



SedonaWeb Changes from version 1.0 to 2.0

May 2021

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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:

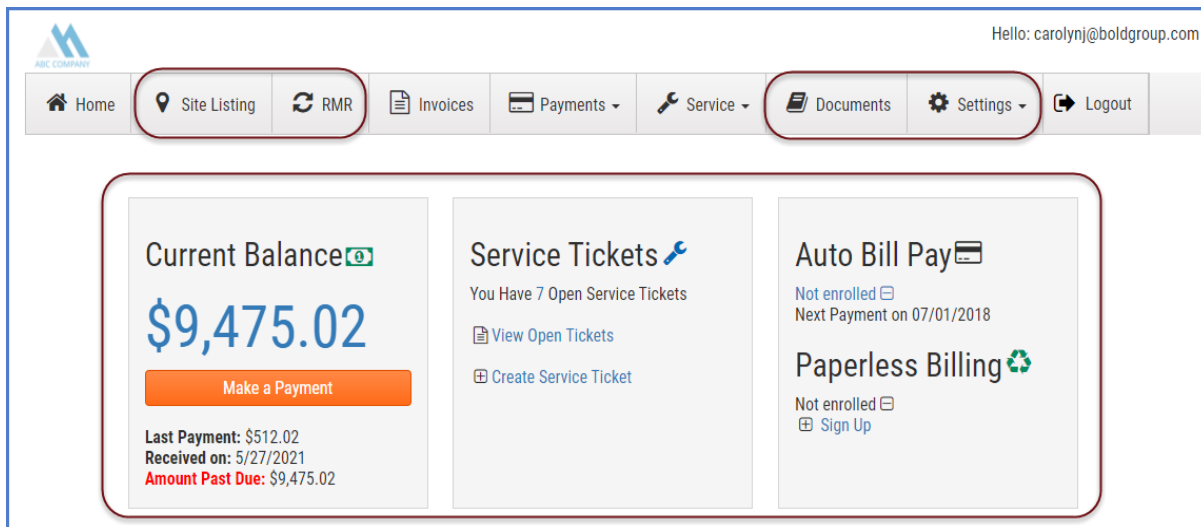
- Site Listing
- RMR
- Documents
- Settings
- Three information panels

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

Home Page SedonaWeb 1.0

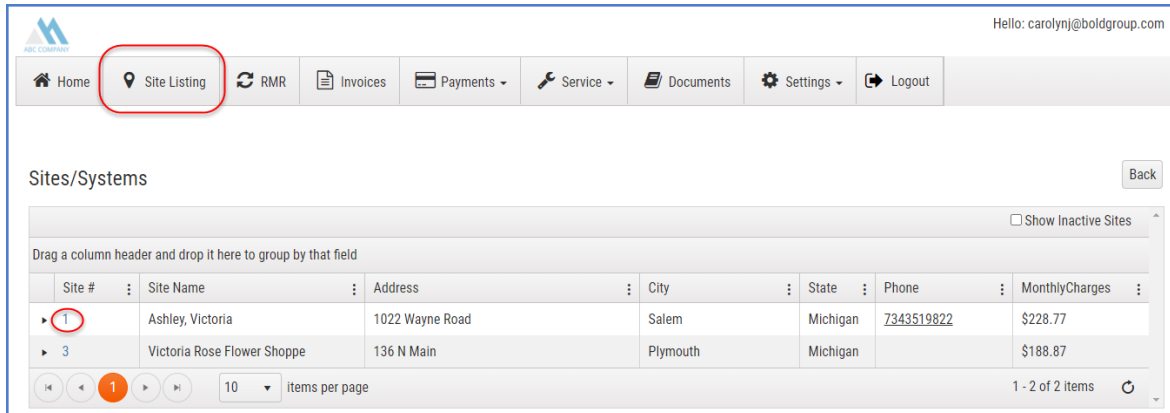


Home Page SedonaWeb 2.0



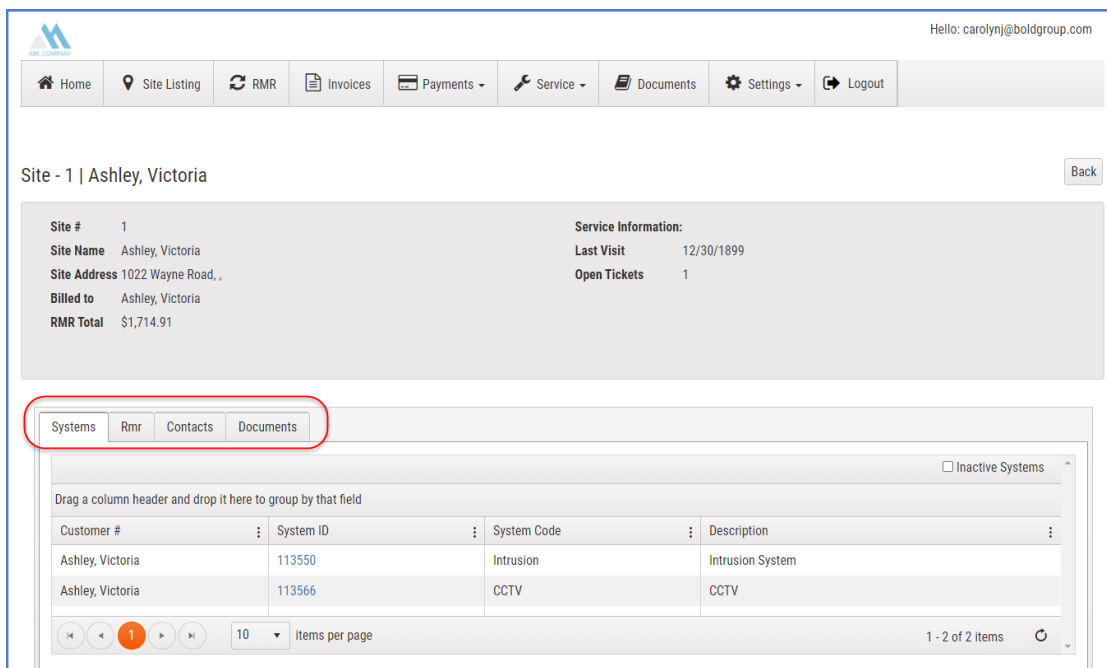
Site Listing Tab*

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.



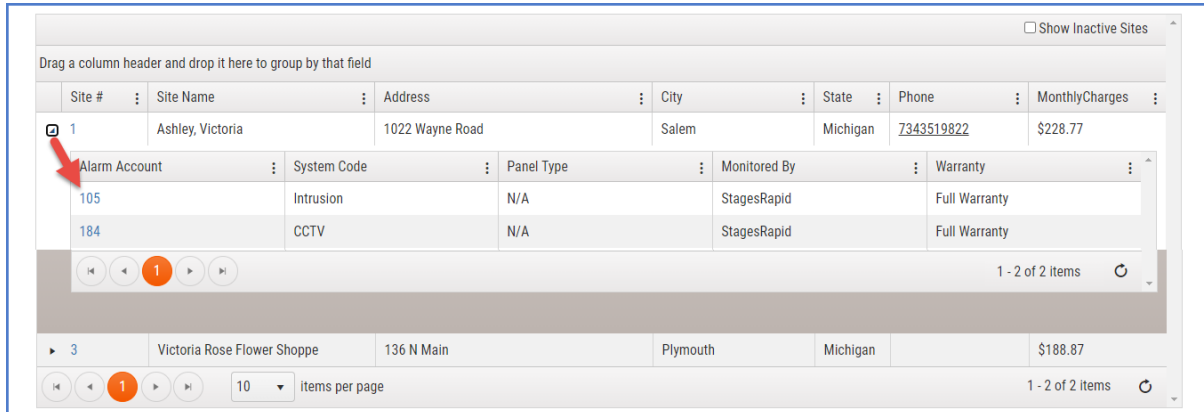
Site Details

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.



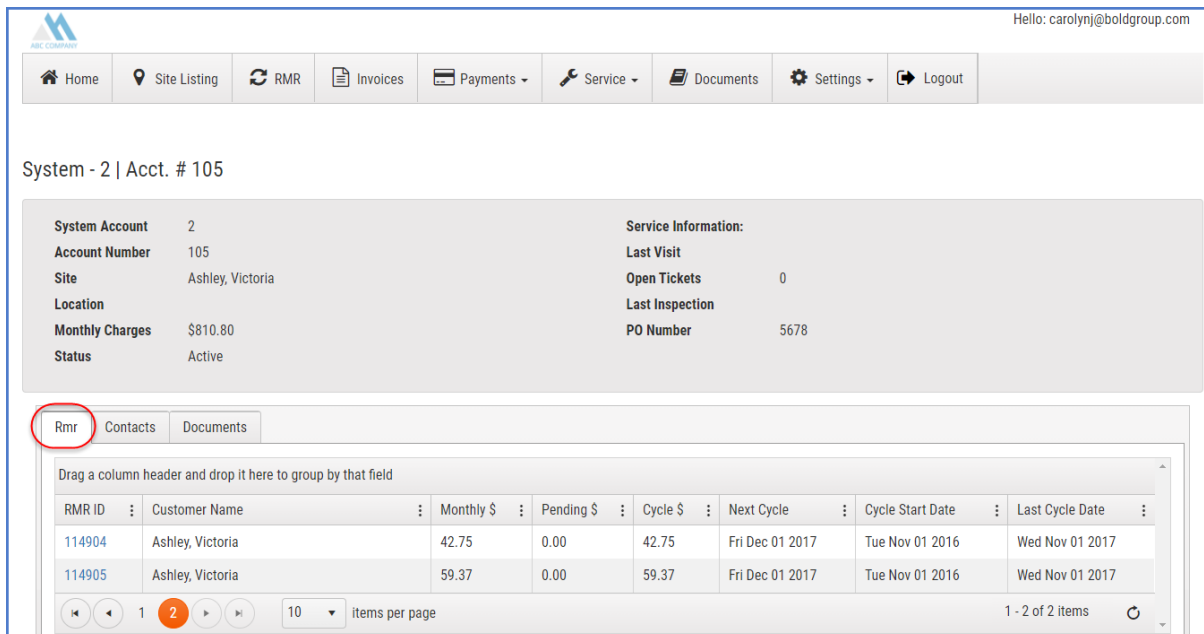
Site System Details

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.



The screenshot shows a web interface for site management. At the top right, there is a checkbox labeled "Show Inactive Sites". Below this is a header for a table: "Drag a column header and drop it here to group by that field". The table has columns: Site #, Site Name, Address, City, State, Phone, and MonthlyCharges. The first row is for Site # 1, Ashley, Victoria, 1022 Wayne Road, Salem, Michigan, 7343519822, with a MonthlyCharges of \$228.77. To the left of the Site # 1 is a red arrow pointing to a small square icon. Below the site row is a sub-table for Alarm Accounts with columns: Alarm Account, System Code, Panel Type, Monitored By, and Warranty. Two rows are shown: Alarm Account 105 (Intrusion, N/A, StagesRapid, Full Warranty) and Alarm Account 184 (CCTV, N/A, StagesRapid, Full Warranty). At the bottom of the sub-table are navigation arrows and "1 - 2 of 2 Items". Below the sub-table is another row for Site # 3, Victoria Rose Flower Shoppe, 136 N Main, Plymouth, Michigan, with a MonthlyCharges of \$188.87. At the bottom of the main table are navigation arrows, a dropdown for "10" items per page, and "1 - 2 of 2 Items".

Site #	Site Name	Address	City	State	Phone	MonthlyCharges
1	Ashley, Victoria	1022 Wayne Road	Salem	Michigan	7343519822	\$228.77
Alarm Account						
105	Intrusion	N/A	StagesRapid	Full Warranty		
184	CCTV	N/A	StagesRapid	Full Warranty		
3	Victoria Rose Flower Shoppe	136 N Main	Plymouth	Michigan		\$188.87



The screenshot shows the details for System - 2 | Acct. # 105. At the top right, it says "Hello: carolynj@boldgroup.com". Below this is a navigation bar with icons for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The main content area is titled "System - 2 | Acct. # 105". It contains two columns of information. The left column lists: System Account (2), Account Number (105), Site (Ashley, Victoria), Location, Monthly Charges (\$810.80), and Status (Active). The right column is titled "Service Information:" and lists: Last Visit, Open Tickets (0), Last Inspection, and PO Number (5678). Below this is a tabbed interface with three tabs: Rmr (circled in red), Contacts, and Documents. The Rmr tab is active and shows a table with columns: RMR ID, Customer Name, Monthly \$, Pending \$, Cycle \$, Next Cycle, Cycle Start Date, and Last Cycle Date. Two rows are shown: RMR ID 114904 (Ashley, Victoria, 42.75, 0.00, 42.75, Fri Dec 01 2017, Tue Nov 01 2016, Wed Nov 01 2017) and RMR ID 114905 (Ashley, Victoria, 59.37, 0.00, 59.37, Fri Dec 01 2017, Tue Nov 01 2016, Wed Nov 01 2017). At the bottom of the Rmr table are navigation arrows, a dropdown for "10" items per page, and "1 - 2 of 2 Items".

RMR ID	Customer Name	Monthly \$	Pending \$	Cycle \$	Next Cycle	Cycle Start Date	Last Cycle Date
114904	Ashley, Victoria	42.75	0.00	42.75	Fri Dec 01 2017	Tue Nov 01 2016	Wed Nov 01 2017
114905	Ashley, Victoria	59.37	0.00	59.37	Fri Dec 01 2017	Tue Nov 01 2016	Wed Nov 01 2017

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.

HELIX COMPANY Hello: carolynj@boldgroup.com

Home Site Listing RMR Invoices Payments Service Documents Settings Logout

RMR - 114904 | Monitoring Back

Billed to	Ashley, Victoria	Status	Active
Site	Ashley, Victoria	Recurring Start	11/01/2016
RMR ID #	114904	Recurring End	01/31/2018
Alarm Account	105	Next Cycle	12/01/2017
Description	Monitoring		
Monthly Charges	\$42.75		
Cycle Amount	\$42.75		
Billing Cycle	M		
PO Number			

Contacts Tab

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

Rmr **Contacts** Documents

Drag a column header and drop it here to group by that field

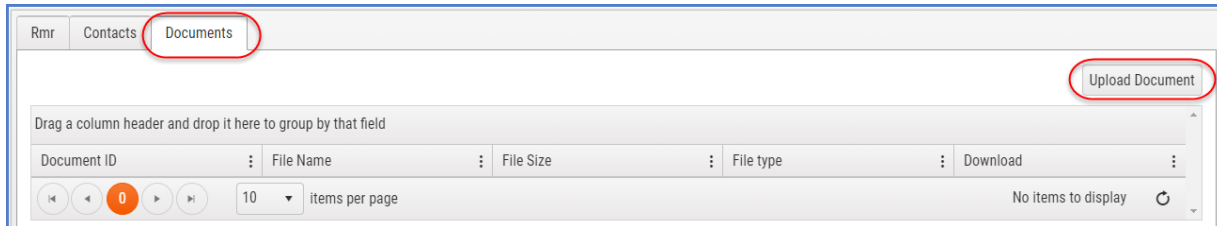
Name	Title	Phone	Email
Jack Ashley		73424870012245	
Carol Johnson		7344140760	carolynj@boldgroup.com

10 items per page 1 - 2 of 2 items

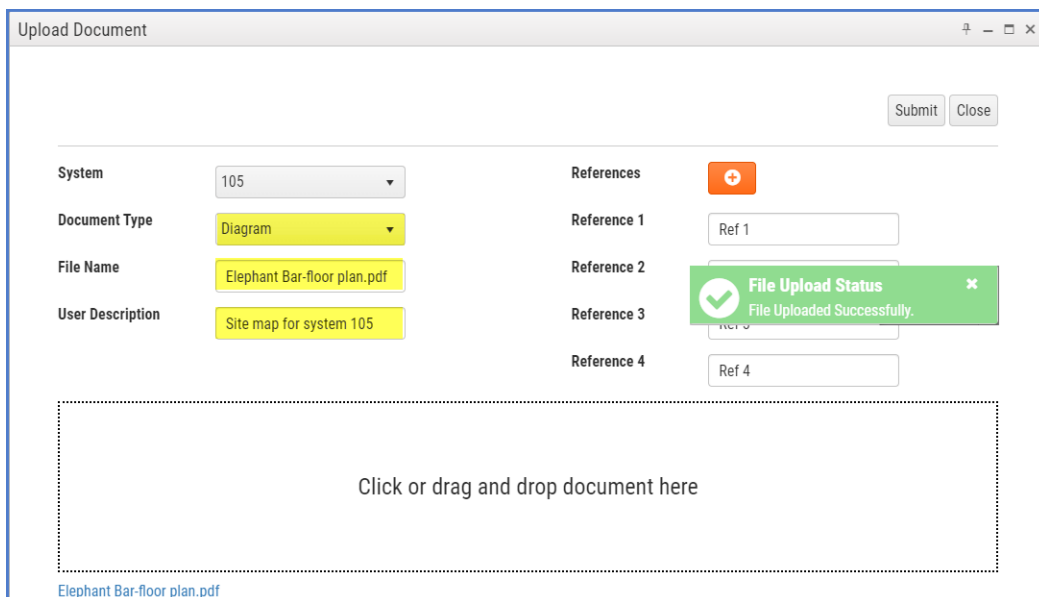
Documents Tab

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.

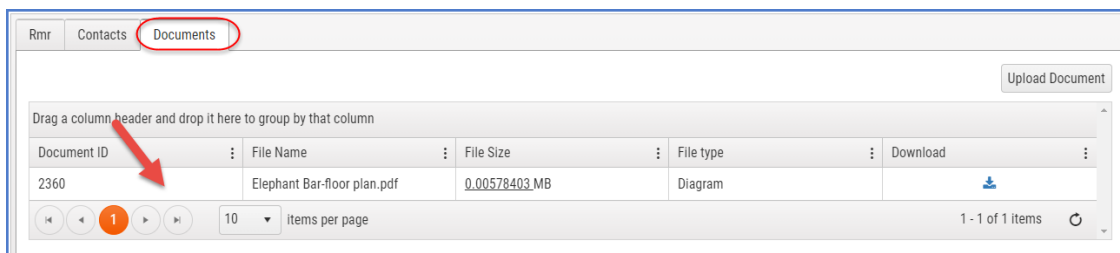
Note: All documents saved with a security level of 1 will be available for the customer.



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.

The screenshot shows the RMR listing page. The navigation bar includes Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The user is logged in as carolynj@boldgroup.com. The RMR listing table has the following data:

RMR ID	Bill To	Site Name	Alarm Account	Monthly \$	Cycle \$
121587	Ashley, Victoria	Ashley, Victoria	105	\$33.78	\$33.78
121588	Ashley, Victoria	Ashley, Victoria	105	\$29.75	\$89.25

At the bottom of the table, there are navigation controls for items per page (set to 10) and a '1 - 2 of 2 items' indicator. A 'Back' button is located in the top right corner of the RMR section.

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.

The screenshot shows the detailed view for RMR ID 121587. The page title is 'RMR - 121587 | 501'. The detailed information is as follows:

Billed to	Ashley, Victoria	Status	Active
Site	Ashley, Victoria	Recurring Start	02/01/2018
RMR ID #	121587	Recurring End	
Alarm Account	105	Next Cycle	12/01/2017
Description	501		
Monthly Charges	\$33.78		
Cycle Amount	\$33.78		
Billing Cycle	M		
PO Number	4378		

The 'Back' button is circled in red with an arrow pointing to it. The footer of the page reads '© 2021 - SedonaCloud - 1.24.4 Version - 6.1.0.24'.

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.

The screenshot shows the RMR management interface. At the top, there is a navigation bar with icons for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The user's email address, Hello: carolynj@boldgroup.com, is displayed in the top right corner. Below the navigation bar, the page title is "RMR". A "Back" button is located in the top right corner of the main content area. A red arrow points to a checkbox labeled "Cancelled RMRs" which is checked. Below this, there is a table with columns: RMR ID, Bill To, Site Name, Alarm Account, Monthly \$, and Cycle \$. The first row of the table has RMR ID 65474 circled in red, and a mouse cursor is hovering over it. The other rows have RMR IDs 65498 and 65580.

RMR ID	Bill To	Site Name	Alarm Account	Monthly \$	Cycle \$
65474	Ashley, Victoria	Ashley, Victoria	105	\$35.00	\$35.00
65498	Ashley, Victoria	Ashley, Victoria	184	\$35.00	\$105.00
65580	Ashley, Victoria	Ashley, Victoria	184	\$37.50	\$112.50

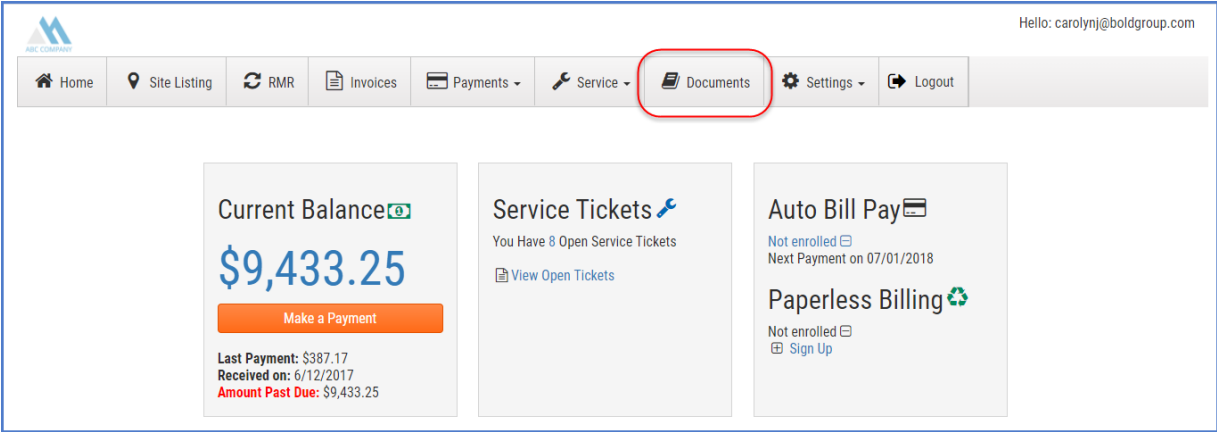
Recurring lines where there is a date shown in the Recurring End field are cancelled lines.

The screenshot shows the details for RMR - 65474 | Monitoring. The page title is "RMR - 65474 | Monitoring" and a "Back" button is in the top right corner. The details are organized into two columns. The left column contains: Billed to (Ashley, Victoria), Site (Ashley, Victoria), RMR ID # (65474), Alarm Account (105), Description (Monitoring), Monthly Charges (\$35.00), Cycle Amount (\$35.00), Billing Cycle (M), and PO Number. The right column contains: Status (Active), Recurring Start (04/01/2014), Recurring End (09/30/2015, circled in red), and Next Cycle (11/01/2015).


Billed to	Ashley, Victoria	Status	Active
Site	Ashley, Victoria	Recurring Start	04/01/2014
RMR ID #	65474	Recurring End	09/30/2015
Alarm Account	105	Next Cycle	11/01/2015
Description	Monitoring		
Monthly Charges	\$35.00		
Cycle Amount	\$35.00		
Billing Cycle	M		
PO Number			

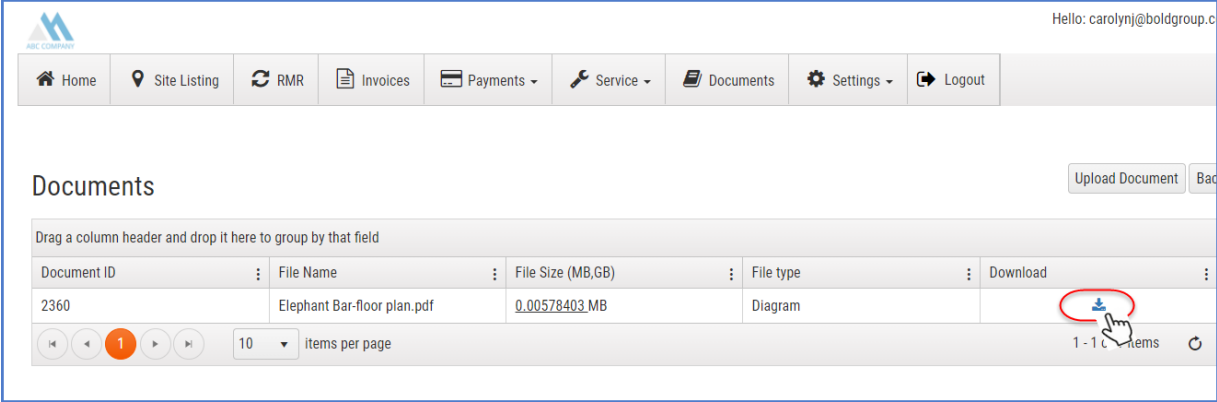
Documents Tab*

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.

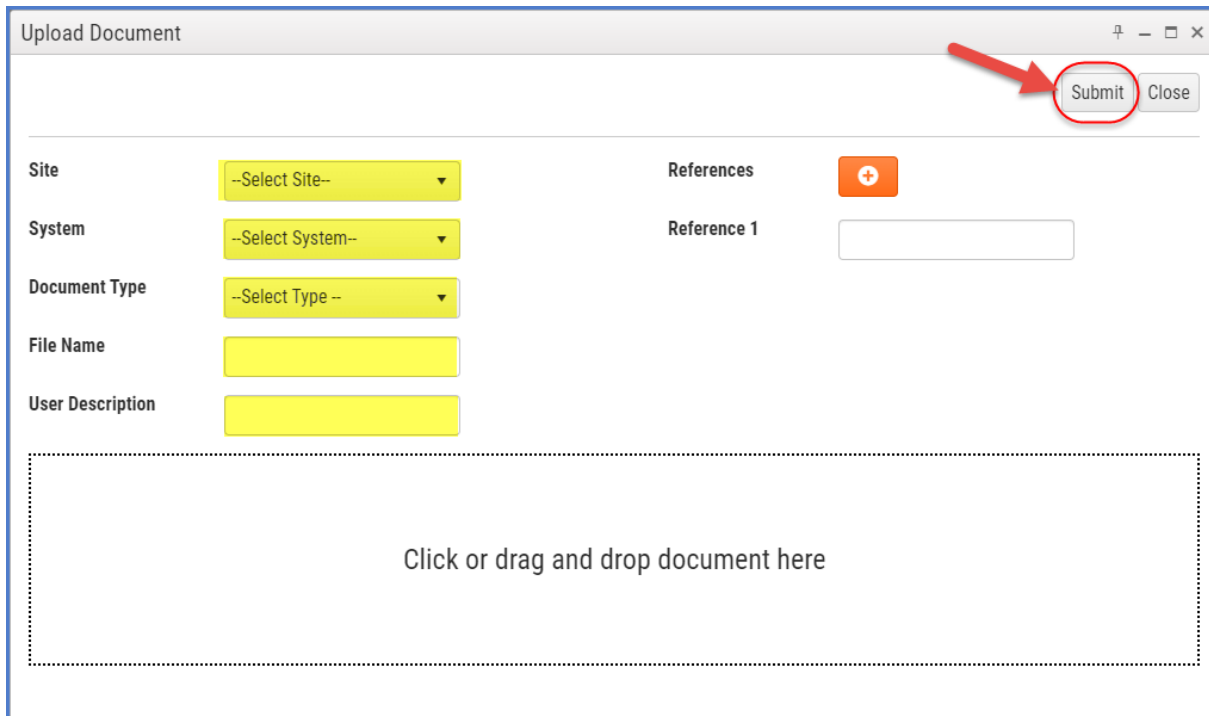


Upload Document

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.

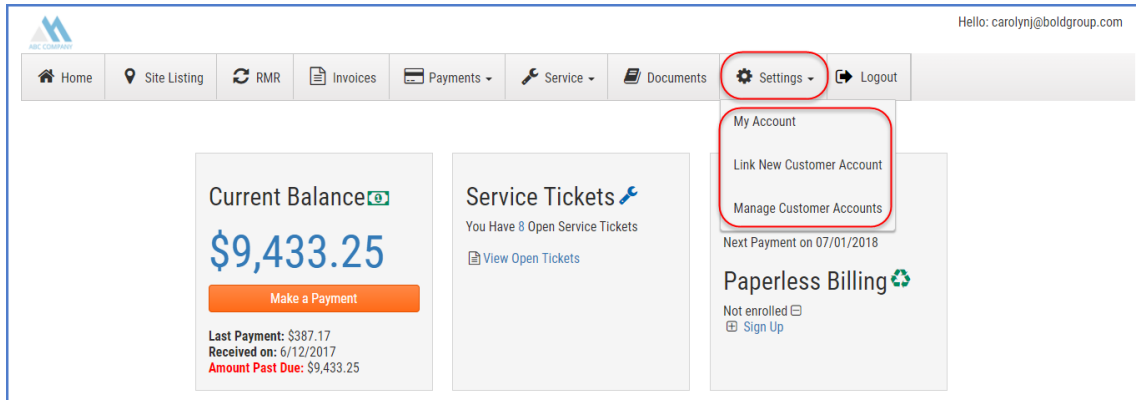


The screenshot shows a web form titled "Upload Document" with a standard window header. The form contains several fields: "Site", "System", and "Document Type" are dropdown menus with yellow backgrounds and "--Select Site--", "--Select System--", and "--Select Type --" respectively. "File Name" and "User Description" are text input fields with yellow backgrounds. To the right, there is a "References" section with an orange "+" button and a "Reference 1" text input field. At the bottom, a large dashed box contains the text "Click or drag and drop document here". In the top right corner, there are "Submit" and "Close" buttons. A red arrow points to the "Submit" button, which is circled in red.

Settings Tab*

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

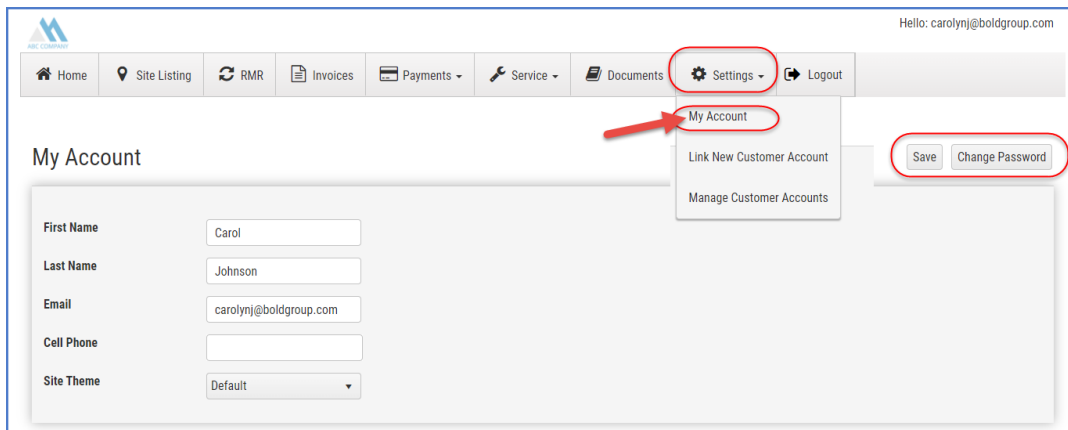
- My Account
- Link New Customer Account
- Manage Customer Accounts



My Account

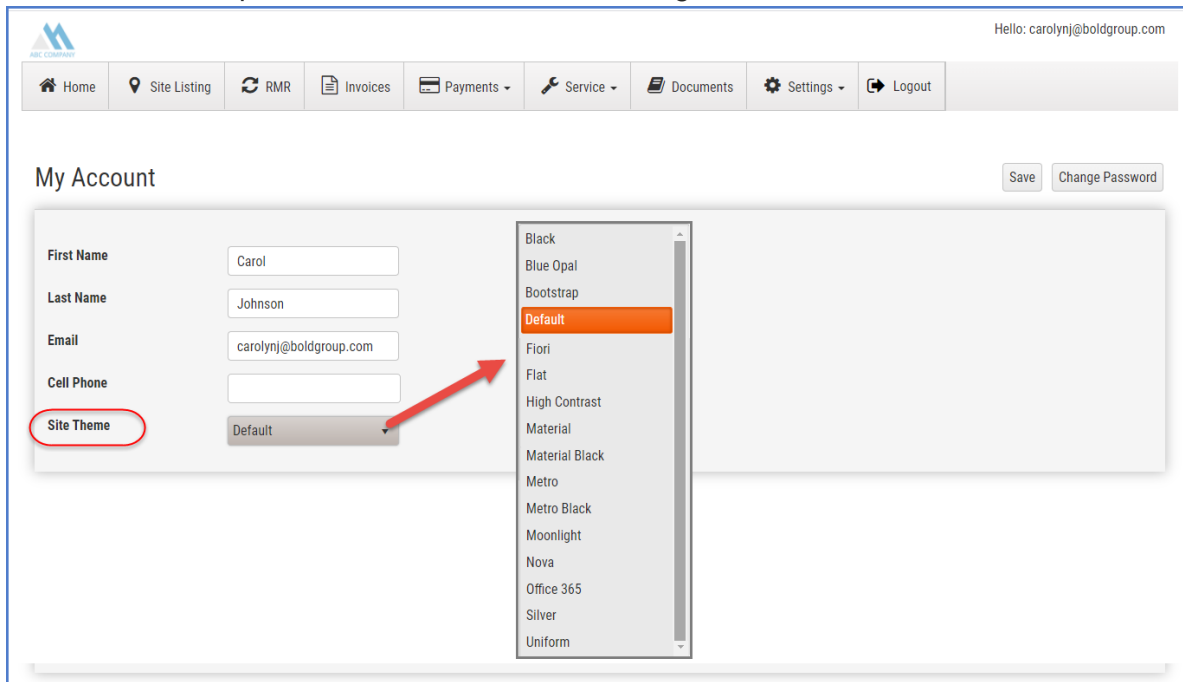
When clicking on the My Account option from the Settings Tab, the customer is able to do the following:

- 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



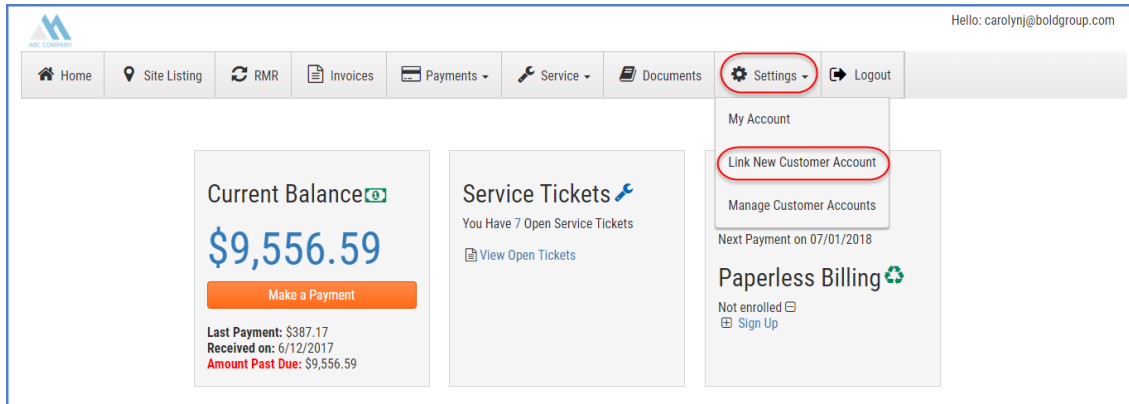
Site Theme

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 are 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.

A screenshot of the 'Link New Customer' form. The form title is 'Link New Customer' and the instruction is 'Enter the information of the customer you want to link to this account'. A 'Create Link' button is circled in red in the top right corner. The form contains the following fields:

- Customer Number *: 306
- First Name *: Ashley
- Last Name *: Optical
- Billing Zip Code *: 48187
- Phone: (empty)
- Extension: (empty)
- Mobile: (empty)
- Fax: (empty)

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.

The screenshot shows a web application interface. At the top right, it says "Hello: carolynj@boldgroup.com". Below this is a navigation bar with icons for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. Below the navigation bar is a summary box for the account:

Account Name carolynj@boldgroup.com
Contact Name Ashley, Victoria
Last Login -

Below the summary box is a section titled "Assets" containing a table with the following data:

Customer Number	Customer Name	Selected	
105	Ashley, Victoria	Yes	View Customer
194	Ashley, Vicky	No	View Customer
10040	Har-Conn Chrome Co.	No	View Customer
10400	Lyons, Francesca	No	View Customer
31705	Plymouth Plantation	No	View Customer
306	Ashley Optical	No	View Customer

In the table, the "306" in the Customer Number column and the "View Customer" button in the final column are circled in red.

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.

The screenshot shows a user interface with a navigation bar at the top containing icons for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The 'Settings' icon is circled in red. Below the navigation bar, a dropdown menu is open, showing options: My Account, Link New Customer Account, and Manage Customer Accounts (circled in red). To the left of the dropdown, account details are displayed: Account Name (carolynj@boldgroup.com), Contact Name (Ashley, Victoria), and Last Login (-). Below this is a section titled 'Assets' containing a table with columns: Customer Number, Customer Name, Selected, and an action column. The table has one row with values: 105, Ashley, Victoria, Yes, and a 'View Customer' button (circled in red).

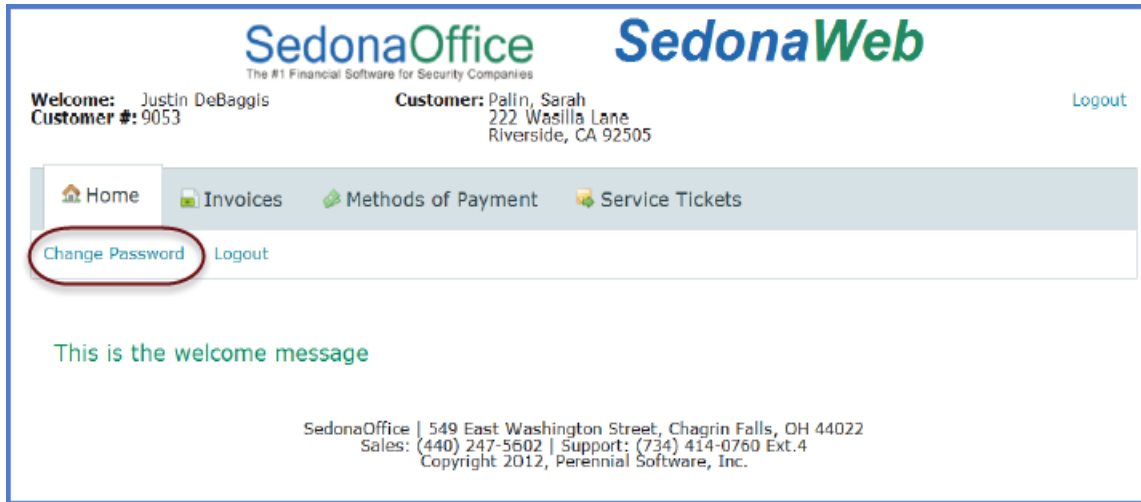
Customer Number	Customer Name	Selected	
105	Ashley, Victoria	Yes	View Customer

The screenshot shows a customer dashboard with three main panels. The first panel, 'Current Balance', displays a balance of \$9,433.25 with a 'Make a Payment' button. Below it, it shows 'Last Payment: \$387.17', 'Received on: 6/12/2017', and 'Amount Past Due: \$9,433.25'. The second panel, 'Service Tickets', shows 'You Have 8 Open Service Tickets' and a 'View Open Tickets' link. The third panel, 'Auto Bill Pay', shows 'Not enrolled' and 'Next Payment on 07/01/2018'. Below this is a 'Paperless Billing' section with 'Not enrolled' and a 'Sign Up' link.

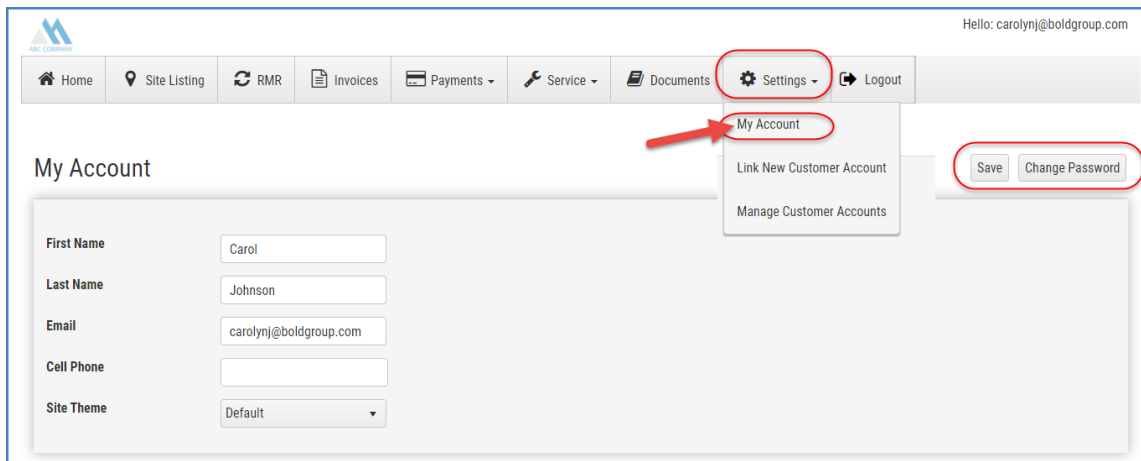
Change Password

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



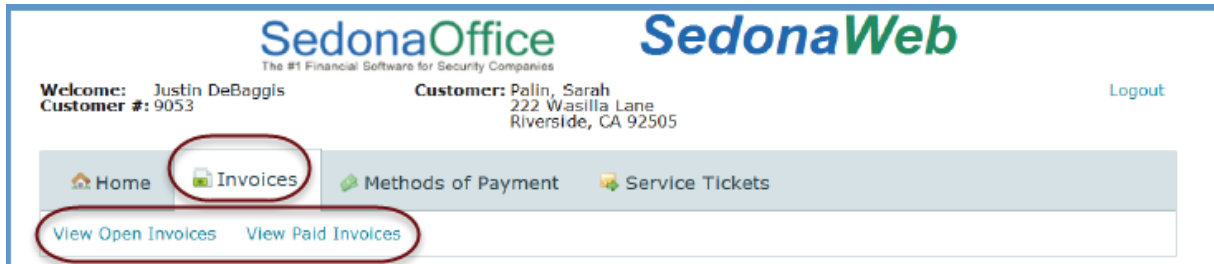
SedonaWeb 2.0



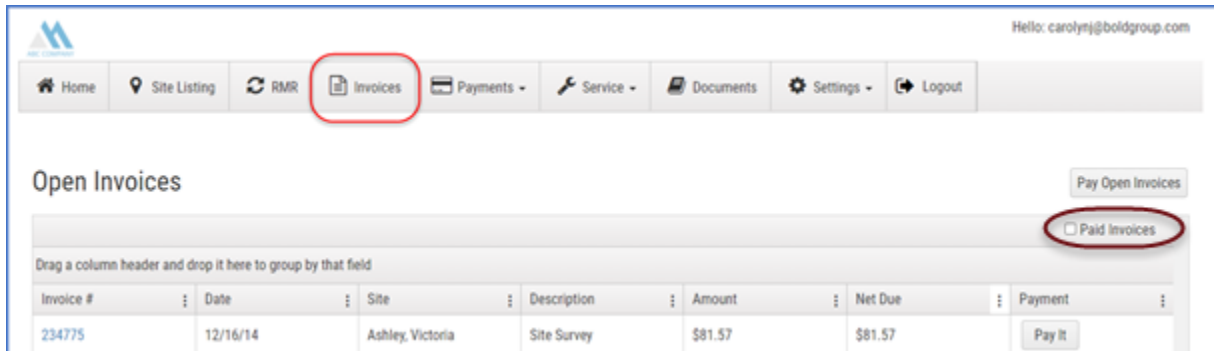
Invoices Tab

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

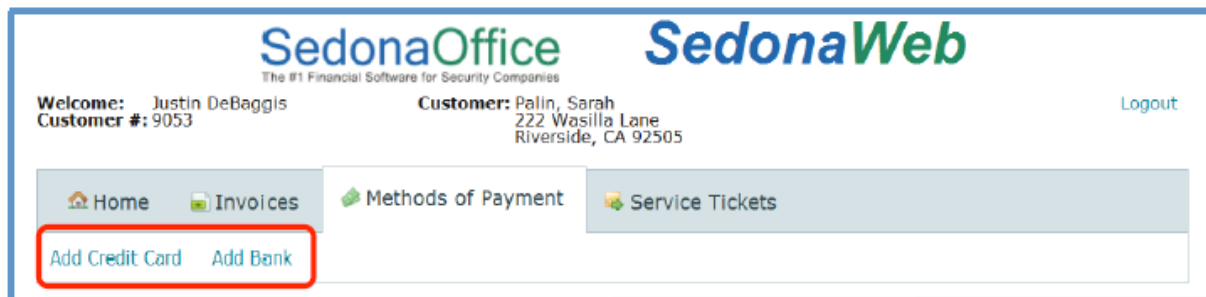


Payments Tab*

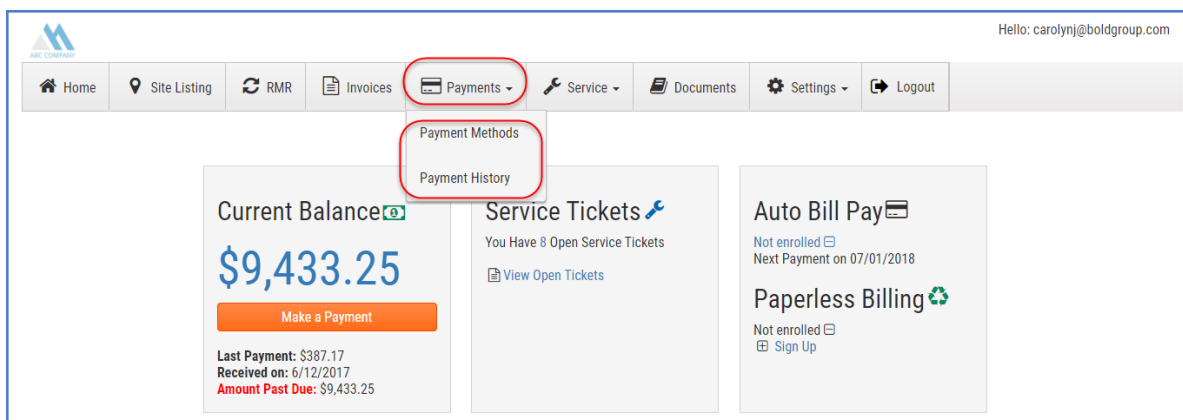
In version 1.0, this tab was labeled, Methods of Payment, and displayed the options of Add Credit Card and Add Bank when clicking on this tab. In version 2.0, this tab is now labeled Payments, and contains two options; Payment Methods and Payment History. The Payment History option is a new feature added 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



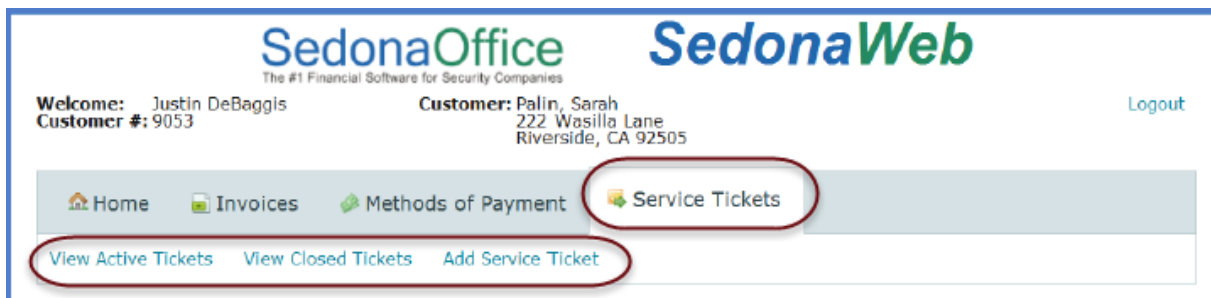
SedonaWeb 2.0



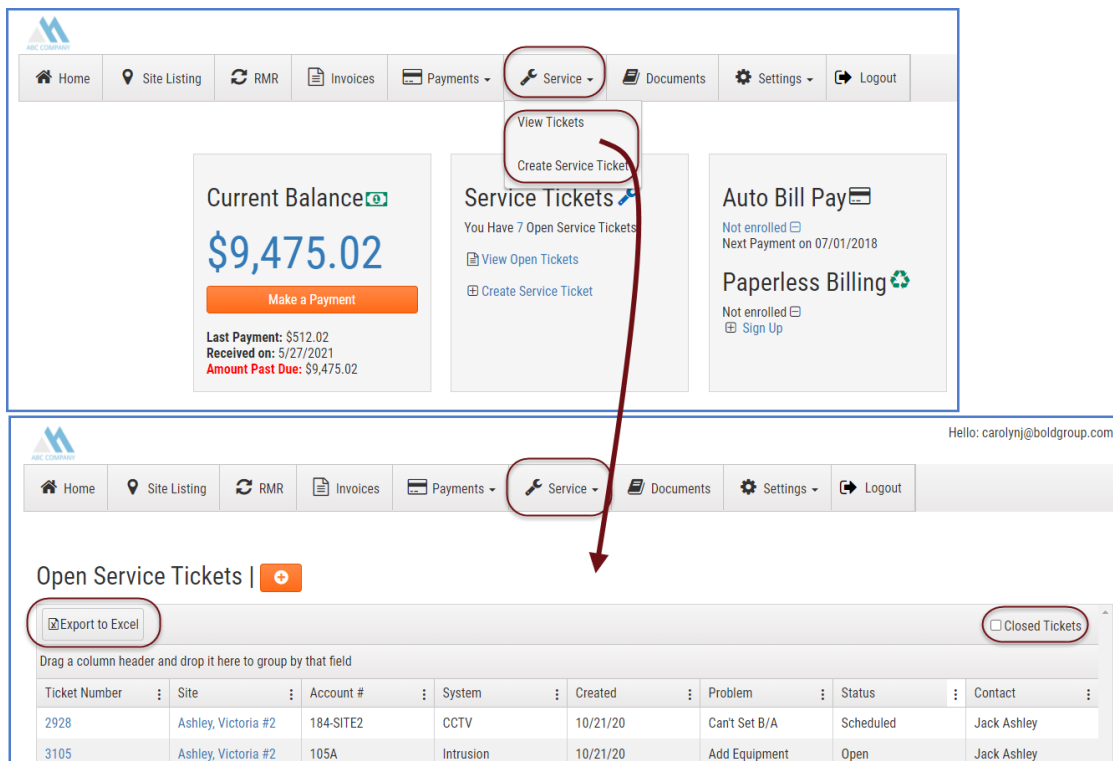
Service Tab*

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 change 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.



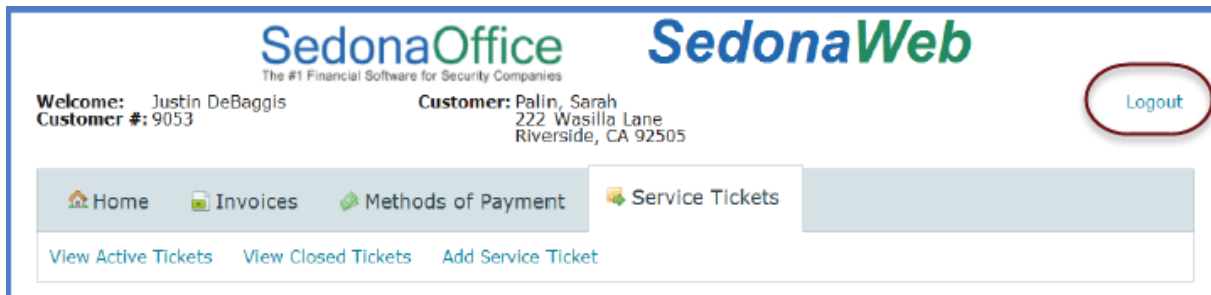
SedonaWeb 2.0



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

