

# 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 .....	3
New User – Setup New Account.....	4
Forgot Password – Changes.....	9
Invoices – Open and Paid.....	13
Methods of Payment .....	19
Service Tickets .....	20
Submission.....	21
Master Accounts.....	25
Subaccount Search .....	28
Open and Closed Service tickets for a subaccount.....	31
View Active and Closed Tickets .....	36
Reports Tab.....	37

## Homepage

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

**SedonaOffice**  
The #1 Financial Software for Security Companies

**SedonaWeb**

**Email Address:**

**Password:**

[Setup New Account](#)      [Forgot Password](#)      [Convert Account](#)

**This is the logon message**

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Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4  
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## 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.



The screenshot shows the SedonaOffice login interface. At the top, the SedonaOffice logo is on the left and the SedonaWeb logo is on the right. Below the SedonaOffice logo is the tagline "The #1 Financial Software for Security Companies". The login form includes an "Email Address:" field, a "Password:" field, and a "Login" button. Below the login fields are three links: "Setup New Account", "Forgot Password", and "Convert Account". The "Setup New Account" link is circled in red, and a blue dashed arrow points to it from the text "This is the logon message" located below the links. At the bottom of the page, contact information for SedonaOffice is provided: "SedonaOffice | 549 East Washington Street, Chagrin Falls, OH 44022", "Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4", and "Copyright 2012, Perennial Software, Inc."

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

\* Required fields



There is already an account with this email address.

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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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The #1 Financial Software for Security Companies

**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.

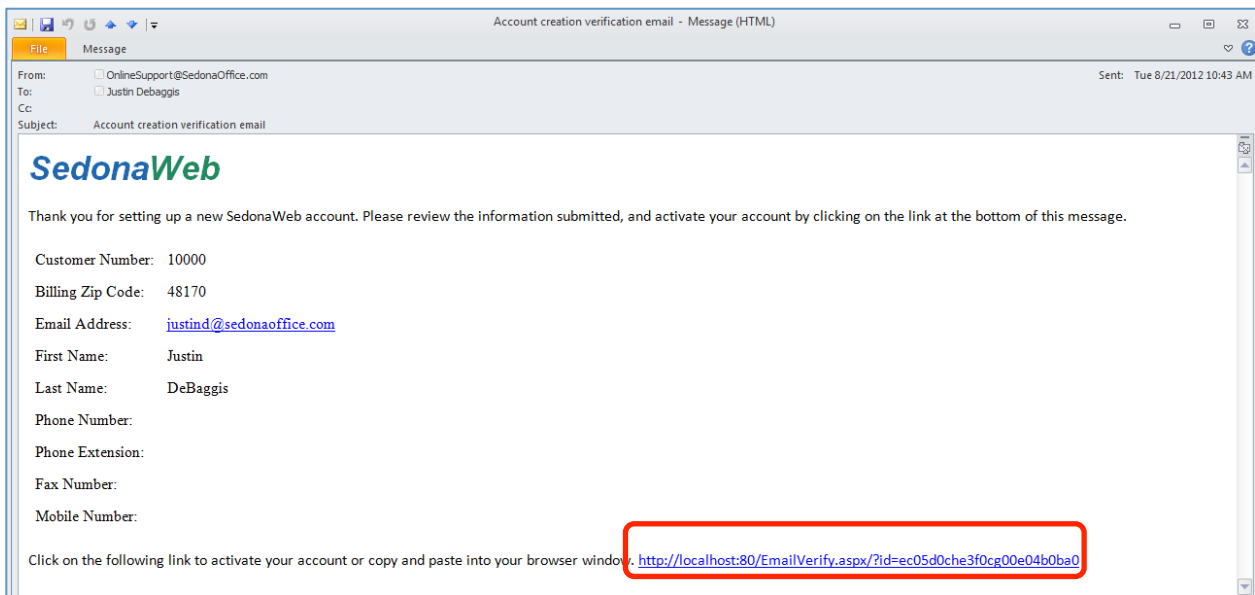
Customer Number: *	<input type="text" value="10000"/>	(Used to identify you)
Billing Zip Code: *	<input type="text" value="48170"/>	(Used to identify you, 12345 in US, A2A 2A2 Canada)
Email Address: *	<input type="text" value="justind@sedonaoffice.com"/>	(Used as logon)
Email Address: *	<input type="text"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

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

\* Required fields

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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 2<sup>nd</sup> screen shot below).

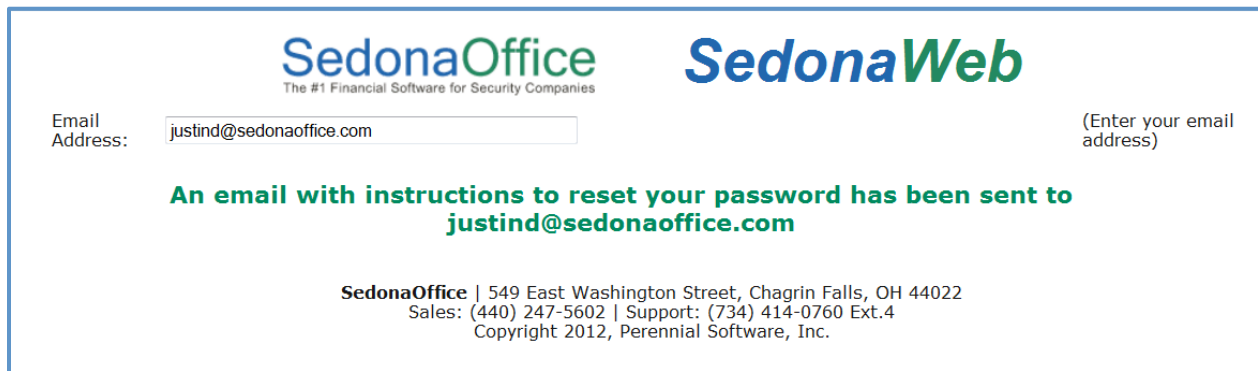


The screenshot shows the SedonaOffice/SedonaWeb login interface. At the top, the SedonaOffice logo (with tagline 'The #1 Financial Software for Security Companies') and SedonaWeb logo are displayed. Below the logos, there are input fields for 'Email Address' (containing 'justind@sedonaoffice.com') and 'Password'. A 'Login' button is positioned below the password field. To the left of the password field are links for 'Setup New Account' and 'Forgot Password' (the latter is highlighted with a red box and a blue arrow). To the right is a 'Convert Account' link. Below the login fields, the text 'This is the logon message' is displayed. At the bottom, contact information for SedonaOffice is provided: 'SedonaOffice | 549 East Washington Street, Chagrin Falls, OH 44022', 'Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4', and 'Copyright 2012, Perennial Software, Inc.'

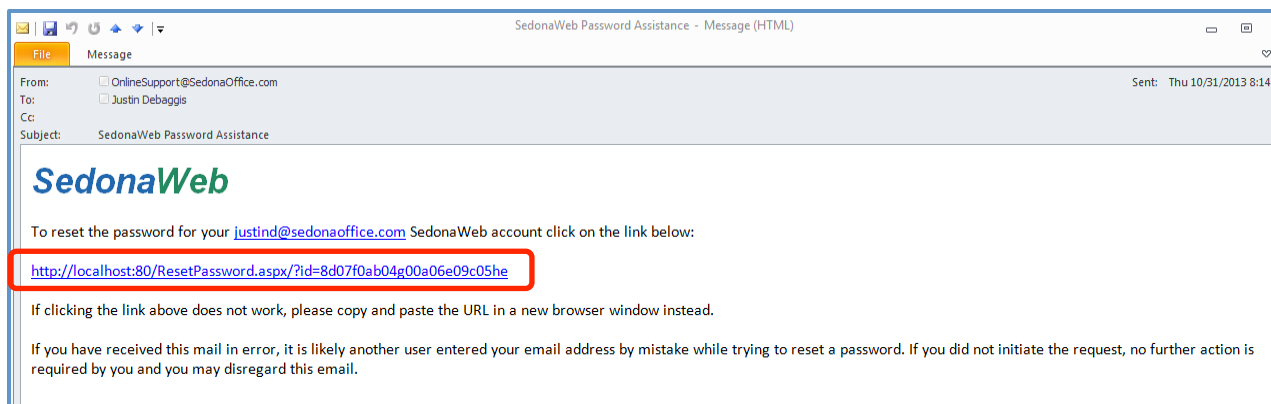


The screenshot shows the 'Forgot Password' form. At the top, the SedonaOffice logo (with tagline 'The #1 Financial Software for Security Companies') and SedonaWeb logo are displayed. Below the logos, there is an 'Email Address' input field containing 'justind@sedonaoffice.com' and a 'Submit' button. To the right of the input field, the text '(Enter your email address)' is displayed. At the bottom, contact information for SedonaOffice is provided: 'SedonaOffice | 549 East Washington Street, Chagrin Falls, OH 44022', 'Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4', and 'Copyright 2012, Perennial Software, Inc.'

After clicking on the *Submit* button (see 2<sup>nd</sup> 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.



- 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.



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Enter new password for: justind@sedonaoffice.com

New Password:  (Between 5 and 15 characters)

Confirm Password:  (Passwords must match)

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- 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*.



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Enter new password for: justind@sedonaoffice.com

New Password:  (Between 5 and 15 characters)

Confirm Password:  (Passwords must match)

Password changed successfully; [click to login](#)

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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.



The #1 Financial Software for Security Companies



[Logout](#)

**Welcome:** Justin DeBaggis  
**Customer #:** 9053

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

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	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

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- 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.



The #1 Financial Software for Security Companies



**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

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

Amount Enclosed: \_\_\_\_\_  
**Net Due**  
**\$26.09**  
*Detach And Return Top Portion With Your Payment*

**Invoice**

Invoice Number	Date
<b>713677</b>	<b>11/1/2010</b>
Customer Number	Due Date
<b>9053</b>	<b>11/1/2010</b>

Remit To: CJM Security  
250 Magnolia  
Riverside, CA 92501

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
	Tax		\$24.10
	Payments/Credit Applied		\$1.99
			(\$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.

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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

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

Payment Method: Credit Card Bank Accounts  
No Credit Cards on File Bank of America - 6789  
Add New Add New

Amount: 26.09  
Submit Cancel

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Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4  
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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.

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The #1 Financial Software for Security Companies

**Welcome:** Justin DeBaggis      **Customer:** Palin, Sarah  
**Customer #:** 9053      222 Wasilla Lane  
Riverside, CA 92505      [Logout](#)

[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

Payment Method: Credit Card   Bank Accounts

No Credit Cards on File   Bank of America - 6789

[Add New](#)   [Add New](#)

Amount:

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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


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- 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.



The #1 Financial Software for Security Companies



**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.

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The #1 Financial Software for Security Companies

Welcome: Justin DeBaggis Customer: Palin, Sarah  
Customer #: 9053 222 Wasilla Lane  
Riverside, CA 92505 Logout

Home Invoices **Methods of Payment** Service Tickets

Add Credit Card Add Bank

Credit Cards

Card Type	Last Four Digits	Expiration Date	Auto Pay
No credit cards on file.			

Bank Accounts

Bank	Last Four Digits	Account Type	Account Name	Auto Pay	Edit	Delete
Bank of America	...6789	Checking	Bank Of America	Y		

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

**SedonaOffice** **Sedc** **SedonaOffice** **Sedc**  
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Welcome: Justin DeBaggis Customer: Palin, Sarah  
Customer #: 9053 222 Wasilla Lane  
Riverside, CA 92505

Home Invoices **Methods of Payment** Service Tickets

Add Credit Card Add Bank

Card Type:

Card Number:

Name on Card:

Expiration Date: January / 2013

Billing Address:

Postal Code:

Use this for auto bill payment

Submit Cancel

Routing Number:

Account Number:

Name of Bank:

Name on Account:

Checking Account  Savings Account

Use this for auto bill payment

Submit Cancel

## Service Tickets

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

  
The #1 Financial Software for Security Companies



**Welcome:** Justin DeBaggis  
**Customer #:** 9053

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

[Logout](#)

Home
 Invoices
 Methods of Payment
 Service Tickets

[View Active Tickets](#)
[View Closed Tickets](#)
[Add 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.

  
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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 Active Tickets](#)   [View Closed Tickets](#)   [Add Service Ticket](#)

**Site and System:**       

**Requested By:**   

**Phone Number:**   

**Problem:**   

**Priority:**   

**Comments:**      
Chars left - 113

**Full Description:**      
Chars left - 959

**Steps to Recreate:**   

**Upload files:**

File 1:  No file selected.    (File should not be over 1 megabyte)  
Description 1:

File 2:  No file selected.    (File should not be over 1 megabyte)  
Description 2:

File 3:  No file selected.    (File should not be over 1 megabyte)  
Description 3:

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.

The screenshot displays the SedonaWeb interface for a service ticket. At the top, the SedonaOffice and SedonaWeb logos are visible. The user is logged in as Justin DeBaggis, and the customer is Sarah Palin. The interface includes a navigation menu with options like Home, Invoices, Methods of Payment, and Service Tickets. The main content area shows ticket details for ticket number 7377, including system information, warranty status, and a list of comments. The 'Add Comment' button is highlighted with a red box, and an arrow points from it to the 'Comments Entered' section. Other buttons like 'Hide Comments' and 'Upload Document' are also visible.

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Welcome: Justin DeBaggis Customer: Palin, Sarah  
Customer #: 9053 222 Wasilla Lane  
Riverside, CA 92505 Logout

Home Invoices Methods of Payment Service Tickets

View Active Tickets View Closed Tickets Add Service Ticket

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

---

**System:** 3737 **Warranty:** None  
**Type:** Intrusion **Expires:** 4/1/2008  
**Panel:** Vista-40 **Service Level:** T&M Intrusion  
**Location:** **Next Inspection:**

---

**Ticket Number:** 7377 **Comments Entered:**  
**Status:** Open  
**Problem:** AC Power Failure  
**Priority:** High  
**Contact:** Justin DeBaggis  
**Phone:** (440) 773-1673  
**Technician:**  
**Scheduled For:**  
**Last Dispatched:**  
**Created By:** 10/31/2013  
**Created By:**  
**Resolution:** N/A  
**Invoice:**

Customer Comments:  
10/31/2013 I would appreciate if your manager in your service department would contact me in regards to discuss a purchase of additional equipment.

Field Comments:  
10/31/2013 Web: jdebaggi@gmail.com  
My office phone is 440.234.2554 and my cell phone is 241.256.3548

No Parts **Add Comment** Hide Comments **Upload Document**

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.

The screenshot displays the SedonaOffice SedonaWeb interface. At the top, the SedonaOffice logo and tagline are on the left, and the SedonaWeb logo is on the right. Below the logos, a welcome message for Justin DeBaggis and customer information for Sarah Palin are shown. A navigation bar includes Home, Invoices, Methods of Payment, and Service Tickets. Below this, there are links for View Active Tickets, View Closed Tickets, and Add Service Ticket.

The main content area shows ticket details for Ticket Number 7377. On the left, a list of fields includes Status (Open), Problem (AC Power Failure), Priority (High), Contact (Justin DeBaggis), and Phone ((440) 773-1673). On the right, fields include Warranty (None), Expires (4/1/2008), Service Level (T&M Intrusion), and Next Inspection. A comment form is open, with the text "I have still not heard" entered. The form has a Submit button (highlighted with a red box) and a Cancel button. An arrow points from the Add Comment button (also highlighted with a red box) to the comment form.

At the bottom of the page, there is contact information for SedonaOffice: 549 East Washington Street, Chagrin Falls, OH 44022. Sales: (440) 247-5602 | Support: (734) 414-0760 Ext.4. Copyright 2012, Perennial Software, Inc.

**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.

**SedonaOffice** **SedonaWeb**  
The #1 Financial Software for Security Companies

Welcome: Justin DeBaggis      Customer: Palin, Sarah  
Customer #: 9053      222 Wasilla Lane  
Riverside, CA 92505      Logout

Home   Invoices   Methods of Payment   Service Tickets

View Active Tickets   **View Closed Tickets**   Add Service Ticket

Ticket #	Site	Account #	System	Closed	Problem	Resolution
7072	Palin, Sarah	3737	Intrusion	8/20/2009	Low Battery	Replace Equipment
7064	Palin, Sarah	4569	Intrusion	7/25/2009	Keypad Trouble	Replace Equipment

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

**SedonaOffice** **SedonaWeb**  
The #1 Financial Software for Security Companies

Welcome: Justin DeBaggis      Customer: Palin, Sarah  
Customer #: 9053      222 Wasilla Lane  
Riverside, CA 92505      Logout

Home   Invoices   Methods of Payment   Service Tickets

View Active Tickets   View Closed Tickets   Add Service Ticket

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

**Site:** Palin, Sarah  
222 Wasilla Lane  
Riverside CA, 92505

---

**System:** 3737      **Warranty:** None  
**Type:** Intrusion      **Expires:** 4/1/2008  
**Panel:** Vista-40      **Service Level:** T&M Intrusion  
**Location:**      **Next Inspection:**

---

**Ticket Number:** 7377      **Comments Entered:**

**Status:** Closed

**Problem:** AC Power Failure

**Priority:** High

**Contact:** Justin DeBaggis

**Phone:** (440) 773-1673

**Technician:** Jose Medina

**Scheduled For:** 10/31/2013 10:15 AM

**Last Dispatched:** 10/31/2013 9:49:00 AM

**Created On:** 10/31/2013

**Created By:**

**Resolution:** Replace Equipment

**Invoice:**

Customer Comments:  
10/31/2013 I would appreciate if your manager in your service department would contact me in regards to discuss a purchase of additional equipment.

Field Comments:  
10/31/2013 Web: jdebaggi@gmail.com  
My office phone is 440.234.2554 and my cell phone is 241.256.3548

Show Parts   Add Comment   Hide Comments   Upload Document

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## 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.

**SedonaOffice**  
The #1 Financial Software for Security Companies

**SedonaWeb**

**Email Address:**

**Password:**

[Setup New Account](#)      [Forgot Password](#)      [Convert Account](#)

**This is the logon message**

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## Homepage

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

**SedonaOffice**  
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**SedonaWeb**

**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](#)

[Change Password](#) [Logout](#)

This is the welcome message

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## Invoices

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



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

[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.

**SedonaOffice** **SedonaWeb**  
The #1 Financial Software for Security Companies

**Welcome:** Justin DeBaggis **Customer:** Sweet Afton Teahouse  
**Customer #:** 10000 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)

Customer #	Customer Name	Address	City	State	Zip Code	System/Alarm#
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10000-1	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-1
10000-1	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-01
10000-2	Sweet Peaches Teahouse	300 Magnolia	Corona	CA	92879	1229
10000-3	Sweet Mary Teahouse	456 Pacific Coast Highway	Huntington Beach	CA	92605	9801
10000-4	Sweet Rebecca Teahouse	8098 Turtlerock Lane	Irvine	CA	92618	7307
10000-5	Sweet Pea Teahouse	98798 Milford Avenue	Simi Valley	CA	93062	7150
10000-6	Sweet Lilly Teahouse	09809 Silverlake Blvd.	Silverdale	CA	98315	9807
10000-7	Sweet Millie Teahouse	3221 Scottsdale Road	Scottsdale	AZ	85251	3456

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**SedonaOffice** **SedonaWeb**  
The #1 Financial Software for Security Companies

**Welcome:** Justin DeBaggis **Customer:** Sweet Afton Teahouse  
**Customer #:** 10000 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)

Customer #	Customer Name	Address	City	State	Zip Code	System/Alarm#
<input type="text"/>	<input type="text"/>	<input type="text" value="forest"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10000-1	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-1
10000-1	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-01

**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 #*.

**SedonaOffice** The #1 Financial Software for Security Companies **SedonaWeb**

Welcome: Justin DeBaggis Customer: Sweet Afton Teahouse Logout  
Customer #: 10000 420 Forest Plymouth, MI 48170

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)

Customer #	Customer Name	Address	City	State	Zip Code	System/Alarm#
<input type="text"/>	<input type="text"/>	forest	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>10000-1</b>	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-1
10000-1	Sweet Afton Teahouse	420 Forest	Plymouth	MI	48170	10000-01

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.

**SedonaOffice** The #1 Financial Software for Security Companies **SedonaWeb**

Welcome: Justin DeBaggis Customer: Sweet Afton Teahouse Logout  
Customer #: 10000 420 Forest Plymouth, MI 48170

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 \$0.00  
Active RMR \$285.12  
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

**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*.

  
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](#)

[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](#)

Open Invoices

Invoice #	Date	Description	Amount	Net Due
714220	10/31/2013	Equipment Sales	\$500.00	\$500.00

**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.

**SedonaOffice**      **SedonaWeb**  
The #1 Financial Software for Security Companies

**Welcome:** Justin DeBaggis      **Customer:** Sweet Afton Teahouse      [Logout](#)  
**Customer #:** 10000      420 Forest  
Plymouth, MI 48170

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)

<b>Account#</b> 10000-1 Sweet Afton Teahouse 420 Forest Plymouth ,MI ,48170 7347823099 <b>Master Account:</b> 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](#)

Open Ticket


Ticket #	Site	System	Created	
7380	Sweet Afton Teahouse	Intrusion	10/31/2013	Download
7378	Sweet Afton Teahouse	Access	10/31/2013	Keypad Trouble

### 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.



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

[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.



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](#)

[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](#)

[Open Tickets](#)

[View Contacts](#)

[Paid Invoices](#)

[Closed Tickets](#)

[Recurring Services](#)

[Payments](#)

[View Ledger](#)

[Create New Ticket](#)

[Customer Notes](#)

Payments

Date	Check #	Amount	Memo
11/1/2008	45111	\$6,860.00	

### 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.

The screenshot displays the SedonaWeb interface for a user named Justin DeBaggis. The top navigation bar includes links for Home, Invoices, Methods of Payment, Select Customer, Service Tickets, and Reports. Below this, there are links for 'Show Customer Search' and 'Show Customer Account Details'. A message indicates that clicking 'Show Customer Search' will open the customer search tab.

Account information for 'Sweet Afton Teahouse' is shown, including account number 10000-1, address (420 Forest, Plymouth, MI 48170), and phone number (734) 782-3099. Financial details include a current balance due of \$500.00 and an active RMR of \$302.12. The customer type is Commercial, and the status is Active Recurring.

The 'Open Tickets' section contains buttons for 'Open Invoices', 'Paid Invoices', 'Payments', 'View Ledger', 'Open Tickets', 'Closed Tickets', and 'Create New Ticket'. The 'Open Tickets' and 'Create New Ticket' buttons are highlighted with red boxes, and blue arrows point to them from the left and right sides respectively.


The 'Create New Ticket' form includes the following fields:

- Site and System:** A dropdown menu showing 'Sweet Afton Teahouse - 420 Forest' and another dropdown for 'System' set to '--Select System--'.
- Requested By:** A text field containing 'Justin DeBaggis'.
- Phone Number:** An empty text field.
- Problem:** A dropdown menu set to '--Problem Code--'.
- Priority:** A dropdown menu set to 'Low'.
- Comments:** A large text area for entering comments.
- Full Description:** A large text area for entering the full description of the ticket.


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## Subaccount Ledger

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



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](#)

[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](#)

Ledger

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.



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

[View Active Tickets](#)
[View Closed Tickets](#)

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

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## Reports Tab

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



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	

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