SedonaWeb

Online Invoicing and Bill Payment Portal

SedonaWeb is an internet portal for customers to view invoices, create payments and service tickets over the web. With SedonaWeb customers have a secure Internet portal to manage their account. SedonaWeb updates SedonaOffice with real-time updates, and data is fully encrypted with SSL security.

Table of Contents

Homepage

Below is the homepage for SedonaWeb that may be branded with the customer's logo and contact information.

New User – Setup New Account

The following process describes the steps a new User will go through when requesting to Setup a New Account.

1. The User will click on the *Setup New Account* link as shown below.

2. A page will be displayed for the User to enter required information to create their new account. The User must know their *Customer Number* and the *Billing Zip Code* for their primary billing address on their customer account.

Required fields are denoted with an asterisk. Tips are displayed to the right of each field to guide the User in entering information in the required format.

Once finished filling in all the required information on this page, the User will click on the *Create Login* button at the bottom of the page.

Once the login has been setup, a new contact record will be created in SedonaOffice for the User.


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SedonaWeb

Welcome to the Account Login Setup process. Please fill in each field below. After you have filled in the fields, press the Create Login button at the bottom. Shortly after the Login is created you will be sent an email with instructions on how to finish the creation of your Login.

Customer Number: *	10000	(Used to identify you)
Billing Zip Code: *	48170	(Used to identify you, 12345 in US, A2A 2A2 Canada)
Email Address: *	justind@sedonaoffice.com	(Used as logon)
Email Address: *	justind@sedonaoffice.com	(Make sure to type the same email in both fields)
Password: *	••••••••	(Must between 5 and 15 characters)
Password: *	••••••••	(Make sure to type the same password in both fields)
First Name: *	Justin	
Last Name: *	DeBaggis	
Phone Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)
Phone Extension:		(Valid numeric digits)
Mobile Phone Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)
Fax Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)
		There is already an account with this email address.
* Required fields	Create Login	

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3. After clicking the *Create Login* button (in step 2 on the previous page), the *Create Login* button will disappear and be replaced with the message circled in the screen shot below. The User should receive an email shortly.


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Welcome to the Account Login Setup process. Please fill in each field below. After you have filled in the fields, press the Create Login button at the bottom. Shortly after the Login is created you will be sent an email with instructions on how to finish the creation of your Login.

Customer Number: *	10000	(Used to identify you)
Billing Zip Code: *	48170	(Used to identify you, 12345 in US, A2A 2A2 Canada)
Email Address: *	justind@sedonaoffice.com	(Used as logon)
Email Address: *	justind@sedonaoffice.com	(Make sure to type the same email in both fields)
Password: *	••••••••	(Must between 5 and 15 characters)
Password: *	••••••••	(Make sure to type the same password in both fields)
First Name: *	Justin	
Last Name: *	DeBaggis	
Phone Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)
Phone Extension:		(Valid numeric digits)
Mobile Phone Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)
Fax Number:		(Valid (248)123-4567, 248-123-4567, 248 123 4567 or 248.123.4567)

* Required fields

Your Login has been created, an email has been sent to your email address with instructions on how to activate your Login.

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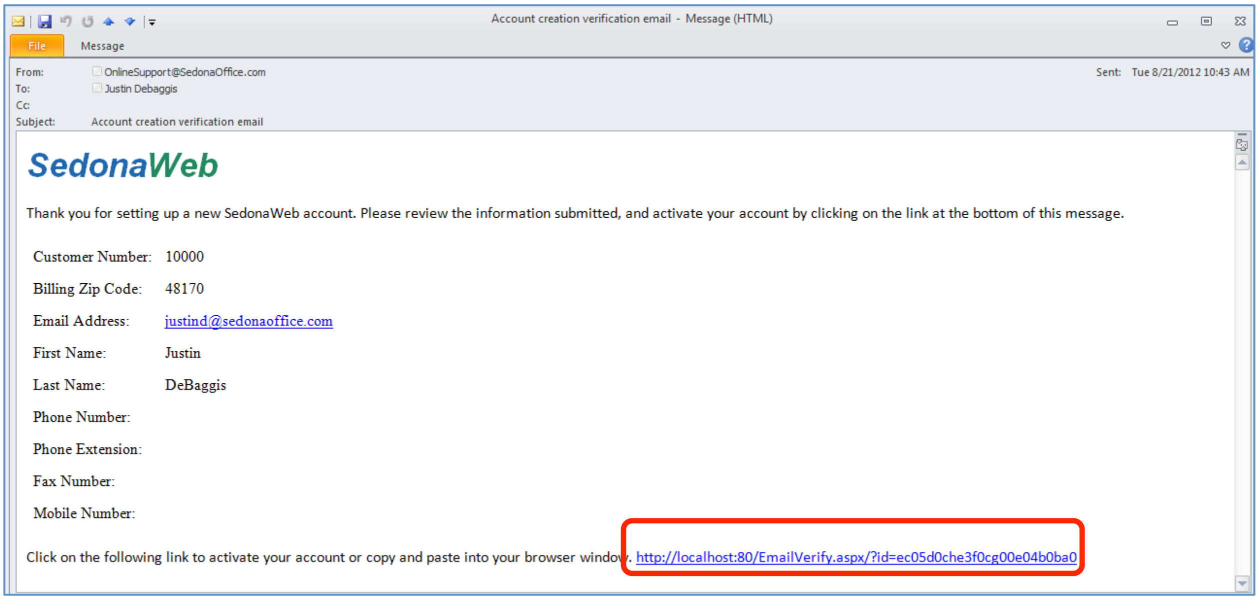
4. Below is a sample of the email that is sent to the User. At the bottom of the email is a link on which they will click to take them to the activation Login page.



5. Once the User clicks on the link within the activation email (see step 4 above) they will be directed to the activation Login page. The User will click on the link *Click here to Login*, which will then display the main Login page.

6. For future logins, the User will only need to navigate within the page displayed below asking for the User's email address and password.

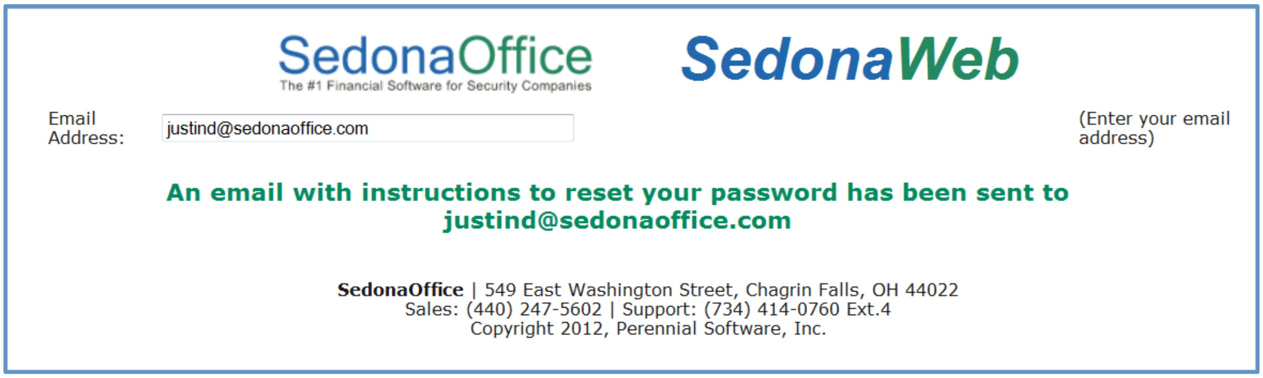
Forgot Password – Changes

The *Forgot Password* does not require the company to have a staff member maintain User passwords; all password change requests are automated by email.

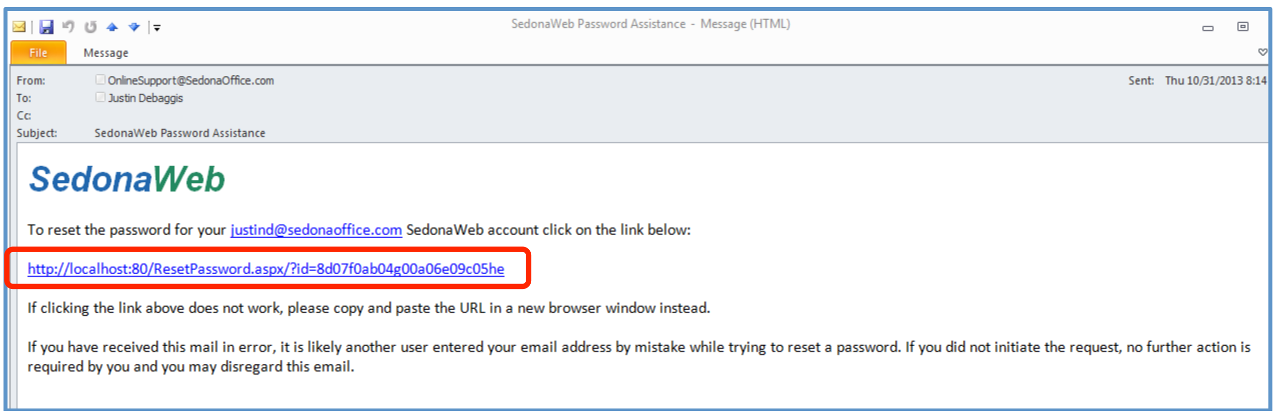
The steps below describe the process of a User initiated *Forgot Password* request.

1. When an existing User clicks on the *Forgot Password* link from the main Login page, a form will be displayed for the User to enter their email address and then click on the *Submit* button (see 2nd screen shot below).

After clicking on the *Submit* button (see 2nd screen on the previous page) the *Submit* button will be replaced with a message advising the User an email with instructions has been sent to them.



2. Below is a sample of the email that is sent to the User. In the center of the email is a link on which the User will click to take them to the SedonaWeb login page to enter their new password.

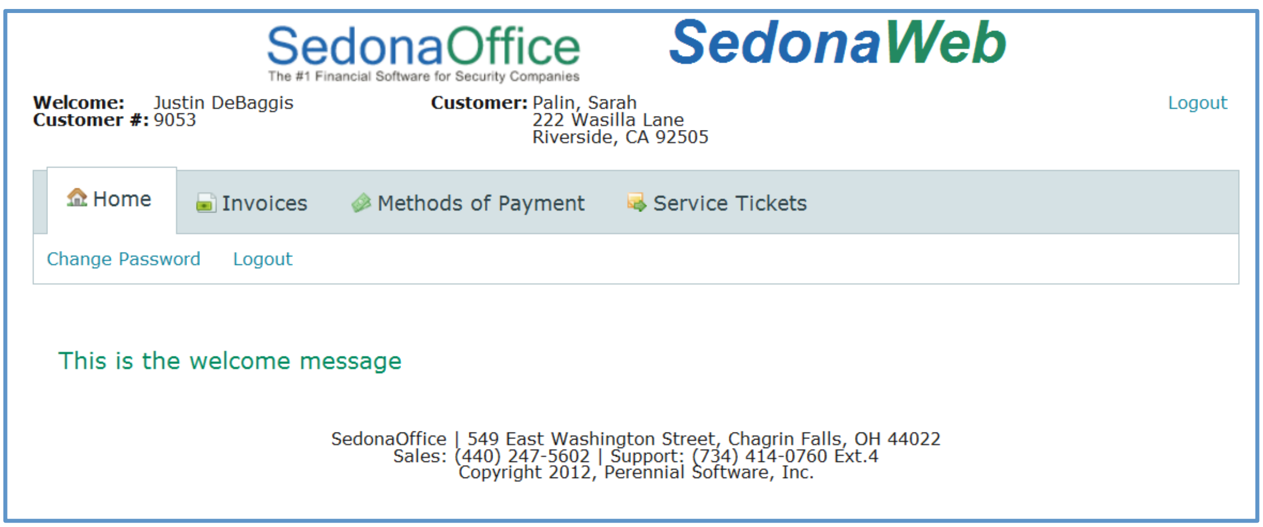


3. Below is the page the User will be directed to when clicking on the link with the email they received as a result of submitting a request for a new password. The User will fill in the *New Password* field and re-type the same into the *Confirm Password* field then click on the *Submit* button.

4. After clicking on the *Submit* button in step 3 above, the *Submit* button will be replaced with a message advising the User their Password has been changed successfully and select the link, *Click to Login*.

5. After clicking on the link *Click to Login* (in step 4 on the previous page) the main Login page will be displayed for the User to enter their *Email Address* and *Password* and then click on the *Login* button.

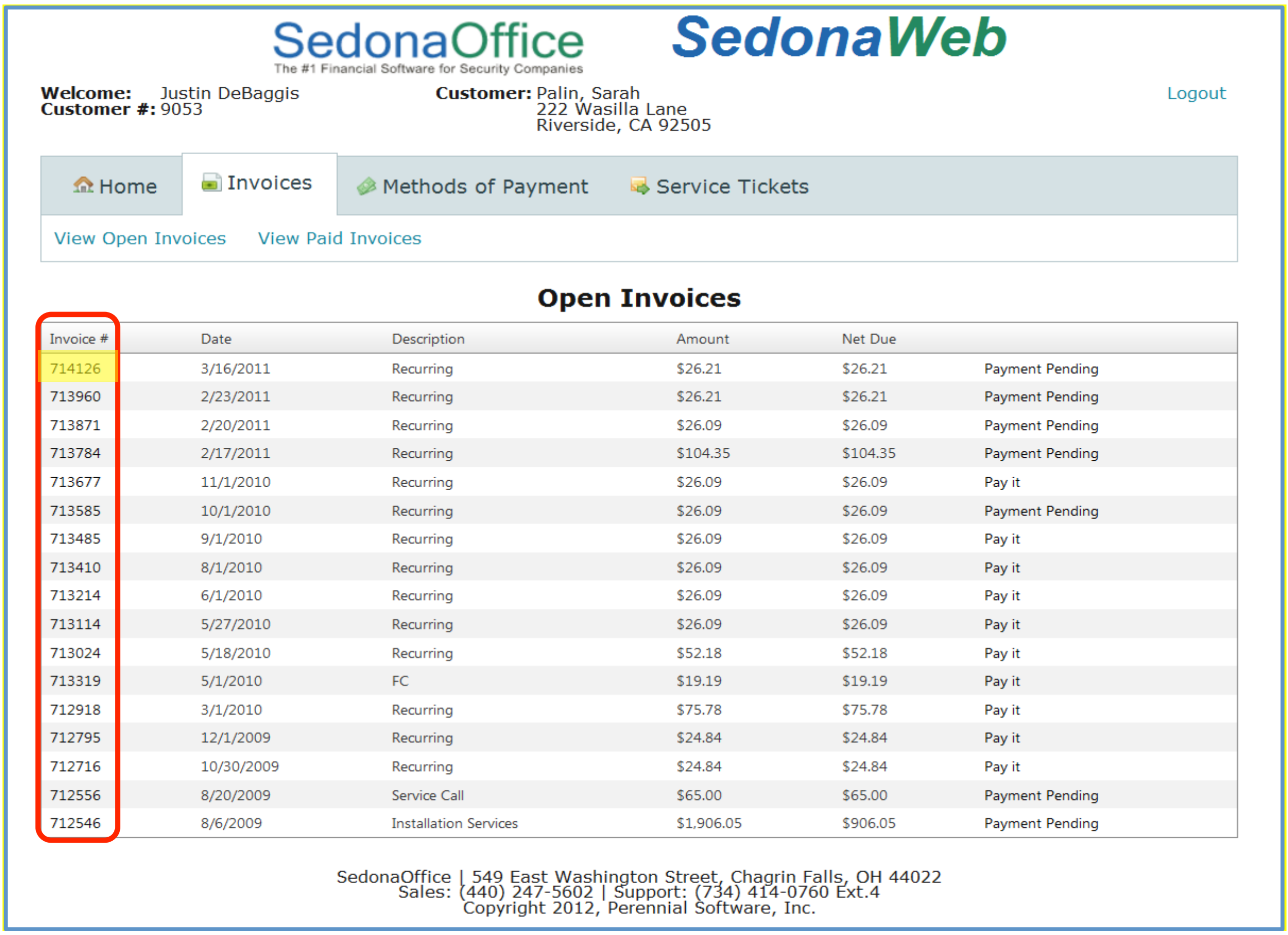
If the User correctly enters their *Email Address* and *Password*, their customer page will be displayed (example below).



Invoices – Open and Paid

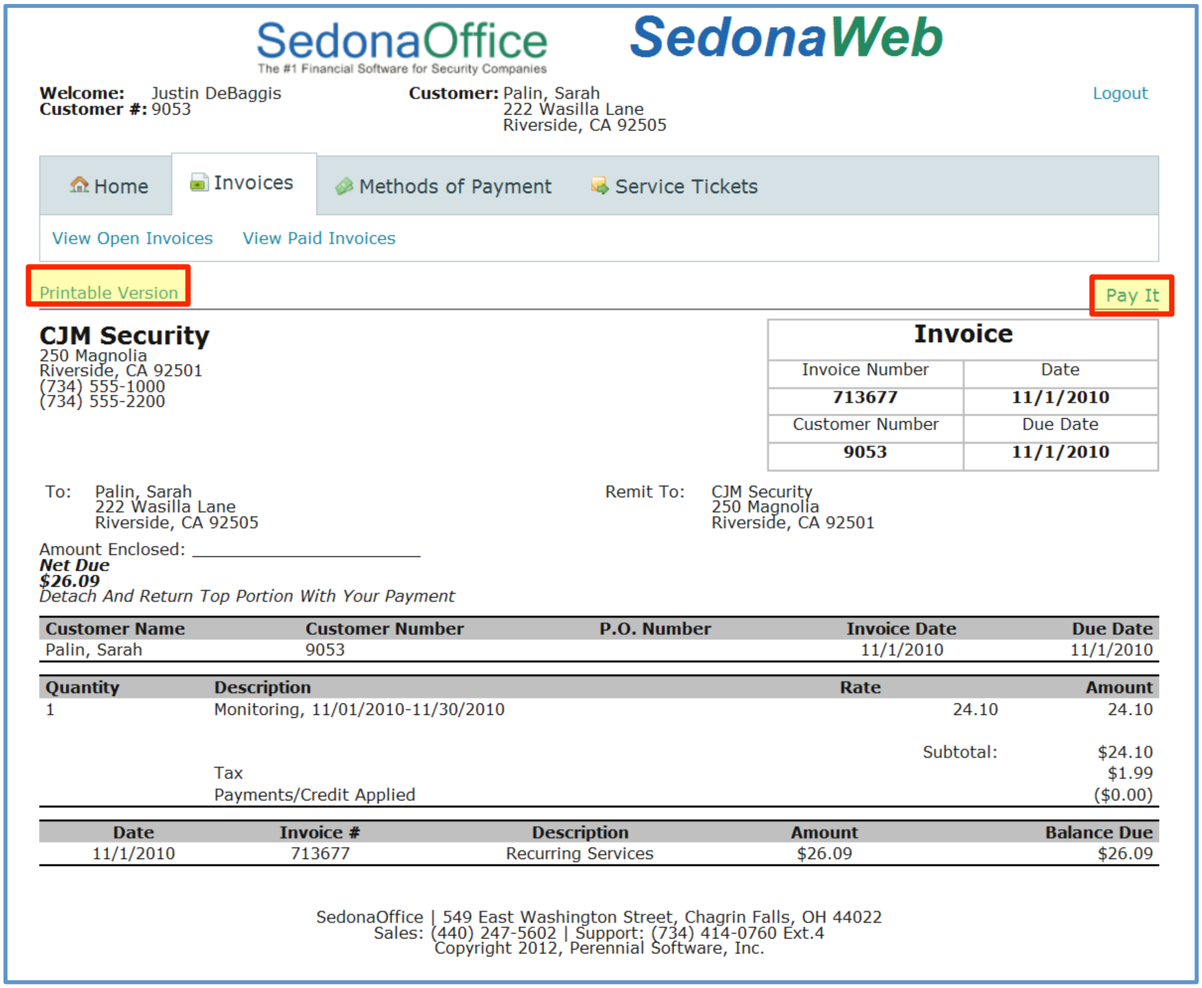
Next to the homepage tab is the *Invoices* tab, which allows customers to view open and paid invoices.

1. To the left hand side for each invoice line you will see an invoice number. If you hover over the number with your mouse you will be able to click and drill into a specific invoice.



Invoice #	Date	Description	Amount	Net Due	
714126	3/16/2011	Recurring	$26.21	$26.21	Payment Pending
713960	2/23/2011	Recurring	$26.21	$26.21	Payment Pending
713871	2/20/2011	Recurring	$26.09	$26.09	Payment Pending
713784	2/17/2011	Recurring	$104.35	$104.35	Payment Pending
713677	11/1/2010	Recurring	$26.09	$26.09	Pay it
713585	10/1/2010	Recurring	$26.09	$26.09	Payment Pending
713485	9/1/2010	Recurring	$26.09	$26.09	Pay it
713410	8/1/2010	Recurring	$26.09	$26.09	Pay it
713214	6/1/2010	Recurring	$26.09	$26.09	Pay it
713114	5/27/2010	Recurring	$26.09	$26.09	Pay it
713024	5/18/2010	Recurring	$52.18	$52.18	Pay it
713319	5/1/2010	FC	$19.19	$19.19	Pay it
712918	3/1/2010	Recurring	$75.78	$75.78	Pay it
712795	12/1/2009	Recurring	$24.84	$24.84	Pay it
712716	10/30/2009	Recurring	$24.84	$24.84	Pay it
712556	8/20/2009	Service Call	$65.00	$65.00	Payment Pending
712546	8/6/2009	Installation Services	$1,906.05	$906.05	Payment Pending

2. After your drill into the invoice (in step 1 on the previous page) you will be able to view, print, and select the *Pay It* button to make a payment.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Welcome: Justin DeBaggis
Customer #: 9053

Customer: Palin, Sarah
222 Wasilla Lane
Riverside, CA 92505

Logout

Home | Invoices | Methods of Payment | Service Tickets

View Open Invoices   View Paid Invoices

Printable Version

Pay It

CJM Security
250 Magnolia
Riverside, CA 92501
(734) 555-1000
(734) 555-2200

Invoice	
Invoice Number	Date
713677	**11/1/2010**
Customer Number	Due Date
9053	**11/1/2010**

To: Palin, Sarah
222 Wasilla Lane
Riverside, CA 92505

Remit To: CJM Security
250 Magnolia
Riverside, CA 92501

Amount Enclosed: ____________________
Net Due
$26.09
Detach And Return Top Portion With Your Payment

Customer Name	Customer Number	P.O. Number	Invoice Date	Due Date
Palin, Sarah	9053		11/1/2010	11/1/2010

Quantity	Description	Rate	Amount
1	Monitoring, 11/01/2010-11/30/2010	24.10	24.10
		Subtotal:	$24.10
	Tax		$1.99
	Payments/Credit Applied		($0.00)

Date	Invoice #	Description	Amount	Balance Due
11/1/2010	713677	Recurring Services	$26.09	$26.09

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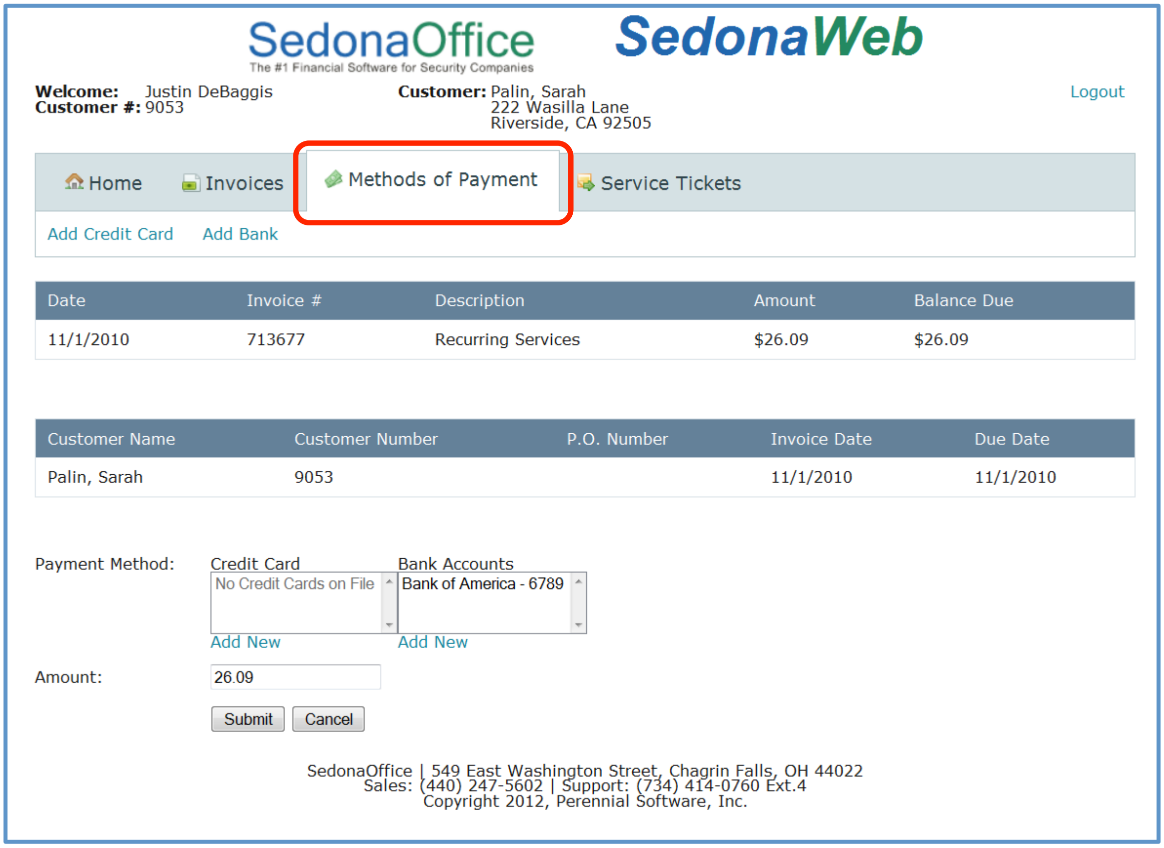
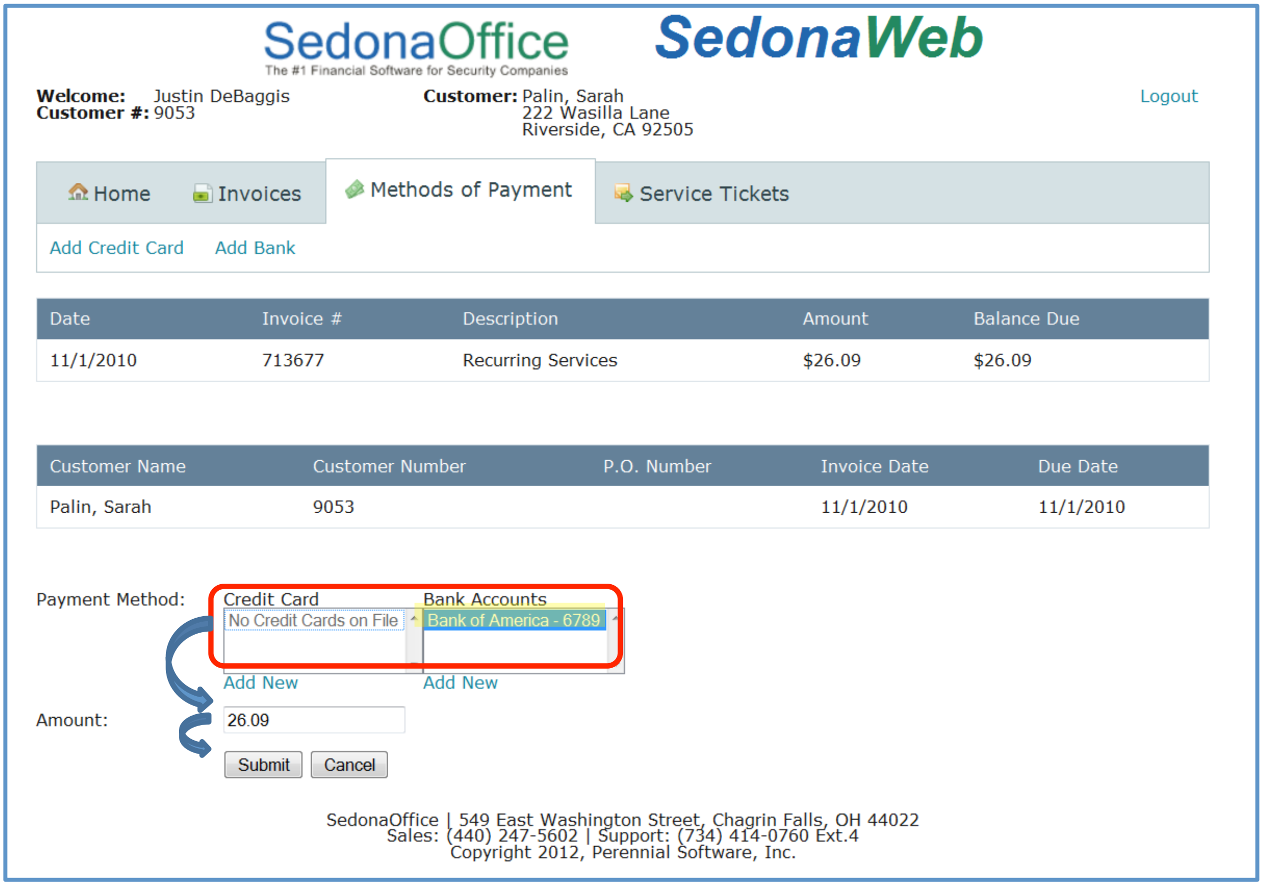
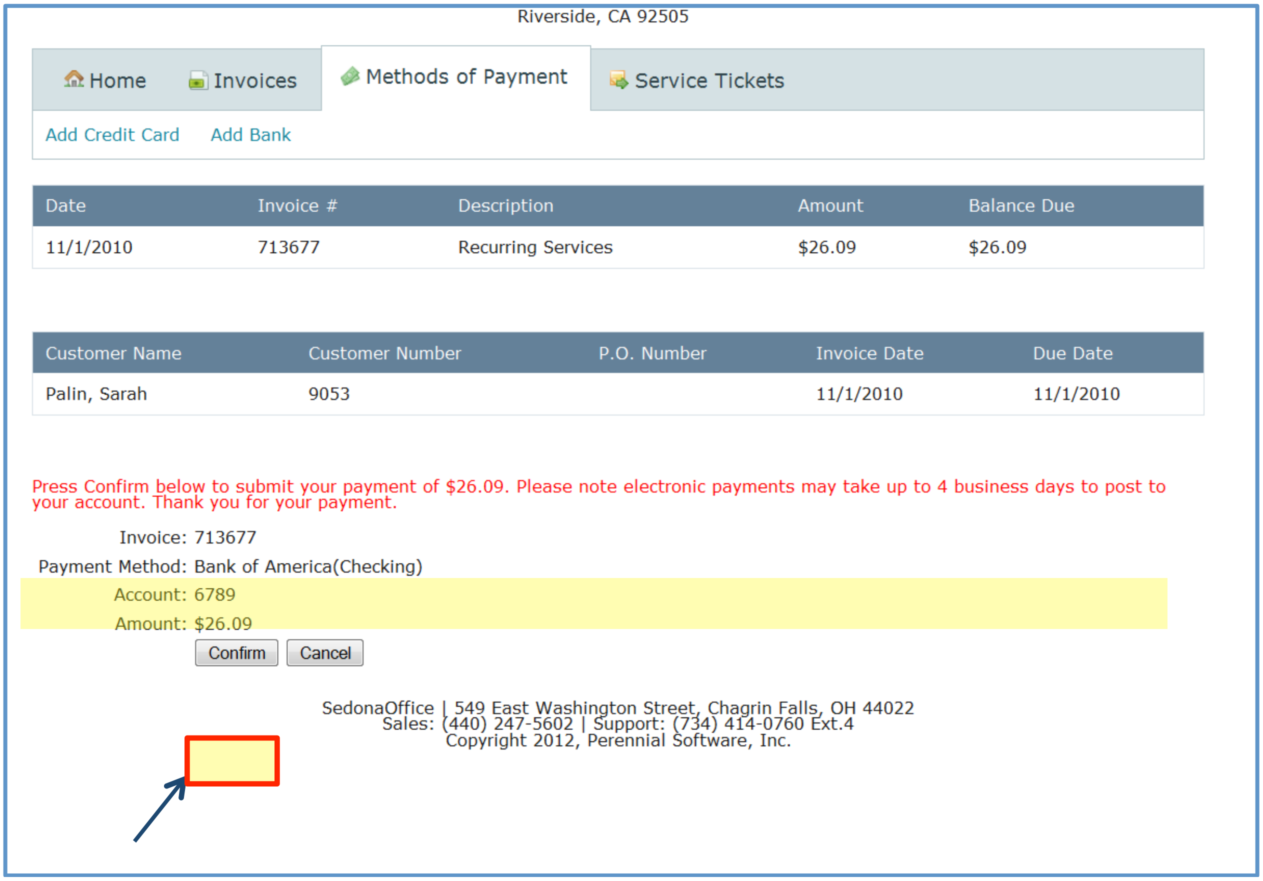
3. After selecting *Pay it* for your specific invoice it will direct you to the *Methods of Payment* tab.



4. Select a bank account or credit card that you have on file, type in the amount you would like to pay and then hit submit.



5. After the payment is submitted the Users must select confirm to submit the payment.


Riverside, CA 92505

Home | Invoices | Methods of Payment | Service Tickets

Add Credit Card | Add Bank

Date	Invoice #	Description	Amount	Balance Due
11/1/2010	713677	Recurring Services	$26.09	$26.09

Customer Name	Customer Number	P.O. Number	Invoice Date	Due Date
Palin, Sarah	9053		11/1/2010	11/1/2010

Press Confirm below to submit your payment of $26.09. Please note electronic payments may take up to 4 business days to post to your account. Thank you for your payment.

Invoice: 713677
Payment Method: Bank of America(Checking)
Account: 6789
Amount: $26.09

Confirm | Cancel

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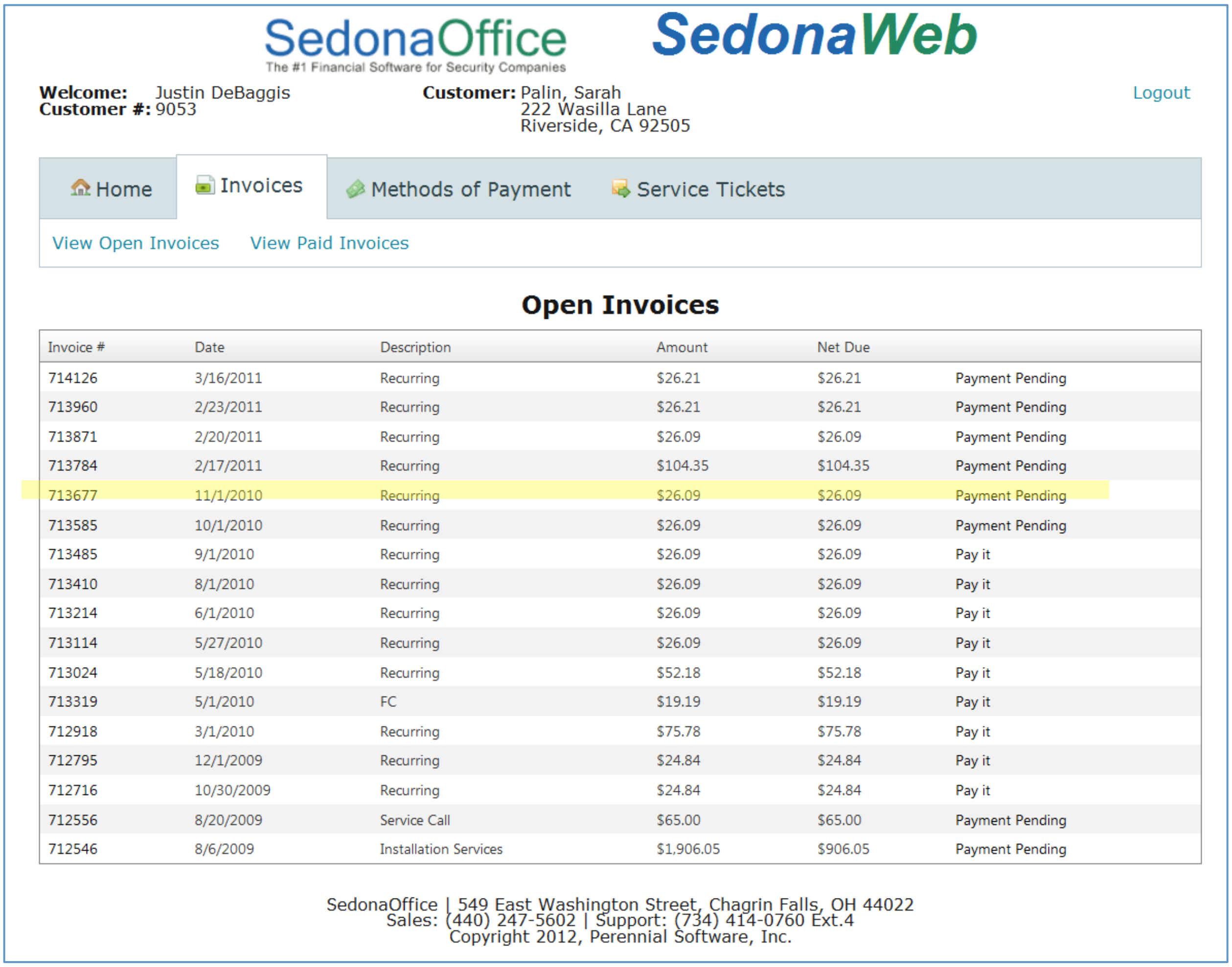
6. The applied payment then moves to payment pending and will move to paid invoices once the transaction is processed and posted to the customer's account.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Welcome: Justin DeBaggis
Customer #: 9053

Customer: Palin, Sarah
222 Wasilla Lane
Riverside, CA 92505

Logout

Home | Invoices | Methods of Payment | Service Tickets

View Open Invoices View Paid Invoices

Open Invoices

Invoice #	Date	Description	Amount	Net Due	
714126	3/16/2011	Recurring	$26.21	$26.21	Payment Pending
713960	2/23/2011	Recurring	$26.21	$26.21	Payment Pending
713871	2/20/2011	Recurring	$26.09	$26.09	Payment Pending
713784	2/17/2011	Recurring	$104.35	$104.35	Payment Pending
713677	11/1/2010	Recurring	$26.09	$26.09	Payment Pending
713585	10/1/2010	Recurring	$26.09	$26.09	Payment Pending
713485	9/1/2010	Recurring	$26.09	$26.09	Pay it
713410	8/1/2010	Recurring	$26.09	$26.09	Pay it
713214	6/1/2010	Recurring	$26.09	$26.09	Pay it
713114	5/27/2010	Recurring	$26.09	$26.09	Pay it
713024	5/18/2010	Recurring	$52.18	$52.18	Pay it
713319	5/1/2010	FC	$19.19	$19.19	Pay it
712918	3/1/2010	Recurring	$75.78	$75.78	Pay it
712795	12/1/2009	Recurring	$24.84	$24.84	Pay it
712716	10/30/2009	Recurring	$24.84	$24.84	Pay it
712556	8/20/2009	Service Call	$65.00	$65.00	Payment Pending
712546	8/6/2009	Installation Services	$1,906.05	$906.05	Payment Pending

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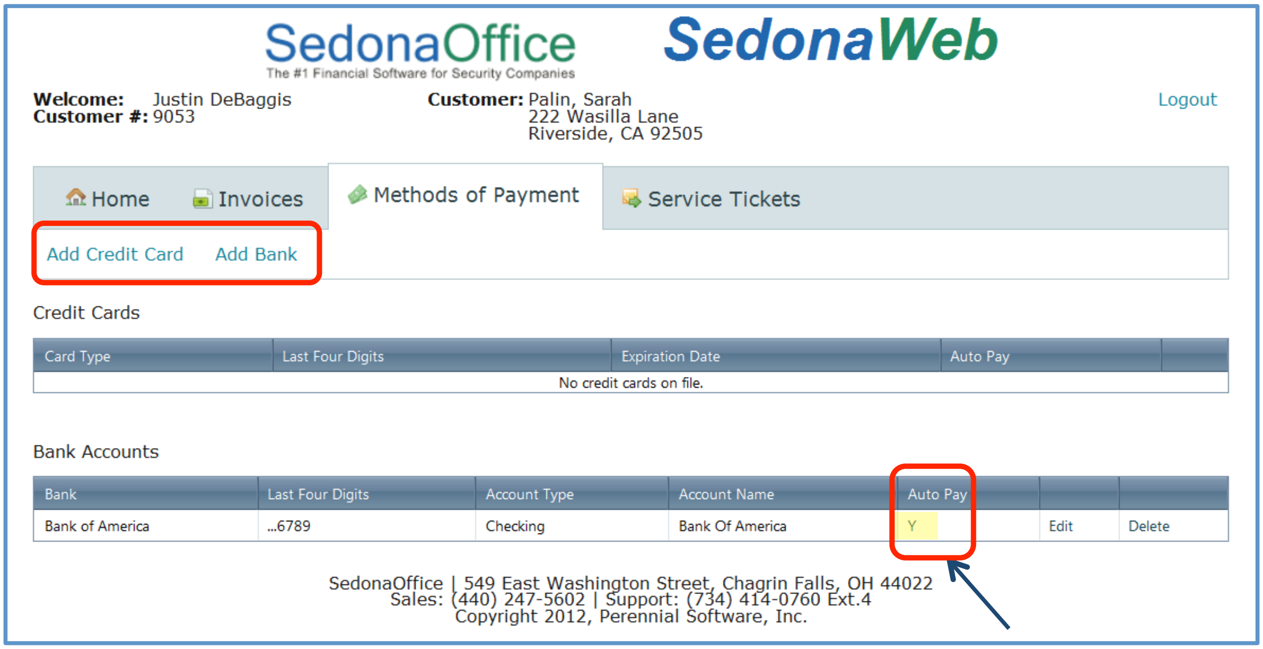
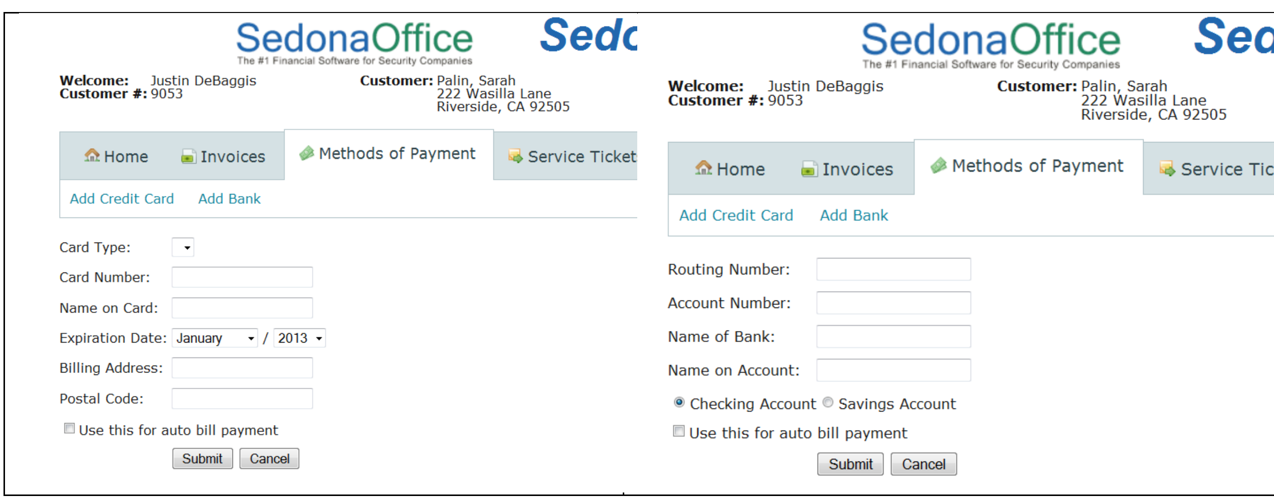
Methods of Payment

Users may hover over an existing payment method to be used or not used for recurring invoices. The User must position the mouse directly over the Auto Pay field. Clicking once will change the option from Y to N. Each click will toggle the Y/N selection.

The User also has the ability to add a credit card or bank to their account to save on file.



After typing in the appropriate account information, the User will be able to select *Use this for auto bill payment* and hit *Submit*.



Service Tickets

The *Service Tickets* tab allows a User to view active and closed tickets and the ability to create a service ticket.

Ticket #	Site	Account #	System	Created	Problem	Status	Last Note	Docs
7376	Palin, Sarah	4569	Intrusion	9/3/2013	AC Power Failure	Scheduled	9/3/2013	0
7375	Palin, Sarah	3737	Intrusion	8/20/2013	AC Power Failure	Open		1
7372	Palin, Sarah	3737	Intrusion	5/13/2013	Add Equipment	Scheduled		0
7369	Palin, Sarah	3737	Intrusion	1/9/2013	Add Equipment	Open	1/9/2013	1
7368	Palin, Sarah	3737	Intrusion	1/2/2013	Smoke Detector	Scheduled	1/2/2013	2
7345	Palin, Sarah	4569	Intrusion	5/16/2012	Can't Set B/A	Open	12/21/2012	1
7341	Palin, Sarah	3737	Intrusion	4/18/2012	Add Equipment	Scheduled	4/18/2012	0
7337	Palin, Sarah	3737	Intrusion	10/19/2011	AC Power Failure	Scheduled	3/6/2012	1

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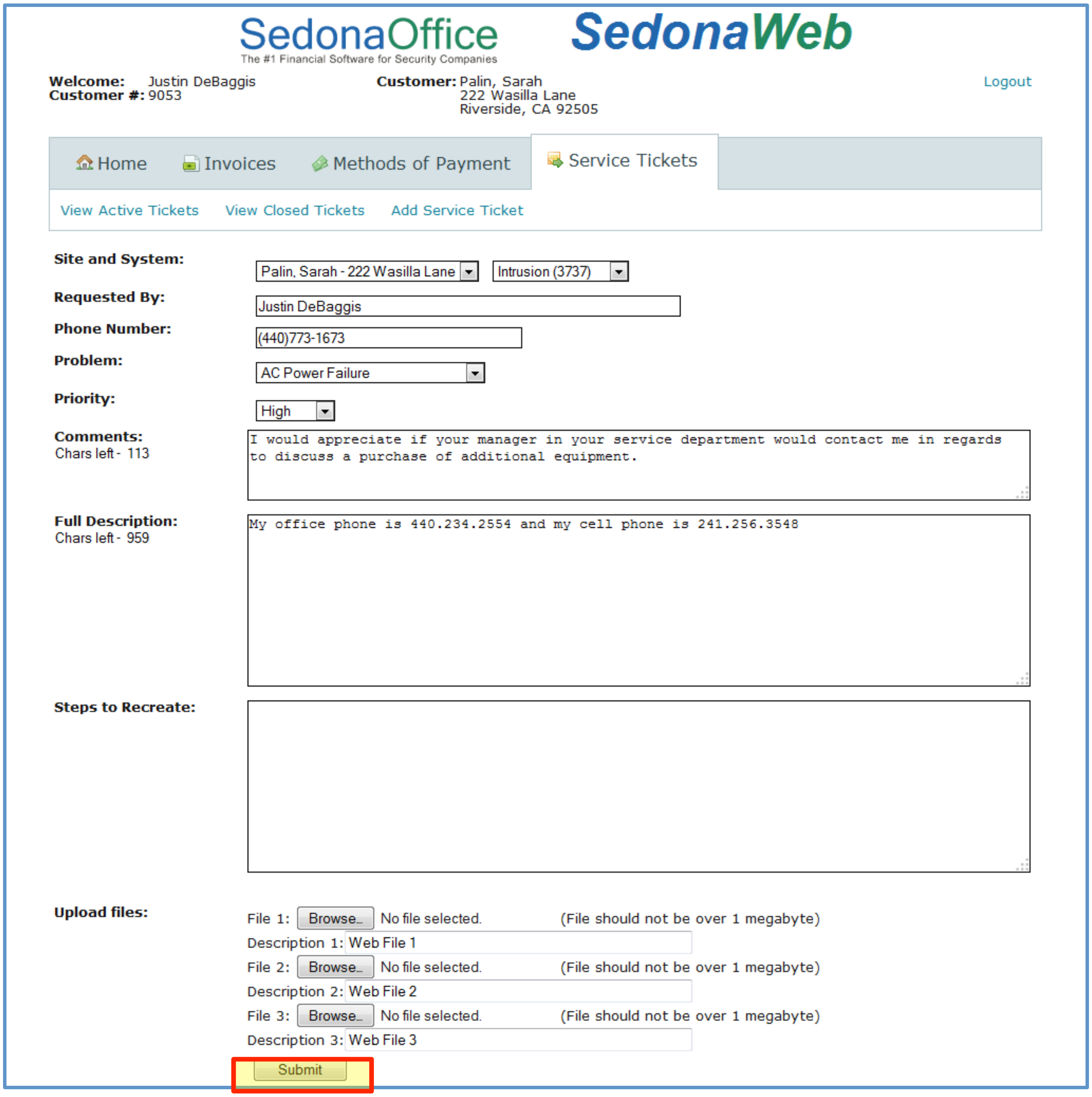
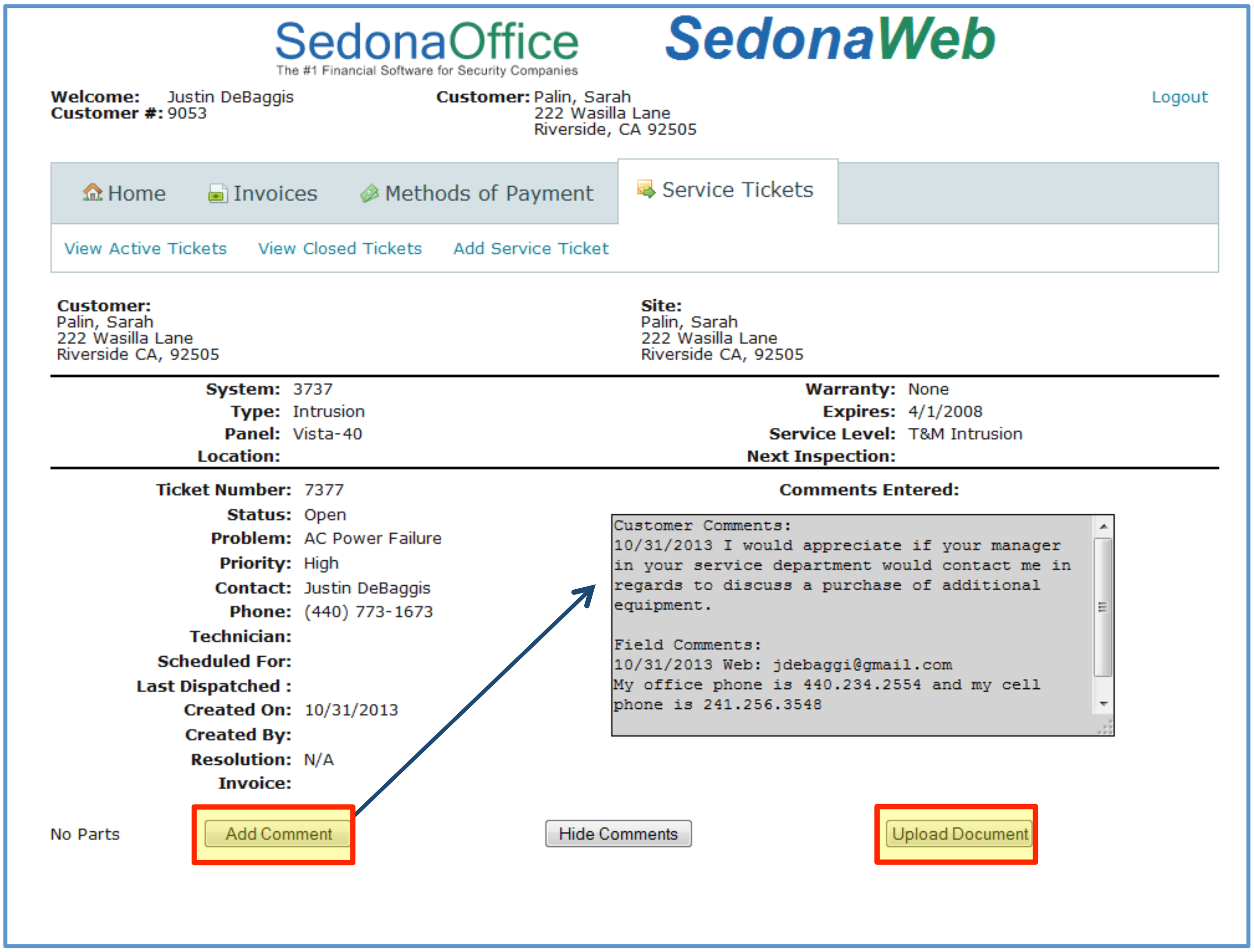
Submission

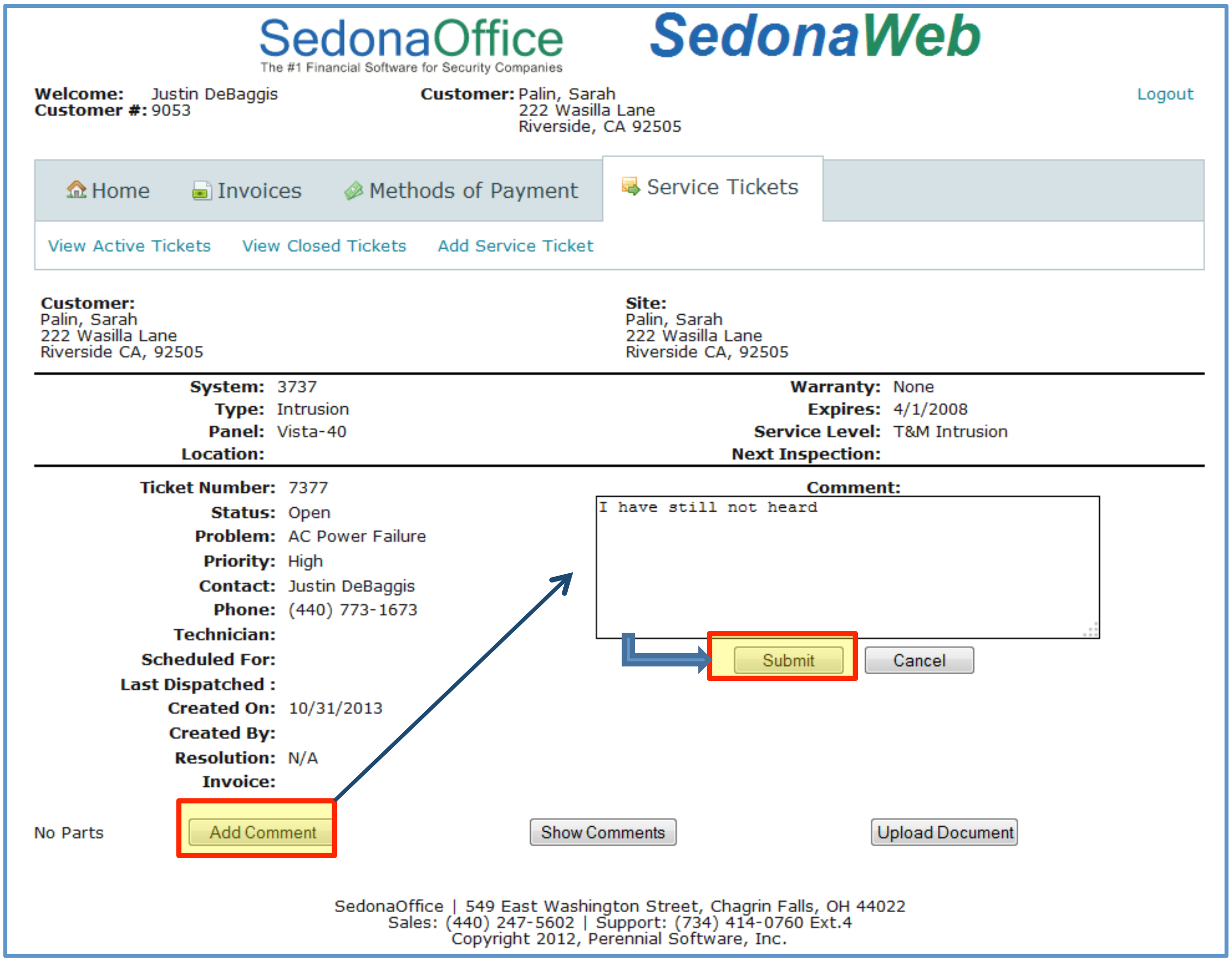
Once a User has entered the information for a new Service Ticket and clicks on the *Submit* button, the *Submit* button will disappear and the page will refresh with the entered information about the service ticket. After the submission it will generate an email to the support staff and create a service ticket within SedonaOffice.



From here the User can enter additional notes and attach documents. They will also be able to view notes added to service ticket from the SedonaOffice Application.

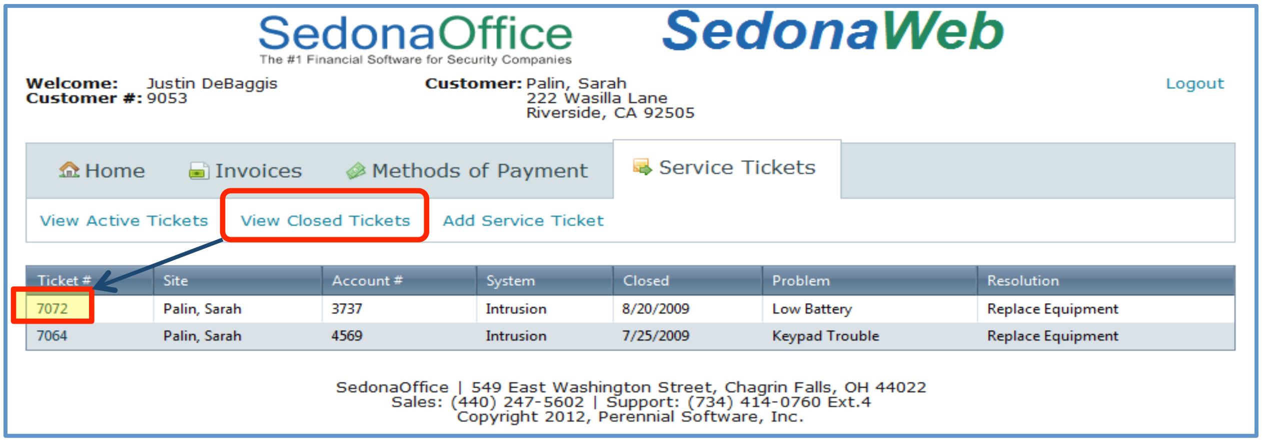


By selecting the *Add Comment* button Users can enter a note in the comment field and hit submit to save the note to the ticket. Once this note is entered in it will be saved in the history for this ticket and may be viewed in SedonaOffice.

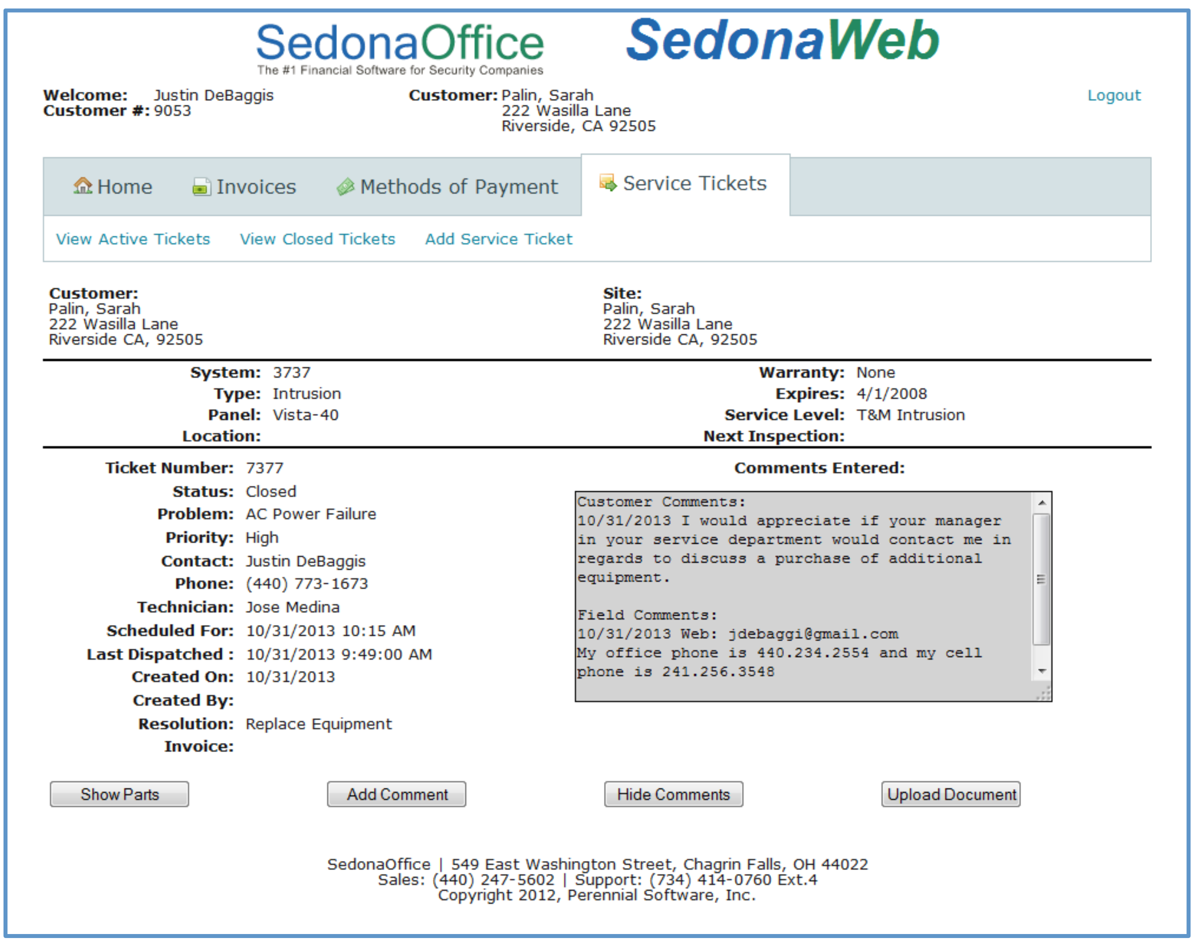


Closed Tickets

When selecting the *View Closed Tickets* tab a list of all closed tickets will appear. Select the ticket number to the far left column under *Ticket #* to drill into the specific ticket.



When viewing a closed ticket the User may view parts used, comments, status information, documents, and the resolution note.



Master Accounts

SedonaWeb allows Master Accounts to manage and view activities occurring within any subaccounts tied to the Master Account. The Master Account will go through the same set up process (as *Setup New Account* on page 4) to create their account and login.

Homepage

The homepage is very similar to the look and feel of a customer with exception of the tabs *Select Customer* and *Reports*.

Invoices

The Master Account will be able to view all open invoices, view summaries, and make a payment.

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Welcome: Justin DeBaggis
Customer #: 10000

Customer: Sweet Afton Teahouse
420 Forest
Plymouth, MI 48170

Logout

Home | Invoices | Methods of Payment | Select Customer | Service Tickets | Reports

View Open Invoices   View Paid Invoices

Open Invoices

Invoice #	Date	Description	Amount	Net Due	
714196	9/9/2011	Service Call	$100.00	$100.00	Pay it
714041	3/12/2011	Service Call	$165.75	$165.75	Payment Pending
713651	1/11/2011	Service Call	$195.00	$195.00	Payment Pending
713634	11/8/2010	Installation Services	$4,475.25	$4,475.25	Payment Pending
714187	8/25/2010	Service Call	$36.87	$36.87	Pay it

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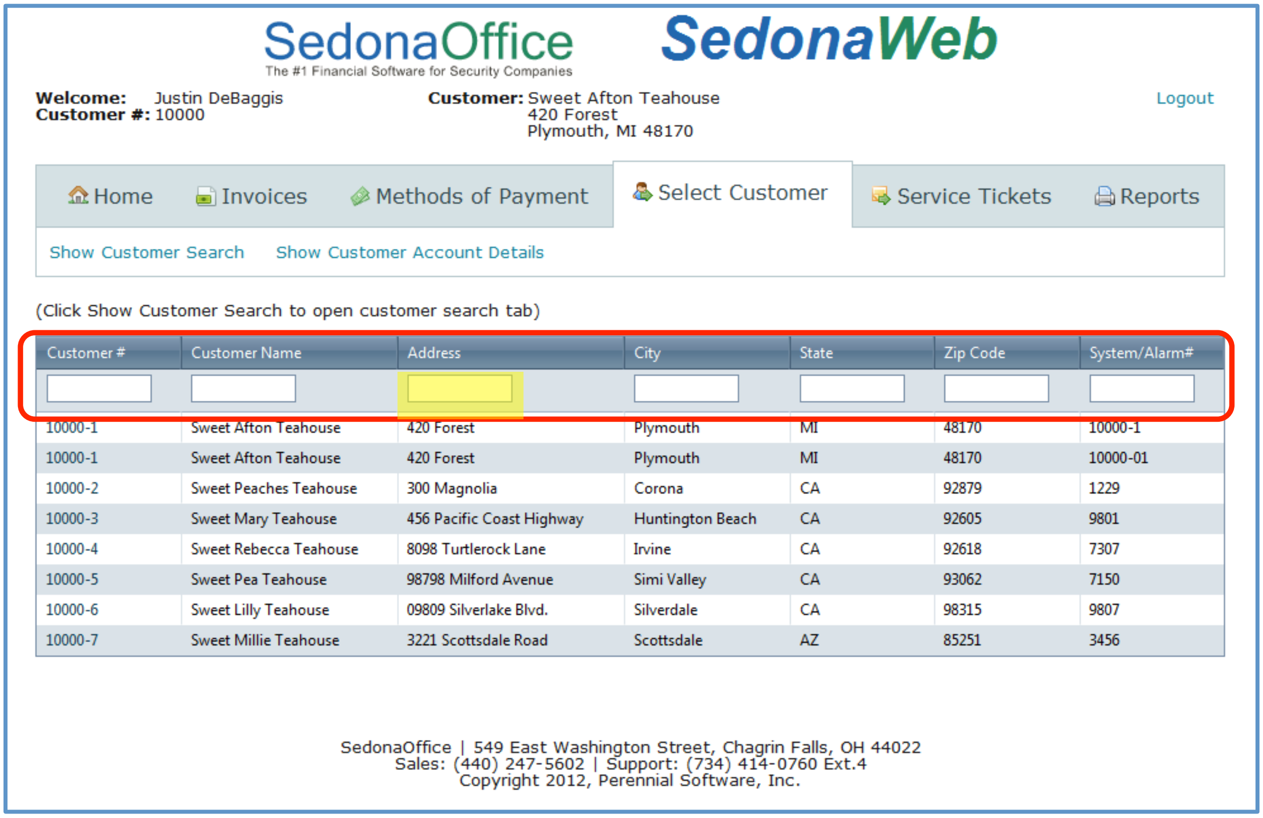
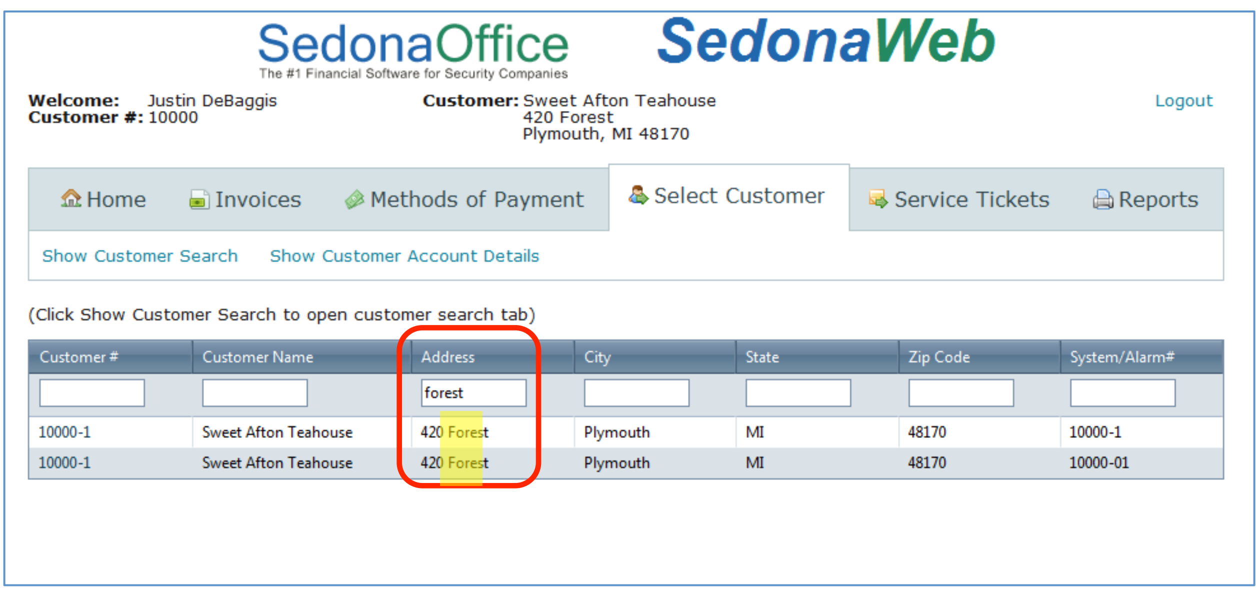
Subaccount Search

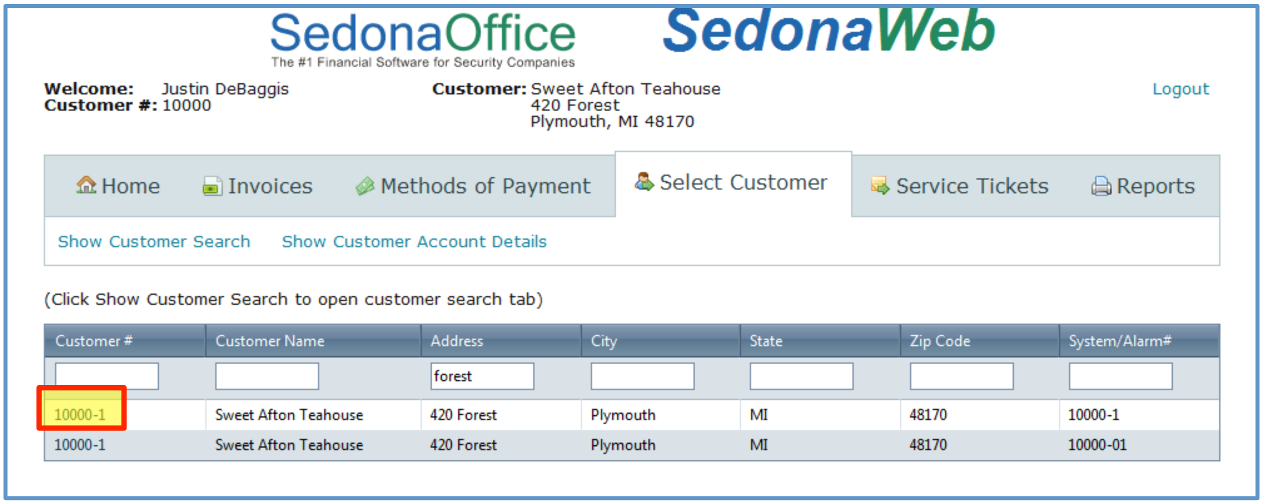
There is the ability to utilize the "search method" for looking up a Subaccount. The search query employs "contains" logic. For example if I am looking for a Subaccount located on Forest, I simply type in the word *Forest* into the search filter and press the enter key on my keyboard. All Subaccounts containing the word *Forest* in the Site address will be displayed.



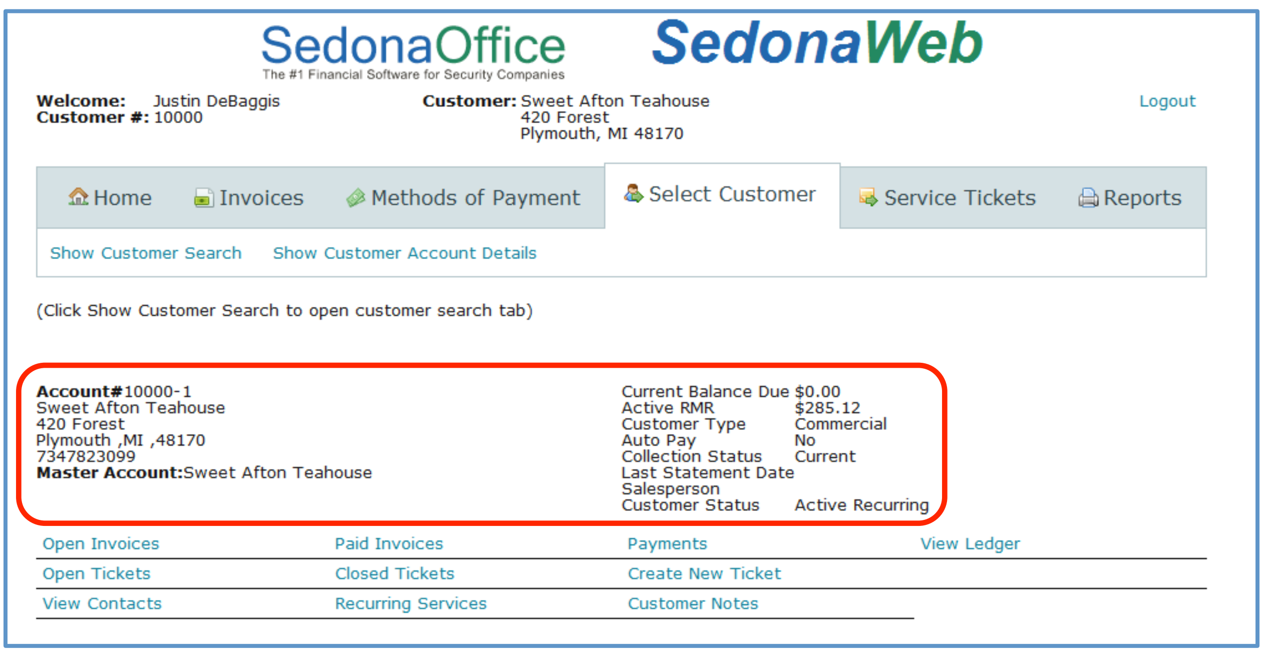


Drill into a Subaccount

After looking up a specific subaccount the User can drill into that account by clicking on the subaccount number located under the *Customer #*.



After drilling into the subaccount view a "snapshot" of basic information such as the site address, current balance due, active RMR, collection status, and the last statement date will be displayed. Under the "snapshot" for the subaccount are various tabs to view more information.

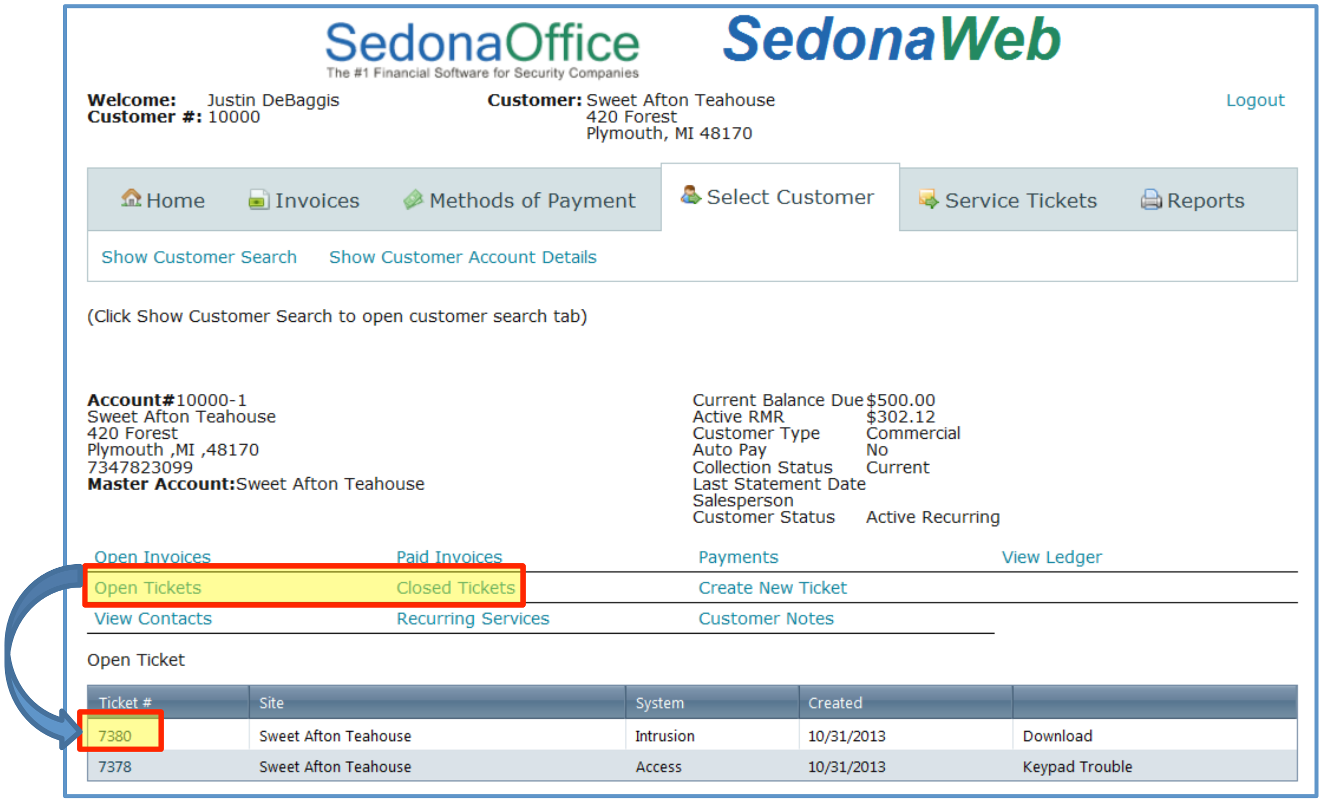


Subaccount Open Invoices

Select the *Open Invoices tab* to generate a list of all open invoices for this subaccount. Select the invoice you would like to view a summary of and the User will have the option to create a *Printable version* or *Pay*.

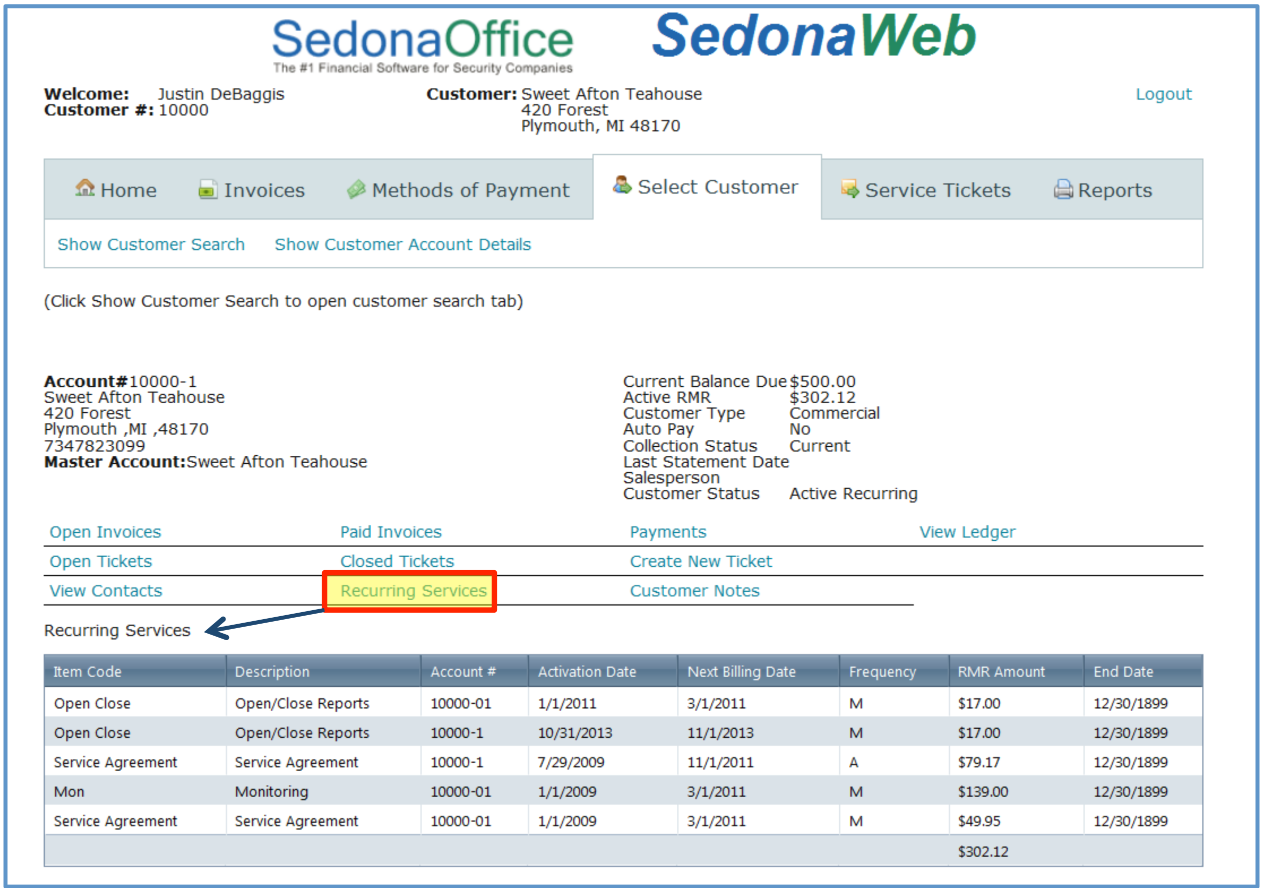
Open and Closed Service tickets for a subaccount

Select the *Open Tickets tab* to generate a list of all open tickets for this subaccount. Select the *Ticket #* you would like to view a summary of and the User will have the option to create/view a note, add documents, view parts, and view all service related details within the ticket.



Recurring Services

Selecting *Recurring Services* will show all recurring charges for each system under the selected subaccount. This will include the activation date, next billing date, frequency, amount, item code, and description.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Welcome: Justin DeBaggis
Customer #: 10000
Customer: Sweet Afton Teahouse
420 Forest
Plymouth, MI 48170
Logout

Home | Invoices | Methods of Payment | Select Customer | Service Tickets | Reports

Show Customer Search | Show Customer Account Details

(Click Show Customer Search to open customer search tab)

Account#10000-1
Sweet Afton Teahouse
420 Forest
Plymouth ,MI ,48170
7347823099
Master Account: Sweet Afton Teahouse

Current Balance Due	$500.00
Active RMR	$302.12
Customer Type	Commercial
Auto Pay	No
Collection Status	Current
Last Statement Date	
Salesperson	
Customer Status	Active Recurring

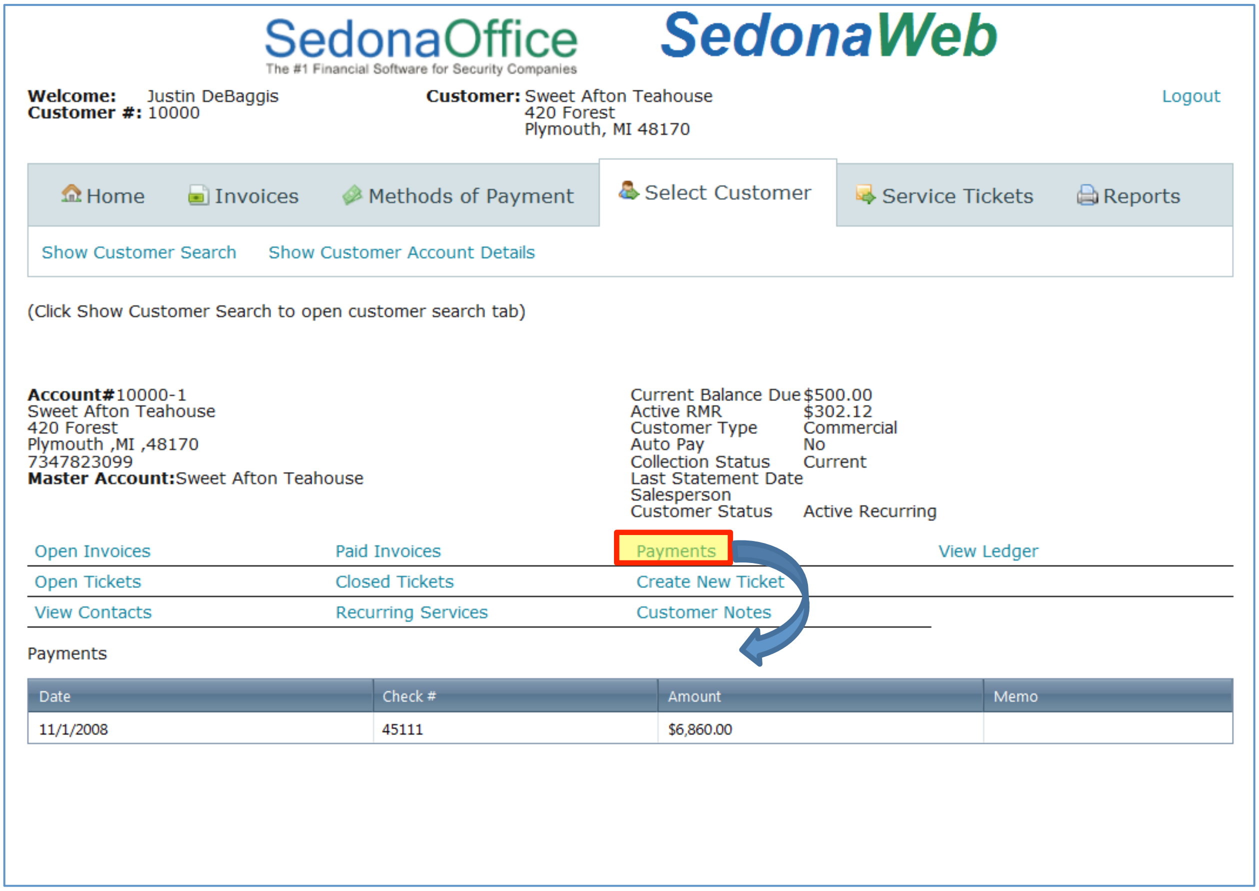
Open Invoices | Paid Invoices | Payments | View Ledger
Open Tickets | Closed Tickets | Create New Ticket
View Contacts | Recurring Services | Customer Notes

Recurring Services

Item Code	Description	Account #	Activation Date	Next Billing Date	Frequency	RMR Amount	End Date
Open Close	Open/Close Reports	10000-01	1/1/2011	3/1/2011	M	$17.00	12/30/1899
Open Close	Open/Close Reports	10000-1	10/31/2013	11/1/2013	M	$17.00	12/30/1899
Service Agreement	Service Agreement	10000-1	7/29/2009	11/1/2011	A	$79.17	12/30/1899
Mon	Monitoring	10000-01	1/1/2009	3/1/2011	M	$139.00	12/30/1899
Service Agreement	Service Agreement	10000-01	1/1/2009	3/1/2011	M	$49.95	12/30/1899
						$302.12	

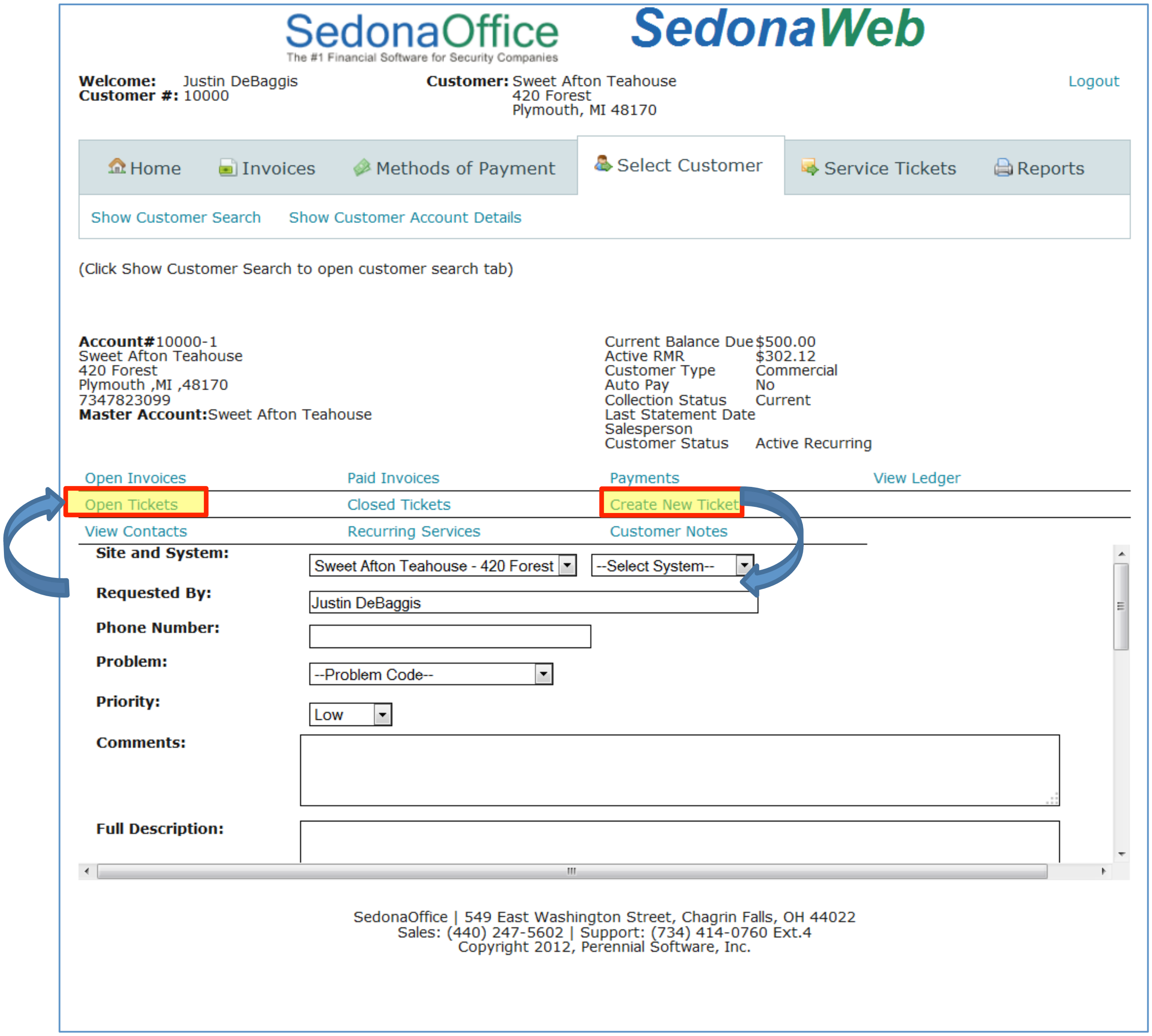
Payments

Selecting *Payments* will create a list of all payments made on the subaccount and a specific date it was made.



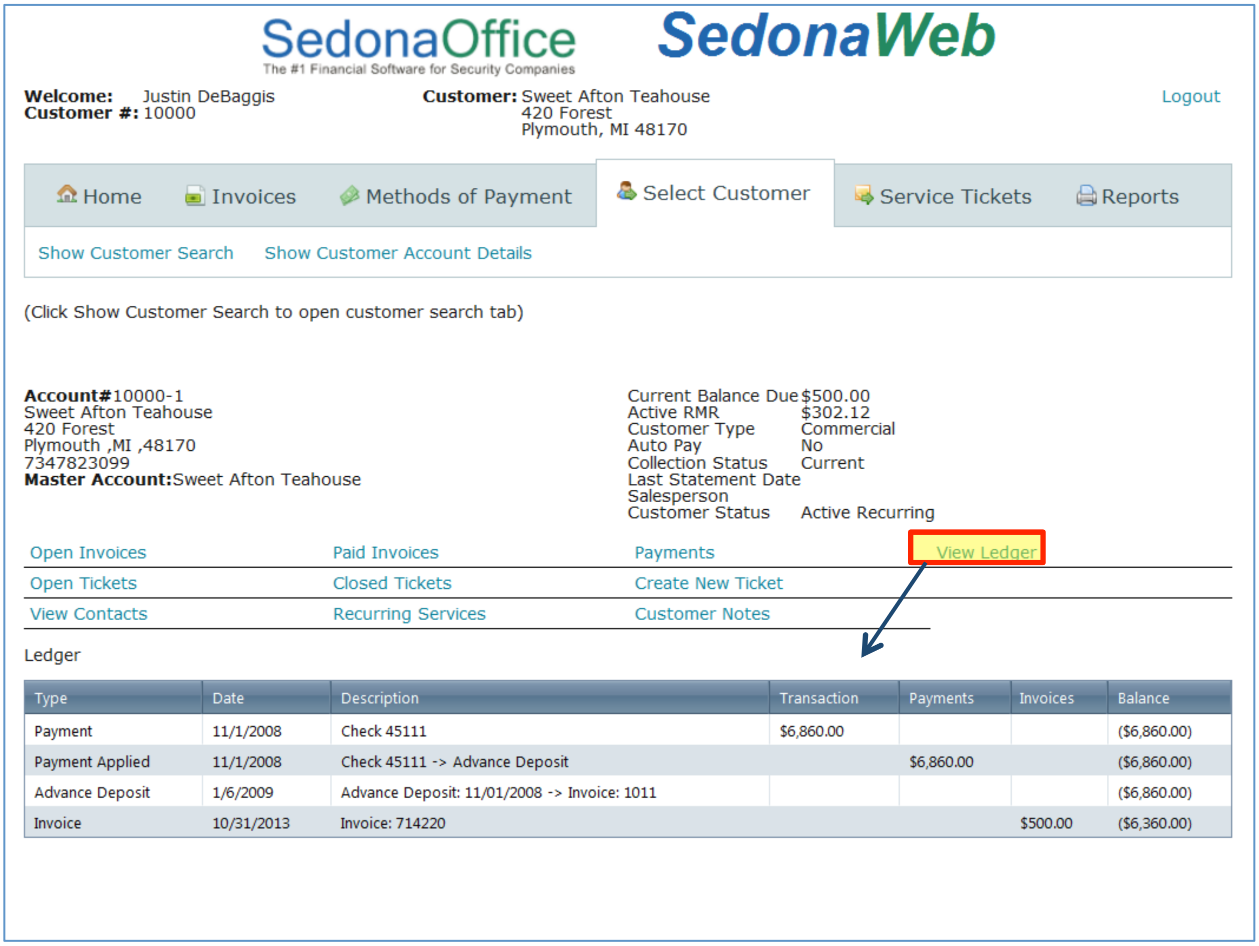
Create New Ticket

Select *Create New Ticket* to create a ticket for a specific subaccount. After filling out the required information and selecting submit this will create an active ticket under this subaccount in the *Open Tickets* queue.



Subaccount Ledger

Select the *View Ledger* tab to view journal entries associated with this subaccount.



Type	Date	Description	Transaction	Payments	Invoices	Balance
Payment	11/1/2008	Check 45111	$6,860.00			($6,860.00)
Payment Applied	11/1/2008	Check 45111 -> Advance Deposit		$6,860.00		($6,860.00)
Advance Deposit	1/6/2009	Advance Deposit: 11/01/2008 -> Invoice: 1011				($6,860.00)
Invoice	10/31/2013	Invoice: 714220			$500.00	($6,360.00)

View Active and Closed Tickets

In the *Service Tickets* tab the User may view and drill into any active and closed ticket to create/view a note, add documents, view parts, and view all service related details within the ticket.

Ticket #	Site	Account #	City	Address	Created	Problem	Scheduled
7380	Sweet Afton Teahouse	10000-01	Plymouth	420 Forest	10/31/2013	Download	
7378	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	10/31/2013	Keypad Trouble	
7344	Sweet Rebecca Teahouse	7307	Irvine	8098 Turtlerock Lane	5/10/2012	PO	8/23/2012 3:00 PM
7343	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	5/10/2012	Inspection	8/23/2012 8:30 AM
7342	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	5/10/2012	Low Battery	
7330	Sweet Peaches Teahouse	1229	Corona	300 Magnolia	9/7/2011	N/A	9/26/2011 8:30 AM
7329	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	9/7/2011	RTI	8/23/2012 12:00 PM
7326	Sweet Afton Teahouse	10000-01	Plymouth	420 Forest	8/29/2011	AC Power Failure	
7325	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	8/29/2011	Add Equipment	8/1/2011 9:00 AM
7321	Sweet Peaches Teahouse	1229	Corona	300 Magnolia	8/25/2011	AC Power Failure	8/25/2011 10:30 AM
7320	Sweet Mary Teahouse	9801	Huntington Beach	456 Pacific Coast Highway	8/24/2011	N/A	9/19/2011 12:00 AM
7316	Sweet Rebecca Teahouse	7307	Irvine	8098 Turtlerock Lane	8/23/2011	Pick and Pack	8/25/2011 1:30 PM
7313	Sweet Rebecca Teahouse	7307	Irvine	8098 Turtlerock Lane	8/18/2011	Inspection	8/24/2011 10:45 AM
7312	Sweet Afton Teahouse	10000-1	Plymouth	420 Forest	8/9/2011	Order	8/24/2011 8:45 AM

Reports Tab

When selecting the *Reports* tab the User will be able to select the Customer Aging report to view various aging buckets.

SedonaOffice SedonaWeb
The #1 Financial Software for Security Companies

Welcome: Justin DeBaggis
Customer #: 10000

Customer: Sweet Afton Teahouse
420 Forest
Plymouth, MI 48170

Logout

Home | Invoices | Methods of Payment | Select Customer | Service Tickets | Reports

Customer Aging

Printable Version

Customer Number	Customer Name	Current	1-30 days	31-60 days	61-90 days	91-120 days	over 120	Total	Credits	Net Due	Last Aged Date
10000	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	7,076.70	7,076.70	0.00	7,076.70	10/7/2013
10000-1	Sweet Afton Teahouse	0.00	500.00	0.00	0.00	0.00	0.00	500.00	0.00	500.00	10/31/2013
10000-2	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10/7/2013
10000-3	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	552.50	552.50	0.00	552.50	10/7/2013
10000-4	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(2,585.93)	(2,585.93)	10/7/2013
10000-5	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10/7/2013
10000-6	Sweet Afton Teahouse	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10/7/2013
10000-7	Sweet Millie Teahouse	0.00	0.00	0.00	0.00	0.00	500.00	500.00	0.00	500.00	10/7/2013
	Totals:	0.00	500.00	0.00	0.00	0.00	8,129.20	8,629.20	(2,585.93)	6,043.27	

SedonaOffice | 549 East Washington Street, Chagrin Falls, OH 44022
Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4