SedonaWeb 2.0

CONTENTS

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

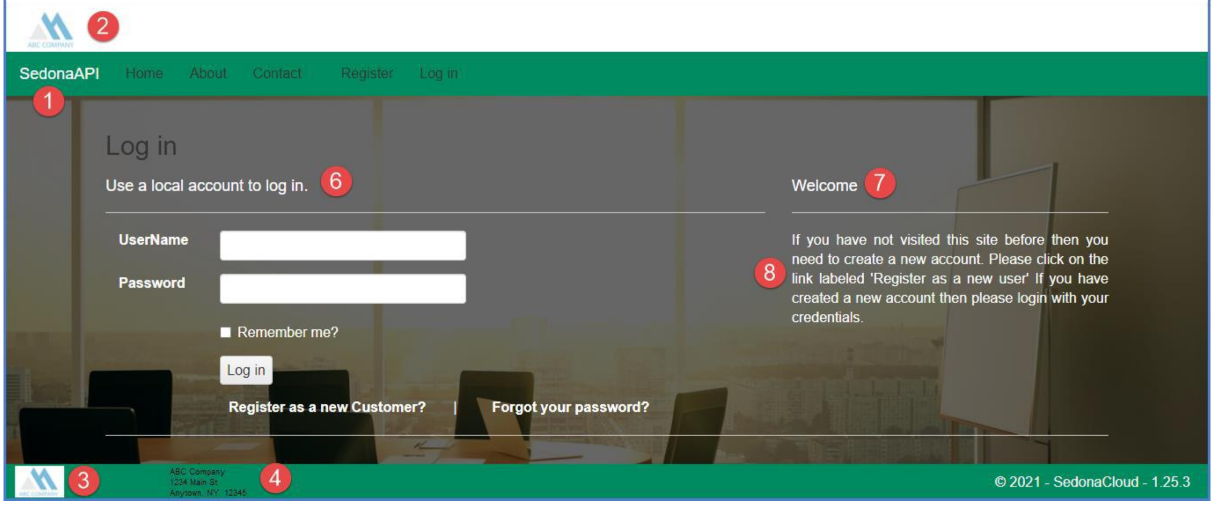
Preferences

There are several options available to customize the look of your company's SedonaWeb application. A BoldGroup technician will set the options for your company with the information you provide.

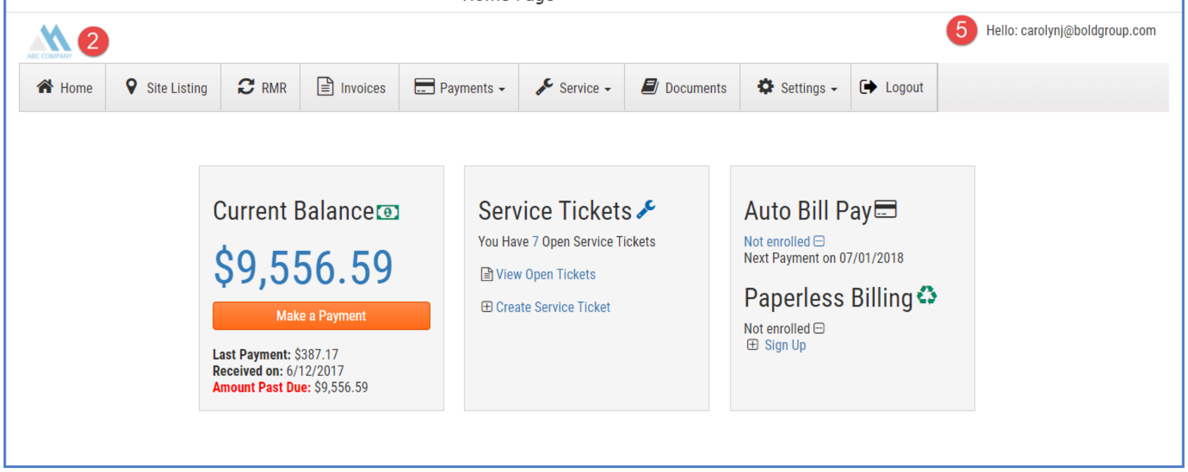
Some of the preference options are related to the login page while others are related to the home page a customer will see after logging into your company's SedonaWeb portal. Please refer to the illustrations on the next page.

Name		Description	Value	Category	
Company Header Name	1	Company Header Name	Sedona-Company-Name		
Header Logo Image	2	Image at the top of every page (located in Content/images/SedonaWeb			
Footer Image	3	Web footer image (located in Content/images/SedonaWeb; use this or Footer Lines but not both)			
Footer Line 1	4	Appears in the web footer (use this or Footer Image but not both)			
Footer Line 2	4	Appears in the web footer (use this or Footer Image but not both)			
Footer Line 3	4	Appears in the web footer (use this or Footer Image but not both)			
Home Page Message	5	Text displayed on the home page. HTML markup is allowed.	This is the welcome message		
Login Message Description	6	Login Message Description	If you have not visited this site before then you need to create a		
Login Message Header	7	Login Message Header	Welcome		
Login Page Message	8	Text displayed on the Login screen. HTML markup is allowed.	This is the logon message		

Login Page



Home Page

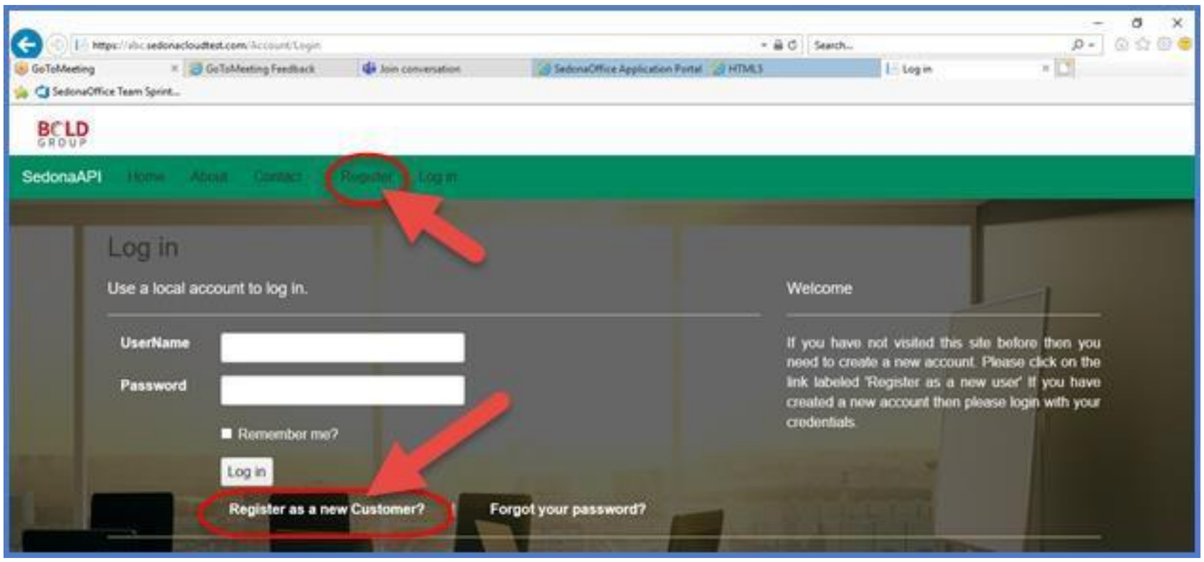


Setup

Register as a new Customer

Once your customer clicks on the URL provided to your company, the main login page will be displayed. If the customer has not yet registered, they will click on the Register as a new customer link at the lower left of the page or click on the Register tab at the top of the page.

This main login page may be customized to display your company name, logo and other branding options.



Creating a new Account

After clicking on the Register as a new Customer link or clicking on the Register tab from the main page, the Register data entry form will be displayed.

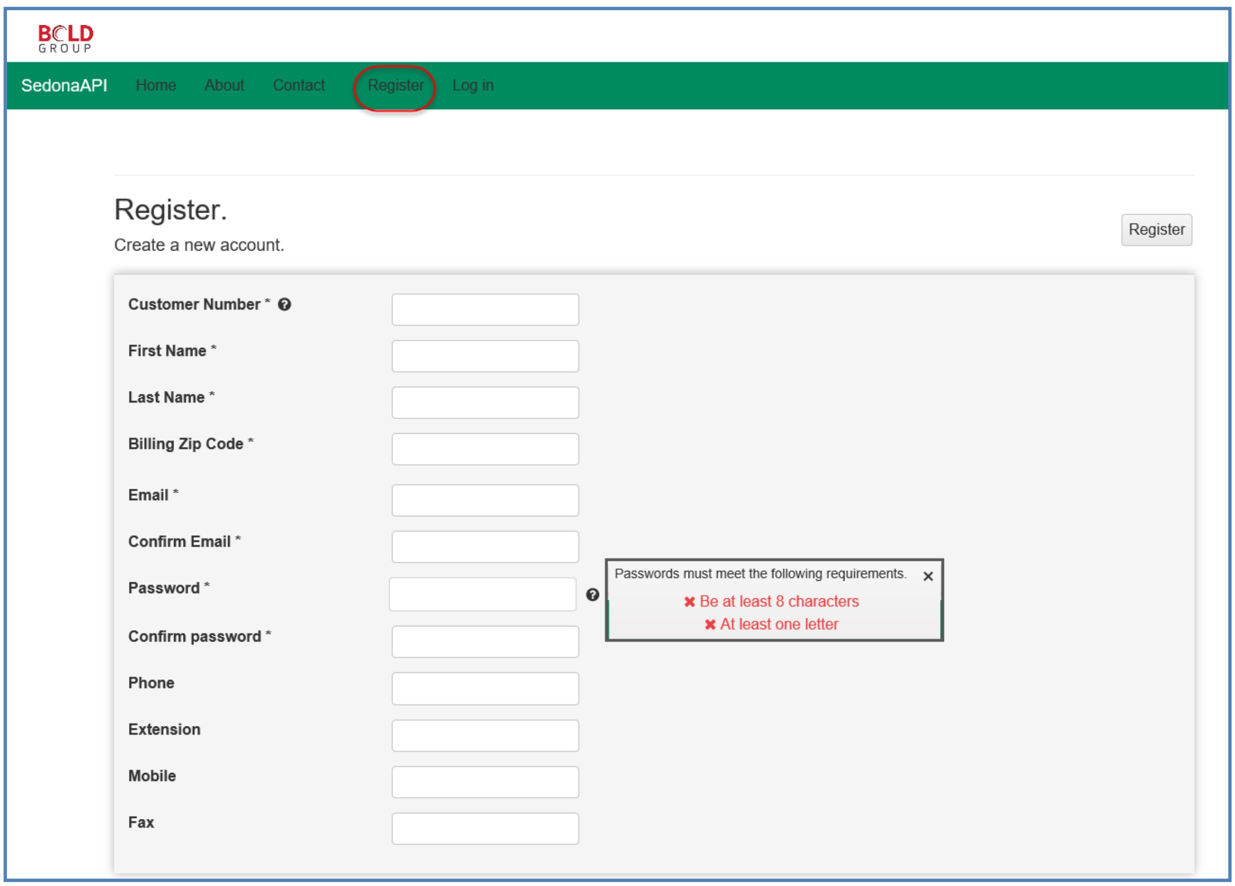
Note: A customer must have their SedonaOffice customer number and the postal code of their primary billing address with your company to be able to setup a new SedonaWeb account.

All data entry fields on the form denoted with an asterisk at the end are required.

Passwords must be at least eight characters long and must contain at least one alpha character.

Once all required fields have been populated, click on the Register button at the upper right of the page.

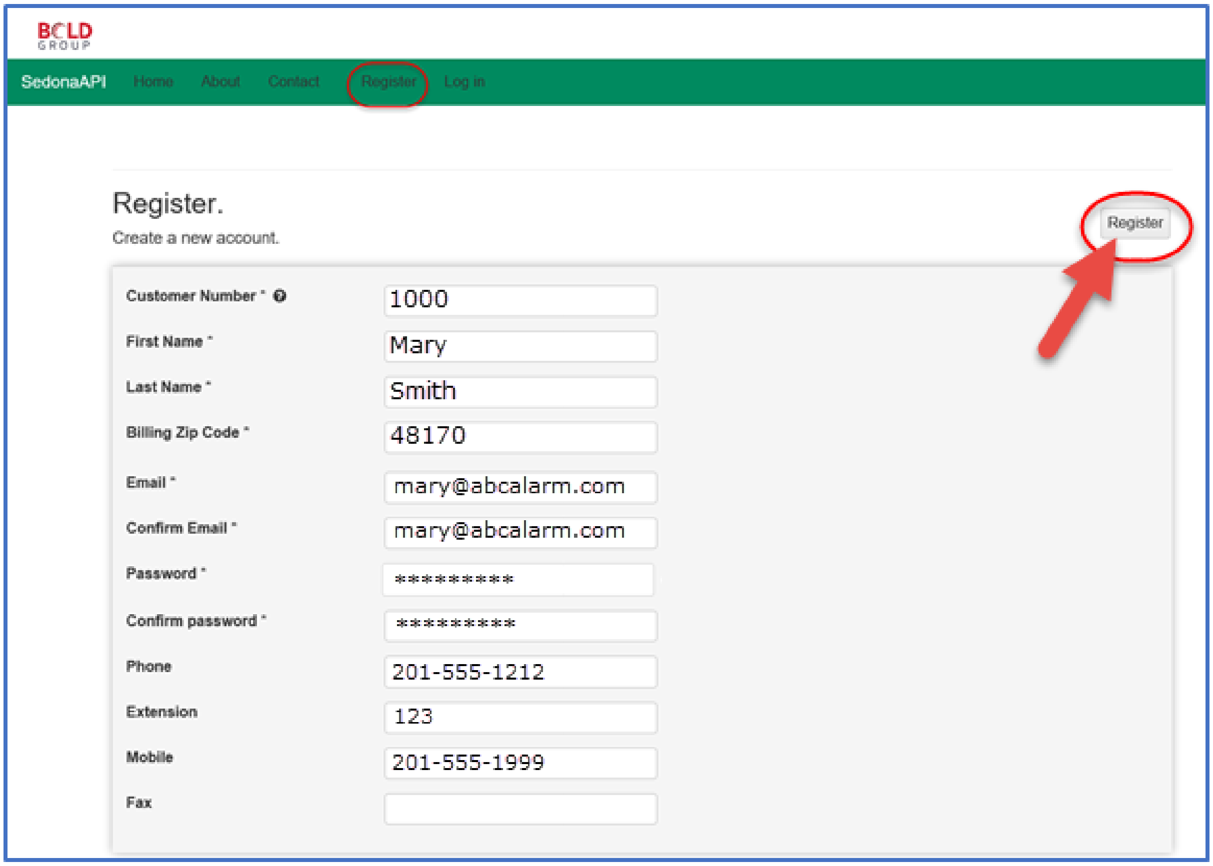
Please refer to the next page of a properly completed registration form.



Completed Registration form

Once all required fields have been populated, click on the Register button at the upper right of the page.

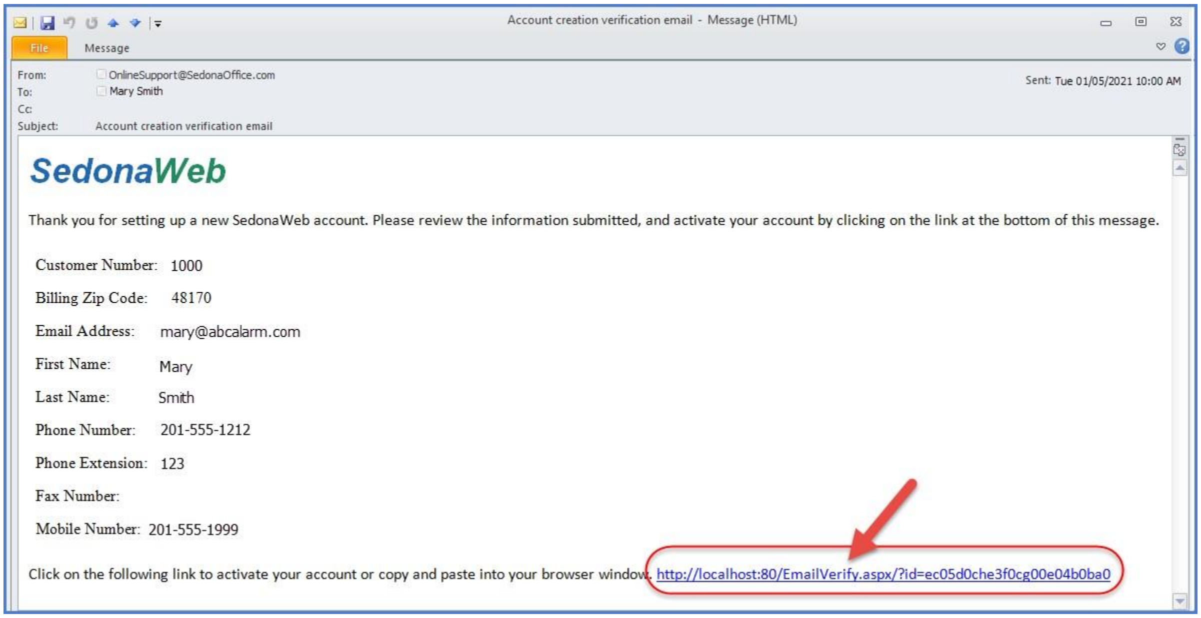
If the email address entered is valid, the customer will receive an email within a few seconds with a link to confirm the email address. When clicking on this link, the customer will be taken to the main SedonaWeb login page. An example email that will be sent to the customer is illustrated on the next page of this document.



Example confirmation email to the Customer

If the email address entered on the registration form was valid, the customer will receive an email within a few seconds with a link to confirm the email address.

When clicking on the link within this email, the customer will be taken to the SedonaWeb login page.



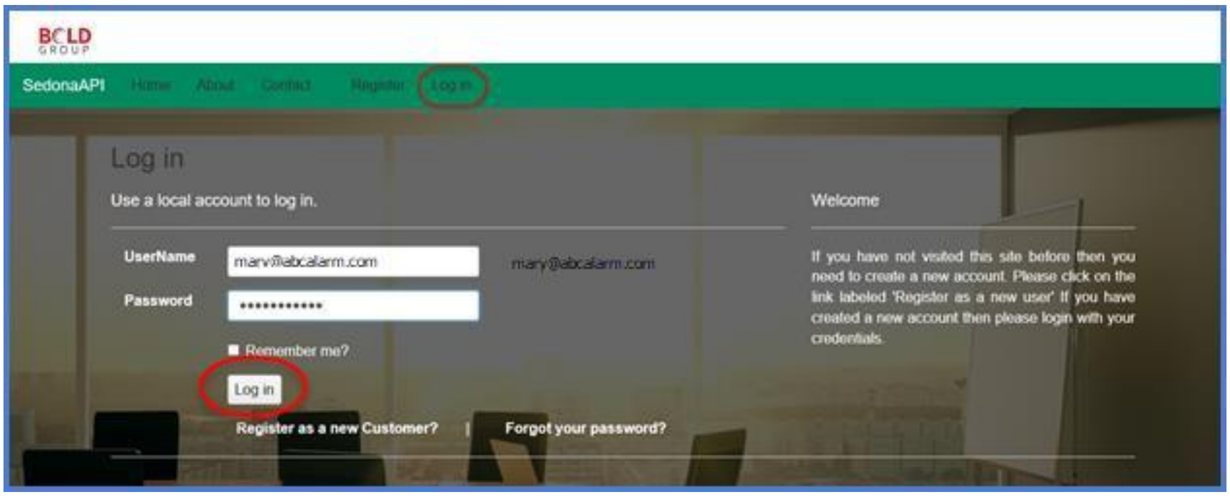
Functionality

Login to SedonaWeb

Whether an existing registered customer or a customer who has just completed the new customer registration, the following steps are the same.

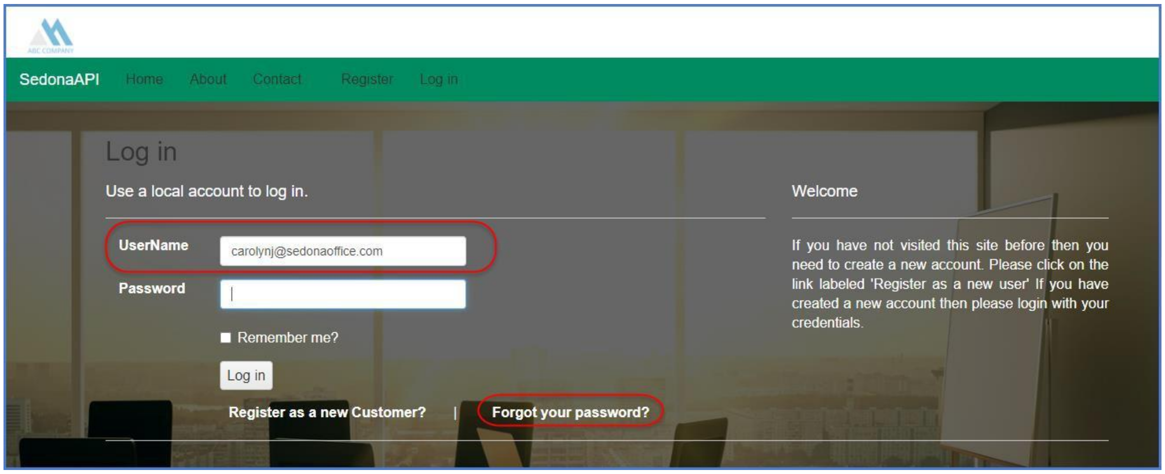
At the main login page, type in the UserName (the customer's registered email address) and password then click on the Log In option as shown in the illustration below.

If the customer forgets their password, this may be reset. Please refer to the topic Forgot Password.

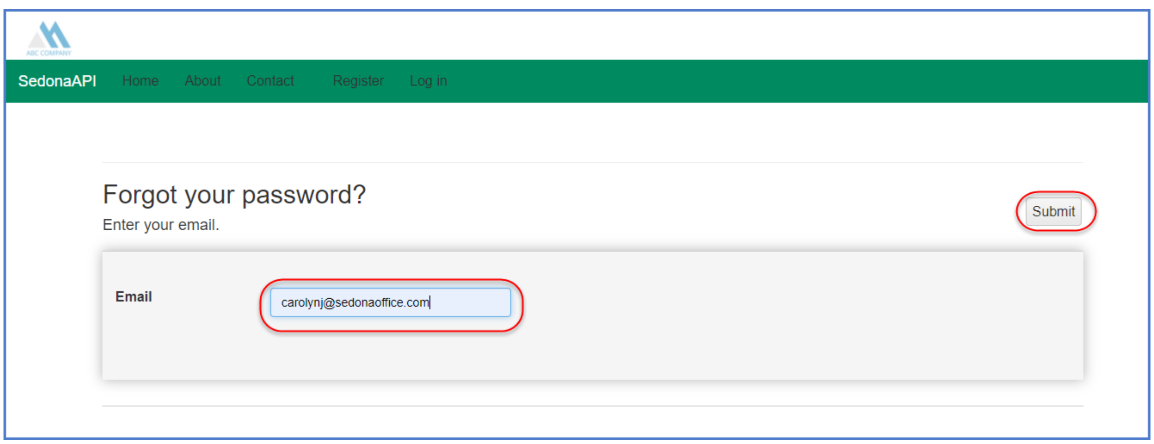


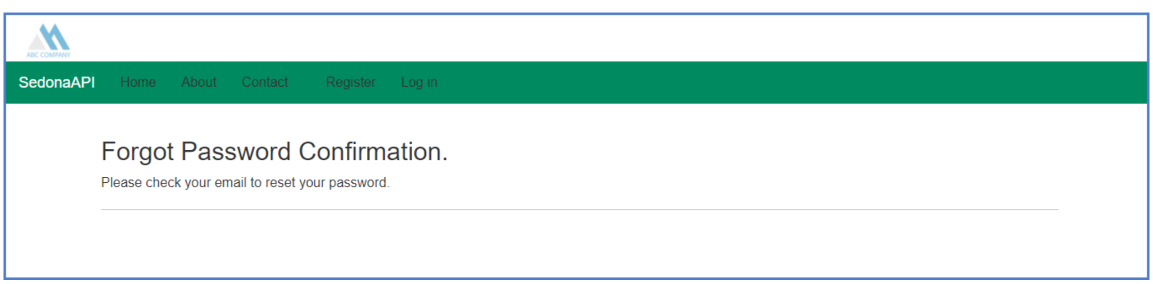
Forgot Password

If the registered customer has forgotten their password, from the main login page, type in the UserName (the customer's registered email address) and password then click on the "Forgot your password?" option as shown in the illustration below.



The Forgot your password page will be displayed. Enter your registered email address then click on the Submit button. If a valid email address was submitted, you will receive an email, which will include a link for resetting your password.





The Home Page

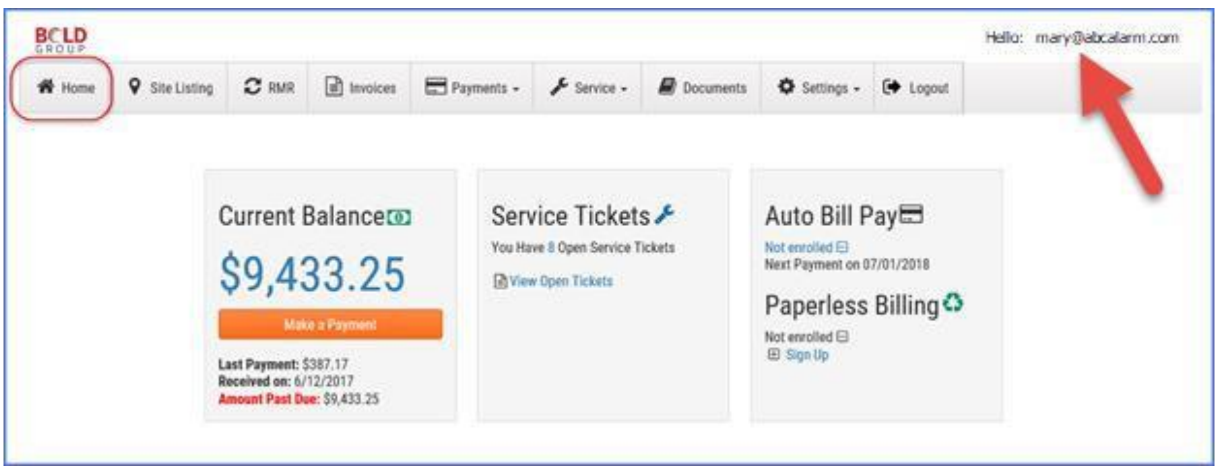
If the Customer correctly enters their *Email Address* and *Password*, their customer home page will be displayed (example below).

At the upper right of the home page will display the name of the logged in user.

Three panels are displayed on the home page:

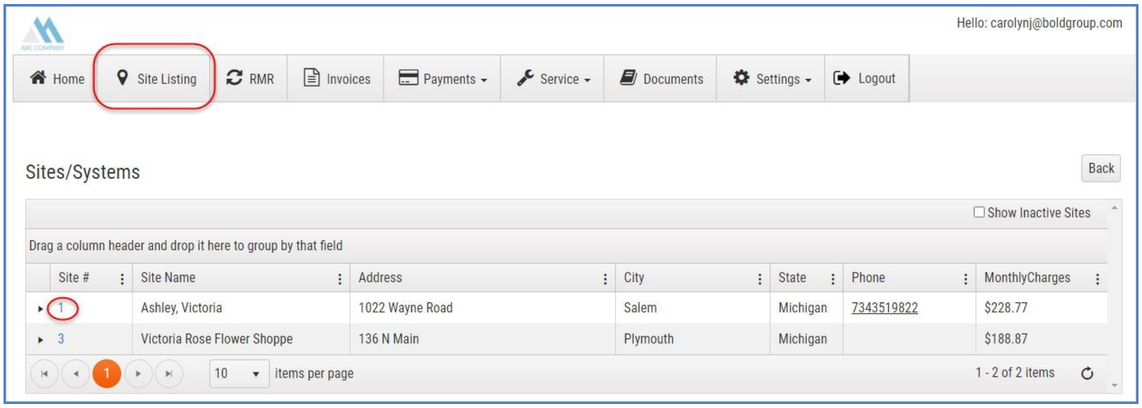
- **Current Balance –** This will show the total net due on the customer's account, which is the sum of all open invoices and unapplied payments and unapplied credit memos.
- **Service Tickets –** If the customer has any open service or inspection tickets, the count of all tickets will be listed. A link is provided to view open tickets.
- **Auto Bill Pay and Paperless Billing**
  - **Auto Bill Pay –** If the customer has a credit card or bank account on file that is setup for auto-pay, this will be indicated under this header.
  - **Paperless Billing** - If the customer is flagged for having their invoices emailed, this will be indicated under this header.

Across the top of the main page are several tabs, each of which will be described on the following pages of this topic.



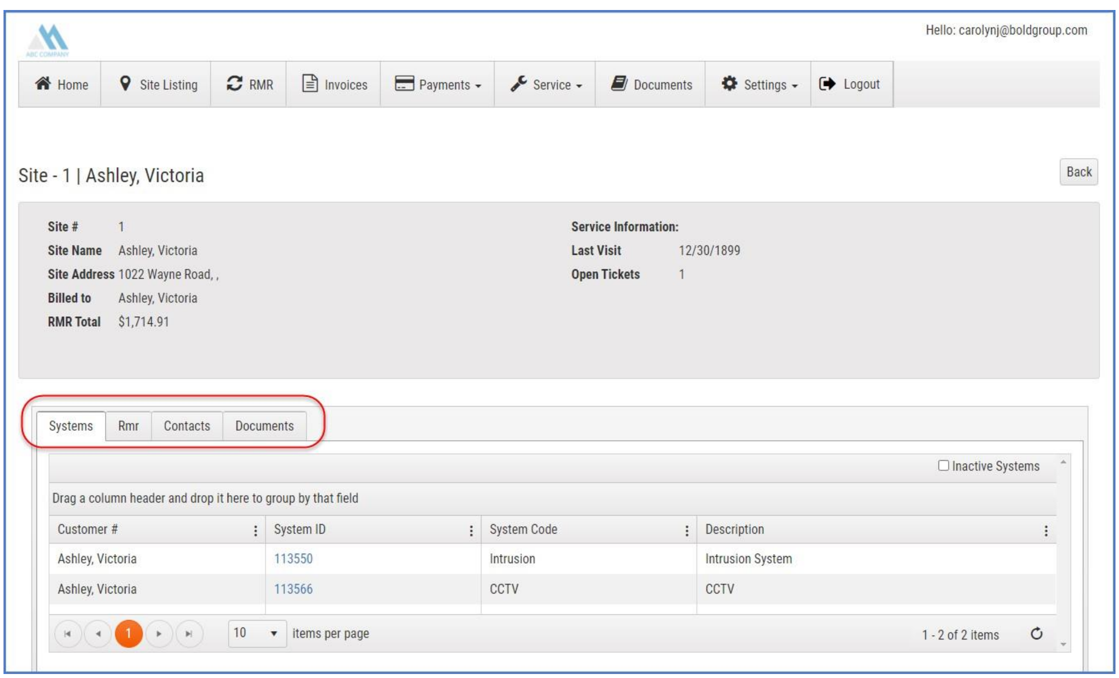
Site Listing Tab

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.



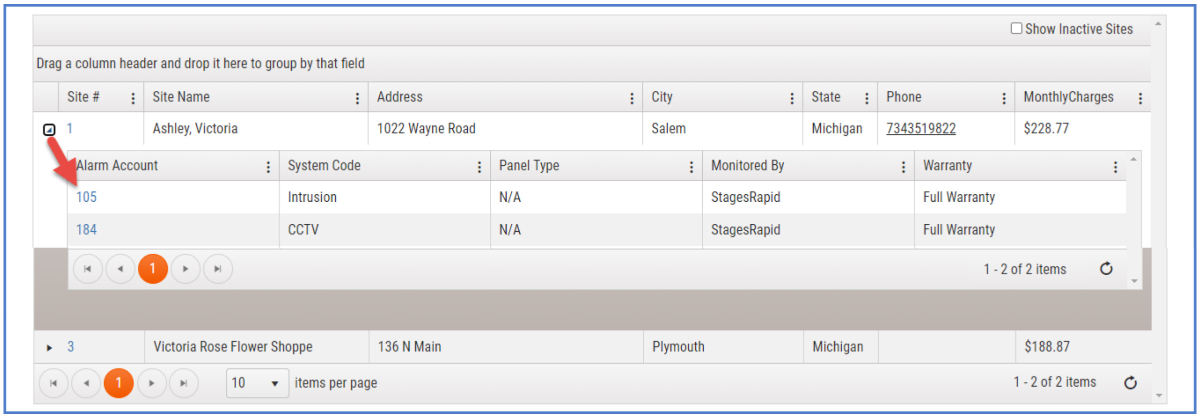
Site Details

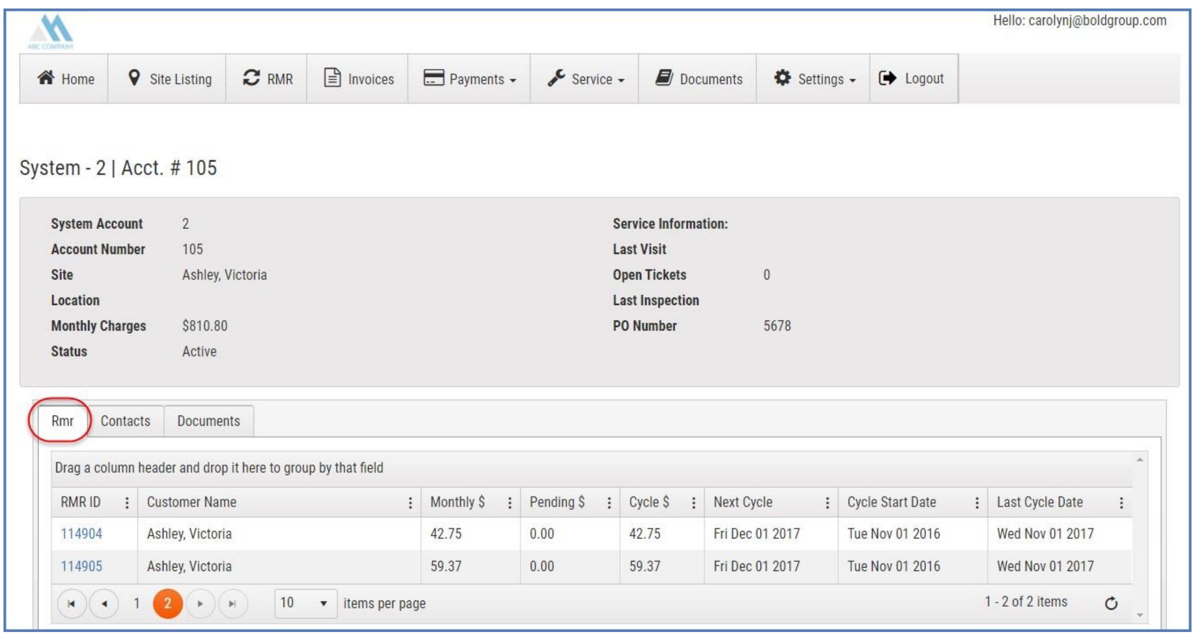
Clicking on a Site Number will display detailed information for that particular site. Below the site information, four tabs of information are available: Systems, RMR, Contacts and Documents. Clicking on each tab will display information related to the customer's site. On any of the tabs where information 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 also display the RMR, Contacts and Documents tabs.



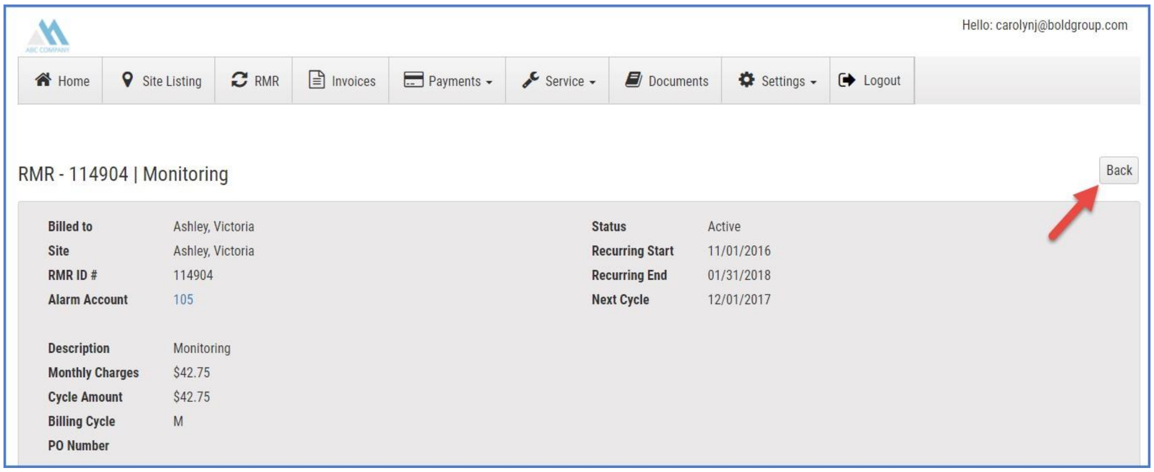


System Details

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

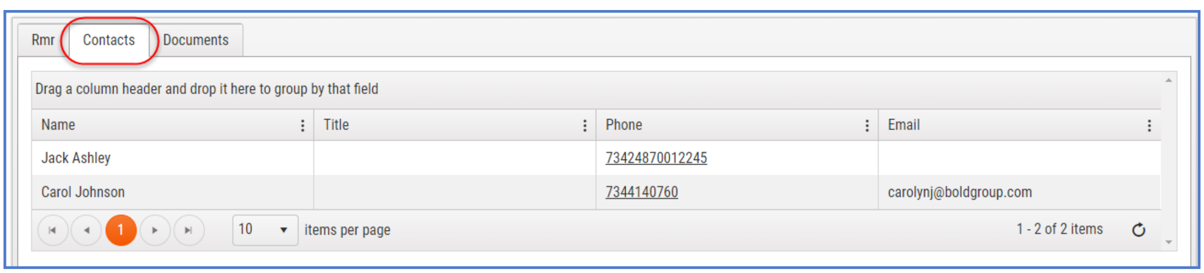
RMR Tab

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

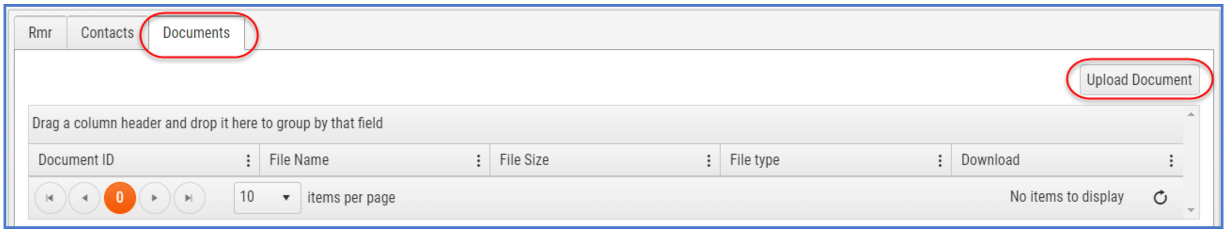
Clicking on the Contacts tab will display all billing and site contacts linked to this particular site.



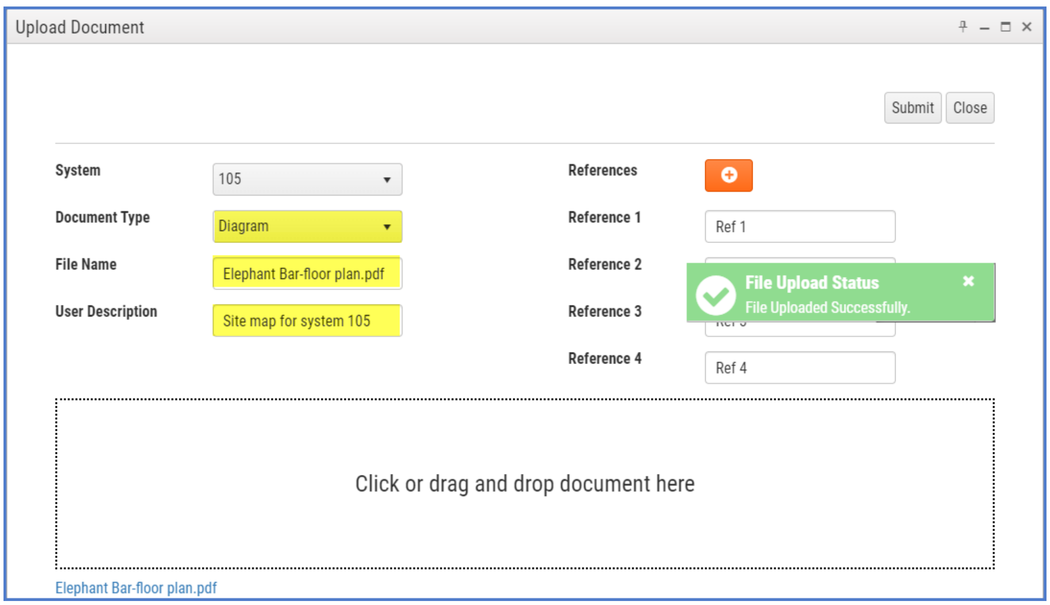
Documents Tab

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.

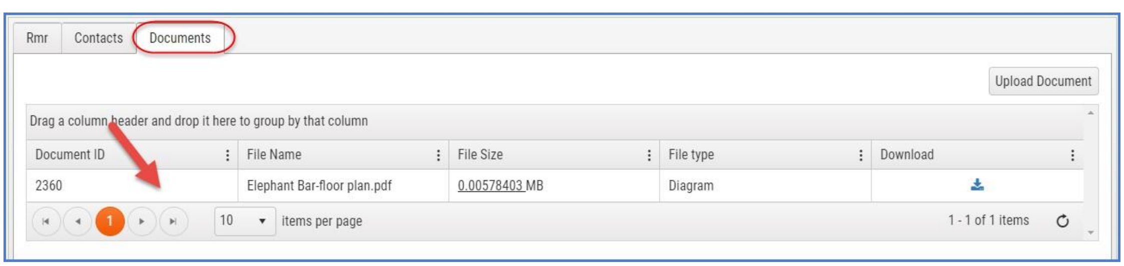
Note: All documents saved with a security level of 1 will be available for the customer.



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.



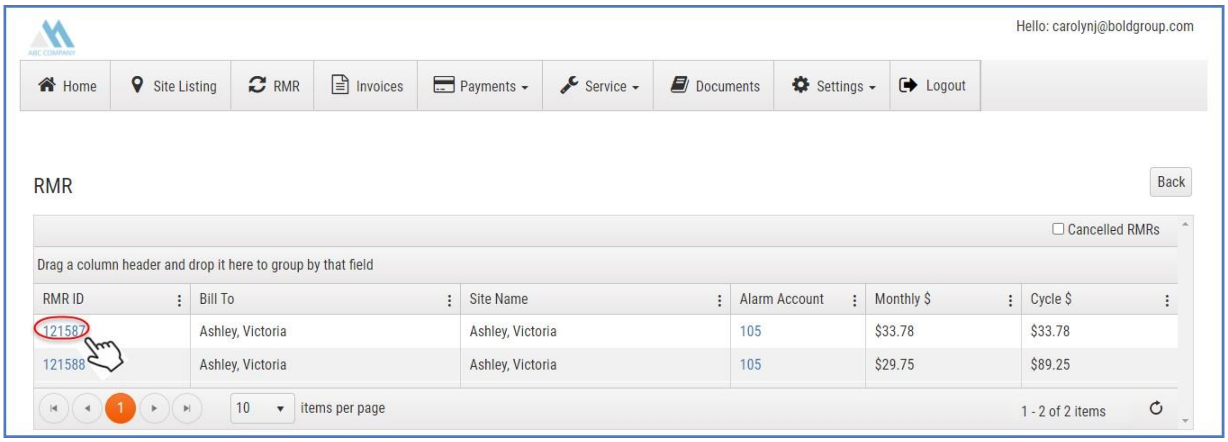
Once a document was uploaded, it will be displayed in the documents listing.



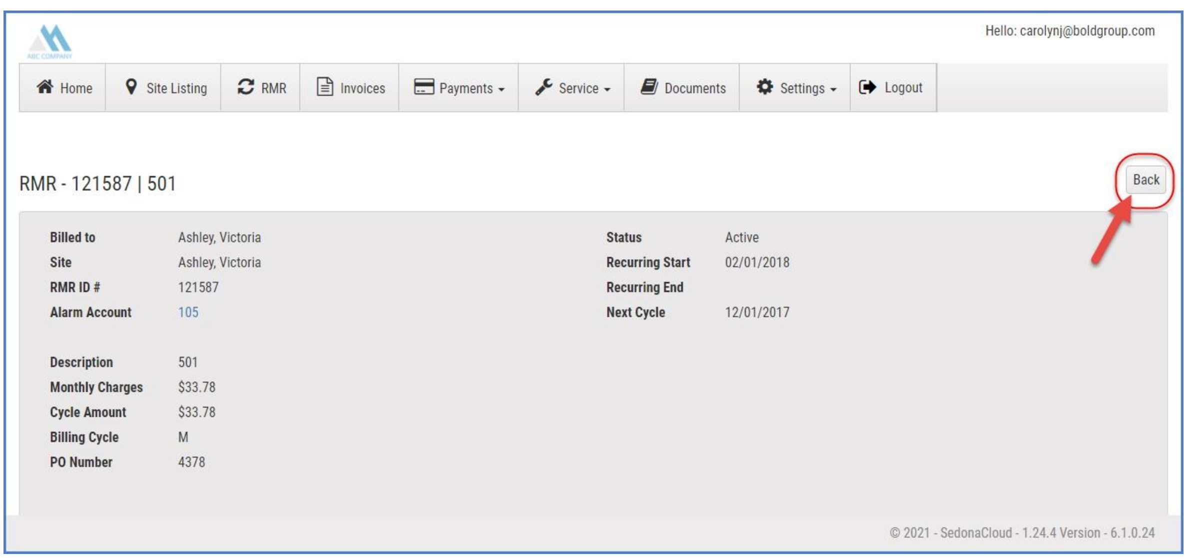
RMR Tab

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.



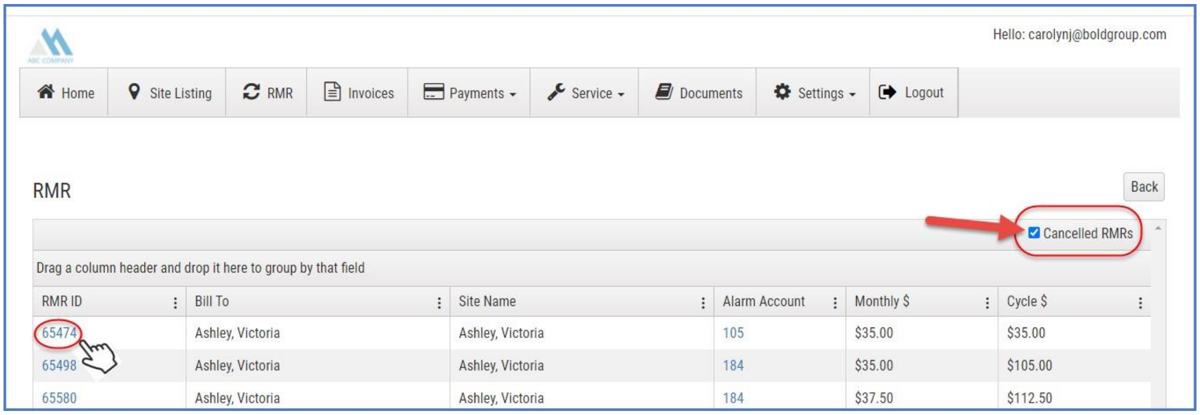
When clicking on a RMR ID link, detailed information will be displayed for that recurring line. To return to the RMR listing, click on the Back button.



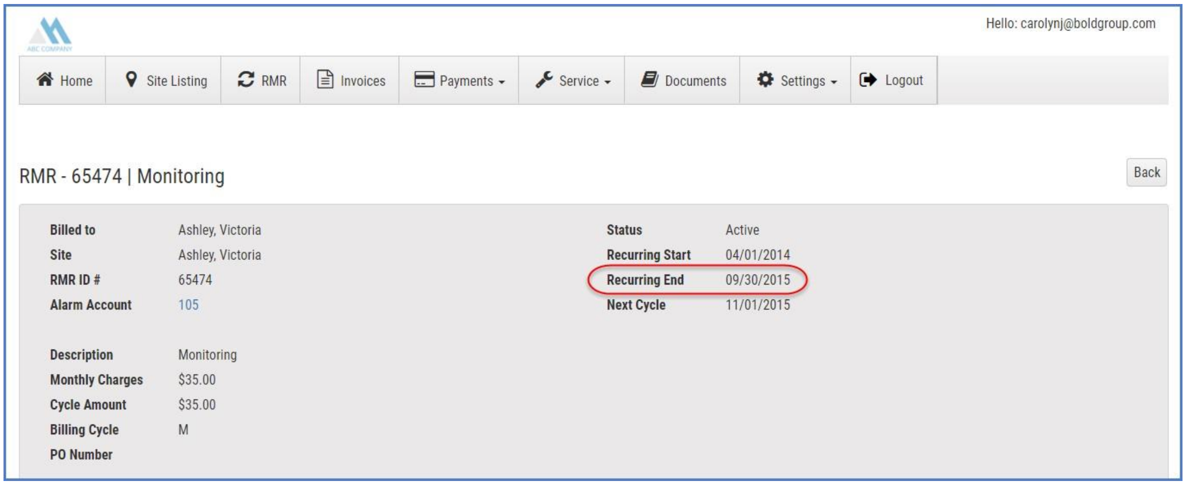
Cancelled RMR

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.



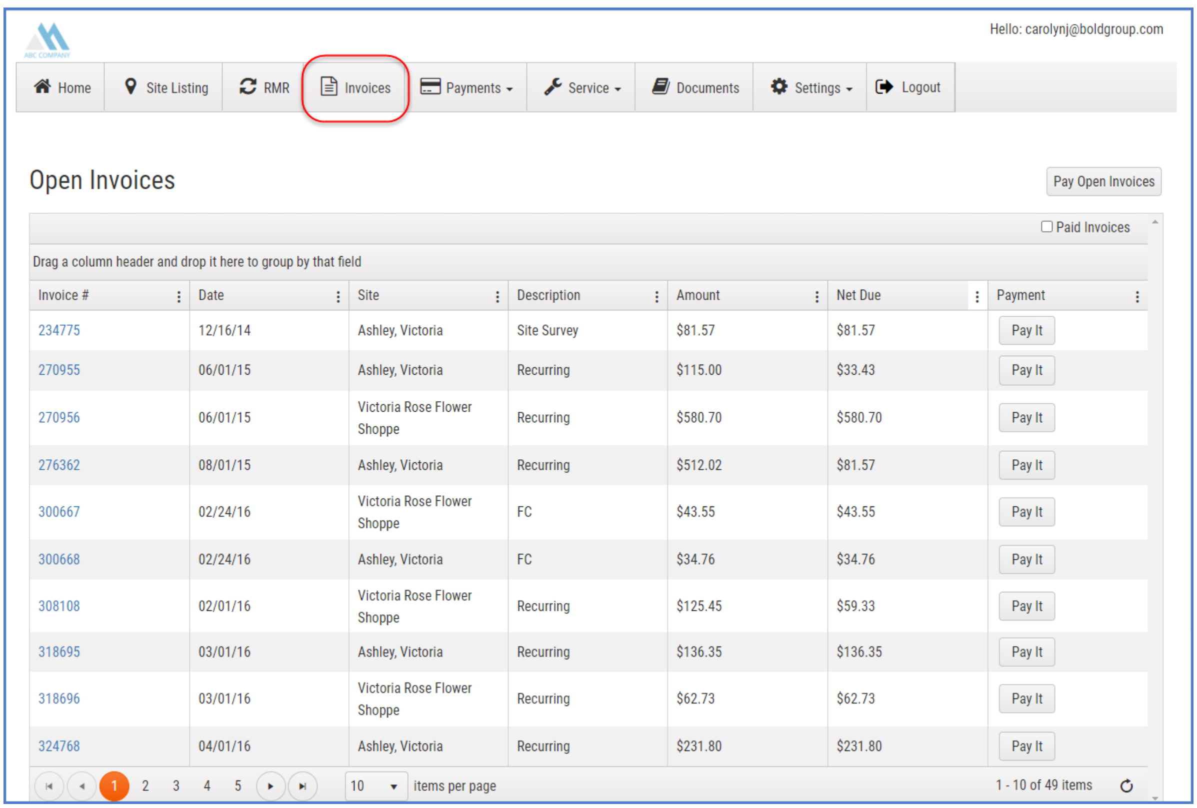
Invoices Tab

Clicking on the Invoices Tab will display a listing of all invoices with an open balance. Invoices are listed beginning with the oldest invoice first. The customer has the ability to drill down into the details of each individual invoice. If checking the box “Paid Invoices”, this listing will include all paid and open invoices for the customer.

If the customer has a credit card or bank account on file, they may click on the Pay It button on any invoice to mark for payment, or if they want to pay all of their invoices, they can click on the Pay Open Invoices button.

Pay It and Pay Open Invoices

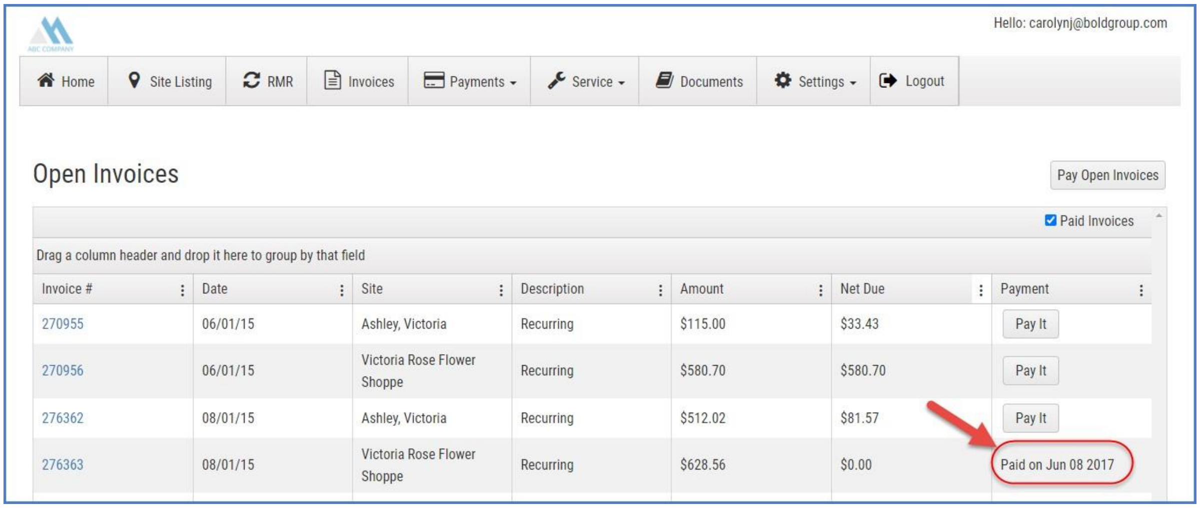
These two options are only available to companies who have set up an account with Forte (merchant bank).



Invoice #	Date	Site	Description	Amount	Net Due	Payment
234775	12/16/14	Ashley, Victoria	Site Survey	$81.57	$81.57	Pay It
270955	06/01/15	Ashley, Victoria	Recurring	$115.00	$33.43	Pay It
270956	06/01/15	Victoria Rose Flower Shoppe	Recurring	$580.70	$580.70	Pay It
276362	08/01/15	Ashley, Victoria	Recurring	$512.02	$81.57	Pay It
300667	02/24/16	Victoria Rose Flower Shoppe	FC	$43.55	$43.55	Pay It
300668	02/24/16	Ashley, Victoria	FC	$34.76	$34.76	Pay It
308108	02/01/16	Victoria Rose Flower Shoppe	Recurring	$125.45	$59.33	Pay It
318695	03/01/16	Ashley, Victoria	Recurring	$136.35	$136.35	Pay It
318696	03/01/16	Victoria Rose Flower Shoppe	Recurring	$62.73	$62.73	Pay It
324768	04/01/16	Ashley, Victoria	Recurring	$231.80	$231.80	Pay It

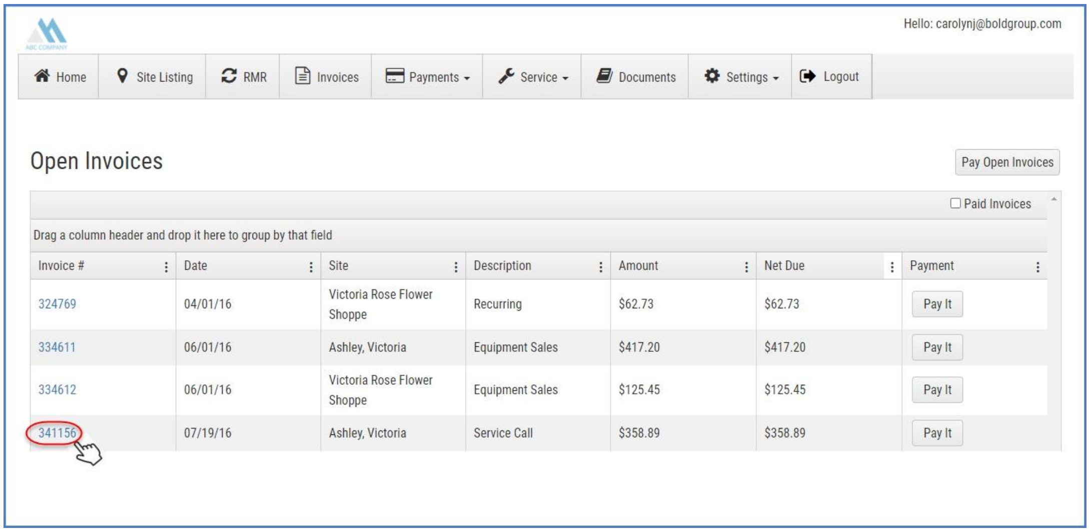
Include Paid Invoices

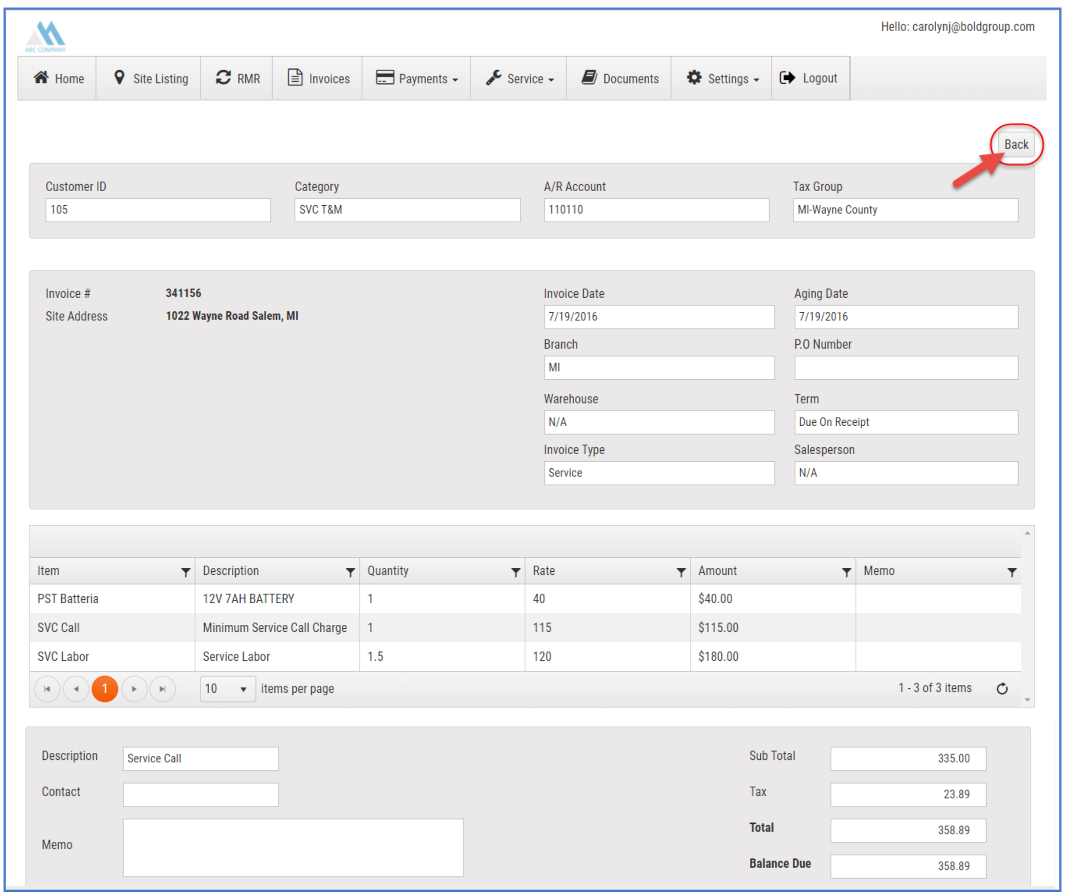
If checking the box "Paid Invoices", both paid and unpaid invoices will be displayed in the listing beginning with the oldest invoice first. For invoices that have been paid, in the Payment column, text will be displayed with the date the invoice was completely paid.



Invoice Details

From the Invoice listing, click on an invoice number link to display the invoice details. When finished viewing the invoice details, click on the Back button to return to the Invoice listing.





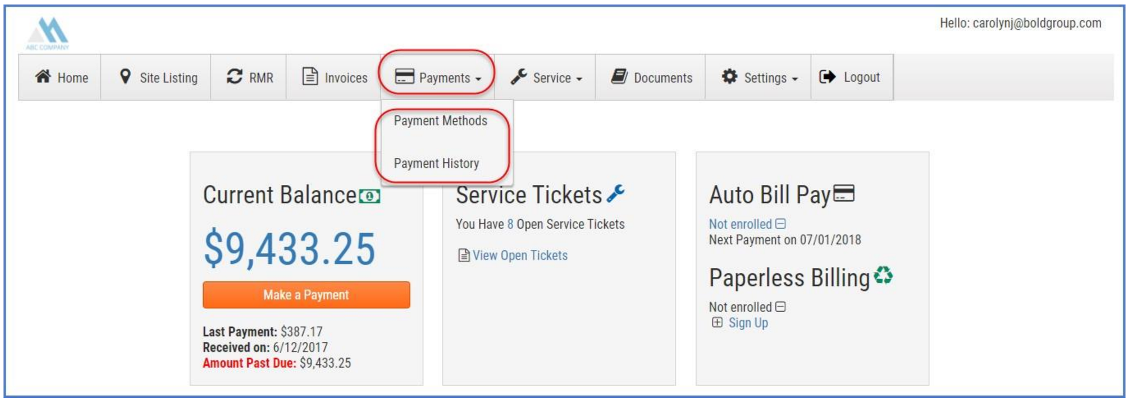
Pay It / Pay Open Invoices

This topic is currently under construction.

Payments Tab

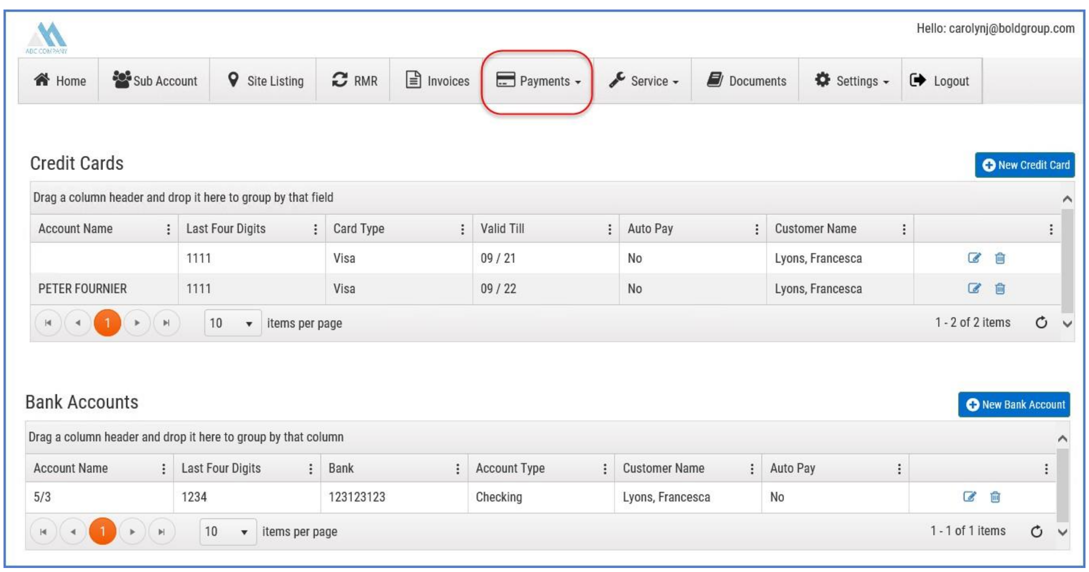
When clicking on the Payments Tab, two options are available:

- Payment Methods
    - Displays a listing of credit cards and bank accounts on file
    - Add a new credit card or bank account
    - Edit or delete a credit card or bank account
- Payment History – Displays a listing of all payments made with a credit card or bank account.



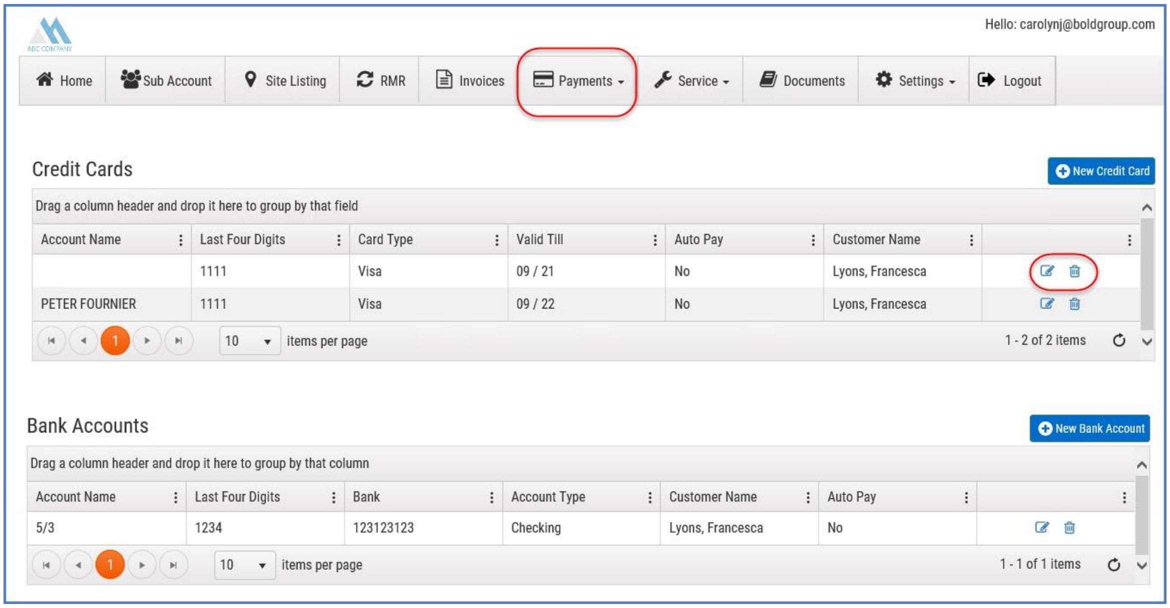
Payment Methods

When clicking on the Payment Methods option from the Payments tab, a listing of all credit cards and bank accounts on file for the customer will be displayed.



Edit a Credit Card

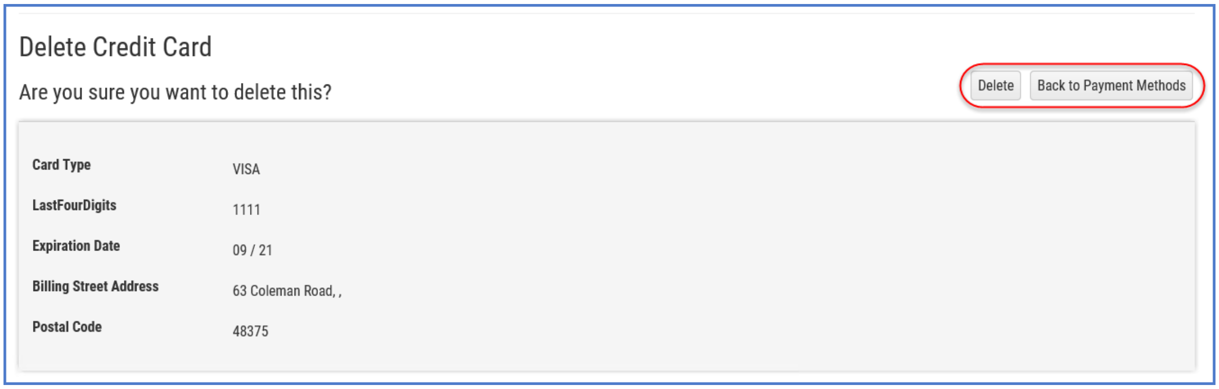
When clicking on the edit icon to the right of a credit card, the customer is able to change the billing address for the credit card and if not already flagged for auto-pay, can check the "Use Card for Auto Bill Payment" checkbox. If selecting the "Use Card for Auto Bill Payment" checkbox, any future recurring invoices will use the credit card for payment.



When finished editing the credit card information, click the Submit button to save the changes. To exit the form without making any changes, click the Back to Payment Methods button.

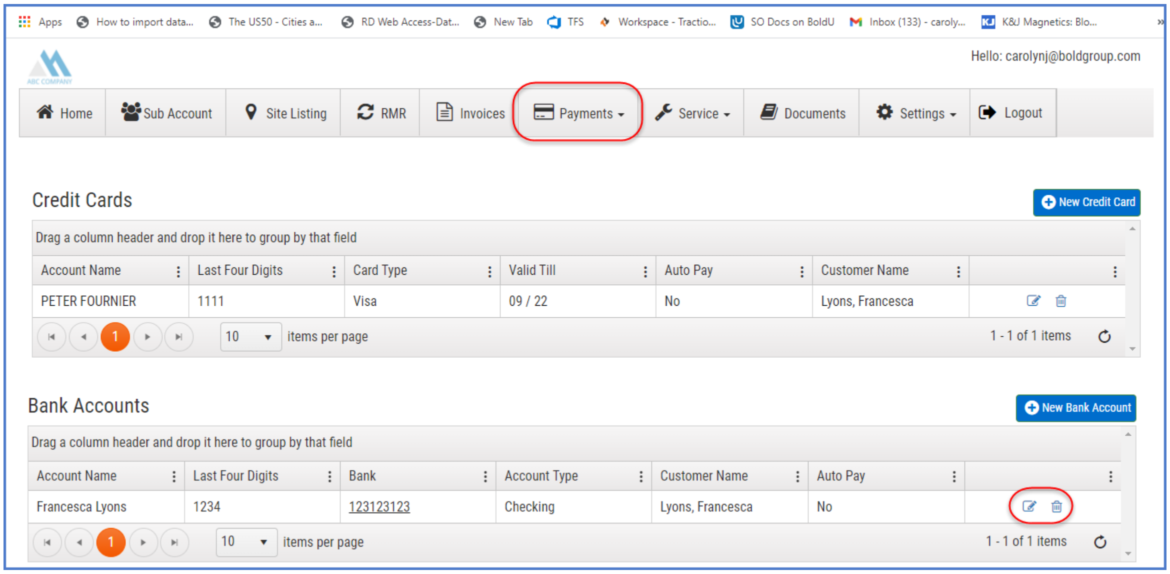
Delete a Credit Card

When clicking on the delete icon to the right of a credit card, the customer is able to delete a credit card on file. **Make certain this is what you want to do – once you click on the Delete button, there is no way to undo this.** If you do not want to delete the credit card, click on the Back to Payment Methods button.

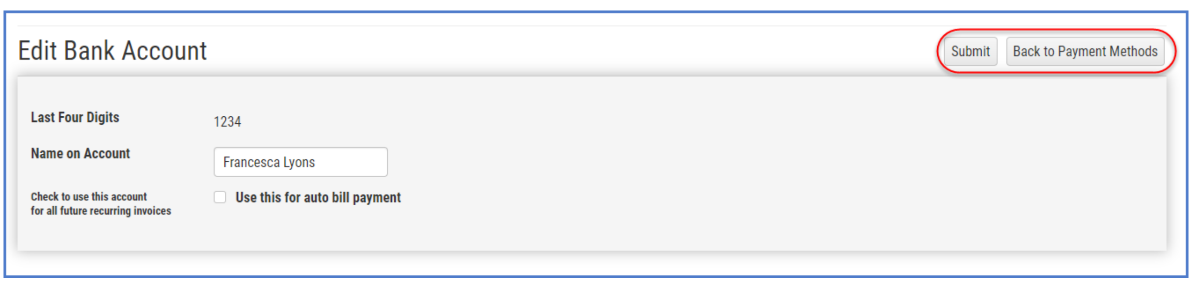


Edit a Bank Account

When clicking on the edit icon to the right of a bank account, the customer is able to change the name on the bank account and if not already flagged for auto-pay, can check the “Use this for Auto Bill Payment” checkbox. If selecting the “Use this for Auto Bill Payment” checkbox, any future recurring invoices will use the bank account for payment.

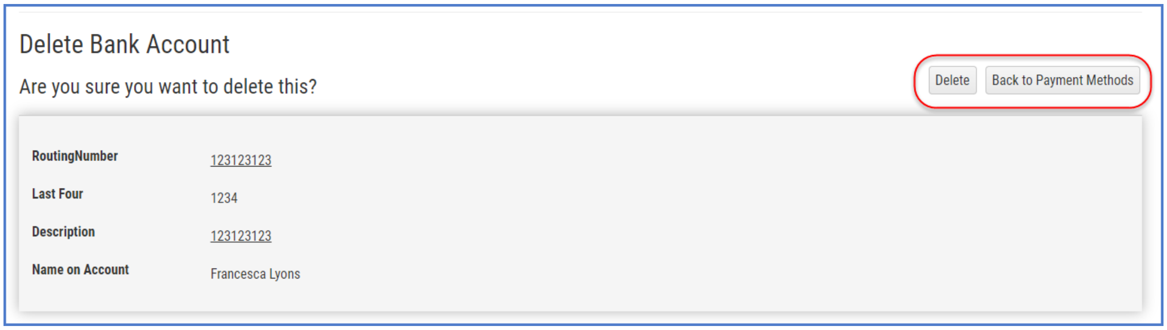


When finished editing the bank account information, click the Submit button to save the changes. To exit the form without making any changes, click the Back to Payment Methods button.



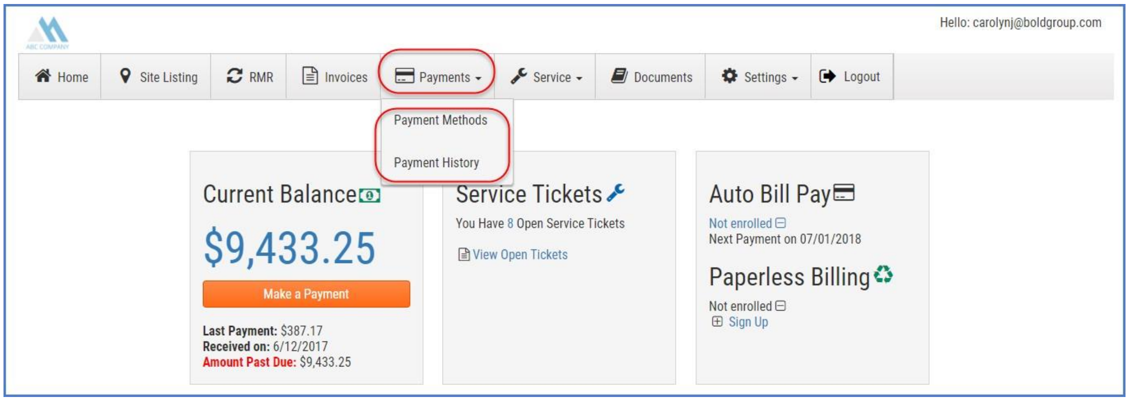
Delete a Bank Account

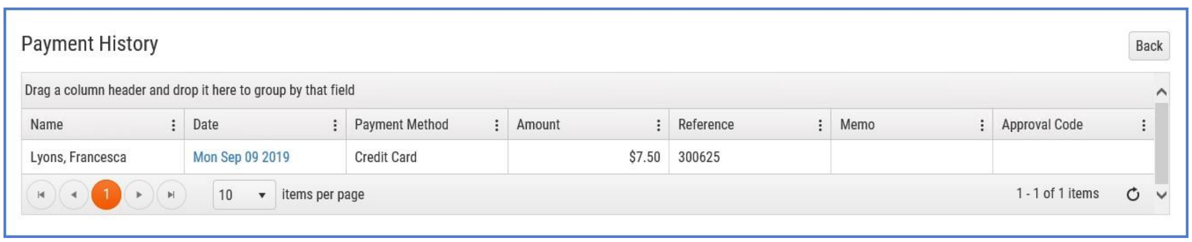
When clicking on the delete icon to the right of a bank account, the customer is able to delete a bank account on file. **Make certain this is what you want to do – once you click on the Delete button, there is no way to undo this.** If you do not want to delete the bank account, click on the Back to Payment Methods button.



Payment History

When clicking on the Payment History option from the Payments tab, a listing of all credit card and bank account transactions for the customer will be displayed.



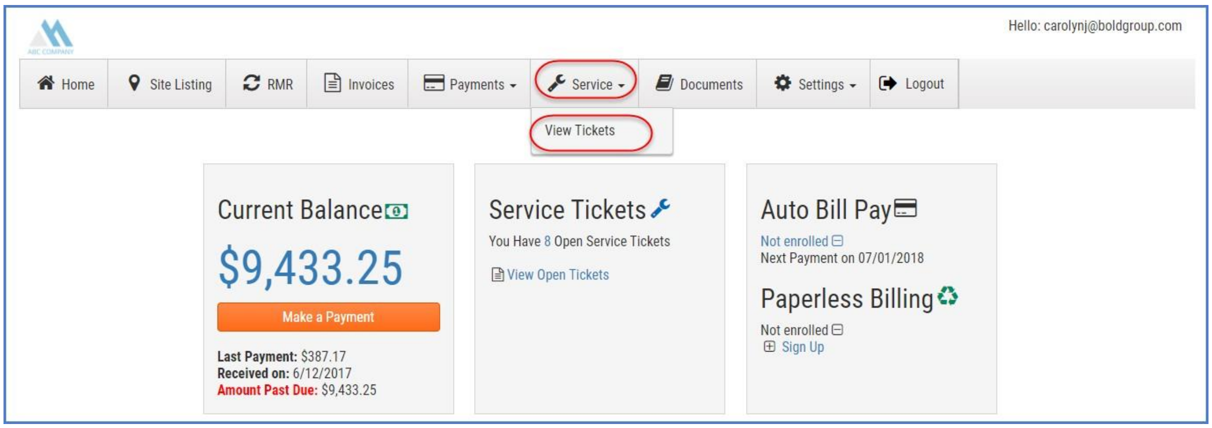


Service Tab

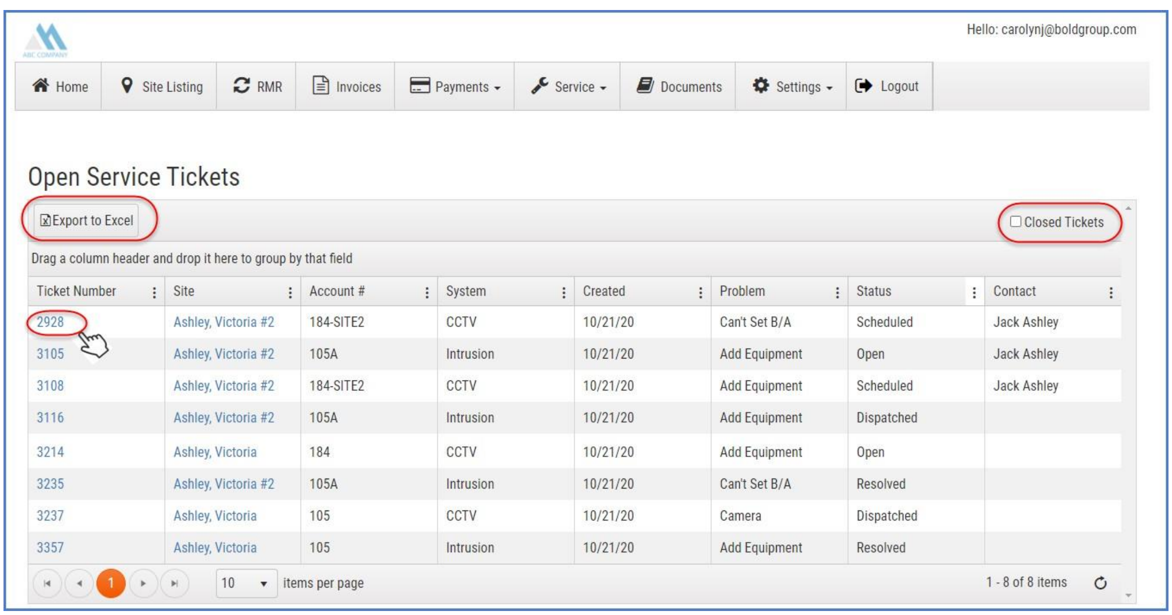
When clicking on the Service Tab, one option is available, View Tickets. When clicking on the View Tickets option, customers are able to do the following:

- View all open tickets
- View all closed tickets
- Export the list of tickets to an excel file
- Upload a document to a particular ticket*

*Your company must purchase the add-on module, SedonaDocs, to be able to use this feature.

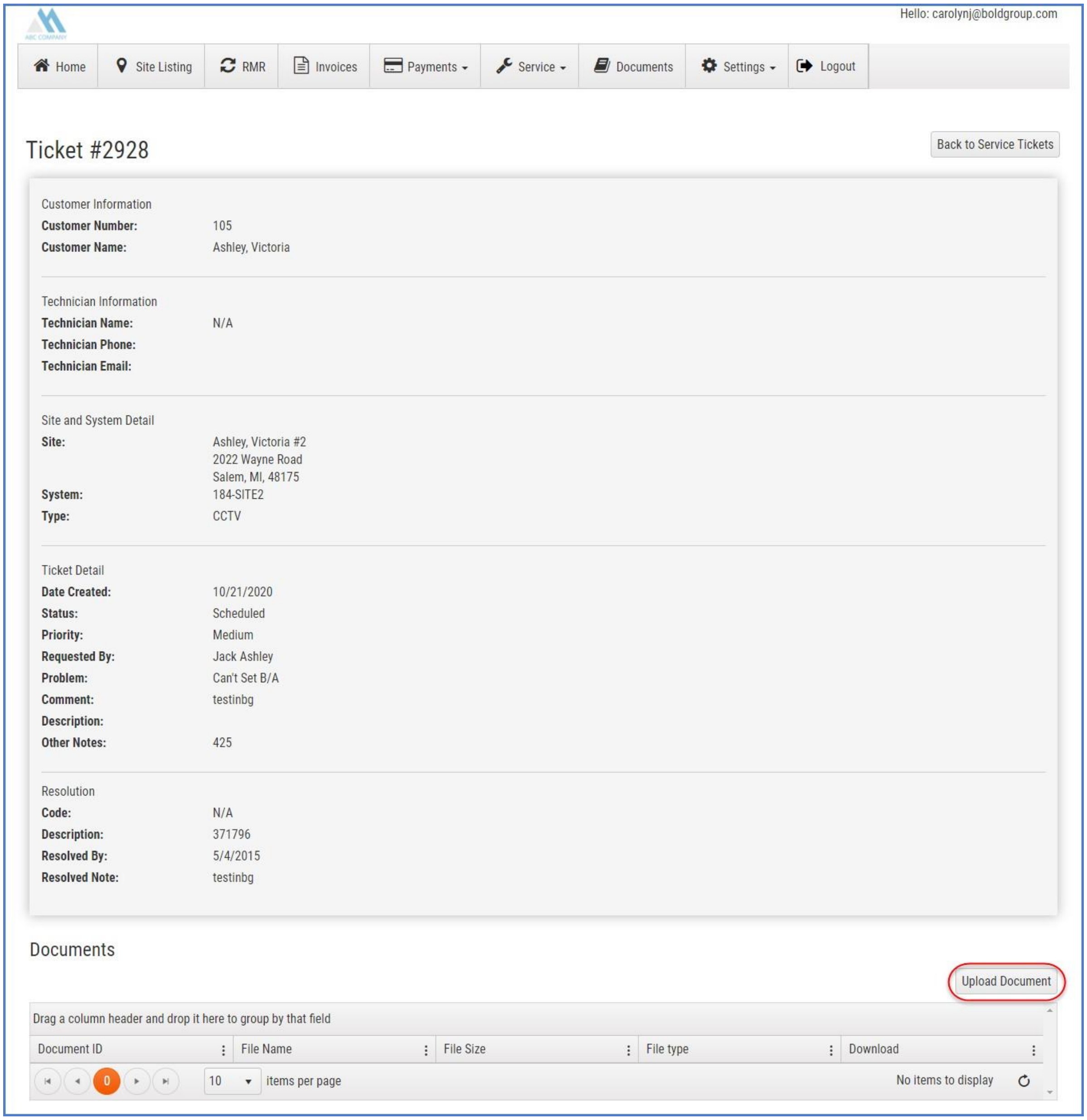


When clicking on the View Tickets option, tickets are listed beginning with the lowest ticket number first. When clicking on a ticket number link, the details of a ticket are viewable.



Ticket Details

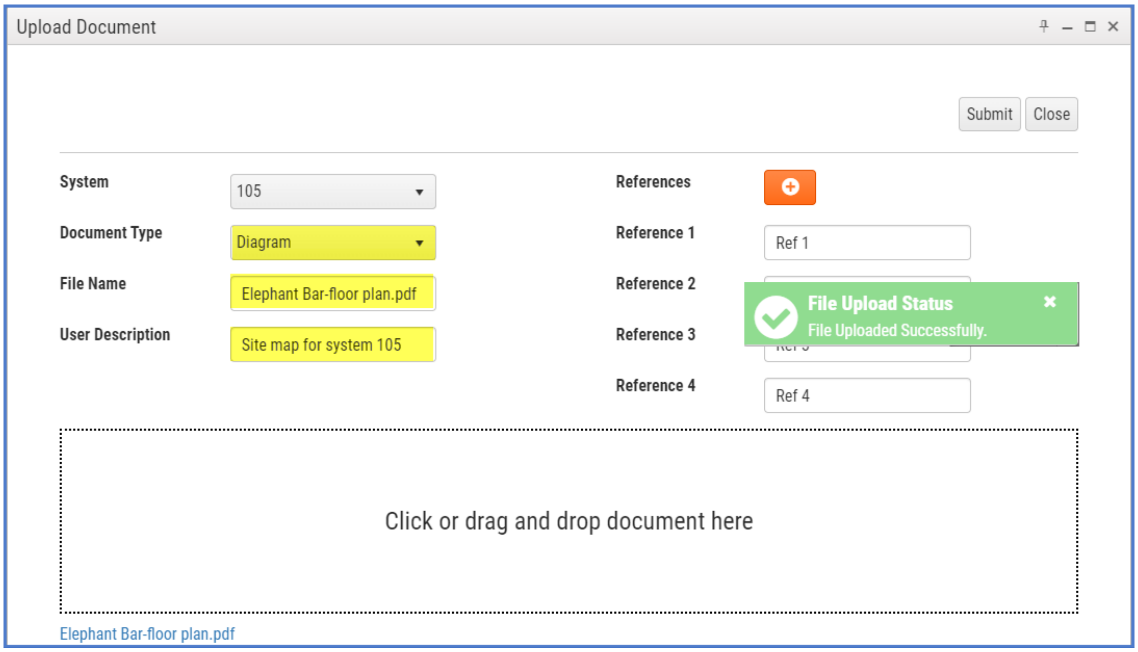
At the bottom of the ticket details page, a customer has the ability to upload a document to the ticket being viewed.



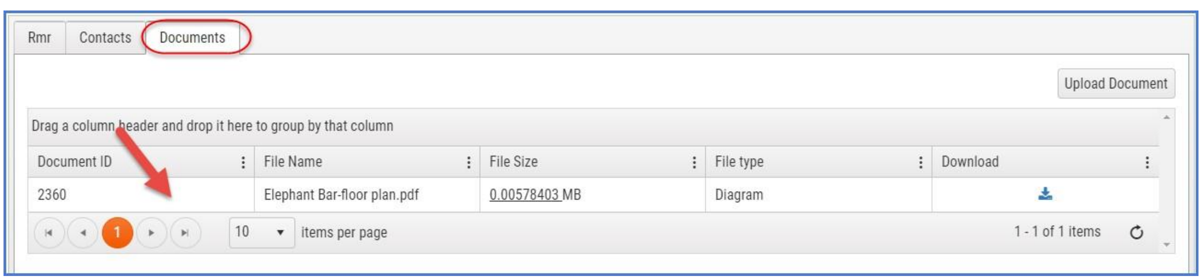
Upload a Document to a Ticket

While viewing the details of a ticket, at the bottom of the page is a section labeled "Documents". All documents saved with a security level of 1 are viewable to the customer. The customer may also upload a document to the ticket by clicking on the "Upload Document" button.

After clicking 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.

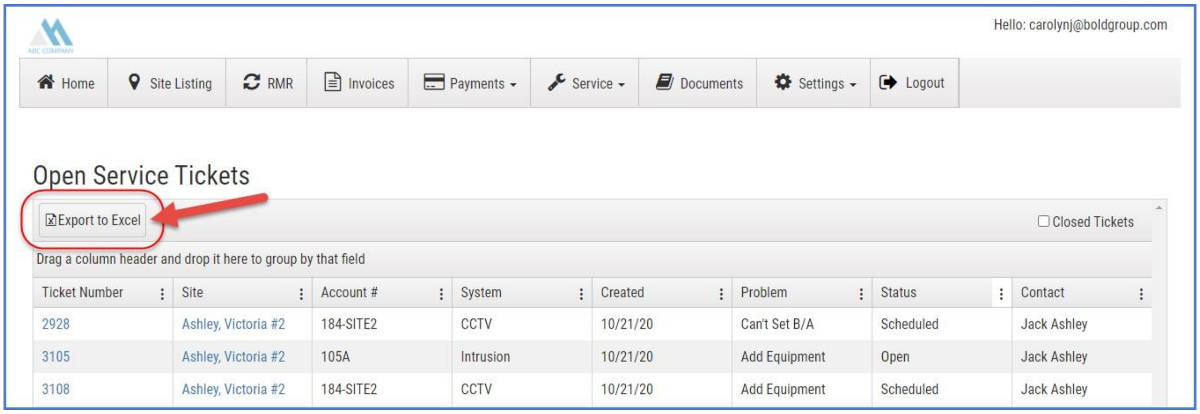


Once a document was uploaded successfully, it will be displayed in the documents listing.



Export to Excel

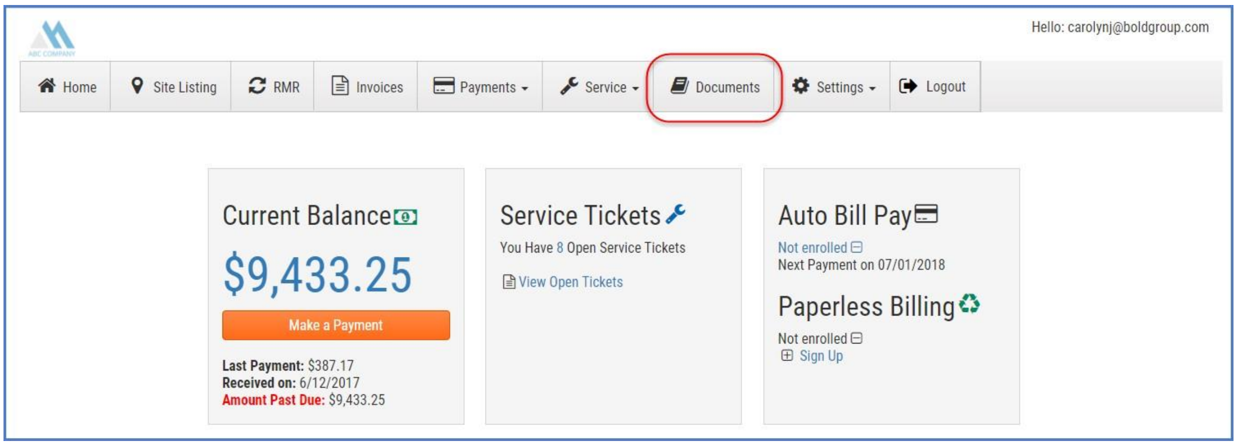
This topic is currently under construction.



Documents Tab

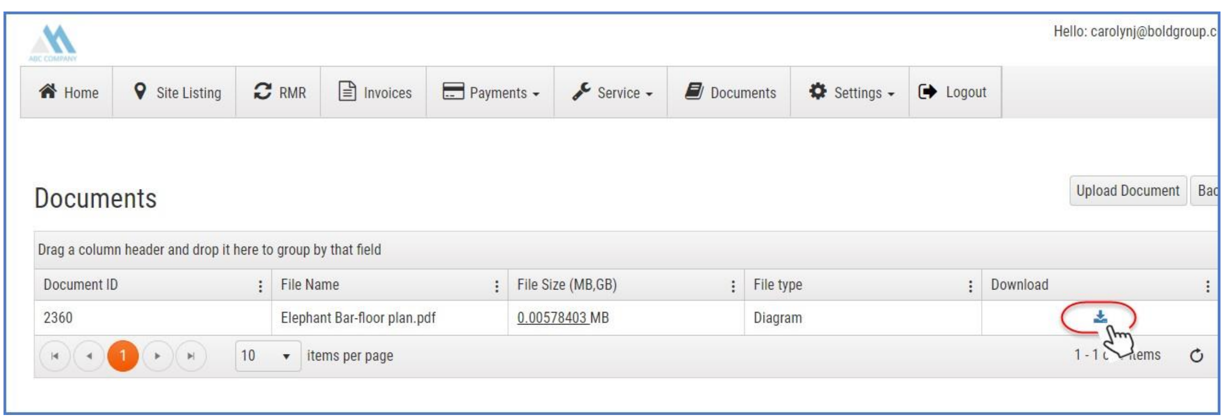
To have access to this feature, your company must purchase the add-on module, SedonaDocs.

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.

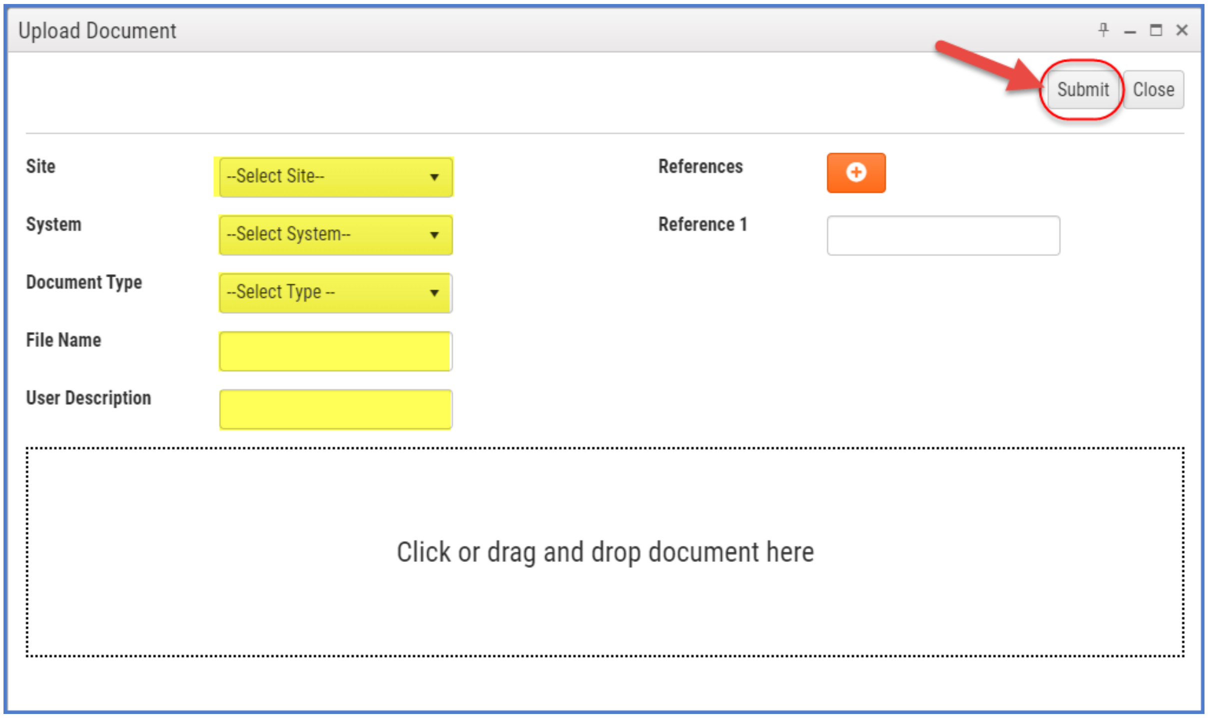


Upload Document

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

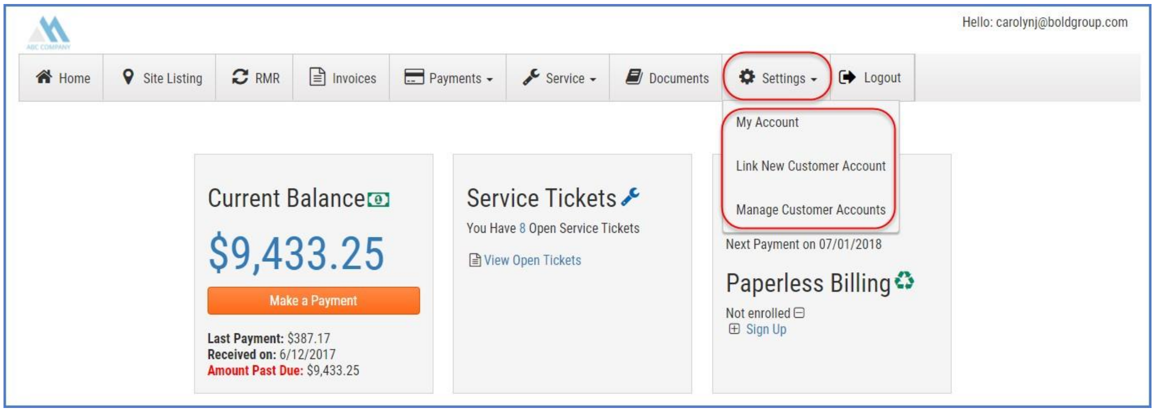
When finished, click the Submit button. If all required fields were populated, the customer will receive a confirmation message that the file upload was successful.



Settings Tab

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

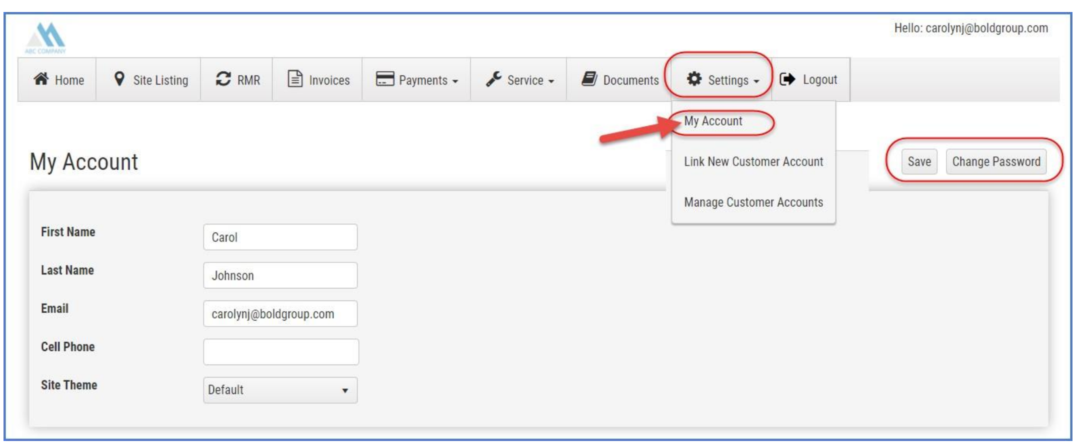
- My Account
- Link New Customer Account
- Manage Customer Accounts



My Account

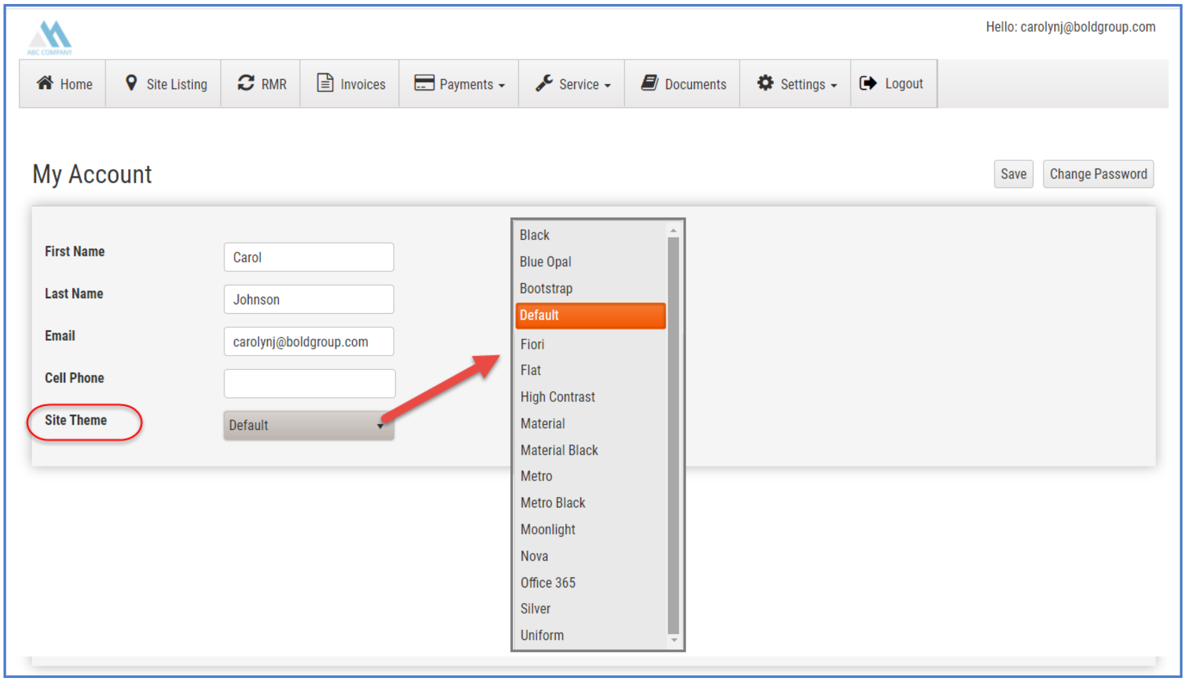
When clicking on the My Account option from the Settings Tab, the customer is able to do the following:

- 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



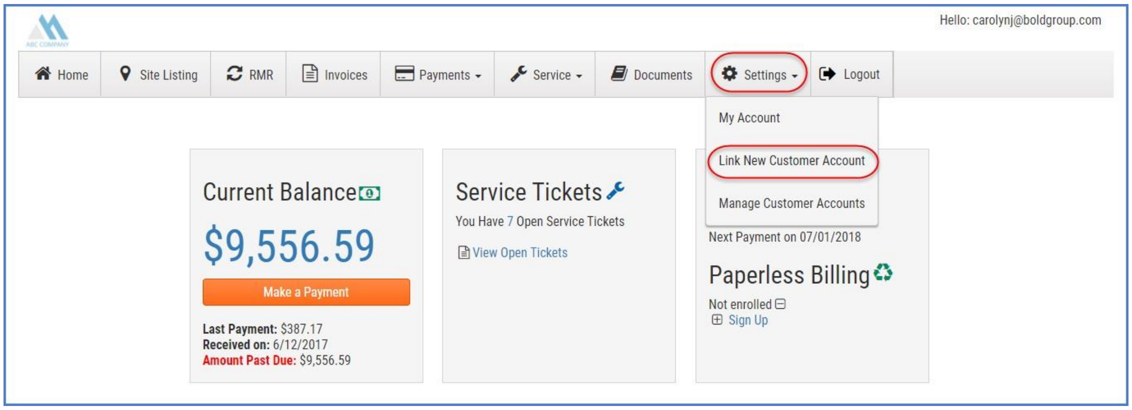
Site Theme

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

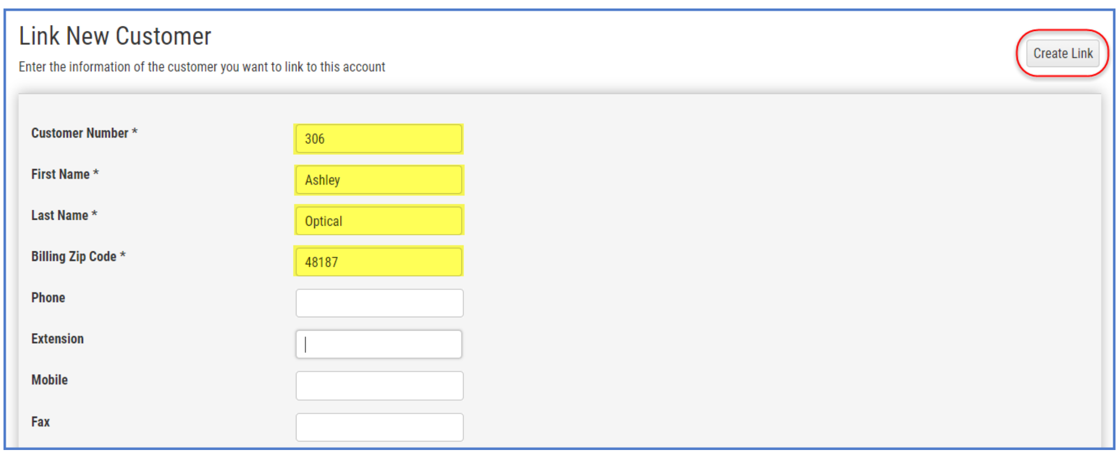


Link New Customer Account

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.

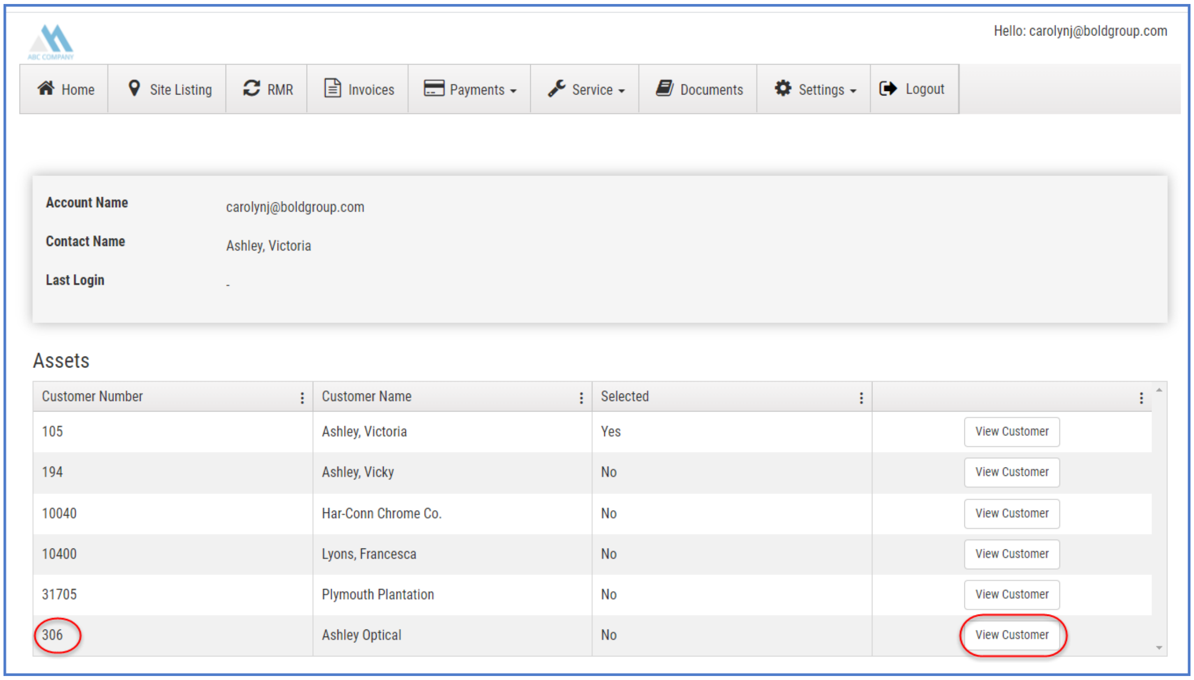


After clicking on the Link New Customer Account from the Settings tab, the Link New Customer form will be displayed. There a four required fields on this form: Customer Number, First Name, Last Name and Billing Zip Code. The telephone number fields are optional. Once these fields have been populated,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



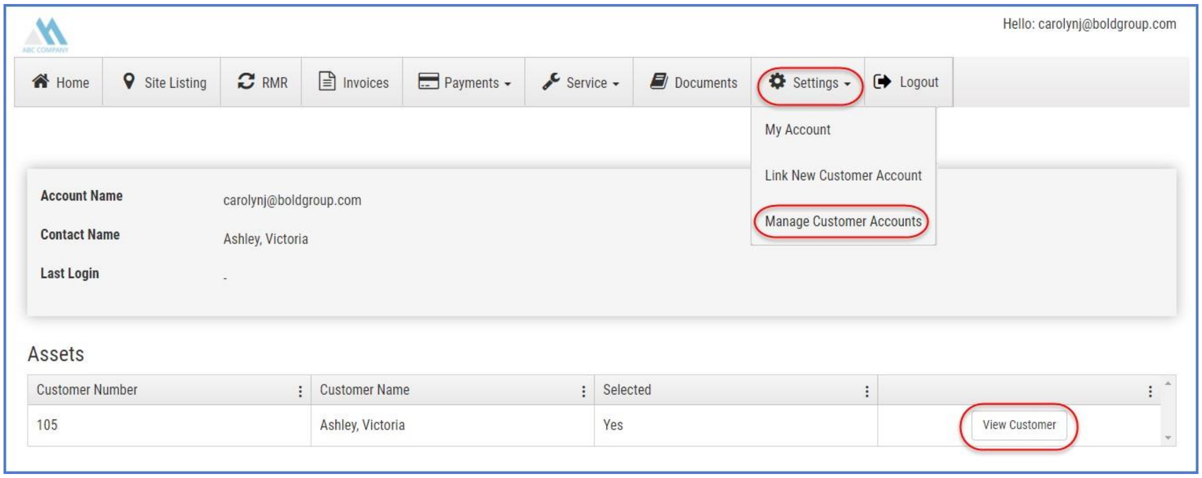
If valid information was entered for the customer to be linked, a listing of all customers linked will be displayed in the listing. To work with one of the linked customers, click on the View Customer button on the customer row desired.

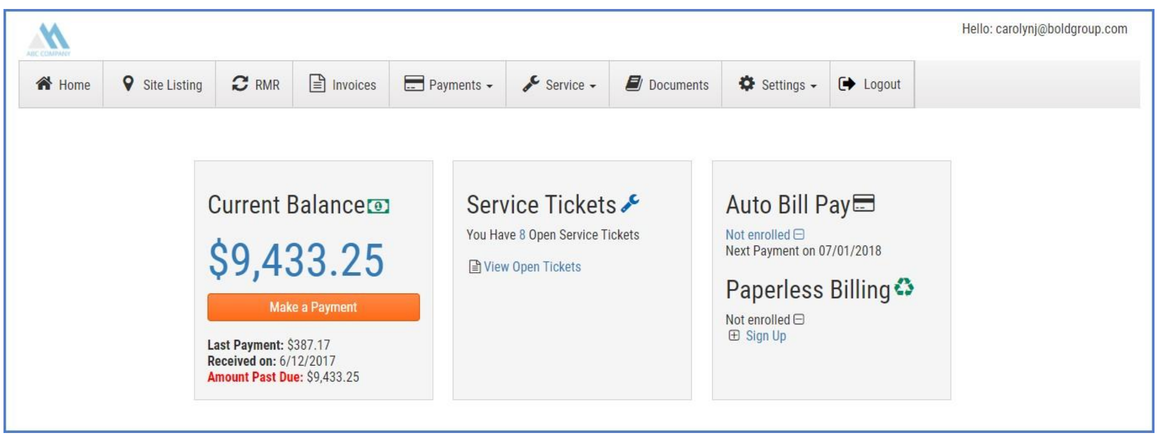
In the example below, the registered customer is linked to six different customer accounts.



Manage Customer Accounts

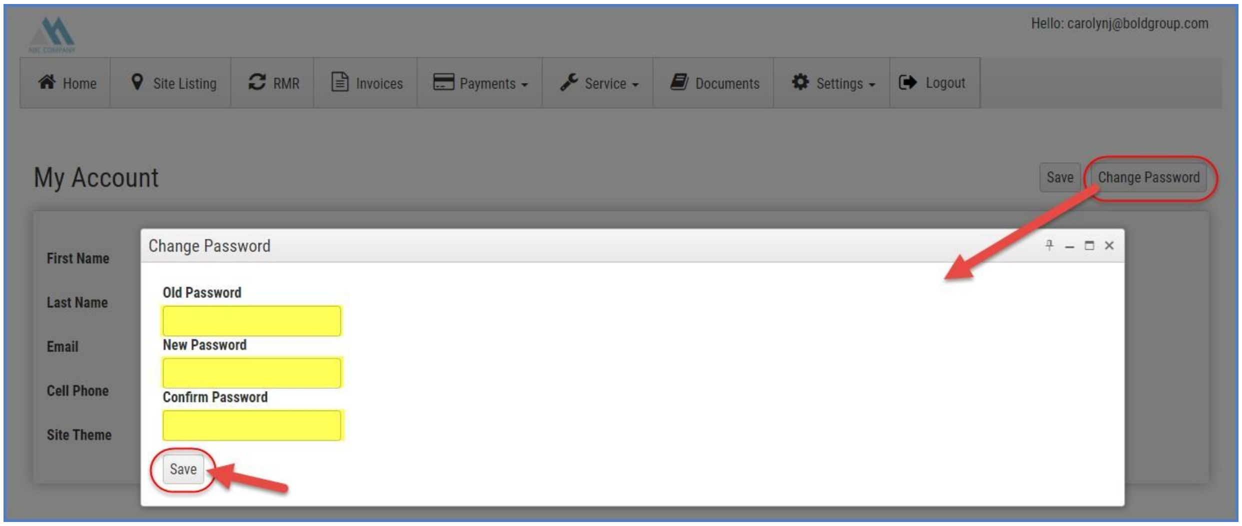
When clicking on the Manage Customer Accounts option from the Settings Tab, the customer's email address and contact name are displayed in the first panel of the page. In the next panel below, under the header of Assets, will be a list of all customer accounts linked to this customer login. When clicking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





Change Password

After clicking on the Change Password button from the My Account page, the customer is able to change their login password at any time. It is highly recommended that customers change their password on a periodic basis for security purposes.

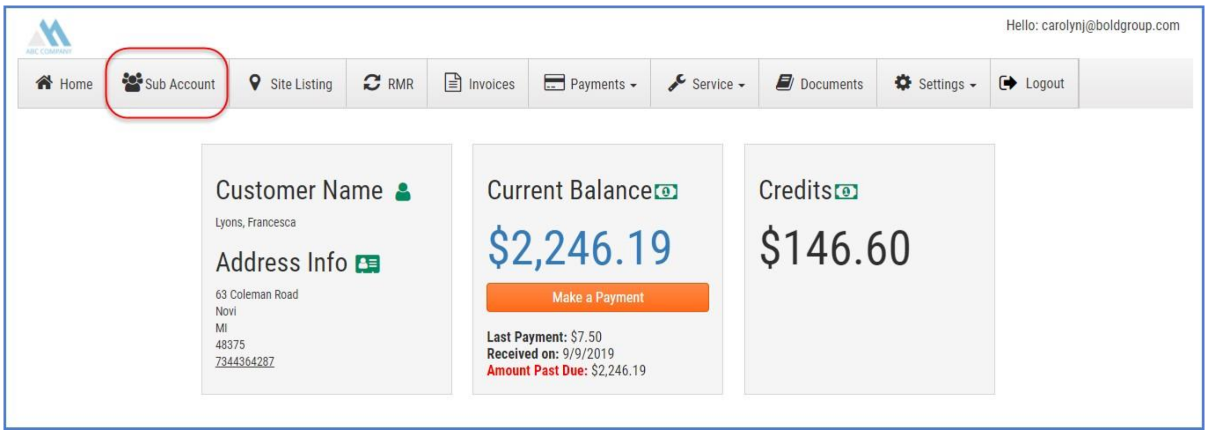


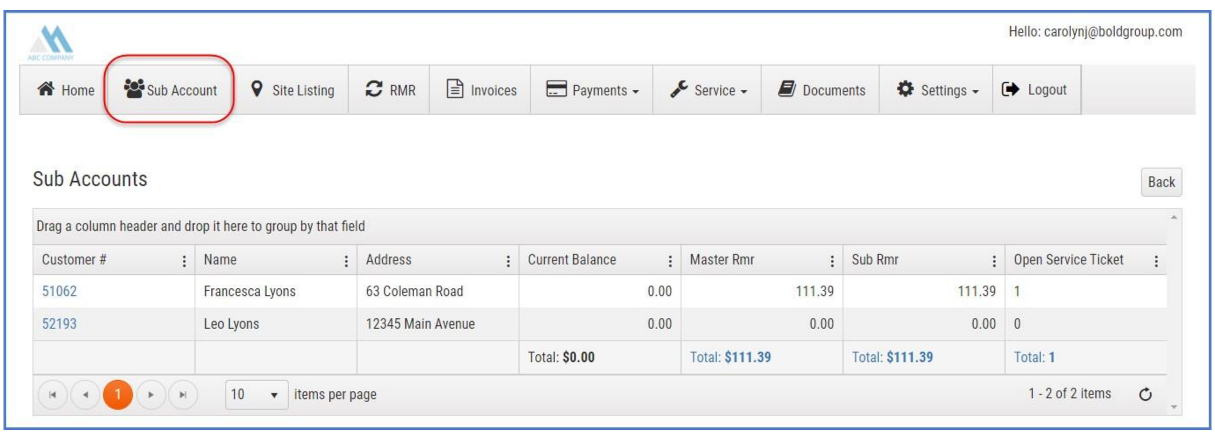
Master Accounts

When a customer is registering their account and they are a Master Account customer (typically a dealer or a national account with many subaccounts), on the home page, the Site Listing tab is replaced by a new tab labeled “Sub Account”. Also under the Settings tab, a new option is displayed labeled “Manage Customer Logins”. Details on each of these options will be described below and on the following pages under this Master Accounts topic.

Sub Account

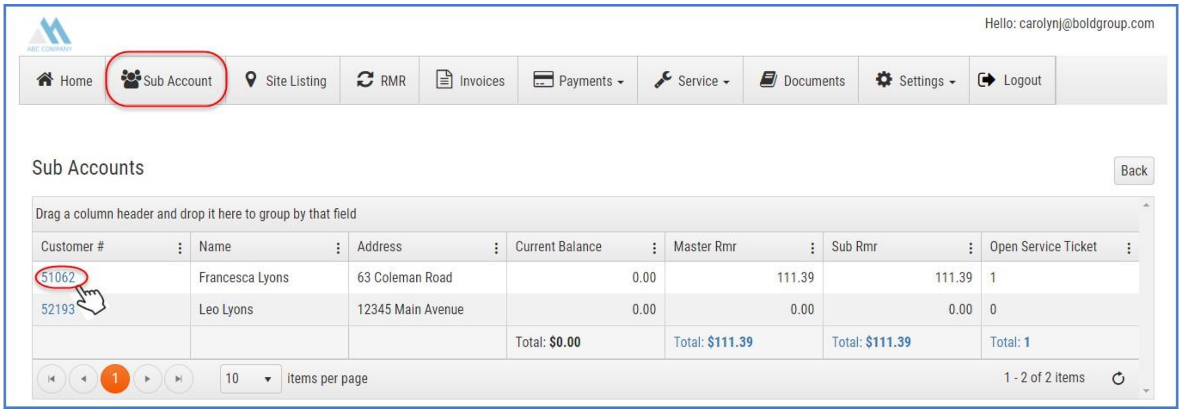
When clicking on the Sub Account tab from the home page, a listing of all sub accounts linked to the master account will be displayed.



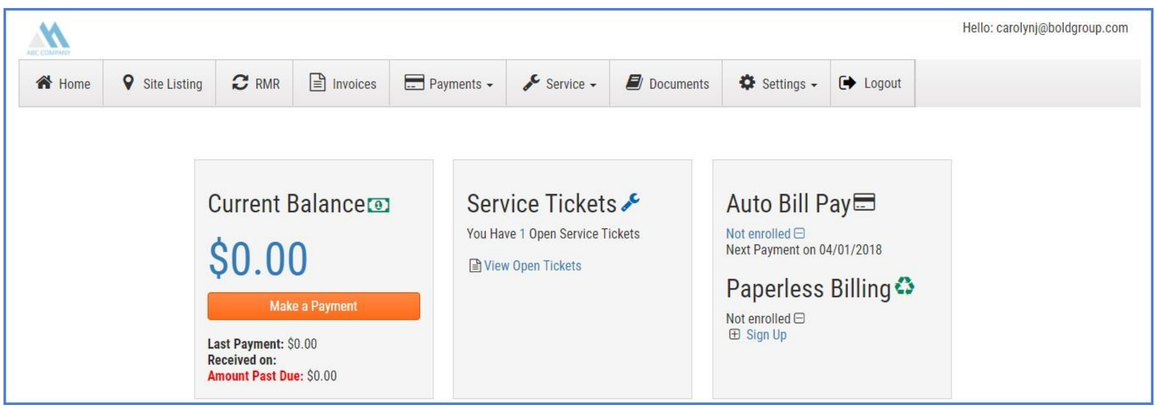


Subaccount Details

While viewing the list of sub accounts, if you click on the Customer # link, the account being viewed will switch to that sub account customer.

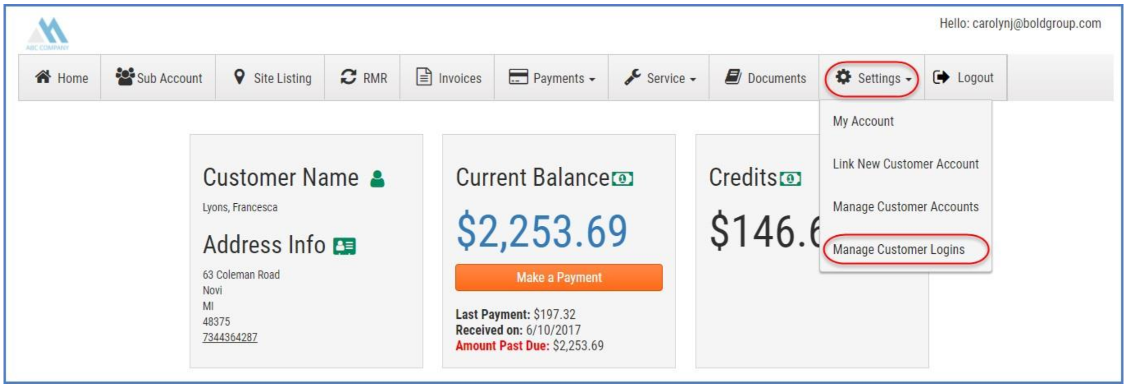


Once the sub account customer record is displayed, you are able to navigate through all the tabs at the top as described earlier in this document.



Manage Customer Logins

If a subaccount has registered for SedonaWeb, when viewing the master account, you may click on the Settings tab and then select the option, Manage Customer Logins, to view all registered subaccount customers.



If the subaccount cancels and you want to prevent the customer from logging into their account, click on the Enabled button, which will change the status to Disabled.