercial Cancellations				
Cancel Reason				
Can-Competition	6	27.27%	(205.62)	26.61%
Can-Dissatisfied	5	22.73%	(80.43)	10.41%
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Exist-Upgrade System	6	19.35%	(148.33)	16.66%
	31	100.00%	(890.29)	100.00%

Drilling Into the Data`

Detailed directions on drilling into this data may be found in the RMR Trending Chart panel in this reference guide.

An Analysis Grid will open showing multiple pages of data involving cancelled data for August 2015 enabling in-depth analysis to begin. Please refer to the section on Analysis Grids within this Reference Guide for detailed information on using this powerful tool.

Cancels

Return to Trending Show RMR Show Adds Refresh Data Save Layout Restore Layout Reset Layout

Formula Filter Add Chart

Table

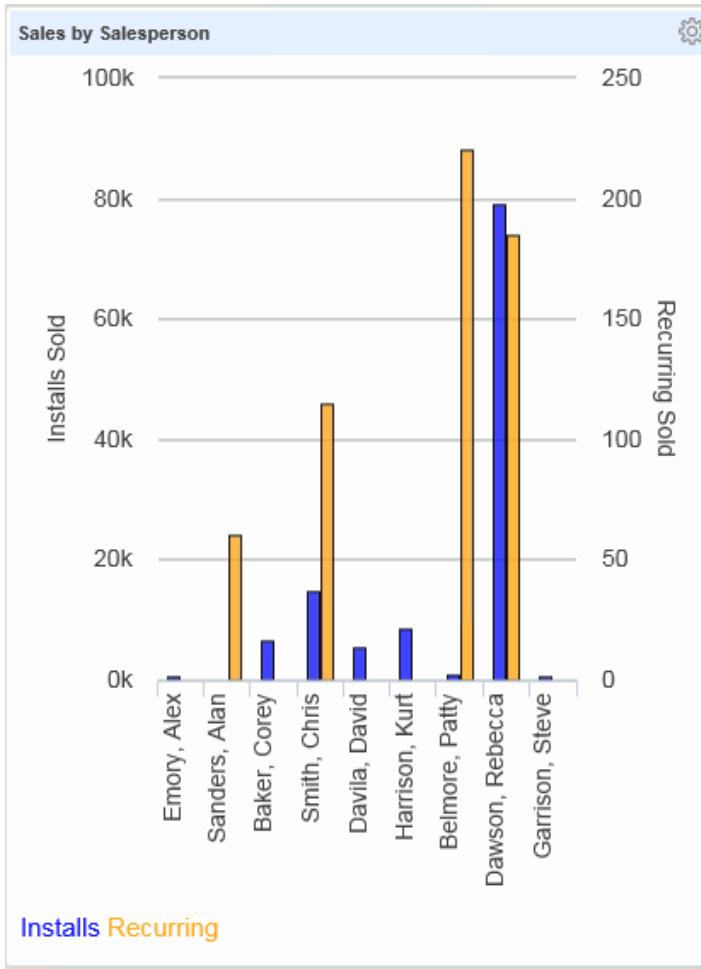
Page 1 of 2

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
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7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yearly, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yearly, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch
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7002356	Stryker, Fred	176 Fairway Dr	1	RMCA2622	-46.41	8/25/2015	Moved	Full	Ranier Branch
7003140	Kennedy, Tom	45 Protector Place	1	RMCB1470	-37.63	8/27/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-39.52	8/28/2015	Moved	Full	McKinley Branch
7002416	Thigpen, Fred	2905-A Aspen Ln	1	RMCA2696	-4.44	8/28/2015	Moved	Full	McKinley Branch

Drill Down	Analysis Grid	Ties To SO Reports
√	√	√

Sales By Salesperson

This panel displays the total amount of install and RMR dollars sold within Jobs by each salesperson this month. The amounts displayed in this panel tie to the total on the last page Jobs Sold report when grouped by salesperson..



Job Sold - By Salesperson

SedonaOffice Conference AP

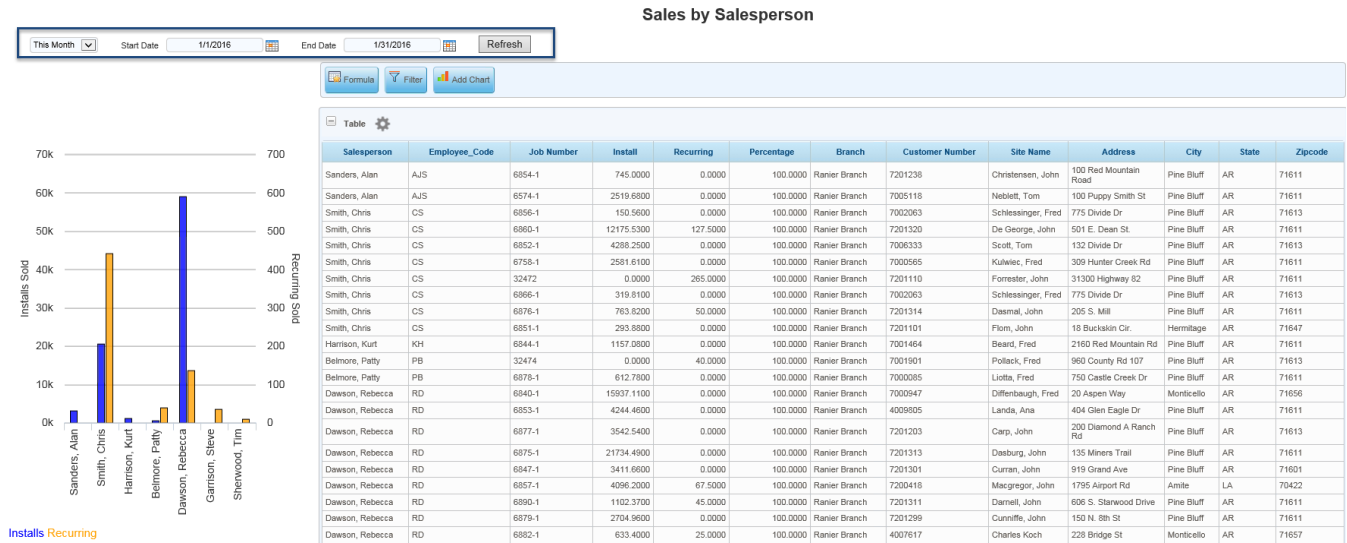
All Active Branches
All Active Job Types
All Departments
All Salespersons
All Active Install Companies
Sold January 2016 (Consolidated)

Salesperson	Install Charges	Part Charges	Recurring
AJS	3,395.98	0.00	0.00
CS	22,552.06	0.00	50.00
JT	1,300.00	0.00	0.00
KH	1,157.08	0.00	0.00
PB	612.78	0.00	40.00
RD	59,960.04	0.00	137.50
SG	0.00	0.00	35.00
TimS	0.00	0.00	10.00
Total	88,977.94	0.00	272.50

Drilling Into the Data

Click on any area of the panel to begin drilling into the data.

A new window will open with two screens of information giving the user the ability to filter the results by period, start and end dates. The user should press the Refresh button to analyze the refined data.

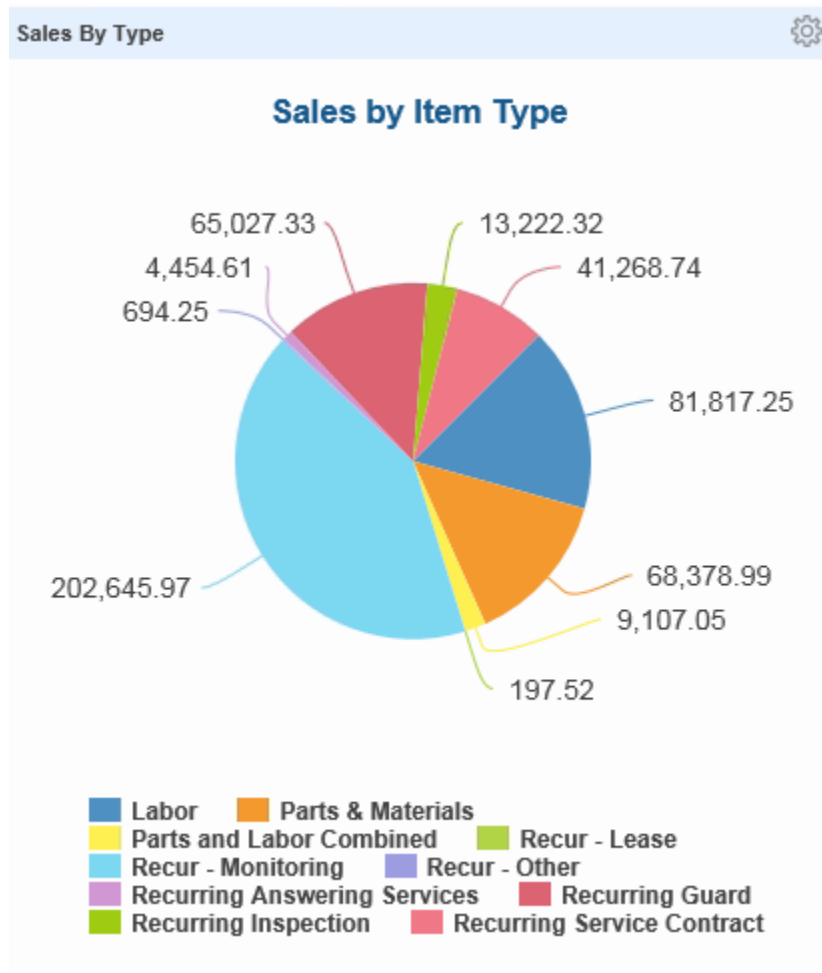


The bar chart will display the totals in the left window for the dates selected, and an Analysis Grid is presented in the right window for further analysis. Please refer to the section on Analysis Grids within this reference guide for information on how to use this powerful tool.

Sales By Type (Pie Chart)

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This panel reports on the total dollar amounts sold this month for items defined in the SedonaOffice Item Type Setup table. The totals that appear in the pie chart will tie to the Sales Report (found within Report Manager under Accounts Receivable) when run by item type, for totals only and for invoices only (no credits).



1/31/2016
14:35

Sales Report (Summary)

Page 1

All Branches
From 1/1/2016 through 1/31/2016

	<u>Qty</u>	<u>Amount</u>	<u>%of Total</u>	<u>Average Rate</u>
Labor Total				
ActivationFee	3	735.00	0.15%	245.00
GResponse	10	1,705.00	0.35%	174.87
Insp Labor	193	15,400.00	3.17%	80.00
Insp Trip Chrg	37	3,145.00	0.65%	85.00
Job Labor	27	36,530.00	7.51%	1,352.96
Svc Labor	161	15,497.25	3.19%	96.11
Svc Trip Chrg	104	8,805.00	1.81%	84.66
		81,817.25	16.82%	
Parts & Materials Total				
Job Parts	36	37,861.36	7.78%	1,066.52
OTC Parts Sale	17	106.90	0.02%	6.29
Svc Parts	511	30,410.73	6.25%	59.51
		68,378.99	14.05%	
Parts and Labor Combined Total				
Install Holdback	1	-135.25	-0.03%	(270.50)
Job Other	98	8,955.27	1.84%	90.92
Parking Violation	15	75.00	0.02%	5.00
Svc Other	1	212.03	0.04%	212.03
		9,107.05	1.87%	
Recur - Lease Total				
Lease	24	197.52	0.04%	8.23
		197.52	0.04%	
Recur - Monitoring Total				
AES Gold	11	275.00	0.06%	25.00
Cellular Backup	1	15.75	0.00%	15.75
Cellular Prim ary	52	1,420.17	0.29%	27.56
Daily Tim er	1,406	7,732.76	1.59%	5.50
MonBack	109	2,691.66	0.55%	24.63
MonCO	11	57.50	0.01%	5.23
MonEnv	58	304.00	0.06%	5.24
Monitoring	4,245	181,773.90	37.36%	42.82
OCL	6	61.50	0.01%	10.25
OCLW	6	59.83	0.01%	10.26
Open Close LogMonthly	232	5,103.80	1.05%	22.00
Remote Access	69	1,164.00	0.24%	16.88
TW	3	23.64	0.00%	7.88
Web	170	1,663.66	0.34%	9.76
		202,347.17	41.59%	

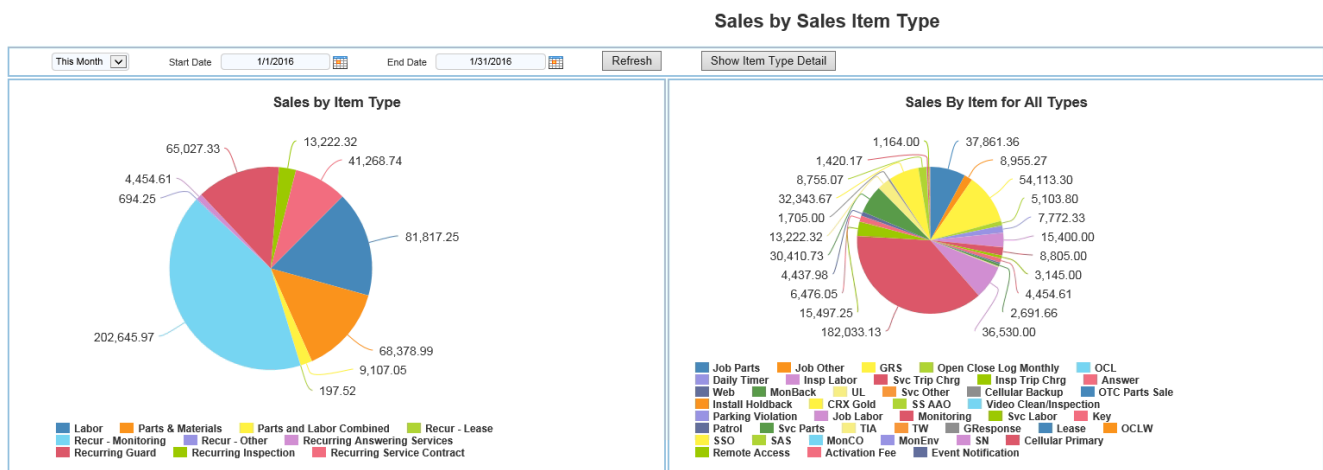
Drilling Into the Data

Click on any area of the panel to begin drilling into the data.

A new window will open with two screens of information giving the user the ability to filter the results by period, start and end dates:

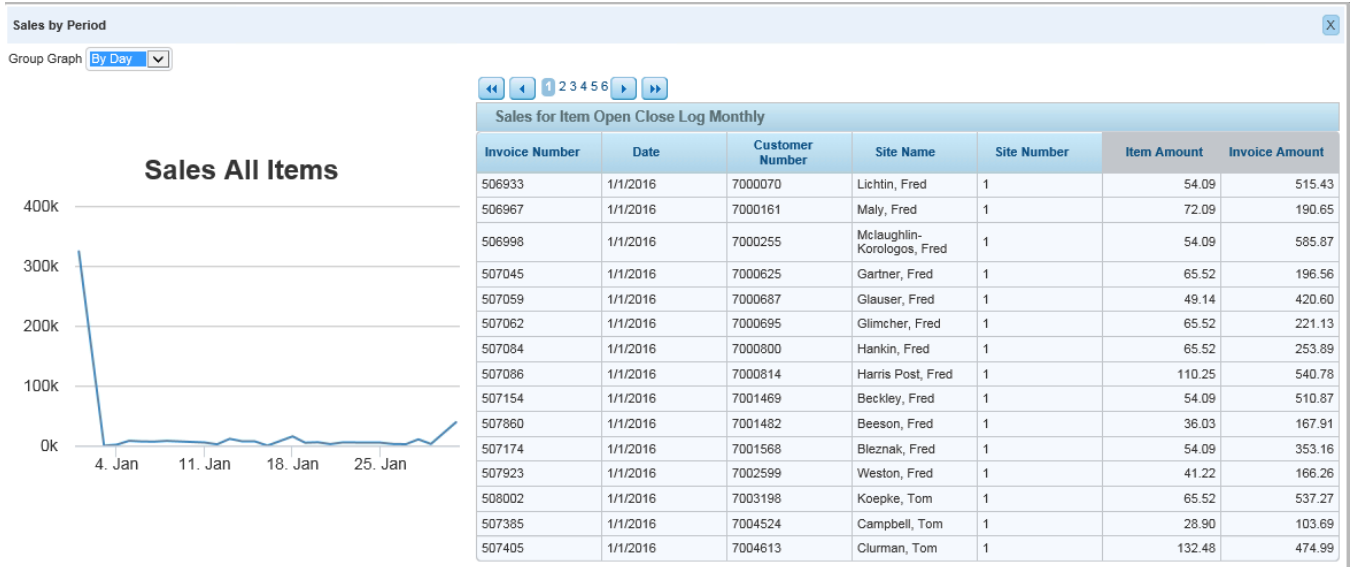
The Refresh key should be pressed after modifying any of the information above so that the updated data may be displayed.

A new window will open showing the Sales By Item Type in the left window and detailed information on the specific area clicked on for drill-down.



The user may click on any specific item type within the right panel to drill into sales for that specific item or click on the Show Item Type Detail button at the top of the screen to bring up the Sales by Period window.

A new window will open enabling the user to see sales by either a specific day, week, or the entire month. Select the specific group period from the drop-down menu to view the results. In the example below the By Day option has been chosen. A trend graph for sales is now displayed.



The columns of this report can be used for sorting by invoice number, date, customer number, site name, site number, item amount of invoice amount.

Sales By Type (Text)

Drill Down	Analysis Grid	Ties To SO Reports
√		√

This panel reports on the total dollar amounts sold this month for items defined in the SedonaOffice Item Type Setup table. The totals that appear will tie to the Sales Report (found within Report Manager under Accounts Receivable) when run by item type, for totals only and for invoices only (no credits).

Sales by Type 		
Item Type	Description	Sales
IPJ	Inventory Part-Jobs	19,923.46
IPS	Inventory Part-Service	157.98
LBJ	Labor-Jobs	646.00
LBS	Labor-Service	60.00
NR	Non-Recurring	6,999.00
OC	Other Charge	546.98
RI	Recurring-Inspections	11,924.00
RL	Recurring-Lease	205.00
RM	Recurring-Monitoring Services	2,629.18
RO	Recurring-Other	223.20
RW	Recurring-Service Contract/Ext. Warranty	1,652.00

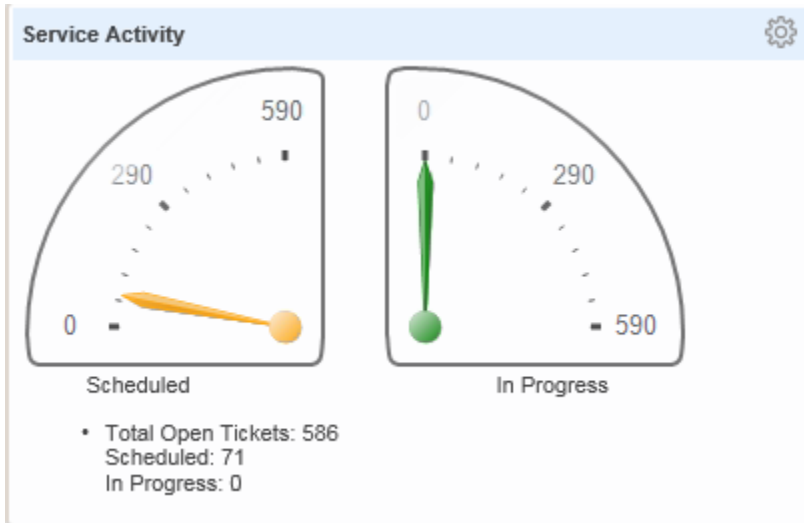
Drilling Into the Data

Click on any area of the panel to begin drilling into the data. Please review the Panel Description for Sales by Item Type (Pie Chart) for full details on drilling into this data and how to tie the totals to the Sales Report.

Drill Down	Analysis Chart	Totals Tie To SO Reports

Service Activity

The two meters displayed on this panel show today’s scheduled on-site service calls and how many of them are in progress. The total number of open tickets, scheduled tickets, and the number of tickets in in progress. The totals on this panel will automatically refresh every 5 minutes.



Analysis Grids

The analysis grid consists of separate panels for controls, tables, and visualizations. Data can be manipulated through use of the controls creating both table and visual analysis.

Layout buttons are available at the top of the screen to refresh the data, save a new layout, or reset the columns back into analysis that may have previously been hidden or otherwise filtered.



There are two parts to analysis grids – using the Controls Panels to manipulate the data and visualizations and the Visualization Panels to determine how the data is displayed.

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-39.75	8/3/2015	Comm/Equip. Failure	Full	Ranier
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKin
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKin
7000746	Grieseiner, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Grieseiner, Fred	796 Little Woody Creek Rd	1		-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yeary, Fred	44 Tumberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yeary, Fred	44 Tumberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch

Controls Panels

There are three buttons on the control panel that determine what data is to be analyzed – The formula button and the filter button. The third tab Add Chart will be used for data visualization.



Formula Button

The formula button enables calculations to be made based on the available columns in the table. A new column may be inserted containing the data calculation.

Formula Help Button

Formulas must be entered using specific function statements and operators. A listing of the acceptable statements and operators be found by pressing the Formula Help button. The Formula Help includes an extensive list of functions (their description and syntax) as well as operators, and Other Notes of Interest.

The screenshot shows the SedonaDashboard interface. At the top, there are three buttons: 'Formula', 'Filter', and 'Add Chart'. Below these, there is a section titled 'Add a new column from a formula.' with a 'Formula Help' button highlighted. The 'Formula Help' dialog box contains the following fields and controls:

- Name:** A text input field containing 'Commissions Penalty'.
- Insert a column:** A dropdown menu with a downward arrow and an 'Insert' button.
- Formula:** A large text area with upward and downward arrows on the right side.
- Data Type:** A dropdown menu with 'Number' selected.
- Display Format:** A dropdown menu.
- Add:** A button at the bottom left of the dialog.

Formula Help

Formulas are expressions made up of columns, constants, functions, and operators.

Columns are values that come from the data. Their names are enclosed in square brackets, like [ShippedDate]. Depending on their data type, they may be used as text strings, numbers, and date/time values.

Constants are simply specific fixed values that you enter into a Formula.

Functions return values, usually computations based on columns and constants.

Operators do arithmetic and logical comparisons.

Here are some examples:

[UnitPrice] * [Quantity]
Multiply two data columns, UnitPrice and Quantity, to make an ExtendedPrice column.

[UnitPrice] * .04
Multiply a data column by an constant value to calculate the tax applied to the price.

DateDiff("d", [OrderDate], [ShippedDate])
Get the number of days from the order to the shipment.

DateDiff("w", [ShippedDate], Now)
Get the number of weekdays since the shipment date.

WeekdayName(Weekday([ShippedDate]))
Return the name of the day of the week of the shipment date.

[LastName] + " " + [FirstName]
Concatenate columns and strings together. This might return: Smith, John

UCase([LastName] + " " + [FirstName])
Convert to upper case. This might return: SMITH, JOHN

Creating the Formula

In the example below, we are taking the RMR amount from the Amount column and multiplying it by 10% to show a penalty which potentially could be assessed against a salesperson for cancelled RMR.

Add the name of the new column to be added in the Name field as well as the name of the column from which the formula will be based (Amount). In the example below, we are defining the column name as Commissions Penalty column which will calculate an amount based on the RMR dollar amount (displayed as the column entitled "Amount" in the analysis grid). Press the Insert button to add the Amount statement into the formula.

Formula Filter Add Chart

Add a new column from a

Name Commissions Penalty

Insert a column

- Customer Number
- Business Name
- Address
- Site Number
- Alarm Account
- Amount
- Effective Date
- Reason
- Full or Partial
- Branch

Insert

Formula]

Data Type Number

Display Format

Add

Add a new column from a formula. Formula Help

Name Commissions Penalty

Insert a column Amount

Insert

Formula [Amount]

Data Type Number

Display Format

Add

To finish the formula, we are stating that the Commission Penalty column should show 10% of the amount in the Amount column. To do this we are adding * .10 to the formula statement, marking the data type as a number, and selecting the specific dollar format that should be displayed in the new column..

Add a new column from a formula. [Formula Help](#)

Name:

Insert a column:

Formula:

Data Type:

Display Format:

- ### ## #0.00
- \$### ## #0.00**
- yyyy/MM/dd
- yyyy/MM/dd hh:mm:ss
- MM/dd/yyyy
- MM/dd/yyyy hh:mm:ss
- Bar Gauges
- Cell Colors

After the formula has been entered, press the Add button at the bottom of the Formula screen. The column, along with its new calculation, will be added to the analysis grid.

Add a new column from a formula. [Formula Help](#)

Name:

Insert a column:

Formula:

Data Type:

Display Format:

The new column and its calculation has been added to the table. More formula columns may be added as necessary. All formula columns are defined in the lower section of the formula panel. At any time the user may replace the calculation or remove it by pressing either the Replace or Remove buttons.

Formula Filter Add Chart

Add a new column from a formula. [Formula Help](#)

Name: Commissions Penalty

Insert a column: [Dropdown]

Formula: [Amount] * .10

Data Type: Number

Display Format: [Dropdown]

Formula Columns:

* Commissions Penalty [Amount] * .10

Table

Page 1 of 3

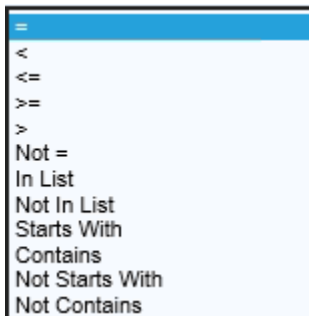
Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch	Commissions Penalty
7200096	Van Bilberbeek, Tom	244 Antler Ridge Ln	1	RMCA3334	-5.25	9/3/2015	End of Contract	Full	Ranier Branch	-0.53
7200096	Van Bilberbeek, Tom	244 Antler Ridge Ln	1	RMCA3334	-15.75	9/3/2015	End of Contract	Full	Ranier Branch	-1.58
7200234	Wilsky, Tom	1495 Homestake Dr	1	DM2487	-5.25	9/8/2015	Moved	Full	Ranier Branch	-0.53
7200234	Wilsky, Tom	1495 Homestake Dr	1	DM2487	-36.75	9/8/2015	Moved	Full	Ranier Branch	-3.68
7006008	Nikolich, Tom	602 Eppley Drive	1	APXW5076	-5.25	9/9/2015	Moved	Full	Ranier Branch	-0.53
7006008	Nikolich, Tom	602 Eppley Drive	1	APXW5076	-31.50	9/9/2015	Moved	Full	Ranier Branch	-3.15
7002158	Shulman, Fred	710 N Third St	1	RMCA2384	-10.50	9/11/2015	(A) Change System	Partial	Ranier Branch	-1.05
7002158	Shulman, Fred	710 N Third St	1	RMCA2384	-5.25	9/11/2015	(A) Change System	Partial	Ranier Branch	-0.53
7006407	Slade, Tom	845 Roaring Fork Rd	1	AL993427	-40.00	9/15/2015	Major Remodel	Full	Ranier Branch	-4.00

Filter Button

Data within an analysis grid may be filtered by one or more columns. To filter data in the analysis grid, click on the Filter button at the top of the screen and enter the first column from which filtering should take place.

Filtering on Cell Values

Comparison designate whether data should be included or excluded or the value to which the field should contain. The available comparisons are:



Select the comparison value required. In the example below = has been selected.

The Value field is where an alphanumeric entry is made designating what the cell value should be based on the comparison chosen. In the example below, we are selecting the branch name McKinley. The Add key is pressed designating the first filter. The second filter is the Reason column = Moved. The Add key is pressed after this selection as well.

The table information after filtering is shown below.

Formula
Filter
Add Chart

Filter rows by cell values.

Filter Column: Reason

Comparison: =

Value: Moved

[Add](#)

Filters:

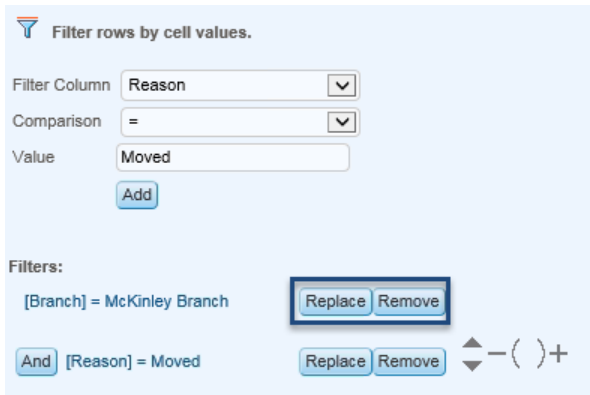
[Branch] = McKinley Branch [Replace](#) [Remove](#)

[And](#) [Reason] = Moved [Replace](#) [Remove](#) ↕ - () +

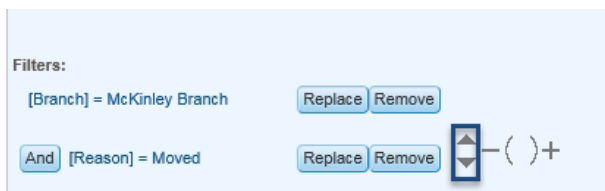
Table

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch	Commissions Penalty
7001596	Borgers, Fred	21 Stag Gulch Ct	1	RMCA1435	-25.78	9/21/2015	Moved	Full	McKinley Branch	-2.58
7001596	Borgers, Fred	21 Stag Gulch Ct	1	RMCA1435	-41.85	9/21/2015	Moved	Full	McKinley Branch	-4.19
7001596	Borgers, Fred	21 Stag Gulch Ct	1	RMCA1435	-22.91	9/21/2015	Moved	Full	McKinley Branch	-2.29
7002727	Lenkin, Tom	97 Stonebridge Dr	1	RMCB0503	-4.01	9/23/2015	Moved	Full	McKinley Branch	-0.40
7002727	Lenkin, Tom	97 Stonebridge Dr	1	RMCB0503	-31.40	9/23/2015	Moved	Full	McKinley Branch	-3.14
7006359	Shawar, Tom	225 Highlands Dr	1	RMCA1957	-5.25	9/29/2015	Moved	Full	McKinley Branch	-0.53
7006359	Shawar, Tom	225 Highlands Dr	1	RMCA1957	-31.50	9/29/2015	Moved	Full	McKinley Branch	-3.15
7002045	Salet, Fred	29 West Ridge	1	RMCA2224	-28.64	9/30/2015	Moved	Full	McKinley Branch	-2.86

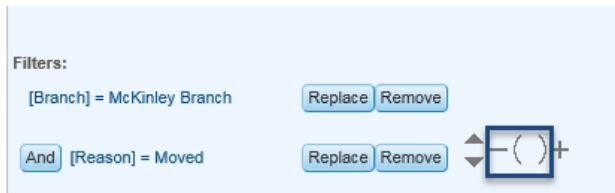
Filtering options may be replaced or removed at any time by pressing either the Replace or Remove buttons next to the specific filter.



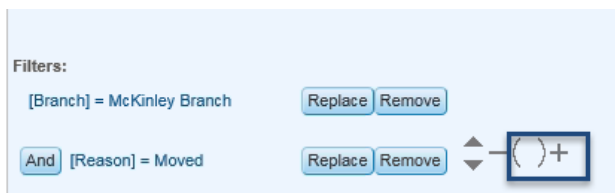
Other filtering selections may also be made using symbols displayed next to the filtering selection:



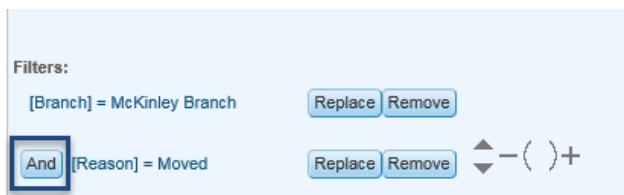
Move Filter
Up/Down



Remove Filter Parenthesis



Add Filter Parenthesis



Toggle And/Or

Filtering on Date Values

Filtering may also be done on a range of dates. The comparison value for this selection would be Date Range. Select the start and end dates from the calendar presented. In the example below, we have selected to view all cancellations between the dates 8/1/2015 and 8/15/2015

Formula Filter Add Chart

Filter rows by cell values.

Filter Column: Effective Date
Comparison: Date Range
Value: Specific Date

Add

Calendar

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Customer Number	Business Name	Address	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch

Formula Filter Add Chart

Filter rows by cell values.

Filter Column: Effective Date
Comparison: Date Range
Value: Specific Date 8/1/2015
Value: Specific Date 8/15/2015

Add

Filters:

[Effective Date] Date Range 8/1/2015 to 8/15/2015 Replace Remove

And [Branch] = McKinley Branch Replace Remove

Table

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	Yeary, Fred	44 Tumberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yeary, Fred	44 Tumberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch

Add Charts

Users may add a new visual display to their analysis by clicking on the Add Chart button. A chart may be created as a pie, bar, line, curved line, scatter plot, heat map or gauge.

Creating A New Chart.

To create a new chart, click on the type of chart desired (pie, bar, line, curved line, scatter plot, heatmap or gauge). Depending upon the type of chart chosen, the user will be presented with a chart configuration panel identifying different fields in which to select data to be included in the chart.

In the example, we will use data from the cancels analysis taken from the RMR Trending Chart for the creation of a pie chart showing the percentages of all reasons that cancellations took place.

Cancels

Return to Trending Show RMR Show Adds Refresh Data Save Layout Restore Layout Reset Layout

Formula Filter Add Chart

Distinct Count of Reason by Reason

Pie Bar Line Curved Line Scatter Plot Heatmap Gauge

Label Column Reason
Data Column Reason Show Percentage
Data Aggregation Distinct Count
Relevance Automatic

Table

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Golt, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Golt, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fried	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	Griesemer, Fried	796 Little Woody Creek Rd	1		-86.00	8/6/2015	(A) Change System	Partial	Ranier Branch

Export: Excel GSV PDF

The **Label Column** represents the name of the column which will identify the information being calculated in the chart. In the example above, the reason for the cancellation is being used.

The **Data Column** represents the name of the column on which data aggregation should take place. In the example above, we are looking for the reason as the column on which aggregation should take place.

The **Show** field represents how the totals should appear. We have chosen to display percentages.

The **Data Aggregation** field represents the type of aggregation (sums, averages, counts, minimums and maximums) that will take place. We have chosen a distinct count.

The **Relevance** field represents how much data should be presented (e.g. automatic means show percentages for all reason codes, only the top 2 reasons, rankings, etc.). This column may also be turned off.

Charts are immediately redrawn as data is selected to go into these fields.

Visualization Panels

Visualization panels contain either a data table or a chart. Panels can be collapsed or expanded using the “+” and “-” icons.

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKin
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKin
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-30.00	8/7/2015	Moved	Full	McKin
7002797	Lyders, Tom	503 Oro Grande	1	RMCB0706	-5.00	8/7/2015	Moved	Full	McKin
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-9.02	8/7/2015	Moved	Full	McKin
7003009	Horning, Tom	18 Stag Gulch Ct	1	RMCB1219	-37.63	8/7/2015	Moved	Full	McKin
7002676	Yeary, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	Yeary, Fred	44 Turnberry Pl, Side A	1	RMCB0407	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	Goldfarb, John	5410 BellyAche Rd.	1	AGSM3072	-10.00	8/13/2015	Item Change	Partial	McKinley Branch

Clicking on the table’s gear icon will display a visualization configuration area for the specific table. This enables users to configure a variety of table features including hiding columns/sorting, grouping, aggregating and the paging of data.

The same options that can be accomplished through the visualization configuration area may also be selected by clicking on the specific column name.

Formatting of columns is selected through the Format option under the column name. The following formatting options for an individual column are:

Branch
Ranier
Ranier
Ranier
Ranier
McKin
McKin
Ranier Branch
Ranier Branch
McKinley Branch
McKinley Branch
McKinley Branch
McKinley Branch
McKinley Branch
McKinley Branch
McKinley Branch

Columns may be resized by clicking on the sides of the data column and dragging either left or right to either increase or decrease the width.

Hide/Show Columns

Table column headers contain a variety of features. When the column header text is clicked, drop-down menus provide sorting, filtering, formatting, grouping, and other features. To remove a specific column, uncheck the box next to that column. After all selections have been made, press the OK button. The data will now only display those columns chosen.

Table

Columns Sort Group Aggregate Paging

Hide and show columns.

Customer Number

Site Number

Effective Date

Full or Partial

Business Name

Alarm Account

Reason

Branch

Address

Amount

OK
Select: All None

Page 1 of 2

Customer Number	Address	Site Number	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	250-A Mountain Laurel Dr	1	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	1850 S Frontage Rd 6	1	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	1850 S Frontage Rd 6	1	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	796 Little Woody Creek Rd	1	-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7000746	796 Little Woody Creek Rd	1	-66.00	8/6/2015	(A) Change System	Partial	Ranier Branch
7002797	503 Oro Grande	1	-30.00	8/7/2015	Moved	Full	McKinley Branch
7002797	503 Oro Grande	1	-5.00	8/7/2015	Moved	Full	McKinley Branch
7003009	18 Stag Gulch Ct	1	-9.02	8/7/2015	Moved	Full	McKinley Branch
7003009	18 Stag Gulch Ct	1	-37.63	8/7/2015	Moved	Full	McKinley Branch
7002676	44 Turnberry Pl, Side A	1	-4.44	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7002676	44 Turnberry Pl, Side A	1	-39.52	8/12/2015	Comm/Equip. Failure	Full	McKinley Branch
7200806	5410 BellyAche Rd.	1	-10.00	8/13/2015	Item Change	Partial	McKinley Branch
7001449	2 Music School Rd	1	-68.64	8/24/2015	Site/System Change	Partial	Ranier Branch
7002356	176 Fairway Dr	1	-46.41	8/25/2015	Moved	Full	Ranier Branch
7003140	45 Protector Place	1	-37.63	8/27/2015	Moved	Full	McKinley Branch
7002416	2905-A Aspen Ln	1	-39.52	8/28/2015	Moved	Full	McKinley Branch
7002416	2905-A Aspen Ln	1	-4.44	8/28/2015	Moved	Full	McKinley Branch

Column Sort

Data may be displayed by sorting on one or several columns. Select the column to be sorted in ascending/descending order and press the add button. If further sorts are needed, they may be added by selecting the next sort criteria and pressing the Add button. All sort criteria will be displayed in the panel. Any of the sort criteria may be removed or replaced by pressing the Replace or Remove buttons. In the example below, we have sorted first by branch in ascending order followed by cancellation effective date within branch.

Table

Columns **Sort** Group Aggregate Paging

Order rows by cell values.

Data Column: ▼

Order Direction: ▼

Add

Sort Order Columns:

- Branch - Ascending **Replace** **Remove**
- Effective Date - Ascending **Replace** **Remove**

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Customer Number	Address	Site Number	Amount	Effective Date	Branch	Full or Partial	Branch
7003410	1850 S Frontage Rd 6	1	-7.10	8/4/2015	McKinley Branch	Full	McKinley Branch
7003410	1850 S Frontage Rd 6	1	-25.66	8/4/2015	McKinley Branch	Full	McKinley Branch
7002797	503 Oro Grande	1	-30.00	8/7/2015	McKinley Branch	Full	McKinley Branch
7002797	503 Oro Grande	1	-5.00	8/7/2015	McKinley Branch	Full	McKinley Branch
7003009	18 Stag Gulch Ct	1	-9.02	8/7/2015	McKinley Branch	Full	McKinley Branch
7003009	18 Stag Gulch Ct	1	-37.63	8/7/2015	McKinley Branch	Full	McKinley Branch
7002676	44 Turnberry Pl, Side A	1	-4.44	8/12/2015	McKinley Branch	Full	McKinley Branch
7002676	44 Turnberry Pl, Side A	1	-39.52	8/12/2015	McKinley Branch	Full	McKinley Branch
7200806	5410 BellyAche Rd.	1	-10.00	8/13/2015	McKinley Branch	Partial	McKinley Branch
7003140	45 Protector Place	1	-37.63	8/27/2015	McKinley Branch	Full	McKinley Branch
7002416	2905-A Aspen Ln	1	-39.52	8/28/2015	McKinley Branch	Full	McKinley Branch
7002416	2905-A Aspen Ln	1	-4.44	8/28/2015	McKinley Branch	Full	McKinley Branch
7006127	250-A Mountain Laurel Dr	1	-36.75	8/3/2015	Ranier Branch	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-60.00	8/3/2015	Ranier Branch	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-15.00	8/3/2015	Ranier Branch	Full	Ranier Branch
7006127	250-A Mountain Laurel Dr	1	-5.25	8/3/2015	Ranier Branch	Full	Ranier Branch
7000746	796 Little Woody Creek Rd	1	-42.00	8/6/2015	Ranier Branch	Partial	Ranier Branch

Grouping

Rows within the table may be grouped and then sub-grouped. To select the first group, define the column which the data should be grouped by and press the Add key. Subgrouping may be added by selecting the next grouping column and pressing the Add key. In the example below, we have grouped information first by whether the cancellation was full or partial and then sub-grouped it further by dollar amount within each branch. At any point any of these grouping can be replaced or removed by pressing the Replace or Remove buttons.

Table

Columns
Sort
Group
Aggregate
Paging

Organize rows with grouping and sub-grouping.

Grouping Column: ▼

Add

Groups:

- Full or Partial Replace Remove
- Branch Replace Remove
- Amount Replace Remove

Detail Rows:

• Exclude Detail Rows

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Full or Partial	Branch	Amount	Customer Number	Address	Site Number	Effective Date	Branch
Full							
	McKinley Branch						
		-39.52					
			7002676	44 Turnberry Pl, Side A	1	8/12/2015	McKinley Branch
			7002416	2905-A Aspen Ln	1	8/28/2015	McKinley Branch
		-37.63					
			7003009	18 Stag Gulch Ct	1	8/7/2015	McKinley Branch
			7003140	45 Protector Place	1	8/27/2015	McKinley Branch
		-30.00					
			7002797	503 Oro Grande	1	8/7/2015	McKinley Branch
		-25.66					
			7003410	1850 S Frontage Rd 6	1	8/4/2015	McKinley Branch
		-9.02					
			7003009	18 Stag Gulch Ct	1	8/7/2015	McKinley Branch
		-7.10					
			7003410	1850 S Frontage Rd 6	1	8/4/2015	McKinley Branch
		-5.00					
			7002797	503 Oro Grande	1	8/7/2015	McKinley Branch
		-4.44					

Excluding Detail Rows

In the event that only group totals should be seen without the details making up those totals, a checkbox should be placed in the Exclude Detail Rows box.

Table

Columns
Sort
Group
Aggregate
Paging

Organize rows with grouping and sub-grouping.

Grouping Column: Amount ▼

Add

Groups:

- Full or Partial Replace Remove
- Branch Replace Remove
- Amount Replace Remove

Detail Rows:

- Exclude Detail Rows

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Full or Partial	Branch	Amount	Customer Number	Address	Site Number	Effective Date	Branch
Full							
	McKinley Branch						
		-39.52					
		-37.63					
		-30.00					
		-25.66					
		-9.02					
		-7.10					
		-5.00					
		-4.44					
	Ranier Branch						
		-60.00					
		-46.41					
		-45.82					
		-43.68					
		-40.10					
		-40.00					
		-36.75					
		-34.37					

Aggregating Data

The aggregate feature enables sums, averages, counts, minimums and maximums to be calculated for each of the grouped levels. To add an aggregation, select the data column for the aggregation to occur from the drop-down list, and the aggregate function. Select where the totals should appear (at the top or at the bottom). Select the Add key. Further aggregations may be done on other columns using the same steps. At any point the user may either replace or remove an aggregation by clicking on the Replace or Remove button. In the example below, we have requested a count of all Full and Partial Cancels and to have it appear at the top. The results are displayed below:

Columns Sort Group **Aggregate** Paging

Σ Calculate totals, averages and such for the top and grouped levels.

Data Column: Full or Partial
Aggregate Function: Count
Add

Aggregates:
• COUNT(Full or Partial) **Replace** **Remove**

Layout:
Results Positioning: Top

Page 1 of 2

Full or Partial	Branch	Amount	Customer Number	Address	Site Number	Effective Date	Branch
Count: 35	35 Full or Partial Cancellations						
Full Count: 31	Of the 35, 31 were Full Cancellations						
Count: 11	McKinley Branch	Of the 31, 11 took place in the McKinley Branch					
Count: 2		-39.52	2 were for \$39.52				
			7002676	44 Turnberry Pl, Side A	1	8/12/2015	McKinley Branch
			7002416	2905-A Aspen Ln	1	8/28/2015	McKinley Branch
Count: 2		-37.63	2 were for \$37.63				
			7003009	18 Stag Gulch Ct	1	8/7/2015	McKinley Branch
			7003140	45 Protector Place	1	8/27/2015	McKinley Branch
Count: 1		-30.00	1 was for \$30.00				
			7002797	503 Oro Grande	1	8/7/2015	McKinley Branch

Paging Options

Users may elect to view their analysis grids using pages (where they can be scrolled through while viewing on the screen) or without pages (where they can be exported into an Excel, .csv, or PDF file without page breaks).

Show Pages

When Show Pages has been selected, the user is asked to define how many rows should appear on a page. Once the number of rows has been defined, the OK button should be pressed.

Table

Columns Sort Group Aggregate **Paging**

Set the number of rows displayed per page.

Show all rows

Show paging

Rows per Page

OK

Page 1 of 2

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch

Show All Rows

When paging should not be selected (where an export will be done to Excel), the Show All Rows radio button should be checked. Once selected, the OK button should be pressed.

Table

Columns Sort Group Aggregate **Paging**

Set the number of rows displayed per page.

Show all rows

Show paging

Rows per Page

OK

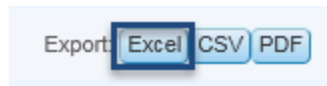
Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch

Exporting Data

Analysis grids may be exported to Excel, .csv (comma separated variable files) or as a .PDF. When working with very large data sets, exports may not be practical without doing some filtering first to reduce the number of rows needing to be exported. Please review the section on Filter button for directions on how to filter data.

Excel

The data is exported into an .xlsx or .xls file, as raw data. The file can be viewed in Excel (if installed on your computer) or can be saved to your file system. Table column headers are exported into the first row of the Excel worksheet, as shown above, and numbers are exported as text. Depending on your application's configuration, the data may be formatted and specific worksheet column widths may be set.xlsx or .xls file, as raw data. To export an analysis grid, press the Excel button in the top right-hand corner of the screen.



The program will ask:



Respond by click on the Save button.

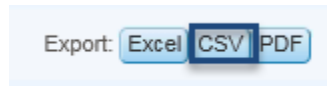
Once the download has been completed, the program will ask:



CSV

The data is exported into a .csv file, as raw data. The file can be viewed in Notepad (or any text editor) and in Excel (if installed on your computer) or can be saved to your file system. Table column headers are exported into the first row. All fields are enclosed in double-quotes and separated by commas.

To save an analysis grid in a .csv file, press the CSV button in the top right-hand corner of the screen.



The data will be displayed as:

```
"Customer Number","Business Name","Address","Site Number","Alarm Account","Amount","Effective Date","Reason","Full or Partial","Branch"
"7006127","Pope, Tom","250-A Mountain Laurel Dr","1","DM2734",-36.75,"8/3/2015","Comm/Equip. Failure","Full","Ranier Branch"
"7006127","Pope, Tom","250-A Mountain Laurel Dr","1","DM2734",-60.00,"8/3/2015","Comm/Equip. Failure","Full","Ranier Branch"
"7006127","Pope, Tom","250-A Mountain Laurel Dr","1","DM2734",-15.00,"8/3/2015","Comm/Equip. Failure","Full","Ranier Branch"
"7006127","Pope, Tom","250-A Mountain Laurel Dr","1","DM2734",-5.25,"8/3/2015","Comm/Equip. Failure","Full","Ranier Branch"
"7003410","Gold, Tom","1850 S Frontage Rd 6","1","RMCB2392",-7.10,"8/4/2015","Tenant Declined Services","Full","McKinley Branch"
"7003410","Gold, Tom","1850 S Frontage Rd 6","1","RMCB2392",-25.66,"8/4/2015","Tenant Declined Services","Full","McKinley Branch"
"7000746","Griesemer, Fred","796 Little Woody Creek Rd","1","","-42.00","8/6/2015","(A) Change System","Partial","Ranier Branch"
"7000746","Griesemer, Fred","796 Little Woody Creek Rd","1","","-66.00","8/6/2015","(A) Change System","Partial","Ranier Branch"
"7002797","Lyders, Tom","503 Oro Grande","1","RMCB0706",-30.00,"8/7/2015","Moved","Full","McKinley Branch"
```

PDF

An image of the table is exported into a temporary .pdf file. This file can be viewed in your browser using the Adobe Acrobat plug-in. The Adobe viewers usually let you save the export as a file, if desired, or print it. Table headers will be displayed at the top of each PDF page.

Customer Number	Business Name	Address	Site Number	Alarm Account	Amount	Effective Date	Reason	Full or Partial	Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-36.75	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-60.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-15.00	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7006127	Pope, Tom	250-A Mountain Laurel Dr	1	DM2734	-5.25	8/3/2015	Comm/Equip. Failure	Full	Ranier Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-7.10	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7003410	Gold, Tom	1850 S Frontage Rd 6	1	RMCB2392	-25.66	8/4/2015	Tenant Declined Services	Full	McKinley Branch
7000746	Griesemer, Fred	796 Little Woody Creek Rd	1		-42.00	8/6/2015	(A) Change System	Partial	Ranier Branch

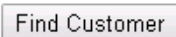
Customer Info

Users may need to lookup customer information while using the dashboard. To find information on a specific customer, click on the **Customer Info** button directly above the dashboard display.



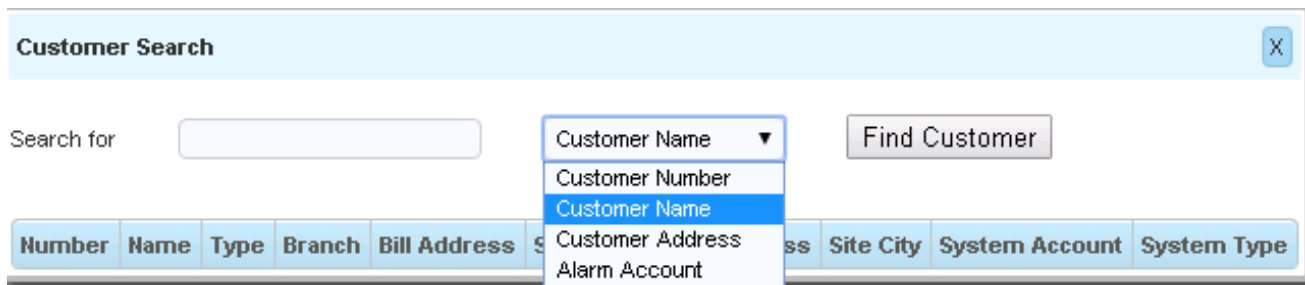
Find Customer

The Find Customer Screen will be displayed:

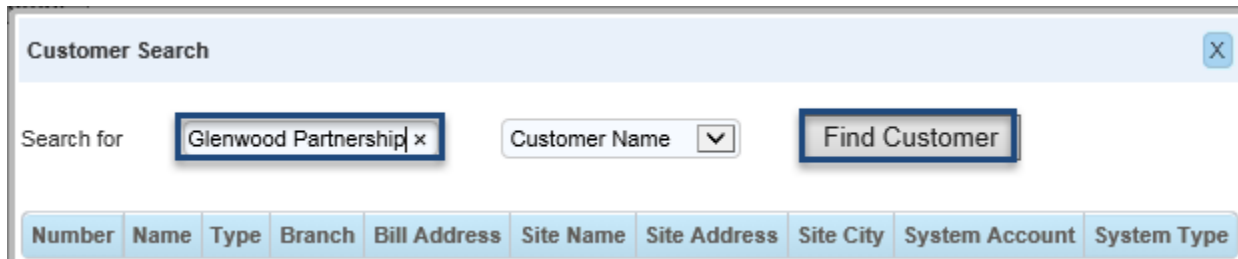


To find a specific customer, click on the Find Customer button.

Use the drop-down menu to define the search method. Customers may be found by customer number, customer name, customer address, or alarm account number.



Enter the information in the Search For box and press Find Customer.



Where more than one customer record is returned (due to more than one site, more than one name, etc.), all customers matching the name will be displayed. Click on the specific customer number representing the correct customer:

Customer Search X

Search for

Number	Name	Type	Branch	Bill Address	Site Name	Site Address	Site City	System Account	System Type
4008150	Glenwood Partnership LLP	Occupant	Ranier	214 Center Dr	Glenwood Partnership LLP	250 Center Dr	Pine Bluff		
4008150	Glenwood Partnership LLP	Occupant	Ranier	214 Center Dr	Glenwood Partnership LLP	202 Center Dr	Pine Bluff		

The customer record will open with information displayed on the Customer tab.

Customer Tab

The customer tab reports the customer number, customer name, billing information, total RMR and the net amount due.

Customer
Sites
Systems
Recurring
Invoices
Ledger
Contacts
Ticket List
Ticket Detail

Customer Info

- Customer Number: **4008150**
- Customer Name:
- Customer Name 2:
- Bill Name: **Glenwood Partnership LLP**
- Bill Name 2:
- Bill Address 1: **214 Center Dr**
- Bill Address 2:
- Bill Address 3:
- Bill City: **Pine Bluff**
- Bill State: **AR**
- Bill Zipcode: **71601**
- Total RMR: **103.25**
- Net Due: **517.25**

Sites

The sites tab provides information on the site branch, site name, site number, city, state, and zipcode.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
Sites								
Branch	Site Name	Site Name 2	Site Number	Site City	Site State	Site Zipcode		
Ranier Branch	Glenwood Partnership LLP		1	Pine Bluff	AR	71601		
250 Center Dr		(Glenwood Partnership)						
Ranier Branch	Glenwood Partnership LLP		2	Pine Bluff	AR	71601		
202 Center Dr		214 Center Dr (PHYSICAL)						

Systems

The systems tab provides information on the specific systems installed at each site including the system account number, system type, panel type, warranty, service level, service company and alarm company.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
Site Name	Site Number	System Account	System Type	Panel Type	Warranty	Service Level	Service Company	Alarm Company
Glenwood Partnership LLP	1	APA0057	Fire Alarm	CID-AVANTGUARD	One Year Parts & Labor	Time & Material	Mountain and Valley Alarm	CSI
Glenwood Partnership LLP	2	RMCA3410	Fire Alarm	SK-5808	Full One Year	Time & Material	Mountain and Valley Alarm	CSI
Glenwood Partnership LLP	2	9845	Burglar Alarm	AD-VISTA	Full One Year	Time & Material	Mountain and Valley Alarm	Sedona Security

Recurring

The customer's current recurring is displayed in the top section (with the date 12/30/1899 used to denote that there is no end date for the cycle). The customer's recurring history is displayed in the lower section.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail				
System Account	System Type	Item	Monthly	Cycle	Next	Start	End	Last				
9845	Burglar Alarm	Monitoring Services	35.00		9/1/2015	9/4/2015	12/30/1899	12/30/1899				
APAD057	Fire Alarm	Monitoring Services	36.75		5/1/2016	10/1/2012	12/30/1899	4/1/2016				
RMCA3410	Fire Alarm	Monitoring Services	31.50		5/1/2016	10/1/2012	12/30/1899	4/1/2016				
System Account	System Type	Item	Cycle	Comments	Effective	Full/Partial	Amount	Reason	User	Branch Change	Cycle Change	Item change
RMCA3410	Fire Alarm	Monitoring Services	Quarterly		10/1/2010	Partial	30.00	Installation	PatriciaB	N	N	N
APAD057	Fire Alarm	Monitoring Services	Monthly		10/1/2012	Partial	1.75	Rate Increase	BudJ	N	N	N
RMCA3410	Fire Alarm	Monitoring Services	Monthly		10/1/2012	Partial	1.50	Rate Increase	BudJ	N	N	N
APAD057	Fire Alarm	Monitoring Services	Monthly		3/16/2007	Partial	35.00	Conversion		N	N	N
RMCA3410	Fire Alarm	Monitoring Services	Quarterly		10/1/2010	Full	-30.00	Unknown Reason	PatriciaB	N	N	N
RMCA3410	Fire Alarm	Monitoring Services	Monthly		10/12/2010	Partial	30.00	Unknown Reason	PatriciaB	N	N	N
9845	Burglar Alarm	Monitoring Services	Monthly		9/4/2015	Partial	35.00	Add System	Administrator	N	N	N

Invoices

The invoices tab contains a multi-page display of all invoices created for the customer.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
<div style="display: flex; justify-content: space-between; align-items: center;"> « « 1 2 3 4 5 6 7 8 9 10 » »» </div>								
Site/Number	Number/Branch	Invoice Date/Category	Aging Date/Tax Group	Amount/Reference	Balance Due	Taxes/PO Number	Payments/Memo	Credits
Glenwood Partnership LLP	394212	11/1/2008	12/1/2008	35.00	0.00	0.00	35.00	0.00
1	Ranier Branch	N/A	Glenwood Springs	Cycle - 11/01/2008 - 11/30/2008				
Glenwood Partnership LLP	400143	12/1/2008	12/1/2008	35.00	0.00	0.00	35.00	0.00
1	Ranier Branch	General & Administration	Glenwood Springs	Cycle - 12/01/2008 - 12/31/2008				
Glenwood Partnership LLP	401226	12/23/2008	1/1/2009	35.00	0.00	0.00	35.00	0.00
1	Ranier Branch	General & Administration	Glenwood Springs	Cycle - 01/01/2009 - 01/31/2009				
Glenwood Partnership LLP	403251	1/26/2009	2/1/2009	35.00	0.00	0.00	35.00	0.00
1	Ranier Branch	General & Administration	Glenwood Springs	Cycle - 02/01/2009 - 02/28/2009				

Ledger

The ledger contains a multi- page activity ledger for the customer.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
<div style="display: flex; justify-content: space-between; align-items: center;"> « « 1 2 3 4 5 6 7 8 9 10 » »» </div>								
Transaction_Type	Transaction_Date	Transaction_Numbe	Transaction_Total	Transaction_Amou	Transaction_Balanc	Transaction_Memo		
1 Invoice	11/1/2008	Invoice: 394212	0.00	35.00	0.00			
2 Payment	11/10/2008	Check 4361: 11/06/2008 -> Invoice: 394212	35.00	35.00	0.00			
1 Invoice	12/1/2008	Invoice: 400143	0.00	35.00	0.00	We appreciate your business. Happy Holidays!		
2 Payment	12/15/2008	Check 4377: 12/11/2008 -> Invoice: 400143	35.00	35.00	0.00			

Contacts

The contacts tab provides the information on the contacts for each site.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
name	Title	Phone	Ext	Email	Fax	Cell		
Floyd Diemoz	owner	5555555671		diemozco@rof.net		5555559418		
Site Contact	Collection Contact: N		Invoice Contact: N					
Floyd Diemoz	owner	5555555671		diemozco@rof.net	9709457460	5555559418		
Site Contact	Collection Contact: N		Invoice Contact: N					

Ticket List

The ticket list tab shows all service and inspection tickets for the customer. To receive details of a ticket, click on a specific ticket number. Press the Ticket Detail tab to view the details of the ticket selected.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
System Account	System Type	Number	Created	Status	Comments			
9845	Burglar Alarm	95041	2015-09-04T10:23:58-04:00	Closed	Panel Keeps Beeping			
APA0057	Fire Alarm	95040	2016-01-31T19:04:57-05:00	Resolved	Annual Fire Inspection			

Ticket Detail

The ticket detail tab shows detailed information and notes on the ticket as well as the dispatch, arrival, and departure time of the technician.

Customer	Sites	Systems	Recurring	Invoices	Ledger	Contacts	Ticket List	Ticket Detail
• Number:	95040							
• Created:	1/31/2016							
• Status:	Resolved							
• Problem:	Inspection							
• Requested By:	Floyd Diemoz							
• Comments:	Annual Fire Inspection							
• Resolution:	Inspected Device or System							
• PO Number:								
Service Notes								
Access Level	User	Entered	Is Resolution	Notes				
All	Administrator	1/31/2016	Y	Inspected all fire systems.				
01/31/2016 09:00	01/31/2016 09:00	01/31/2016 09:00	01/31/2016 10:30	Solomon, Michael A				