SedonaWeb Changes from version 1.0 to 2.0

May 2021

Confidentiality Statement

Acknowledgments

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About This Document

SedonaWeb was completely rewritten to provide new and enhanced features and to provide a new interface, which provides a more user-friendly application. This document describes the differences between SedonaWeb 1.0 and the new SedonaWeb 2.0. Items denoted with an asterisk indicate the item is a new feature to SedonaWeb 2.0.

SedonaWeb Overview

SedonaWeb provides an Internet portal for your customers to conveniently manage their accounts with you. Your customers can view and pay open invoices, submit service tickets, and manage their service calls- all via the web.

Once your company has purchased SedonaWeb, a special URL is created by our team which you may imbed on your company's website or add a link into printed or emailed invoices and/or statements. Once this URL is launched, your customers can register with an email address to setup their own SedonaWeb account. Your customers setup and manage their own password.

Features include:

- SSL Security – all data is fully encrypted
- Clients can sign up and create an account themselves
- Easy to set up and brand with your logo
- Master account features to manage multiple sub-accounts
- PCI Compliant with Forte (Merchant Bank)
- View and/or print open and paid invoices
- Pay an invoice with a credit card or ACH bank payment (must be enrolled with Forte merchant bank)
- View open and closed service tickets
- Create a new service ticket
- Manage service queue for national or chain accounts

User Login*

For customers upgrading from SedonaWeb 1.0 to SedonaWeb 2.0, each user with an existing login will need to reset their password the first time they login to SedonaWeb 2.0. This is due to the implementation of more complex rules for user passwords; this is for enhanced security purposes.

Home Page*

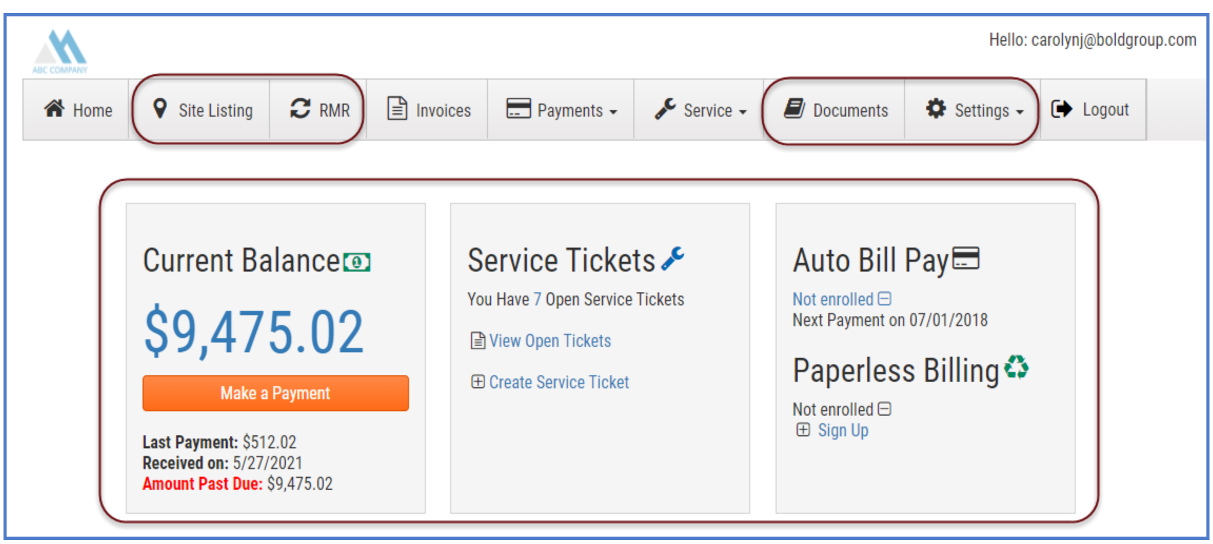
Once a user logs into SedonaWeb 2.0, they will notice the home page has more options than version 1.0. In addition, some changes have been made to the existing options of Invoices, Methods of Payment, and Service Tickets. These changes will be described later in this document. New features on the Home Page include:

- Site Listing
- RMR
- Documents
- Settings
- Three information panels

Each of these new options will be described on the following pages.

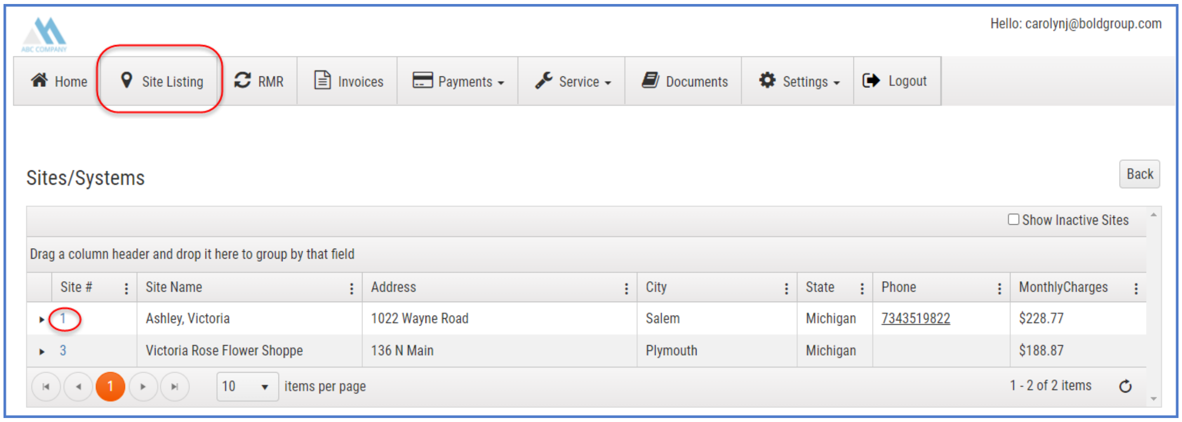
Home Page SedonaWeb 1.0

Home Page SedonaWeb 2.0



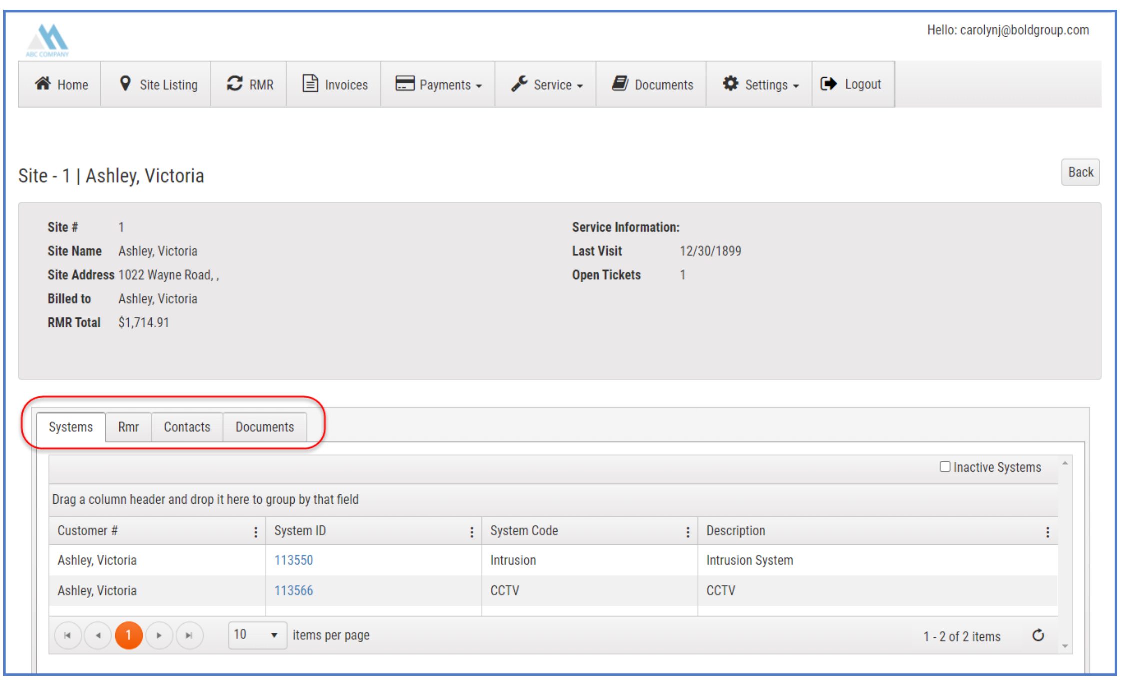
Site Listing Tab*

When clicking on the Site Listing tab, a list of all of the customer's sites will appear in a grid. If the customer has any inactive sites, checking the box labeled "Show Inactive Sites", will include both active and inactive sites in the listing.



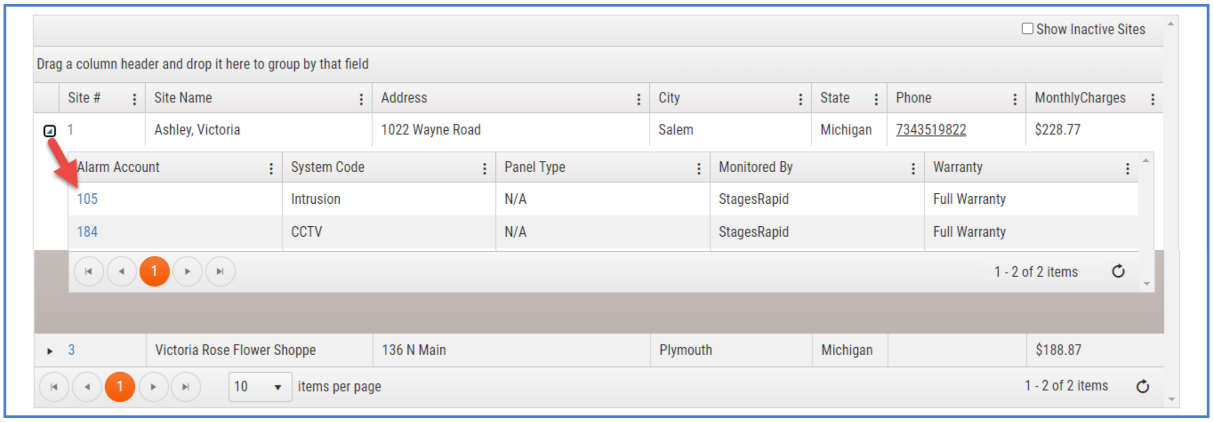
Site Details

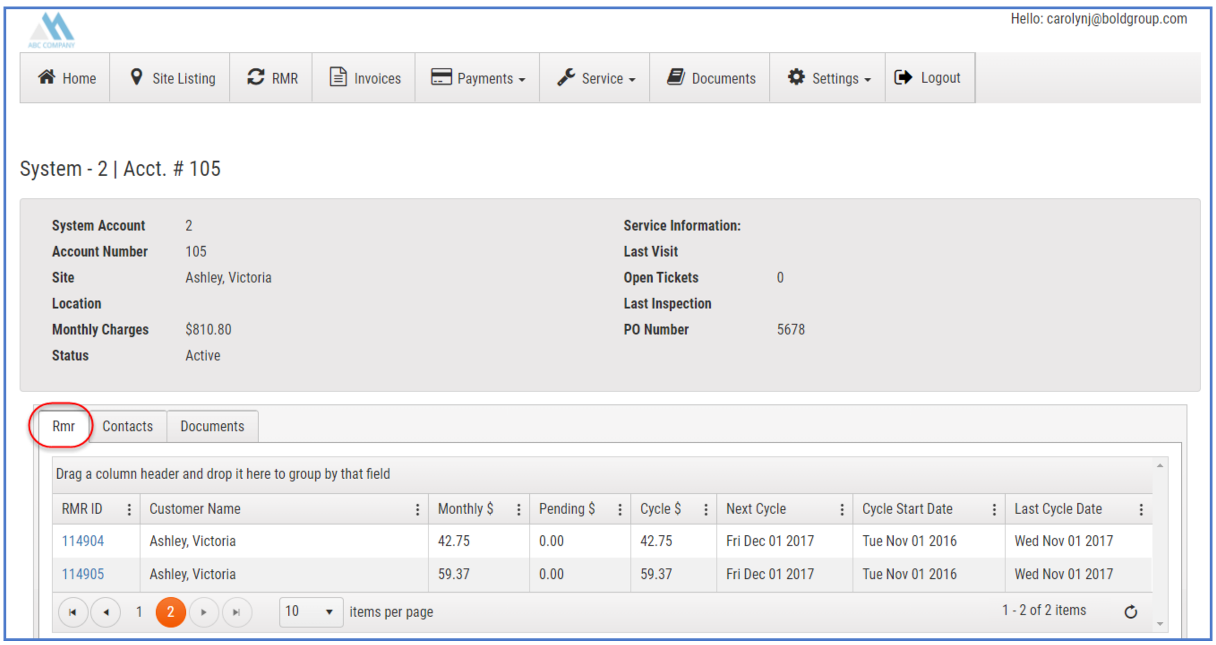
Clicking on a Site Number will display detailed information for that particular site. Below the site information, four tabs of information are available: Systems, RMR, Contacts and Documents. Clicking on each tab will display information related to the customer's site. On any of the tabs where information is displayed in a blue font, clicking on that link will drill down to information that is more detailed.



Site System Details

Clicking on the arrow to the left of a Site Number will display all active systems for the site. Clicking on the Alarm Account (system number), will display details for that system and display the RMR, Contacts and Documents tabs.



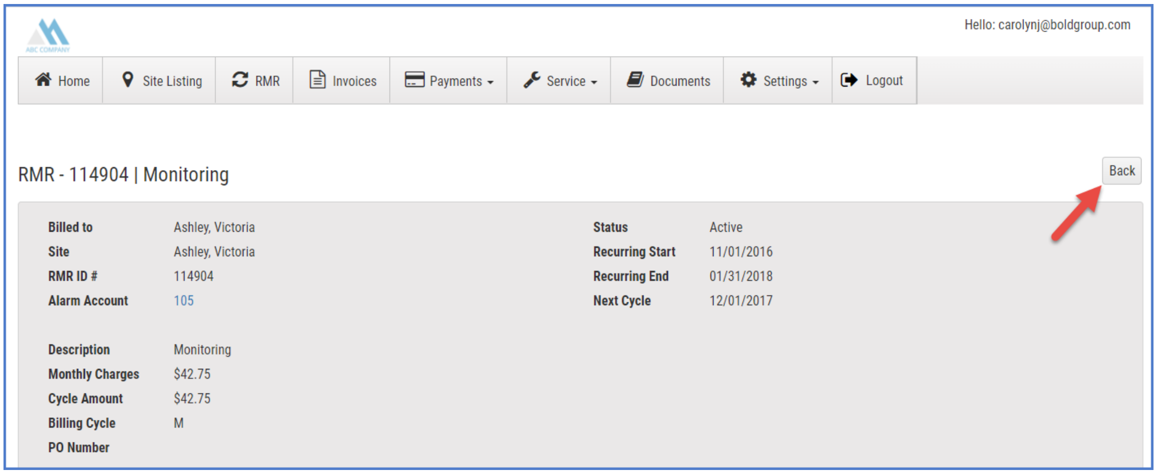


System Details

Once you are viewing the account from the System level, you can also view details related to RMR, Contacts and Documents.

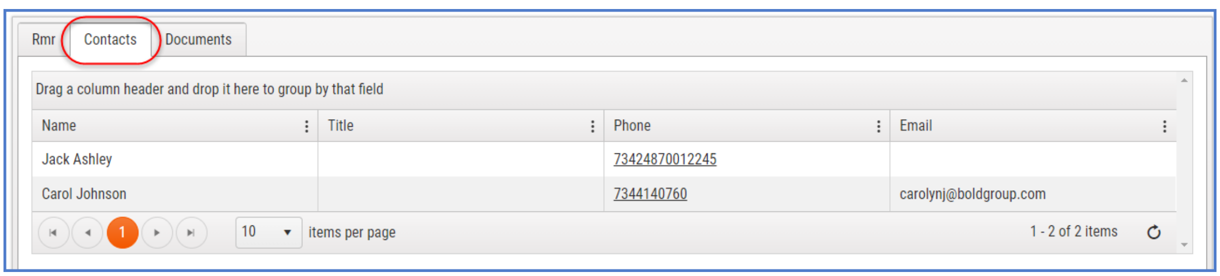
RMR Tab

When clicking on a RMR ID link, detailed information will be displayed for that recurring line. To return to the RMR listing, click on the Back button.



Contacts Tab

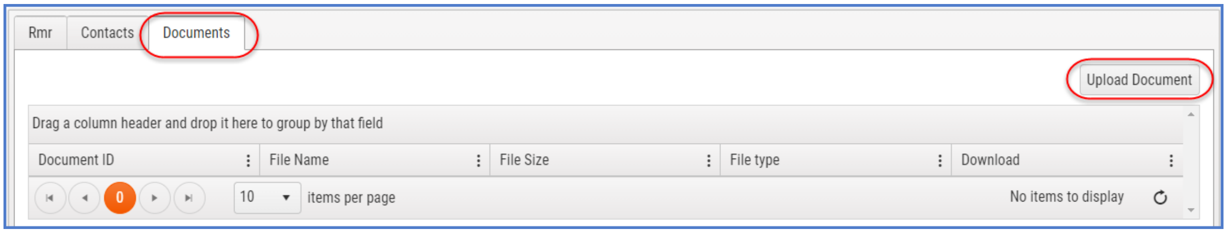
Clicking on the Contacts tab will display all billing and site contacts linked to this particular site.



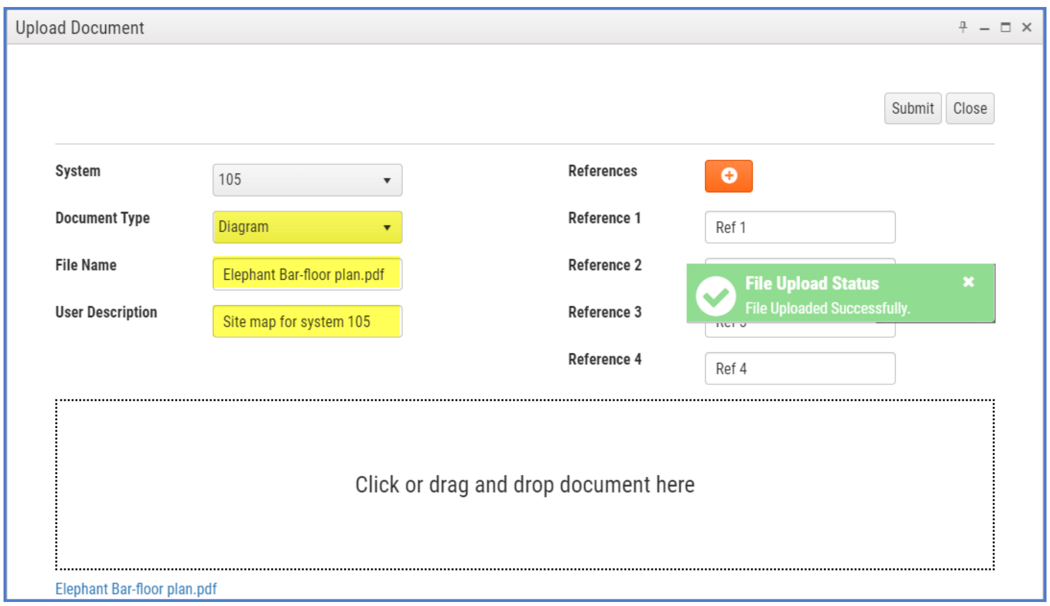
Documents Tab

Clicking on the Documents tab will display a listing of all documents linked to this particular site. The customer also has the ability to upload documents to their account.

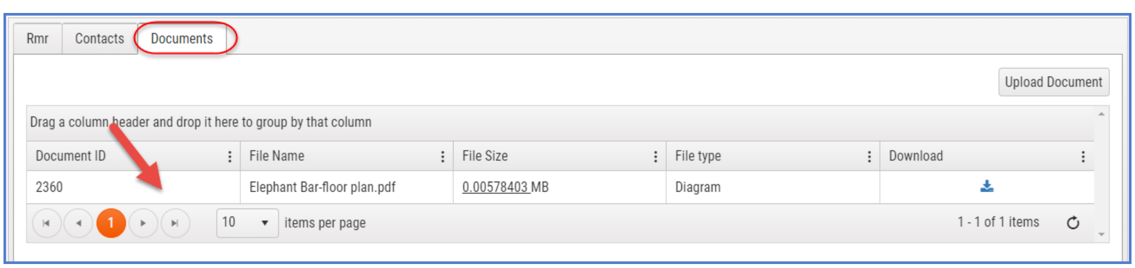
Note: All documents saved with a security level of 1 will be available for the customer.



To upload a document, click on the Upload Document button. The upload document form will be displayed. Required fields are Document Type, File Name and User Description. Click in the text box at the bottom of the form. This will open your file explorer to locate the file to upload. When finished, click the Submit button. If all required fields were populated, the customer will receive a confirmation message that the file upload was successful.



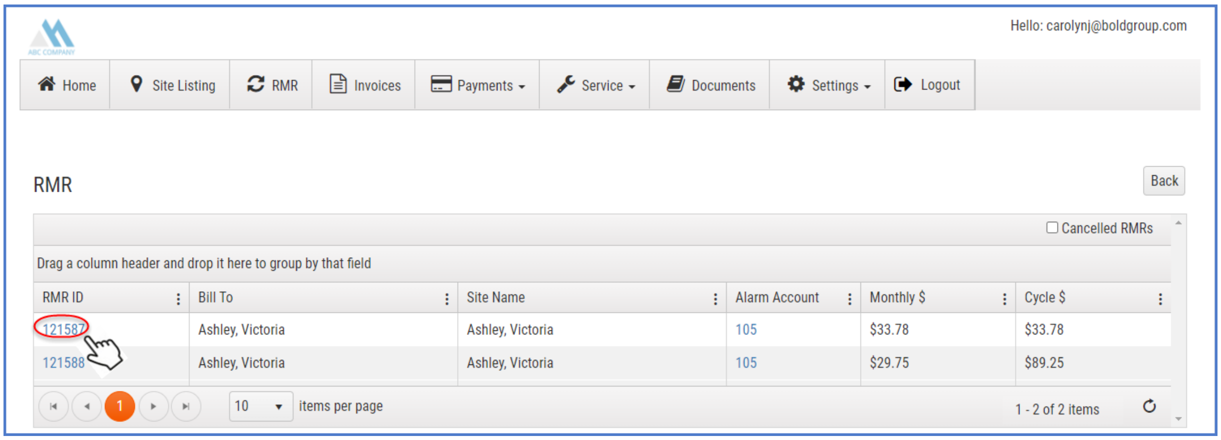
Once a document was uploaded, it will be displayed in the documents listing.



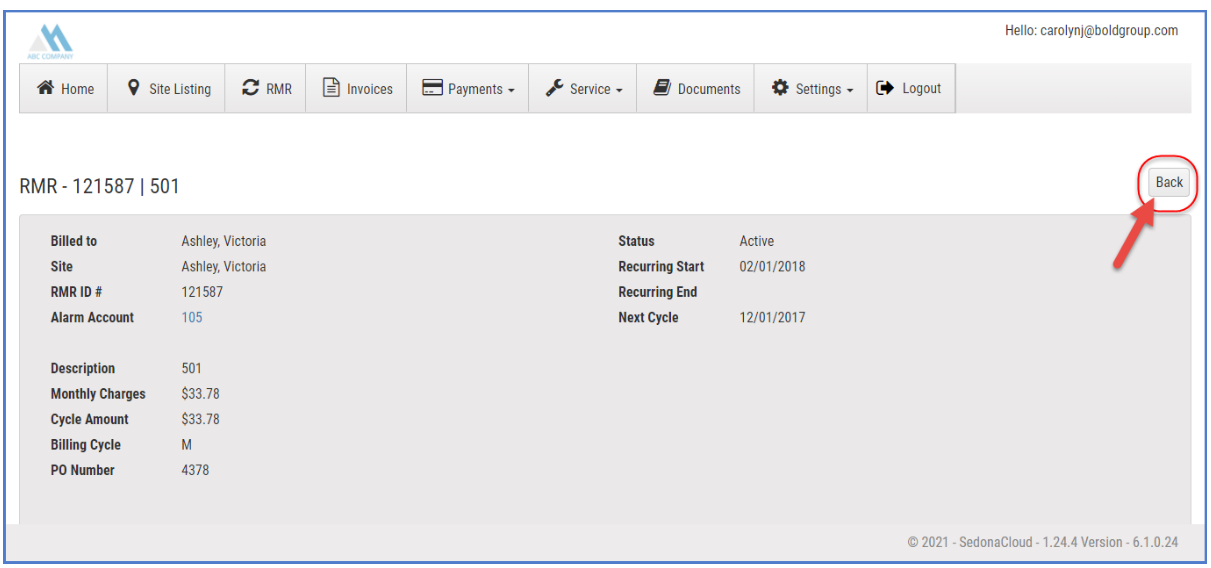
RMR Tab*

When clicking on the RMR Tab, all active recurring lines associated with all Sites and Systems will be listed in the grid. To view the details of a particular recurring line, click on the RMR ID link.

Note: If a recurring line has a recurring end date in the future, it can only be viewed by checking the Cancelled RMR's checkbox.



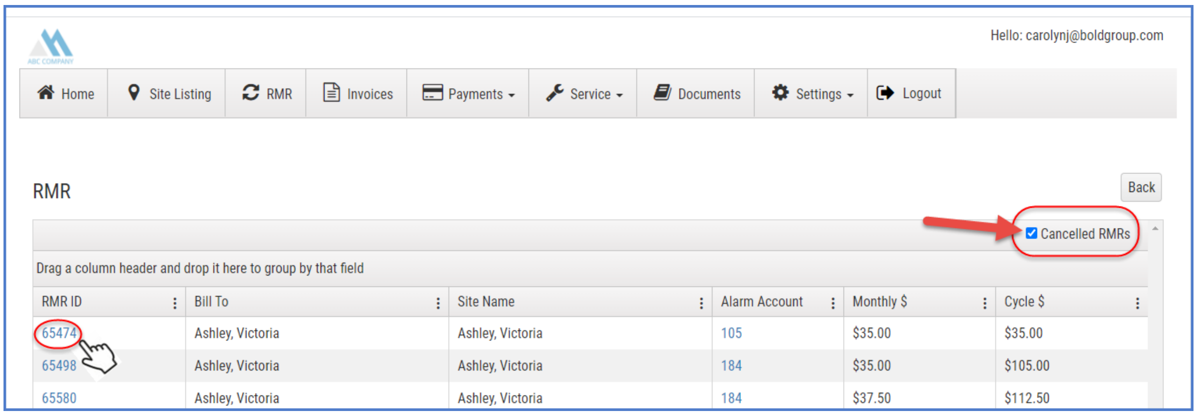
When clicking on a RMR ID link, detailed information will be displayed for that recurring line. To return to the RMR listing, click on the Back button.



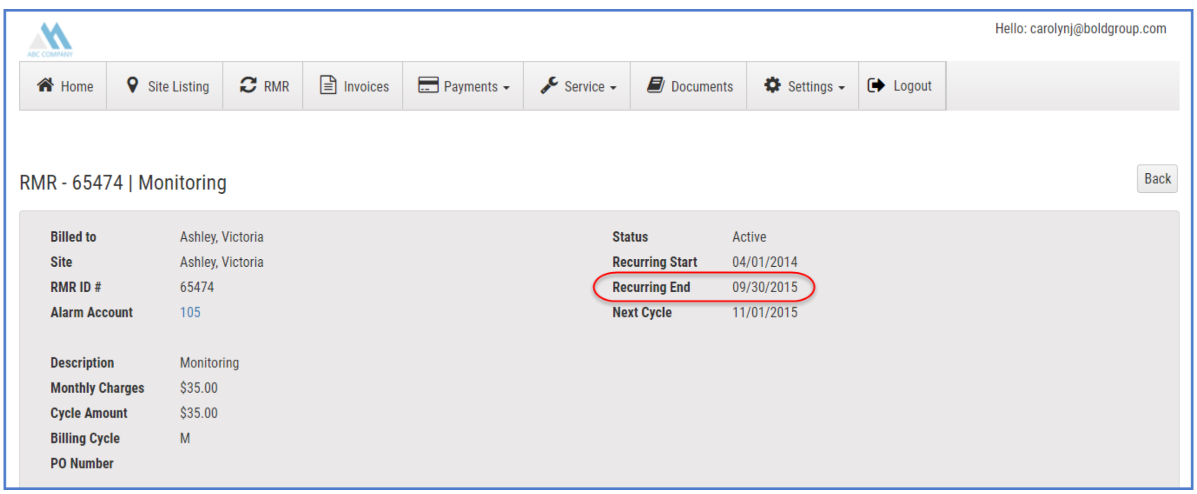
Cancelled RMR

On the RMR Tab is an option to view Cancelled RMR. When checking this box, all active and cancelled recurring lines will be displayed. If a recurring line has a recurring end date in the future, it can only be viewed by checking the Cancelled RMR's checkbox.

Note: If the recurring line was cancelled because of a rate increase, it will be listed if the Cancelled RMR's checkbox is selected.



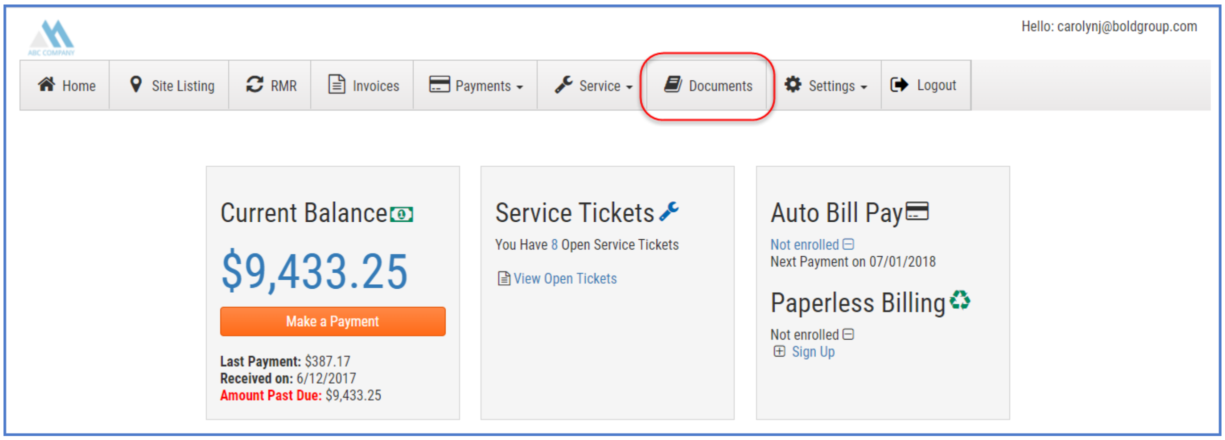
Recurring lines where there is a date shown in the Recurring End field are cancelled lines.



Documents Tab*

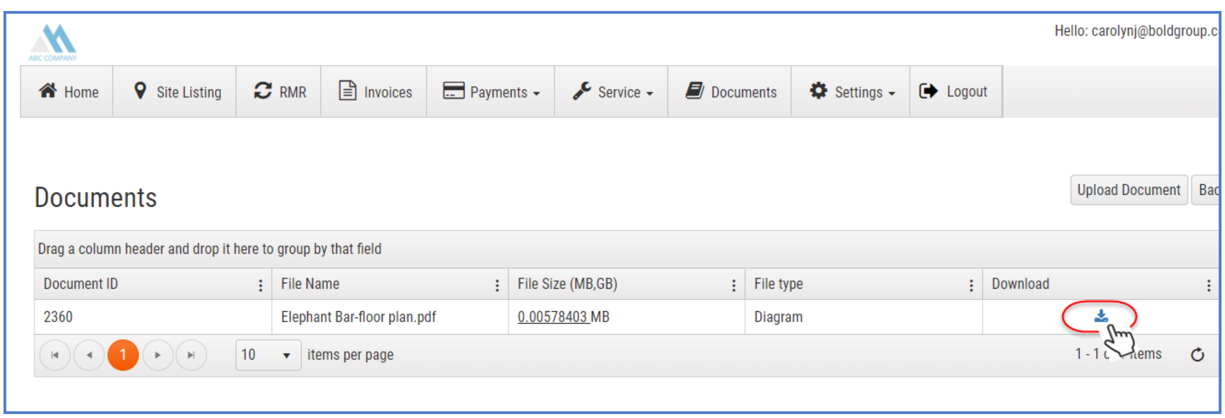
To have access to this feature, your company must purchase the add-on module, SedonaDocs.

After clicking on the Documents Tab, any documents saved with a security access level of 1 that are attached to a customer, site, system or ticket will be displayed in a listing. The customer is able to open the document for viewing and may download the document. The customer may also upload documents from this location.



Download Document

Once the list of documents is displayed, the customer may open the document for viewing or downloading by clicking on the download icon in the Download column of the documents grid.

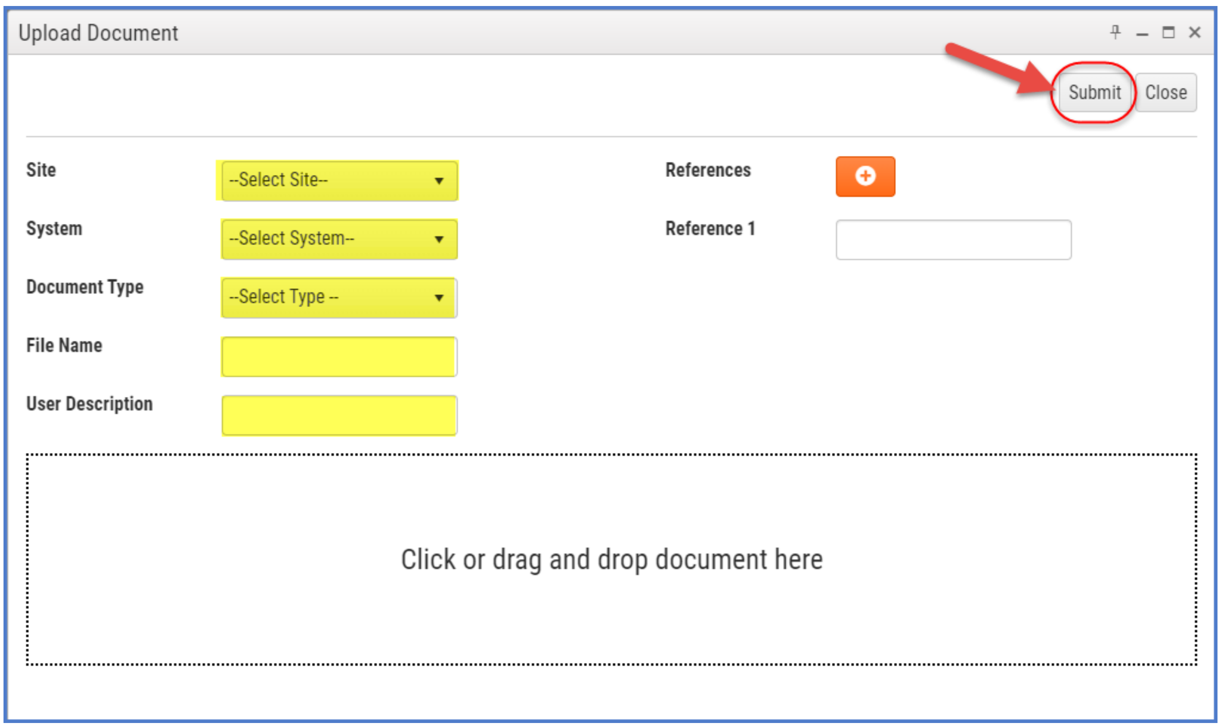


Upload Document

Once the Upload Document form is displayed, the customer must populate the fields highlighted in yellow as displayed in the illustration below:

- Site – Make a selection from the drop-down list
- System - Make a selection from the drop-down list
- Document Type - Make a selection from the drop-down list
- File Name – Whether you drag and drop a file or use your file explorer, this field will automatically populate with the name of the file being uploaded
- User Description – Type in a brief description of the document

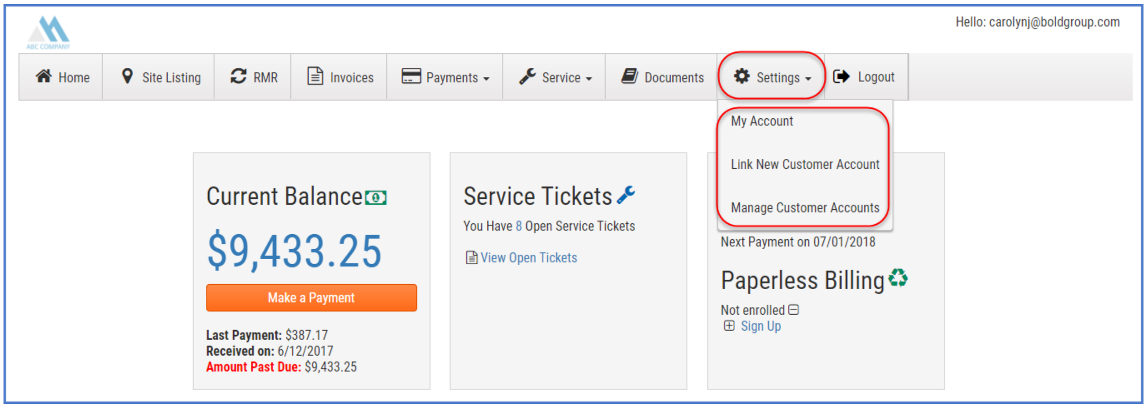
When finished, click the Submit button. If all required fields were populated, the customer will receive a confirmation message that the file upload was successful.



Settings Tab*

When clicking on the Settings Tab, three options are available:

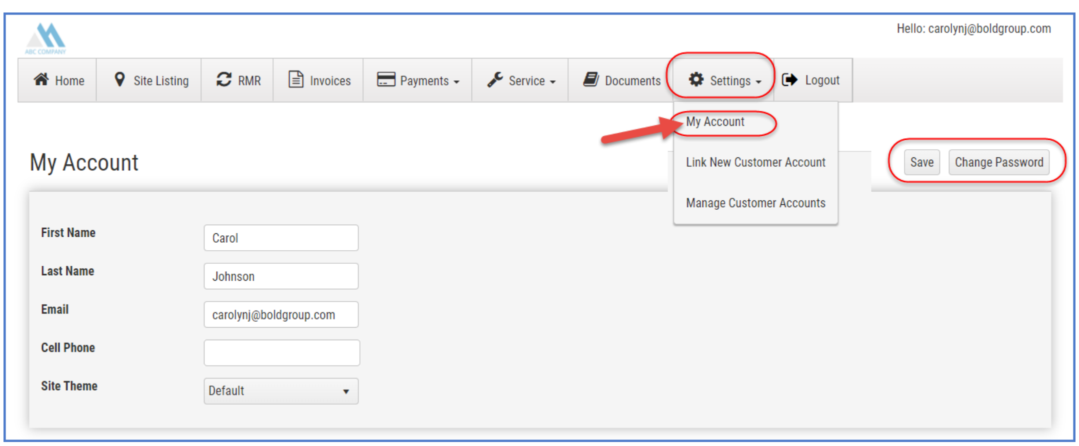
- My Account
- Link New Customer Account
- Manage Customer Accounts



My Account

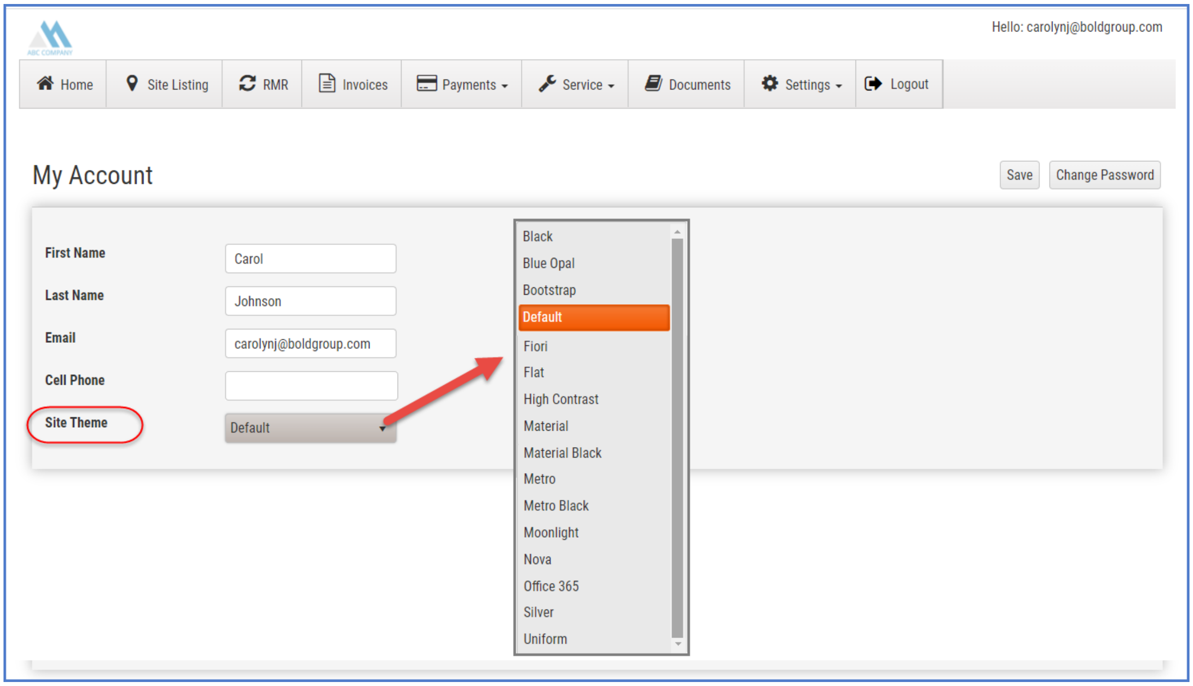
When clicking on the My Account option from the Settings Tab, the customer is able to do the following:

- On the My Account page, change or update any of the following information listed below.
  - First Name
  - Last Name
  - Email
  - Cell Phone
  - Site Theme
  - Change Password



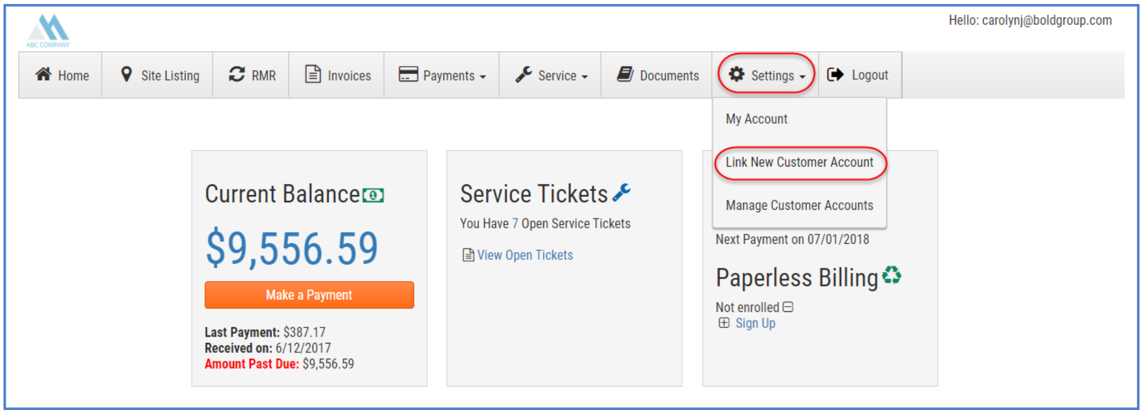
Site Theme

The Site Theme option allows the customer to change the color scheme used in SedonaWeb.

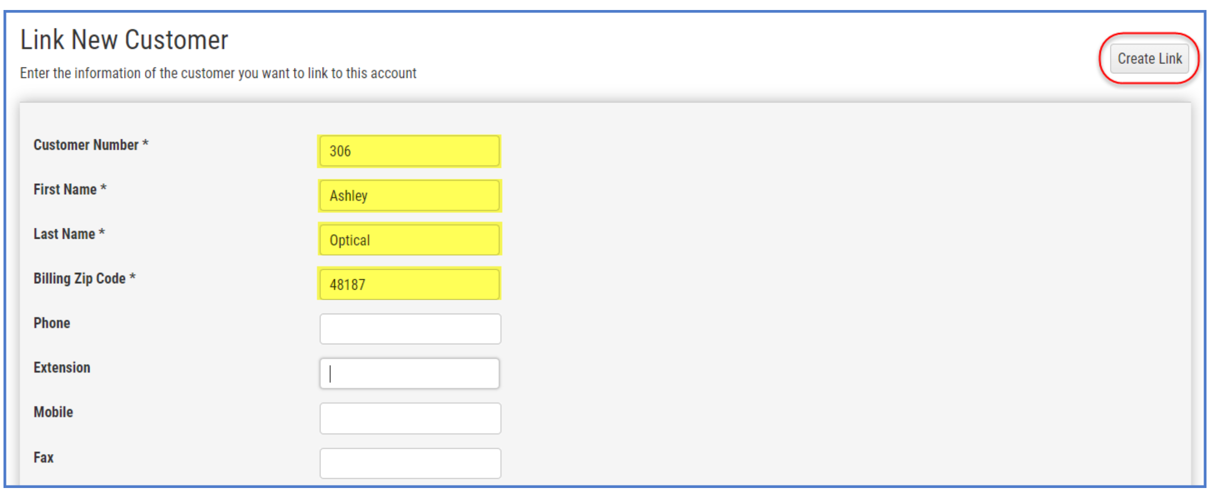


Link New Customer Account

If a customer has more than one customer account, when clicking on the Link New Customer Account option from the Settings Tab, they are able to add additional customers to which they will have access when logging into their SedonaWeb account.

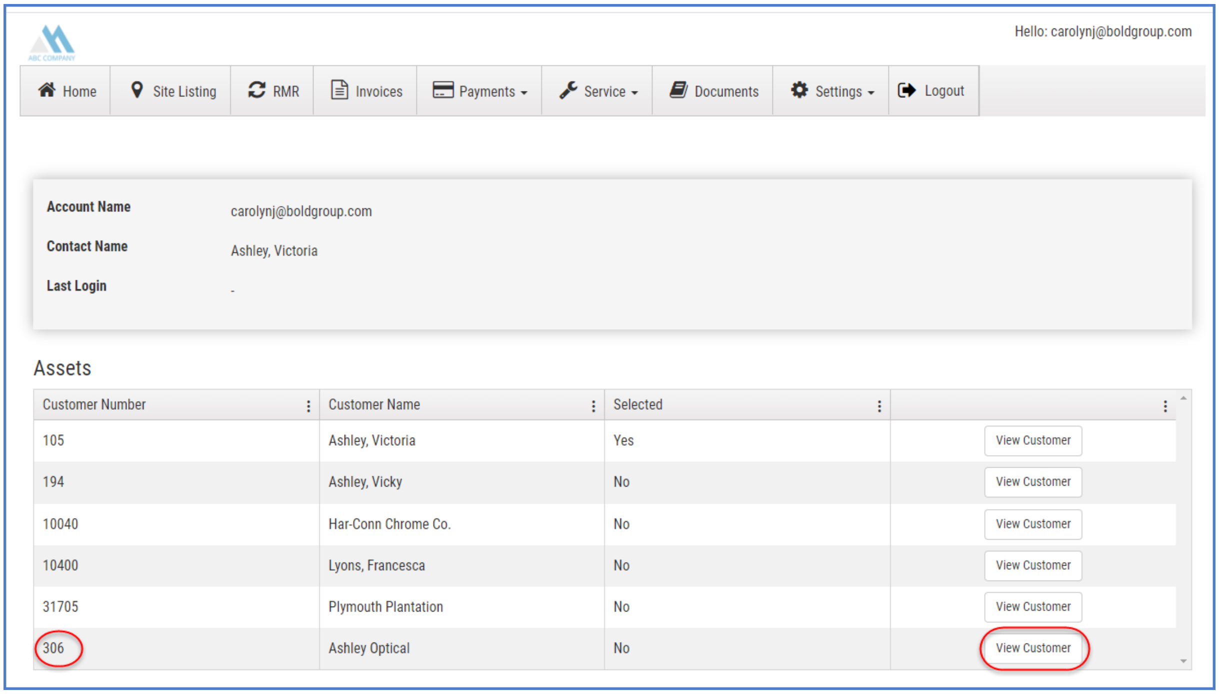


After clicking on the Link New Customer Account from the Settings tab, the Link New Customer form will be displayed. There a four required fields on this form: Customer Number, First Name, Last Name and Billing Zip Code. The telephone number fields are optional. Once these fields have been populated, click on the Create Link button.



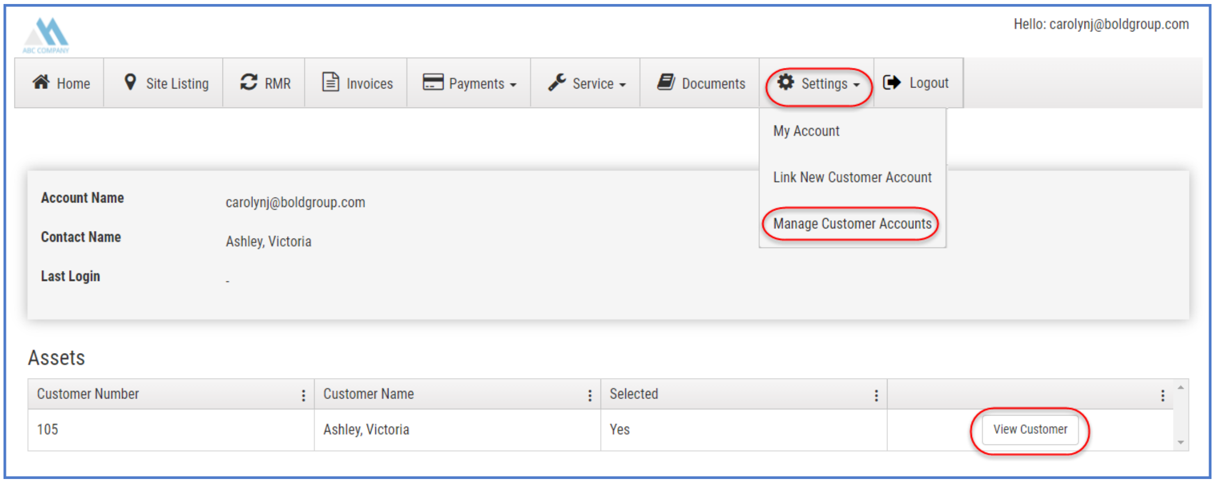
If valid information was entered for the customer to be linked, a listing of all customers linked will be displayed in the listing. To work with one of the linked customers, click on the View Customer button on the customer row desired.

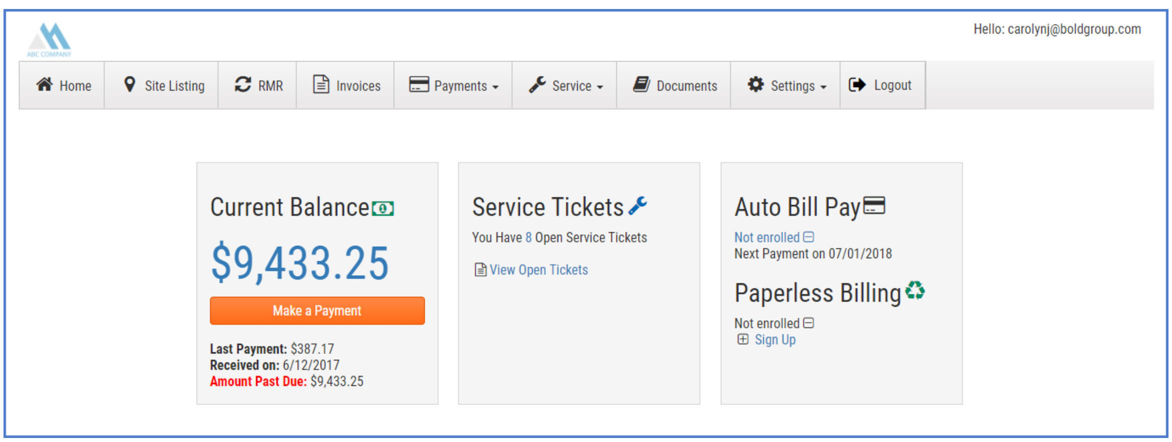
In the example below, the registered customer is linked to six different customer accounts.



Manage Customer Accounts

When clicking on the Manage Customer Accounts option from the Settings Tab, the customer's email address and contact name are displayed in the first panel of the page. In the next panel below, under the header of Assets, will be a list of all customer accounts linked to this customer login. When clicking on the View Customer button, the main dashboard will be displayed for the customer.

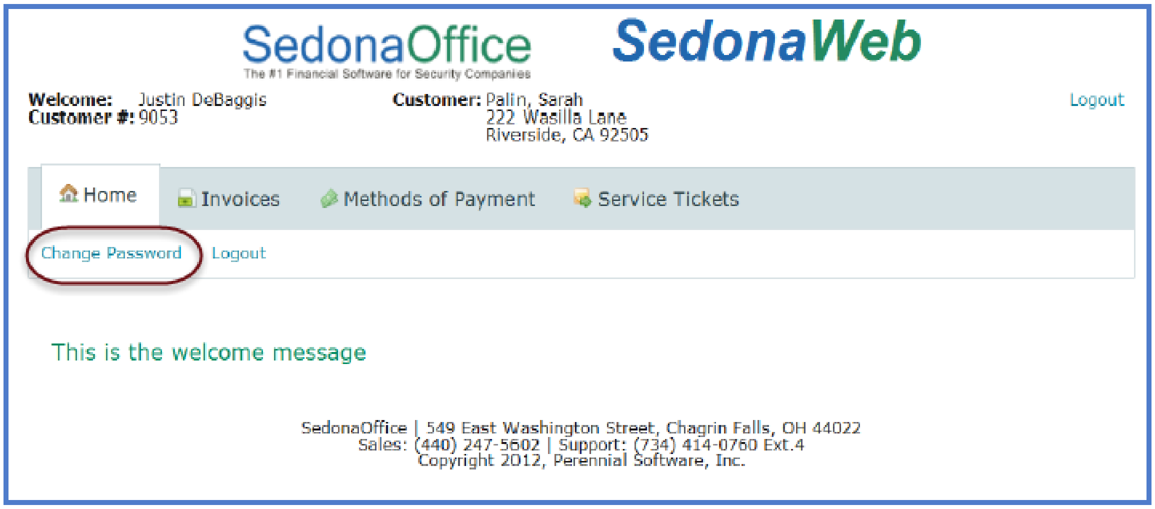




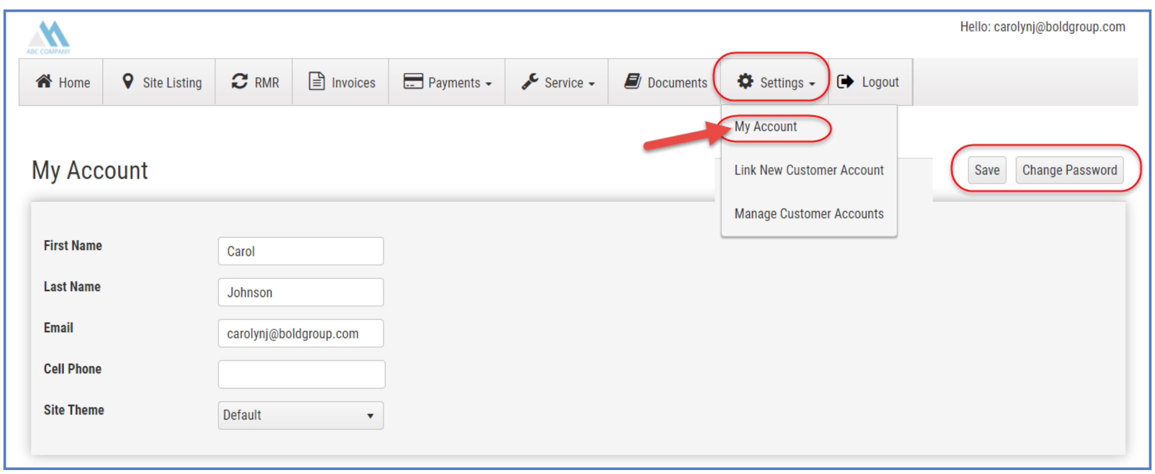
Change Password

The Change Password option has been relocated. In SedonaWeb 1.0, this option was a link at the upper right of the home page. This is now an option under the Settings tab/My Account.

SedonaWeb 1.0



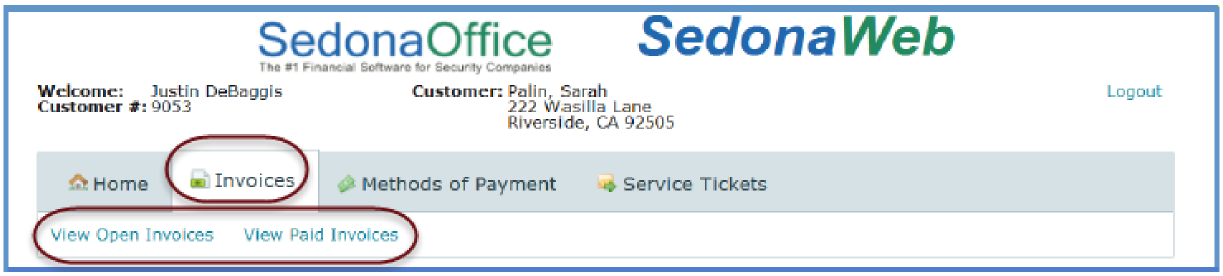
SedonaWeb 2.0



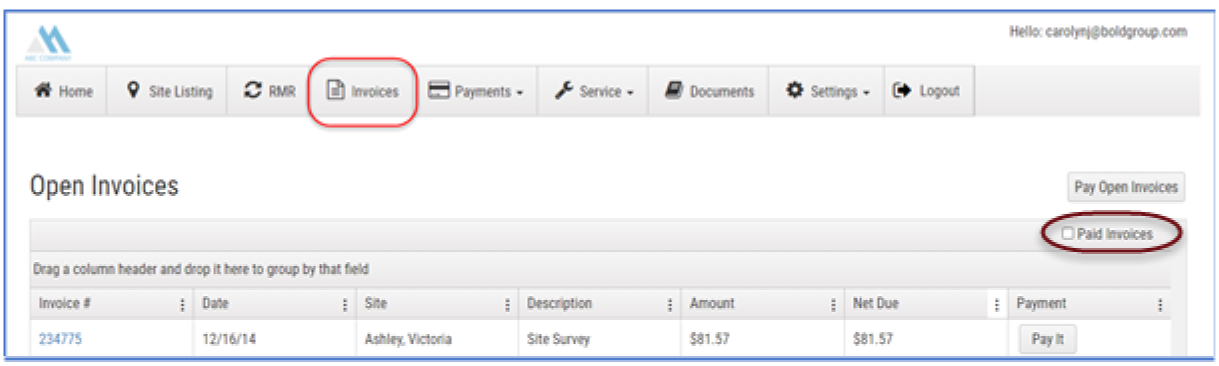
Invoices Tab

A change has been made to access paid invoices. In version 1.0, when clicking on the Invoices tab, two links were available to view open invoices and paid invoices. In version 2.0, after clicking on the Invoices tab, all open invoices are automatically displayed in the grid. To view paid invoices, a checkbox has been added at the upper right above the grid to toggle between open and paid invoices.

SedonaWeb 1.0



SedonaWeb 2.0

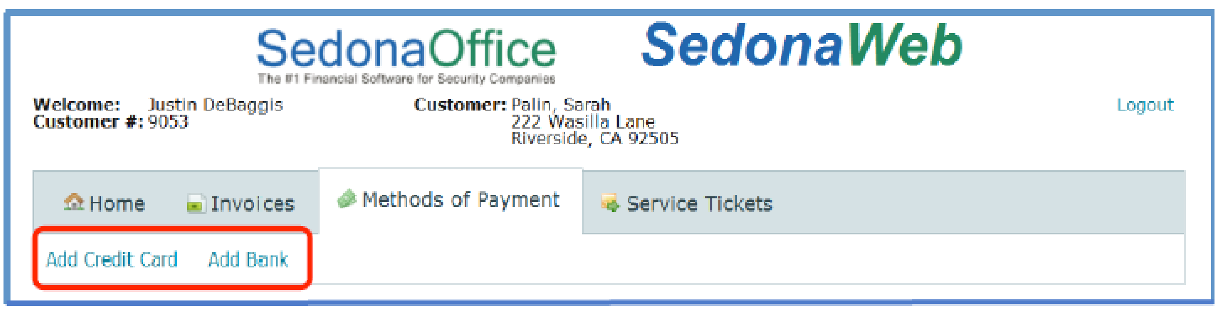


Payments Tab*

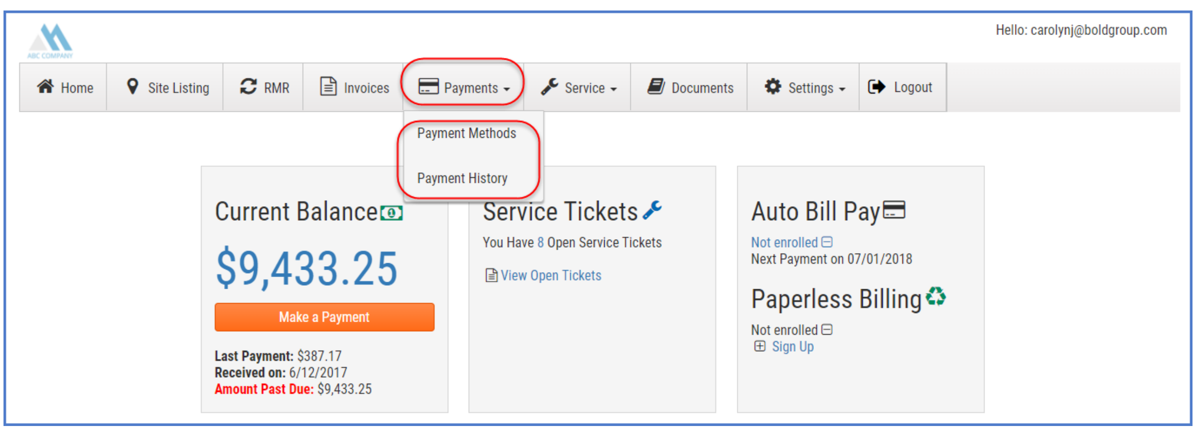
In version 1.0, this tab was labeled, Methods of Payment, and displayed the options of Add Credit Card and Add Bank when clicking on this tab. In version 2.0, this tab is now labeled Payments, and contains two options; Payment Methods and Payment History. The Payment History option is a new feature added to SedonaWeb 2.0, and allows a user to view the payment history for the customer. In version 2.0, you would select the Payment Methods option to add a new credit card or customer bank.

Note: Only payments made with a customer credit card or customer bank account is displayed within the payment history. Any payments posted in SedonaOffice by check are not listed in this section.

SedonaWeb 1.0



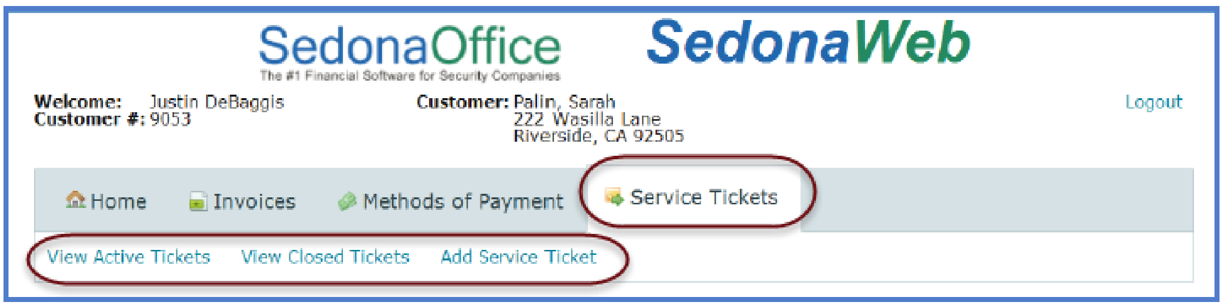
SedonaWeb 2.0



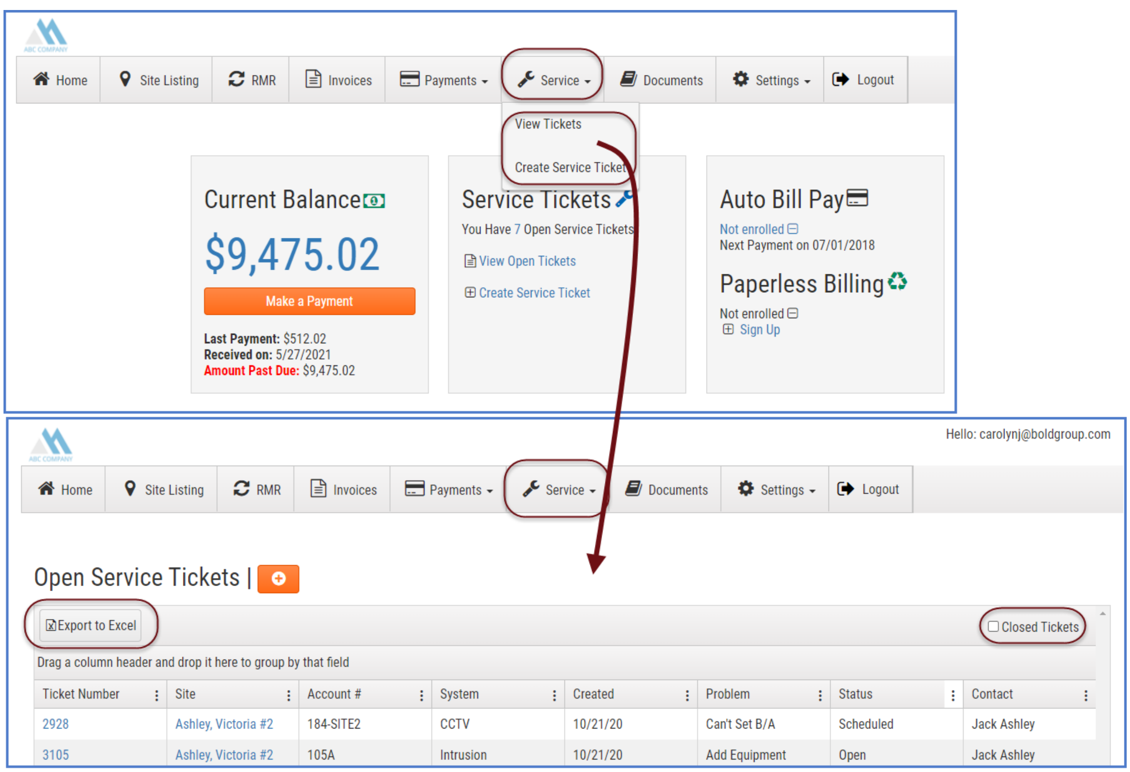
Service Tab*

In version 1.0, this tab was labeled Service Tickets, and displayed the options of View Active Tickets, View Closed Tickets and Add Service Ticket when clicking on this tab. In version 2.0, this tab is now labeled Service. When clicking on the Service tab, two options are displayed; View Tickets and Create Service Ticket. When selecting the View Tickets option, a second form will load displaying all open tickets. At the upper right area above the ticket listing, is a checkbox labeled Closed Tickets. Selecting this option will changed the listing to all closed tickets.

At the upper left area above the ticket listing, is a new button labeled Export to Excel. This is a new feature for SedonaWeb 2.0. Users are able to export a list of open or closed tickets.



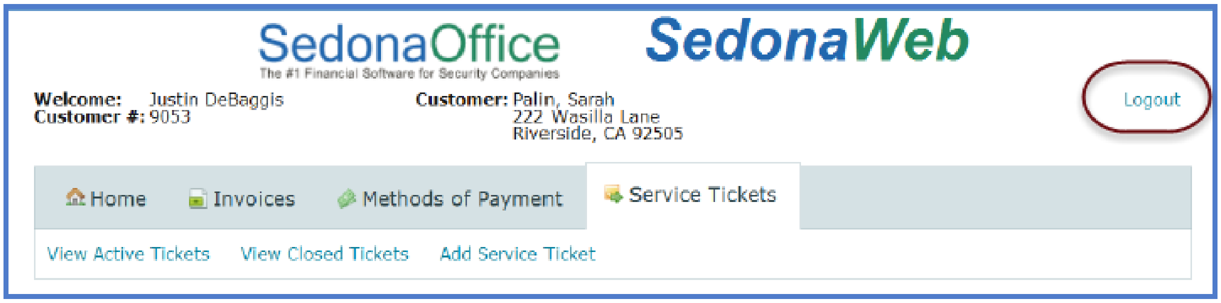
SedonaWeb 2.0



Logout

The Logout option has been relocated. In SedonaWeb 1.0, this option was a link at the upper right of the home page. In version 2.0, this is now a tab on the home page.

SedonaWeb 1.0



SedonaWeb 2.0