

BOLD
GROUP

SedonaWeb 2.0

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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				
Footer Line 3				
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

The screenshot shows the login page for SedonaAPI. At the top left is the SedonaAPI logo (2). Below it is a navigation bar with links for Home, About, Contact, Register, and Log in (1). The main content area features a 'Log in' heading (1) and a sub-heading 'Use a local account to log in.' (6). There are input fields for 'UserName' and 'Password', a 'Remember me?' checkbox, and a 'Log in' button. Below these are links for 'Register as a new Customer?' and 'Forgot your password?'. On the right side, there is a 'Welcome' message (7) and a paragraph of text (8) explaining that new users need to create an account. At the bottom left, there is contact information for ABC Company (3) and a copyright notice (4). At the bottom right, there is a copyright notice for SedonaCloud (3).

Home Page

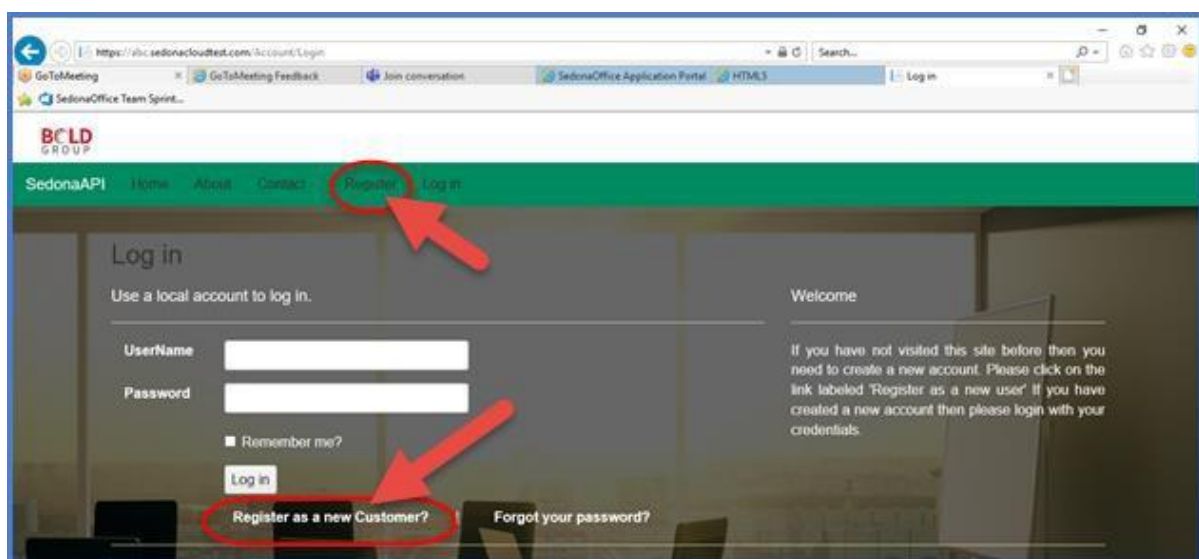
The screenshot shows the home page for a user. At the top left is the SedonaAPI logo (2). At the top right, there is a greeting 'Hello: carolynj@boldgroup.com' (5). Below the logo is a navigation bar with links for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The main content area is divided into three columns: 'Current Balance' showing \$9,556.59 with a 'Make a Payment' button and payment history; 'Service Tickets' showing 7 open tickets with 'View Open Tickets' and 'Create Service Ticket' links; and 'Auto Bill Pay' showing enrollment status and 'Paperless Billing' options.

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.

BOLD GROUP

SedonaAPI Home About Contact **Register** Log in

Register.

Create a new account. Register

Customer Number *

First Name *

Last Name *

Billing Zip Code *

Email *

Confirm Email *

Password * Passwords must meet the following requirements. x

- ✘ Be at least 8 characters
- ✘ At least one letter

Confirm password *

Phone

Extension

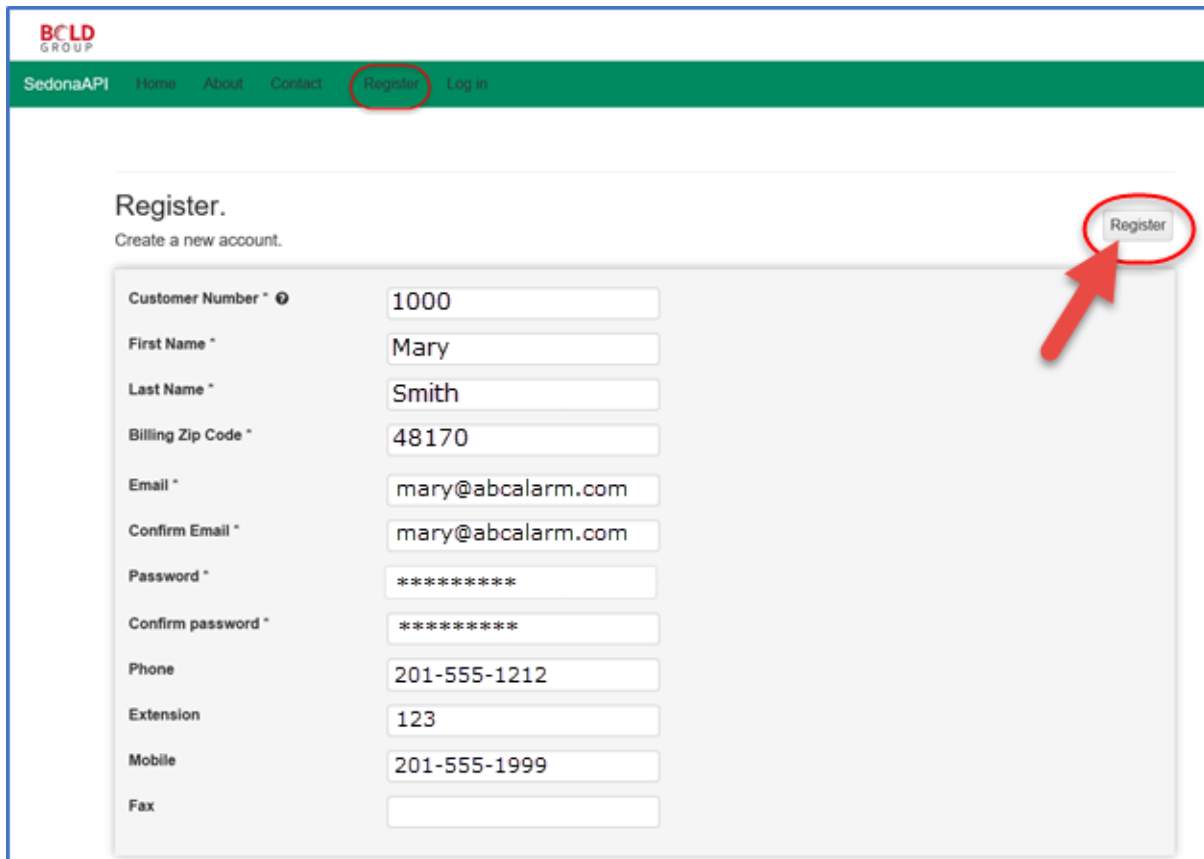
Mobile

Fax

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.



The screenshot shows the BCLD GROUP website's registration page. The navigation bar at the top includes links for SedonaAPI, Home, About, Contact, Register, and Log in. The Register link is circled in red. The main content area is titled "Register." and "Create a new account." It contains a form with the following fields and values:

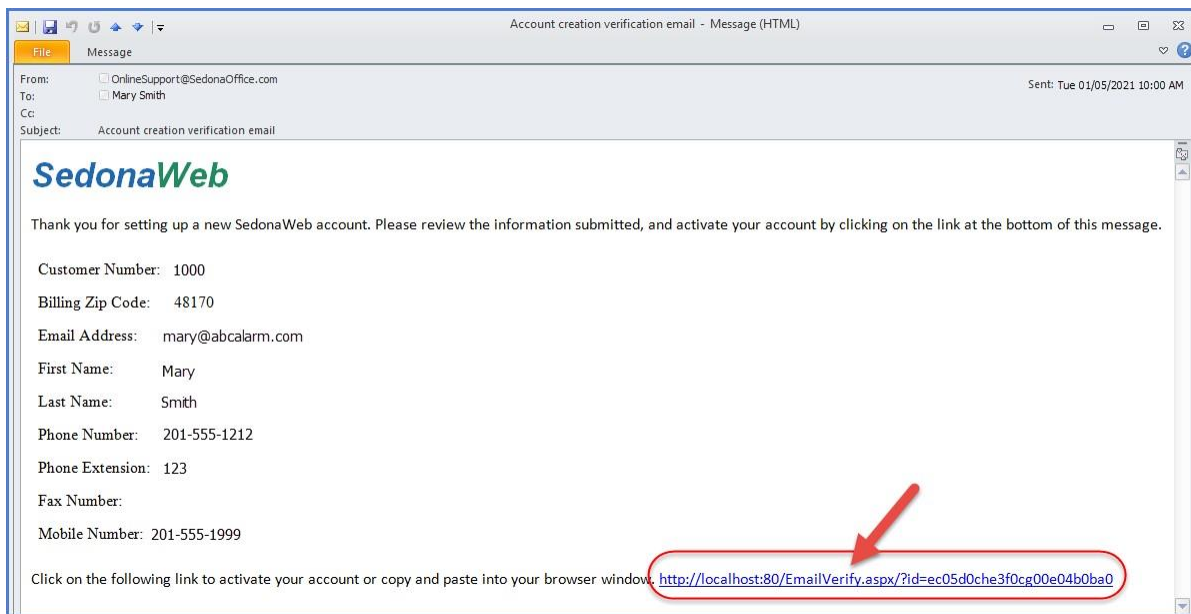
Field	Value
Customer Number *	1000
First Name *	Mary
Last Name *	Smith
Billing Zip Code *	48170
Email *	mary@abcalarm.com
Confirm Email *	mary@abcalarm.com
Password *	*****
Confirm password *	*****
Phone	201-555-1212
Extension	123
Mobile	201-555-1999
Fax	

The Register button is located in the top right corner of the form area and is circled in red with a red arrow pointing to it.

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.



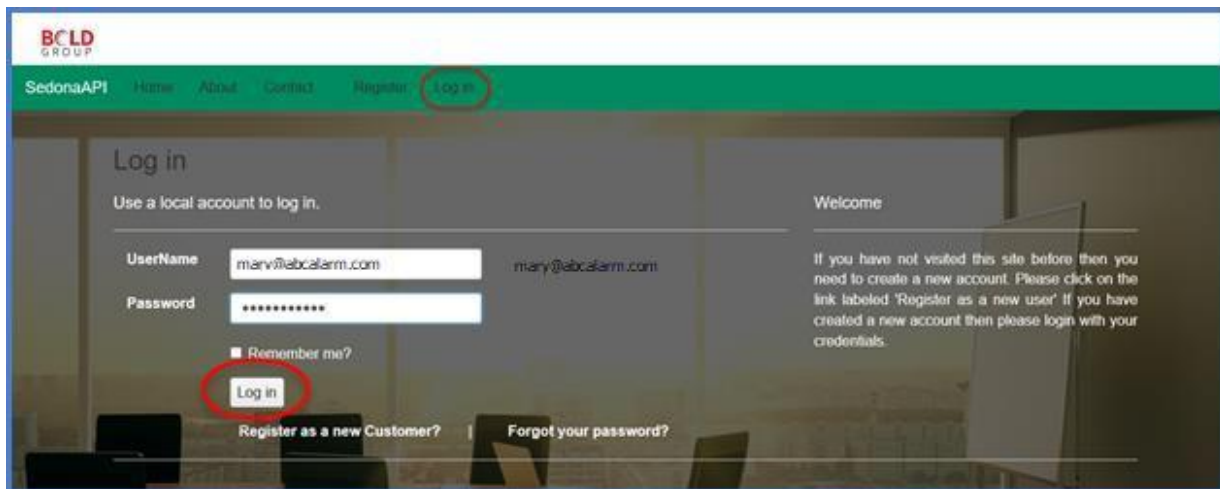
Functionality

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.



BCLD GROUP

SedonaAPI Home About Contact Register **Log in**

Log in

Use a local account to log in.

Welcome

If you have not visited this site before then you need to create a new account. Please click on the link labeled 'Register as a new user'. If you have created a new account then please login with your credentials.

UserName: marv@abcalarm.com | marv@abcalarm.com

Password: *****

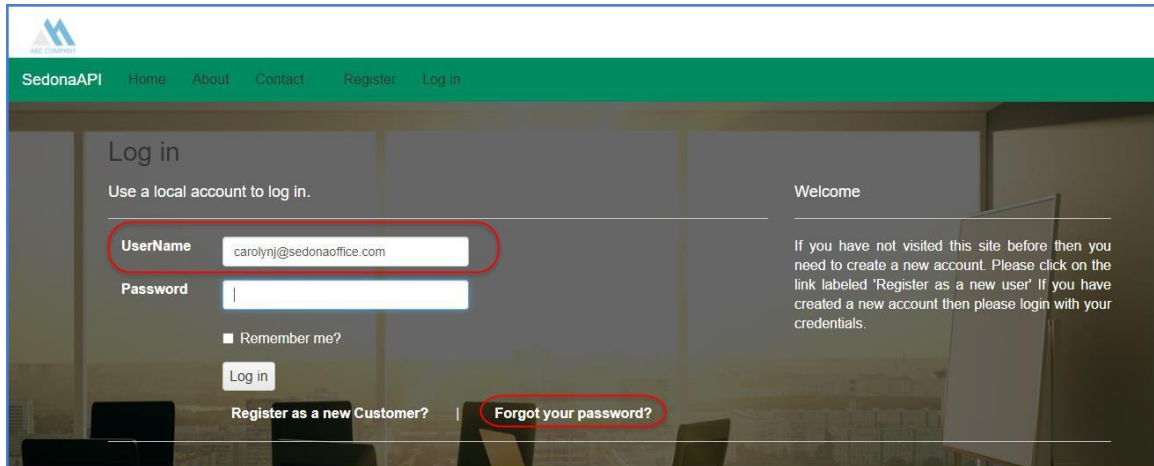
Remember me?

Log in

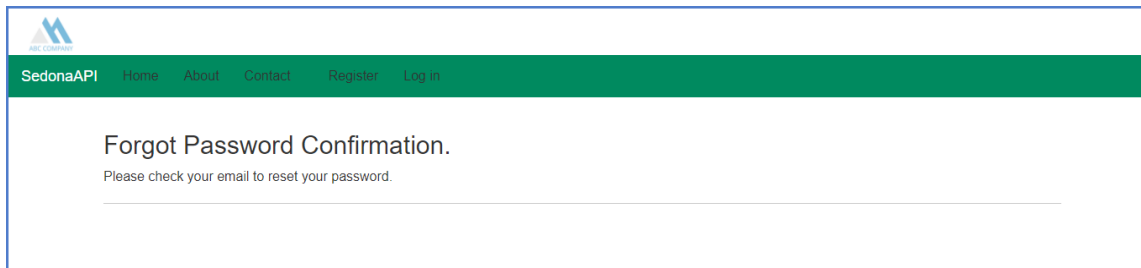
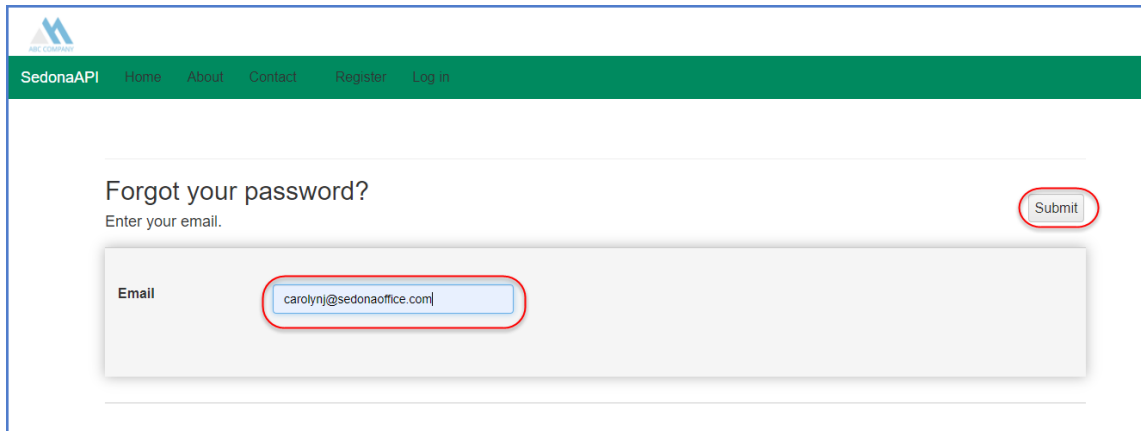
Register as a new Customer? | Forgot your password?

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

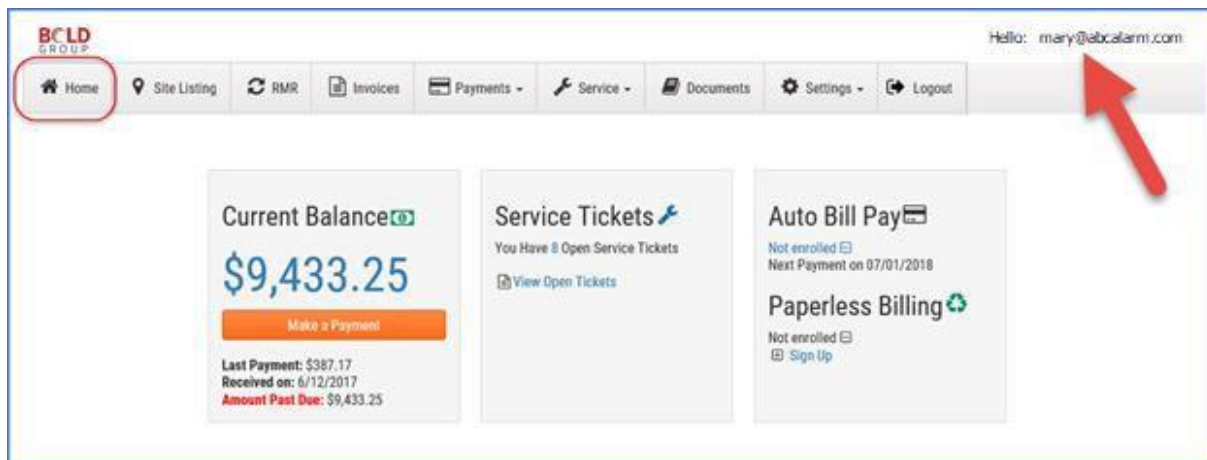
If the Customer correctly enters their *Email Address* and *Password*, their customer home page will be displayed (example below).

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:

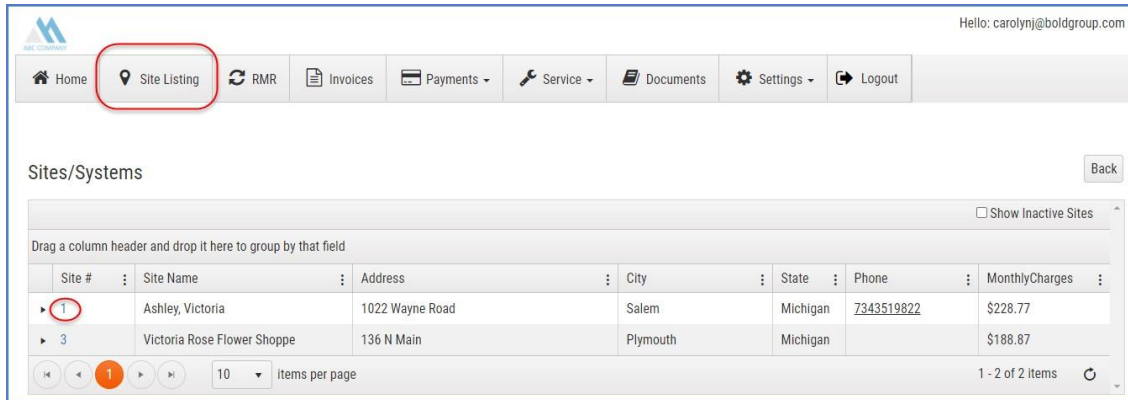
- **Current Balance** – This will show the total net due on the customer’s account, which is the sum of all open invoices and unapplied payments and unapplied credit memos.
- **Service Tickets** – If the customer has any open service or inspection tickets, the count of all tickets will be listed. A link 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.



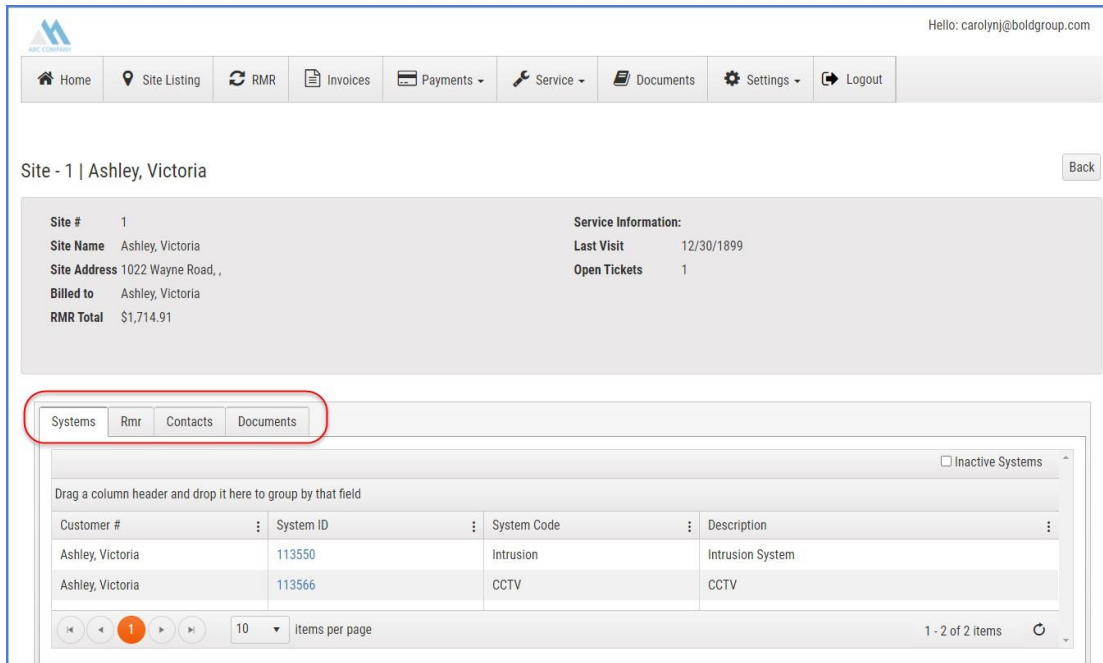
Site Listing Tab

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.

Show Inactive Sites

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

Site #	Site Name	Address	City	State	Phone	MonthlyCharges
1	Ashley, Victoria	1022 Wayne Road	Salem	Michigan	7343519822	\$228.77

Alarm Account	System Code	Panel Type	Monitored By	Warranty
105	Intrusion	N/A	StagesRapid	Full Warranty
184	CCTV	N/A	StagesRapid	Full Warranty

1 - 2 of 2 items

3	Victoria Rose Flower Shoppe	136 N Main	Plymouth	Michigan	\$188.87
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10 Items per page 1 - 2 of 2 items

Hello: carolynj@boldgroup.com

Home
Site Listing
RMR
Invoices
Payments
Service
Documents
Settings
Logout

System - 2 | Acct. # 105

System Account	2	Service Information:	
Account Number	105	Last Visit	
Site	Ashley, Victoria	Open Tickets	0
Location		Last Inspection	
Monthly Charges	\$810.80	PO Number	5678
Status	Active		

Rmr

Contacts

Documents

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

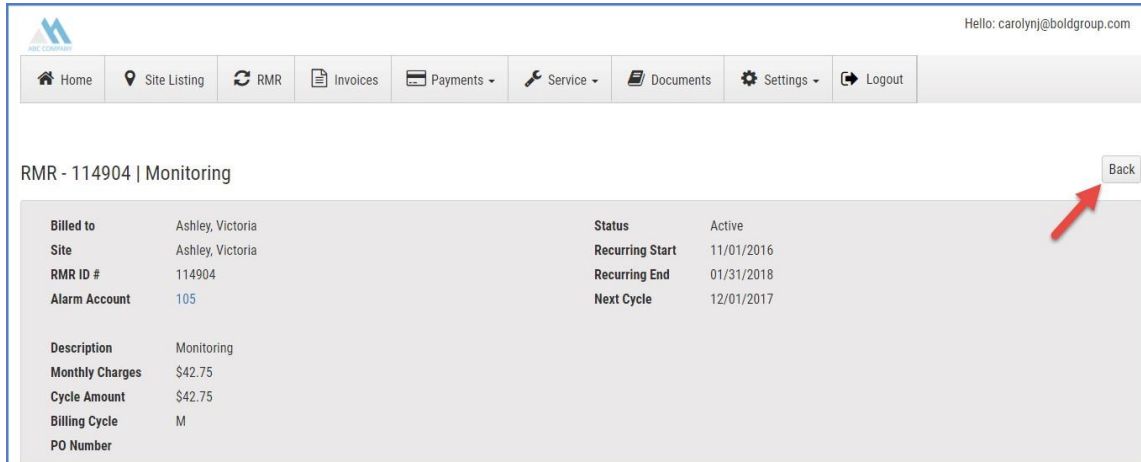
10 Items per page 1 - 2 of 2 items

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 CONTRACTS

Hello: carolynj@boldgroup.com

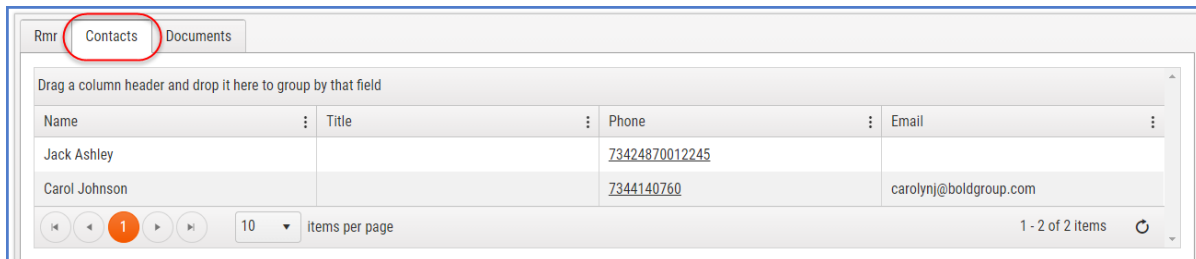
Home Site Listing RMR Invoices Payments Service Documents Settings Logout

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

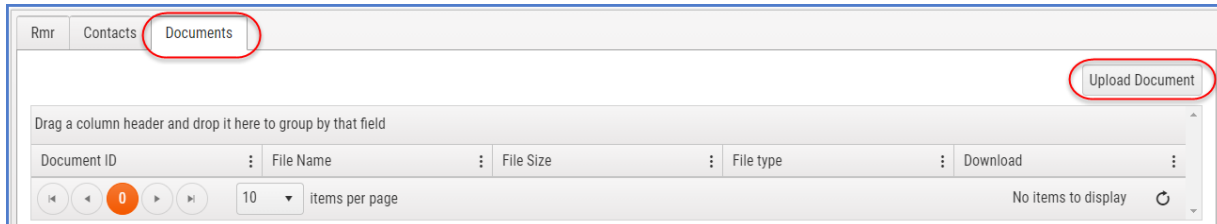
Name	Title	Phone	Email
Jack Ashley		73424870012245	
Carol Johnson		7344140760	carolynj@boldgroup.com

1 10 Items per page 1 - 2 of 2 Items

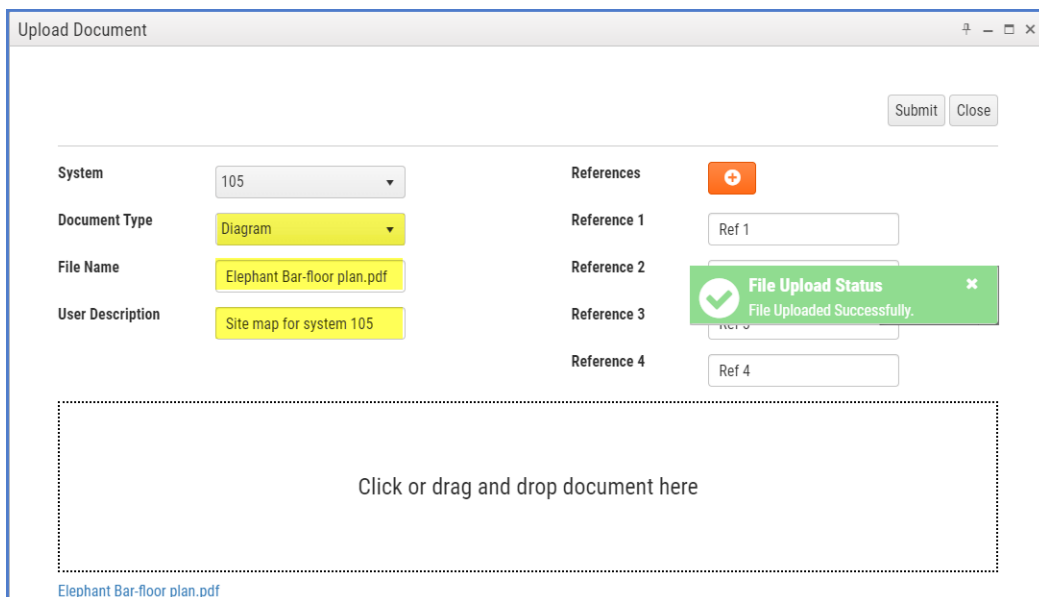
Documents Tab

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.

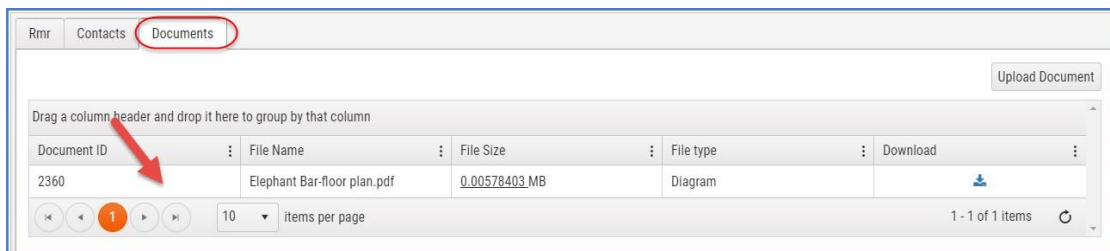
Note: All documents saved with a security level of 1 will be available for the customer.



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.

HELIX COMPANY Hello: carolynj@boldgroup.com

Home Site Listing RMR Invoices Payments Service Documents Settings Logout

RMR Back

Cancelled RMRs

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

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

10 items per page 1 - 2 of 2 items

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 - 121587 | 501 Back

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		

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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 right, it says "Hello: carolynj@boldgroup.com". The navigation bar includes Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. Below the navigation bar, the "RMR" section is active, and a "Back" button is visible. A checkbox labeled "Cancelled RMRs" is checked, indicated by a red arrow. Below this, a table lists RMRs with columns for RMR ID, Bill To, Site Name, Alarm Account, Monthly \$, and Cycle \$. The RMR ID 65474 is circled in red, and a mouse cursor is pointing at it.

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. At the top right, it says "Hello: carolynj@boldgroup.com". The navigation bar is the same as in the previous screenshot. Below the navigation bar, the "RMR - 65474 | Monitoring" section is active, and a "Back" button is visible. The details are displayed in a table format:

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			

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

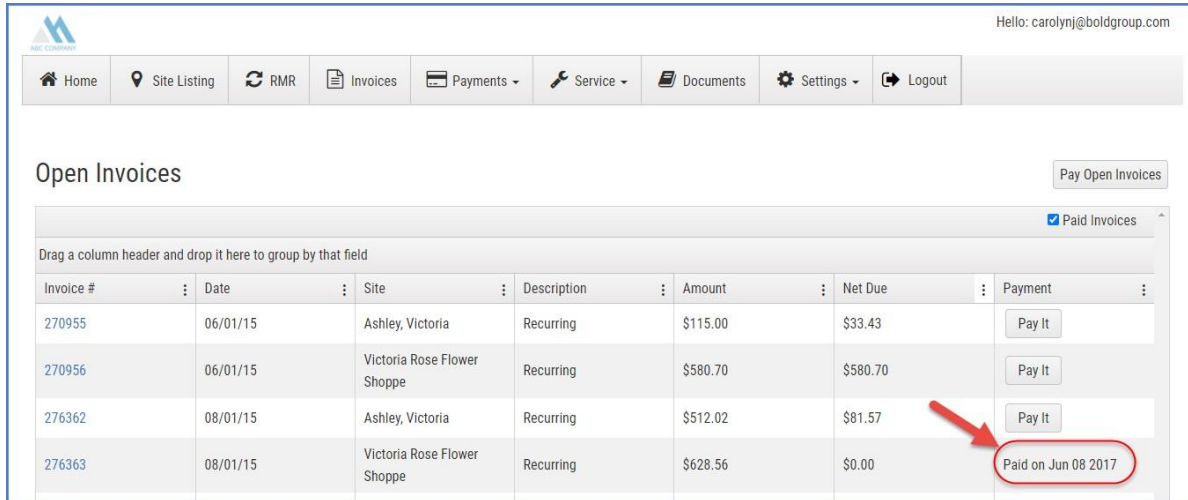
These two options are only available to companies who have set up an account with Forte (merchant bank).

The screenshot shows the 'Invoices' tab selected in the top navigation bar. The main content area displays a table of 'Open Invoices'. The table has columns for Invoice #, Date, Site, Description, Amount, Net Due, and Payment. Each row includes a 'Pay It' button. A 'Pay Open Invoices' button is located in the top right corner of the table area. The table is currently showing 10 items per page, and there are 49 items in total.

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.



The screenshot shows a web application interface for managing invoices. 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 main content area is titled "Open Invoices" and includes a "Pay Open Invoices" button. A checkbox labeled "Paid Invoices" is checked. Below this, there is a table with columns for Invoice #, Date, Site, Description, Amount, Net Due, and Payment. The table contains four rows of invoice data. The last row, with Invoice # 276363, has a "Payment" column containing the text "Paid on Jun 08 2017", which is circled in red. A red arrow points to this text.

Invoice #	Date	Site	Description	Amount	Net Due	Payment
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
276363	08/01/15	Victoria Rose Flower Shoppe	Recurring	\$628.56	\$0.00	Paid on Jun 08 2017

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.

Open Invoices Pay Open Invoices

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

Invoice #	Date	Site	Description	Amount	Net Due	Payment
324769	04/01/16	Victoria Rose Flower Shoppe	Recurring	\$62.73	\$62.73	Pay It
334611	06/01/16	Ashley, Victoria	Equipment Sales	\$417.20	\$417.20	Pay It
334612	06/01/16	Victoria Rose Flower Shoppe	Equipment Sales	\$125.45	\$125.45	Pay It
341156	07/19/16	Ashley, Victoria	Service Call	\$358.89	\$358.89	Pay It

Customer ID: 105 | Category: SVC T&M | A/R Account: 110110 | Tax Group: MI-Wayne County

Invoice # **341156** | Invoice Date: 7/19/2016 | Aging Date: 7/19/2016
Site Address: 1022 Wayne Road Salem, MI | Branch: MI | P.O Number:
Warehouse: N/A | Term: Due On Receipt
Invoice Type: Service | Salesperson: N/A

Item	Description	Quantity	Rate	Amount	Memo
PST Battery	12V 7AH BATTERY	1	40	\$40.00	
SVC Call	Minimum Service Call Charge	1	115	\$115.00	
SVC Labor	Service Labor	1.5	120	\$180.00	

10 items per page | 1 - 3 of 3 items

Description: Service Call | Sub Total: 335.00
Contact: | Tax: 23.89
Memo: | Total: 358.89
Balance Due: 358.89

[Back](#)

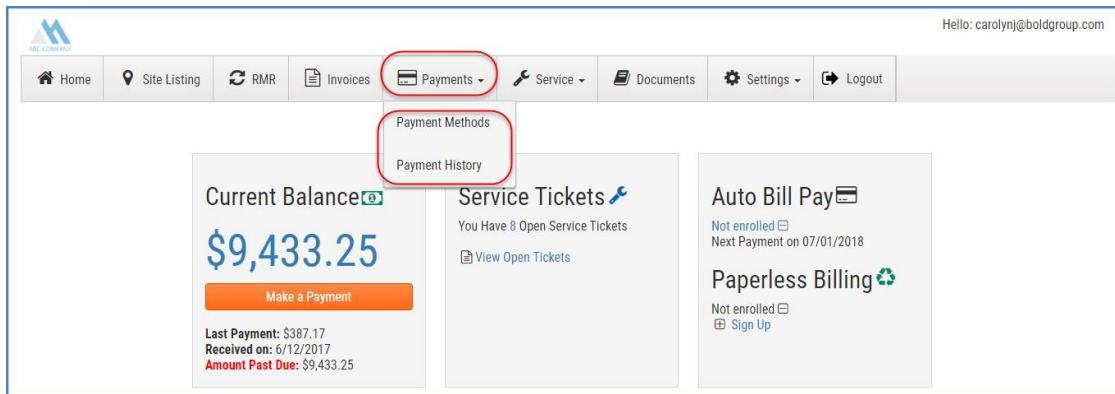
Pay It / Pay Open Invoices

This topic is currently under construction.

Payments Tab

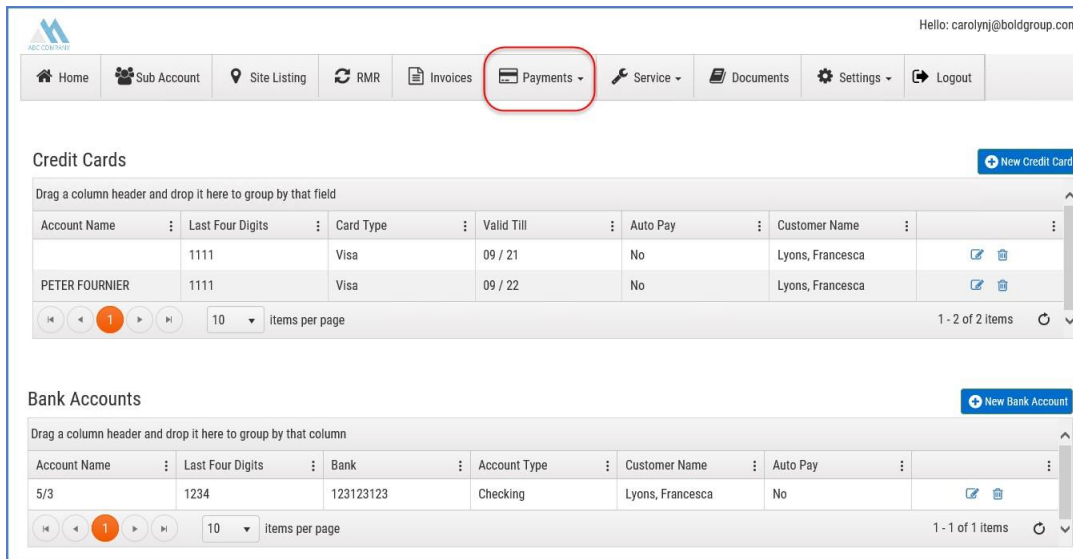
When clicking on the Payments Tab, two options are available:

- 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.




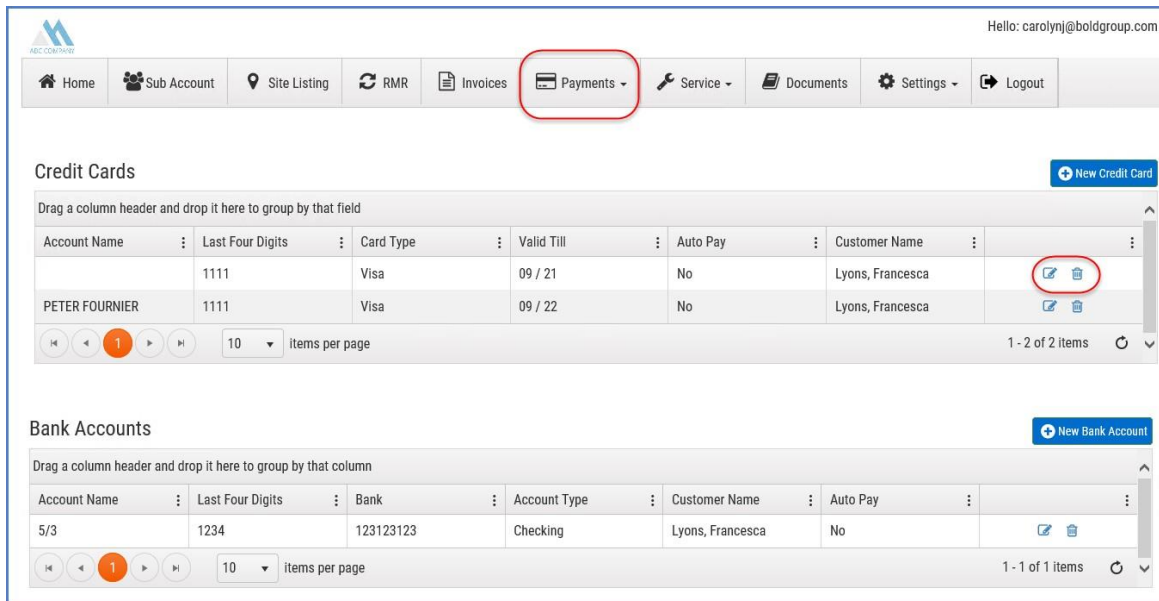
Payment Methods

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.



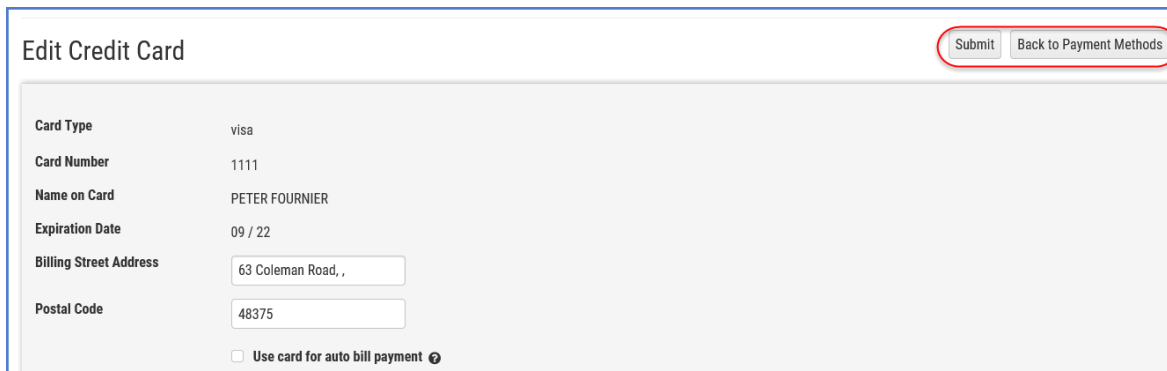
The screenshot shows the ABC COMPANY dashboard with the 'Payments' menu item circled in red. Below the navigation bar, there are sections for 'Credit Cards' and 'Bank Accounts'. The 'Credit Cards' section contains a table with the following data:

Account Name	Last Four Digits	Card Type	Valid Till	Auto Pay	Customer Name	
	1111	Visa	09 / 21	No	Lyons, Francesca	 
PETER FOURNIER	1111	Visa	09 / 22	No	Lyons, Francesca	 

The 'Bank Accounts' section contains a table with the following data:

Account Name	Last Four Digits	Bank	Account Type	Customer Name	Auto Pay	
5/3	1234	123123123	Checking	Lyons, Francesca	No	 

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.




The 'Edit Credit Card' form displays the following information:

- Card Type: visa
- Card Number: 1111
- Name on Card: PETER FOURNIER
- Expiration Date: 09 / 22
- Billing Street Address: 63 Coleman Road, ,
- Postal Code: 48375
- Use card for auto bill payment

The 'Submit' and 'Back to Payment Methods' buttons are circled in red.

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.


Delete Credit Card

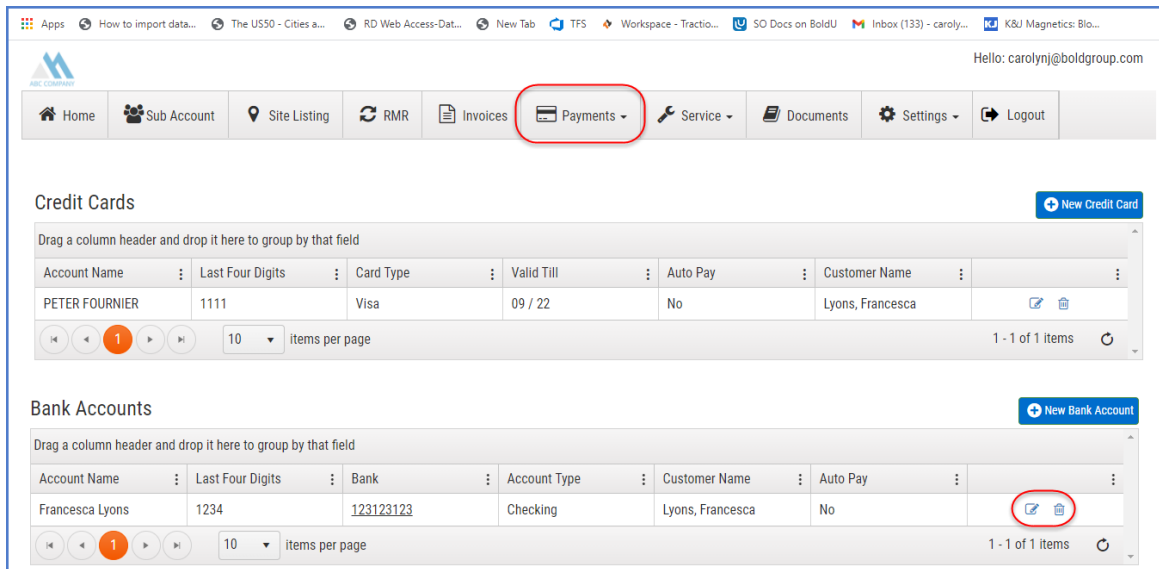
Are you sure you want to delete this?

[Delete](#) [Back to Payment Methods](#)

Card Type	VISA
LastFourDigits	1111
Expiration Date	09 / 21
Billing Street Address	63 Coleman Road, ,
Postal Code	48375

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.

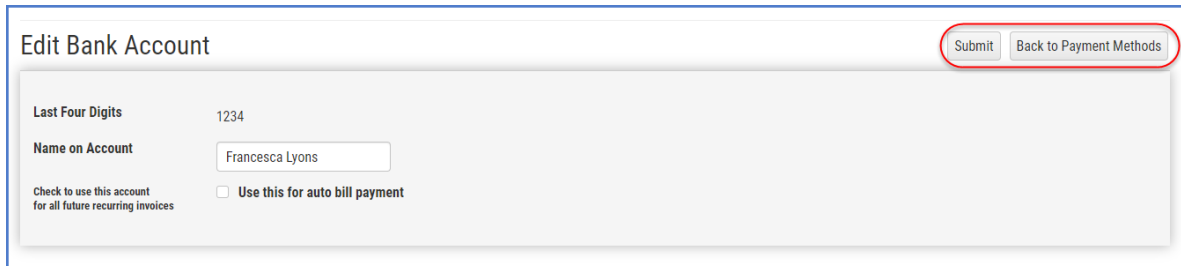


The screenshot shows the Bold Group software interface. The top navigation bar includes Home, Sub Account, Site Listing, RMR, Invoices, Payments (circled in red), Service, Documents, Settings, and Logout. Below the navigation bar, there are two sections: Credit Cards and Bank Accounts. The Credit Cards section shows a table with columns: Account Name, Last Four Digits, Card Type, Valid Till, Auto Pay, and Customer Name. The Bank Accounts section shows a table with columns: Account Name, Last Four Digits, Bank, Accounting Type, Customer Name, and Auto Pay. The edit icon for the Francesca Lyons bank account is circled in red.

Account Name	Last Four Digits	Card Type	Valid Till	Auto Pay	Customer Name
PETER FOURNIER	1111	Visa	09 / 22	No	Lyons, Francesca

Account Name	Last Four Digits	Bank	Accounting Type	Customer Name	Auto Pay
Francesca Lyons	1234	123123123	Checking	Lyons, Francesca	No

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.




The screenshot shows the Edit Bank Account form. The form includes the following fields and options:

- Last Four Digits: 1234
- Name on Account: Francesca Lyons
- Check to use this account for all future recurring invoices: Use this for auto bill payment

The Submit and Back to Payment Methods buttons are circled in red.

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.

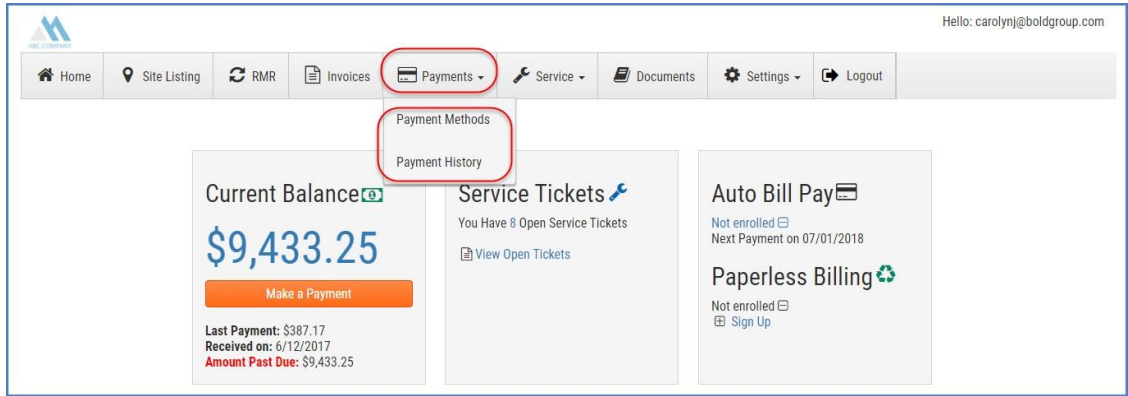
Delete Bank Account

Are you sure you want to delete this? Delete Back to Payment Methods

RoutingNumber	123123123
Last Four	1234
Description	123123123
Name on Account	Francesca Lyons

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.



Payment History Back

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

Name	Date	Payment Method	Amount	Reference	Memo	Approval Code
Lyons, Francesca	Mon Sep 09 2019	Credit Card	\$7.50	300625		

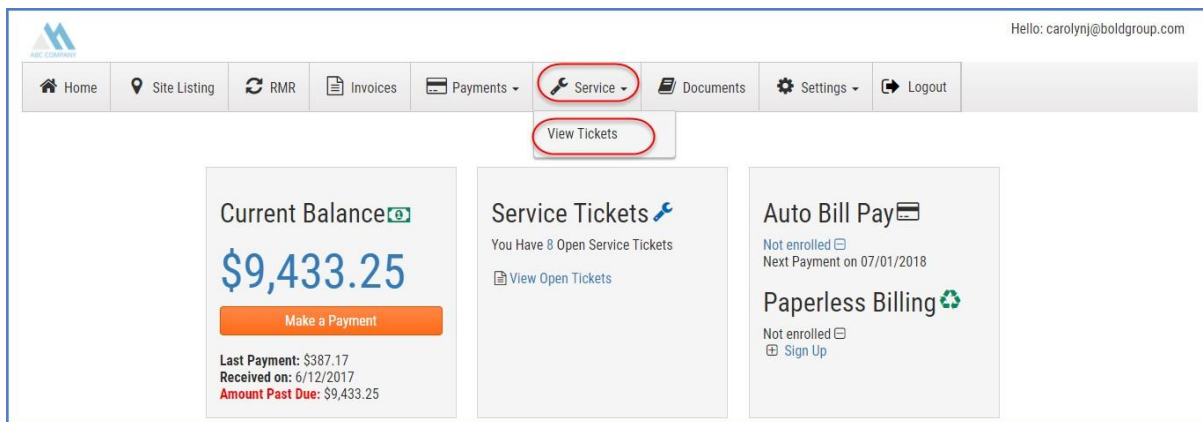
10 items per page 1 - 1 of 1 items

Service Tab

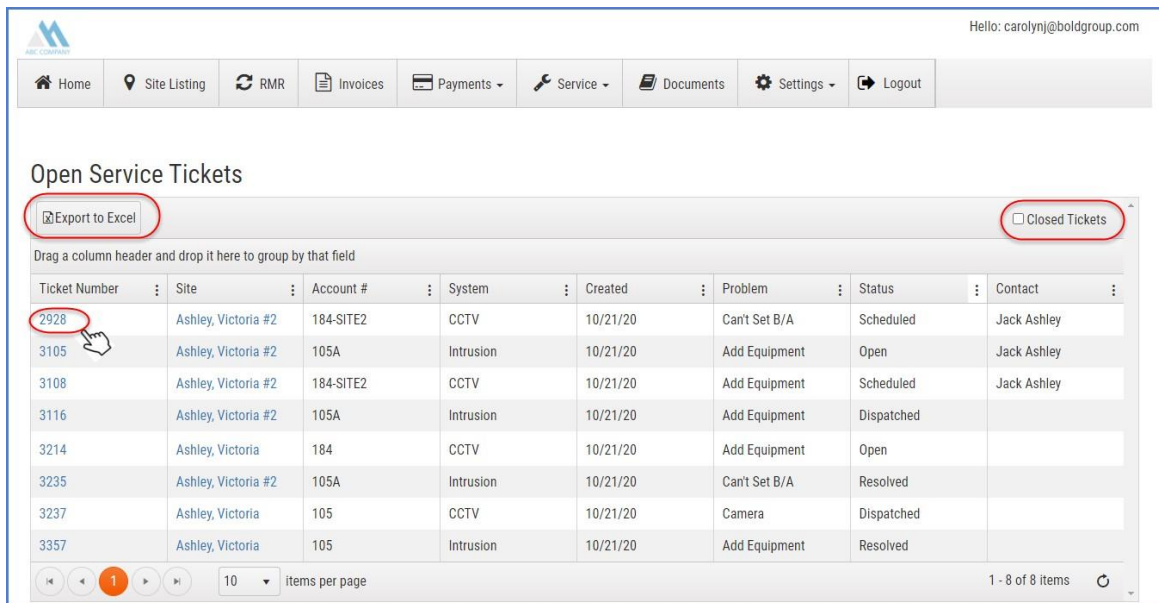
When clicking on the Service Tab, one option is available, View Tickets. When clicking on the View Tickets option, customers are able to do the following:

- 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.

Logo: ABC COMPANY

Hello: carolynj@boldgroup.com

Home Site Listing RMR Invoices Payments Service Documents Settings Logout

Ticket #2928

[Back to Service Tickets](#)

Customer Information
Customer Number: 105
Customer Name: Ashley, Victoria

Technician Information
Technician Name: N/A
Technician Phone:
Technician Email:

Site and System Detail
Site: Ashley, Victoria #2
2022 Wayne Road
Salem, MI, 48175
System: 184-SITE2
Type: CCTV

Ticket Detail
Date Created: 10/21/2020
Status: Scheduled
Priority: Medium
Requested By: Jack Ashley
Problem: Can't Set B/A
Comment: testinbg
Description:
Other Notes: 425

Resolution
Code: N/A
Description: 371796
Resolved By: 5/4/2015
Resolved Note: testinbg

Documents

[Upload Document](#)

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

Document ID	File Name	File Size	File type	Download
No items to display				

10 items per page

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.

Upload Document

Submit Close

System: 105

Document Type: Diagram

File Name: Elephant Bar-floor plan.pdf

User Description: Site map for system 105

References: +

Reference 1: Ref 1

Reference 2: [Green Confirmation Message]

Reference 3: Ref 3

Reference 4: Ref 4

Click or drag and drop document here

Elephant Bar-floor plan.pdf

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

Rmr Contacts Documents Upload Document

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

Document ID	File Name	File Size	File type	Download
2360	Elephant Bar-floor plan.pdf	0.00578403 MB	Diagram	

10 items per page 1 - 1 of 1 items

Export to Excel

This topic is currently under construction.

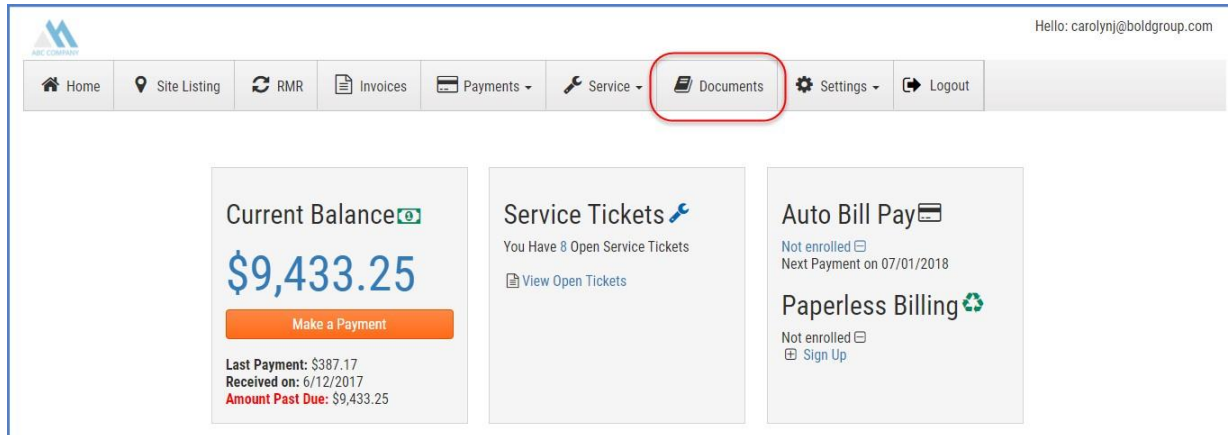
The screenshot shows a web application interface with a navigation menu at the top. The menu includes: Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The user is logged in as 'Hello: carolynj@boldgroup.com'. Below the menu is a section titled 'Open Service Tickets'. In this section, there is a button labeled 'Export to Excel' which is circled in red with a red arrow pointing to it. To the right of this button is a checkbox labeled 'Closed Tickets'. Below the button and checkbox is a table with the following data:

Drag a column header and drop it here to group by that field								
Ticket Number	Site	Account #	System	Created	Problem	Status	Contact	
2928	Ashley, Victoria #2	184-SITE2	CCTV	10/21/20	Can't Set B/A	Scheduled	Jack Ashley	
3105	Ashley, Victoria #2	105A	Intrusion	10/21/20	Add Equipment	Open	Jack Ashley	
3108	Ashley, Victoria #2	184-SITE2	CCTV	10/21/20	Add Equipment	Scheduled	Jack Ashley	


Documents Tab

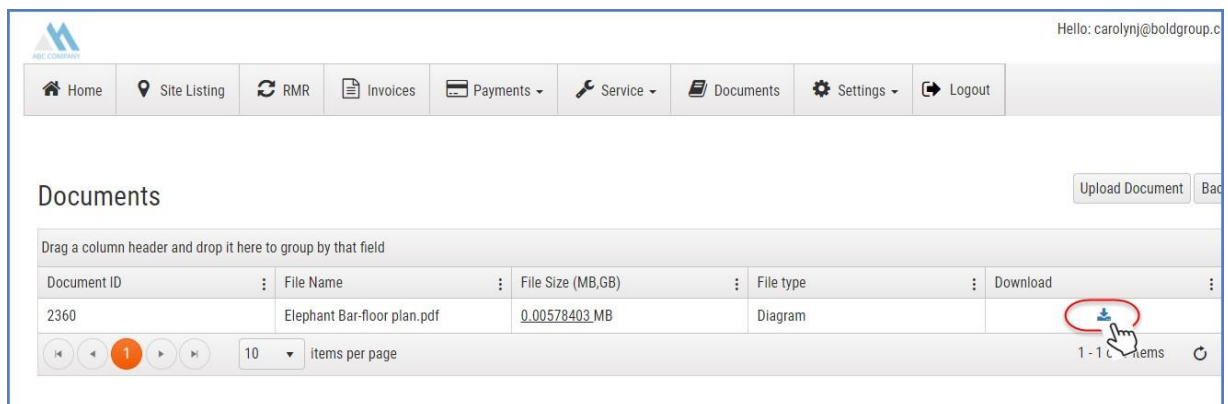
To have access to this feature, your company must purchase the add-on module, SedonaDocs.

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.

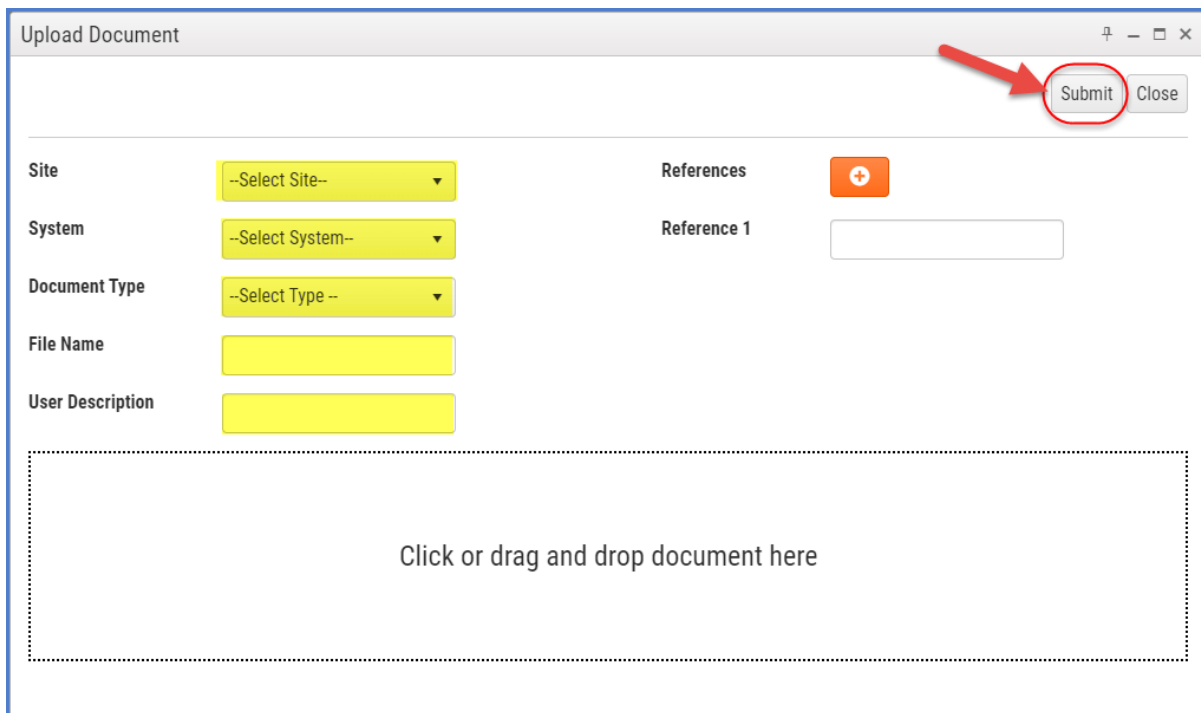


Upload Document

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.

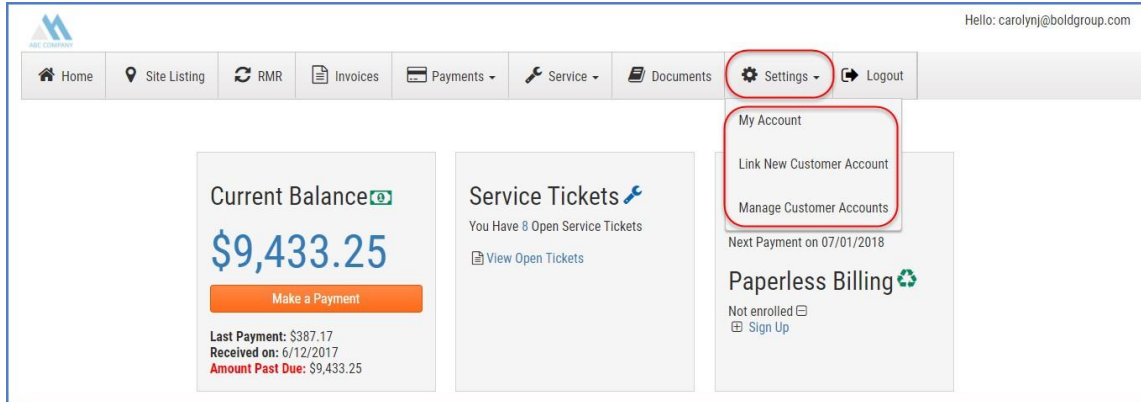


The screenshot shows a web application window titled "Upload Document". The window has a standard title bar with maximize, minimize, and close buttons. In the top right corner, there are two buttons: "Submit" and "Close". A red arrow points to the "Submit" button, which is circled in red. Below the buttons, the form is organized into two columns. The left column contains five fields, all highlighted in yellow: "Site" (a dropdown menu with "--Select Site--"), "System" (a dropdown menu with "--Select System--"), "Document Type" (a dropdown menu with "--Select Type --"), "File Name" (a text input field), and "User Description" (a text input field). The right column contains two fields: "References" (a button with a plus sign) and "Reference 1" (a text input field). At the bottom of the form, there is a large dashed rectangular box containing the text "Click or drag and drop document here".

Settings Tab

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

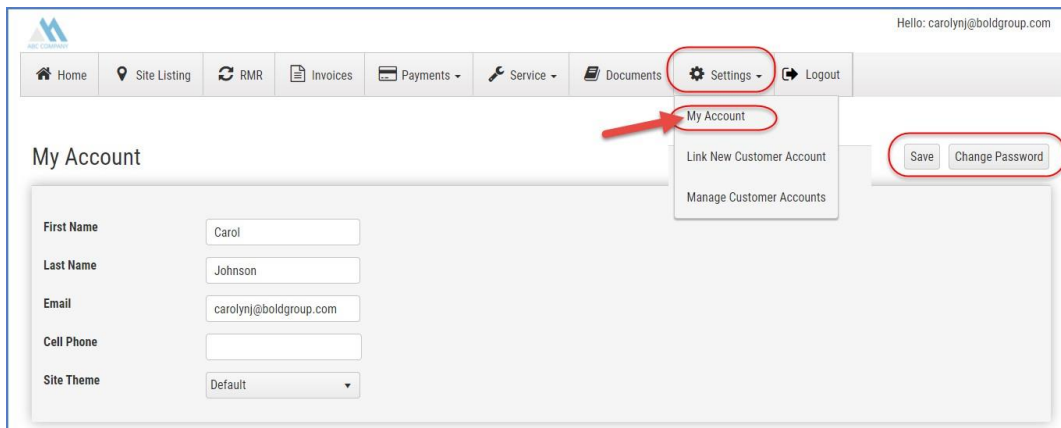
- My Account
- Link New Customer Account
- Manage Customer Accounts



My Account

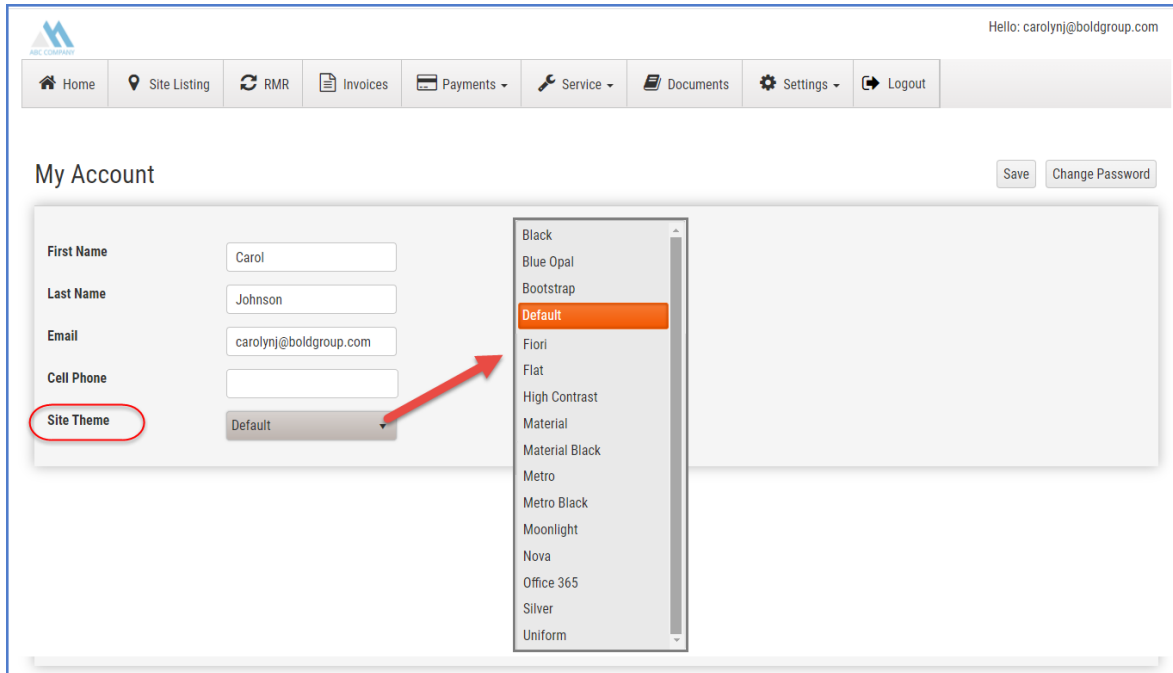
When clicking on the My Account option from the Settings Tab, the customer is able to do the following:

- 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



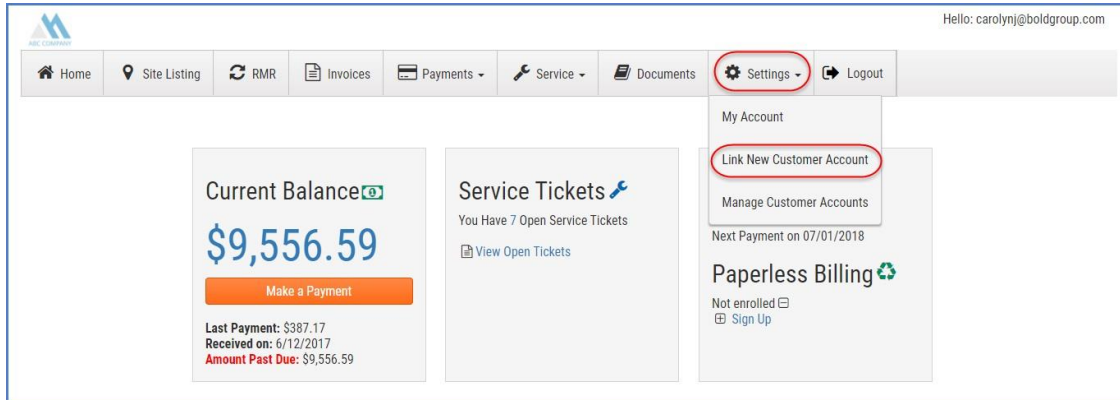
Site Theme

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.

The 'Link New Customer' form is displayed with the following fields and values:

Field	Value
Customer Number *	306
First Name *	Ashley
Last Name *	Optical
Billing Zip Code *	48187
Phone	
Extension	
Mobile	
Fax	

A 'Create Link' button is located in the top right corner of the form area.

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 user account:

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

Below the summary box is a section titled "Assets" containing a table of linked customer accounts:

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 above, the customer number "306" and the "View Customer" button for that row 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 the user interface with the 'Settings' menu open. The 'Manage Customer Accounts' option is highlighted. Below the menu, the account details for 'carolynj@boldgroup.com' are shown, including the contact name 'Ashley, Victoria'. The 'Assets' table below lists customer accounts, with a 'View Customer' button highlighted for the entry with Customer Number 105.

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

The screenshot shows the main dashboard with three main sections: Current Balance, Service Tickets, and Auto Bill Pay. The Current Balance section shows a balance of \$9,433.25 with a 'Make a Payment' button. The Service Tickets section shows 8 open tickets with a 'View Open Tickets' button. The Auto Bill Pay section shows the user is not enrolled with a next payment on 07/01/2018 and a 'Sign Up' button for Paperless Billing.

Section	Value/Status	Action
Current Balance	\$9,433.25	Make a Payment
Service Tickets	You Have 8 Open Service Tickets	View Open Tickets
Auto Bill Pay	Not enrolled, Next Payment on 07/01/2018	Sign Up

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.

The screenshot displays the 'My Account' interface. At the top right, the user is logged in as 'Hello: carolynj@boldgroup.com'. A navigation bar includes links for Home, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings, and Logout. The 'My Account' section features a 'Save' button and a 'Change Password' button. A modal dialog box titled 'Change Password' is open, containing three yellow input fields labeled 'Old Password', 'New Password', and 'Confirm Password'. A 'Save' button is located at the bottom left of the dialog box. Red arrows highlight the 'Change Password' button in the top right and the 'Save' button in the dialog box.

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.

Customer Name

Lyons, Francesca

Address Info

63 Coleman Road
Novi
MI
48375
7344364287

Current Balance

\$2,246.19

[Make a Payment](#)

Last Payment: \$7.50
Received on: 9/9/2019
Amount Past Due: \$2,246.19

Credits

\$146.60

Sub Accounts Back

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

Customer #	Name	Address	Current Balance	Master Rmr	Sub Rmr	Open Service Ticket
51062	Francesca Lyons	63 Coleman Road	0.00	111.39	111.39	1
52193	Leo Lyons	12345 Main Avenue	0.00	0.00	0.00	0
Total: \$0.00			Total: \$111.39	Total: \$111.39	Total: 1	

10 items per page 1 - 2 of 2 items

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.

Sub Accounts

Customer #	Name	Address	Current Balance	Master Rmr	Sub Rmr	Open Service Ticket
\$1062	Francesca Lyons	63 Coleman Road	0.00	111.39	111.39	1
52193	Leo Lyons	12345 Main Avenue	0.00	0.00	0.00	0
Total: \$0.00			Total: \$111.39	Total: \$111.39	Total: 1	

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.

Current Balance

\$0.00

[Make a Payment](#)

Last Payment: \$0.00
Received on:
Amount Past Due: \$0.00

Service Tickets

You Have 1 Open Service Tickets

[View Open Tickets](#)

Auto Bill Pay

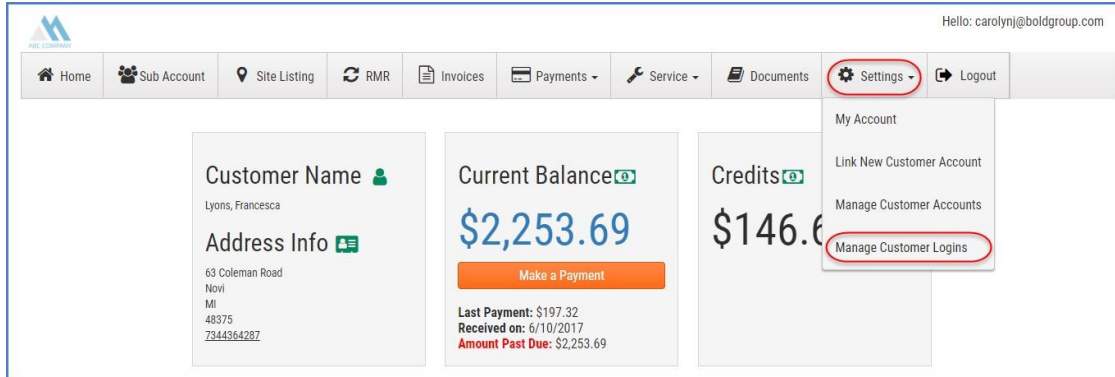
Not enrolled
Next Payment on 04/01/2018

Paperless Billing

Not enrolled
[Sign Up](#)

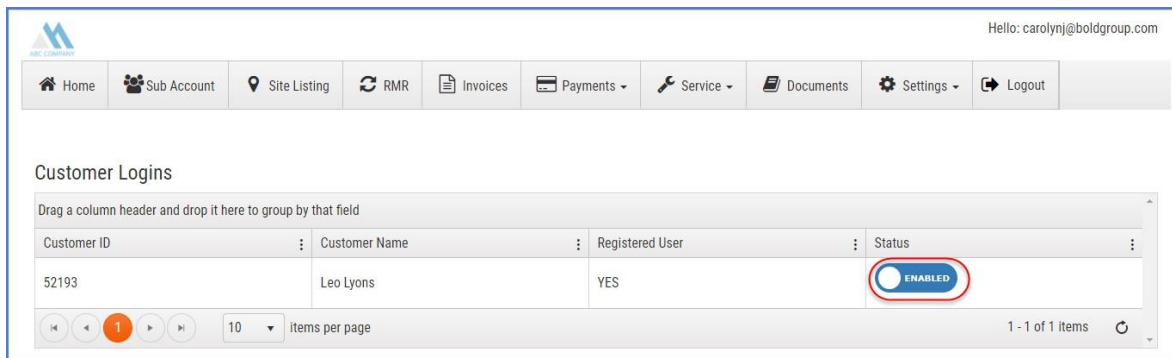
Manage Customer Logins

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.



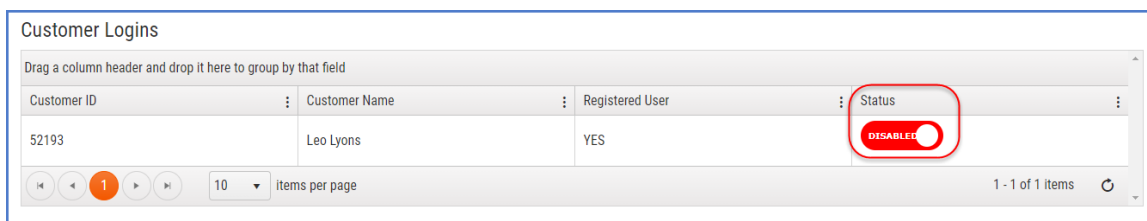
The screenshot shows the top navigation bar with the following items: Home, Sub Account, Site Listing, RMR, Invoices, Payments, Service, Documents, Settings (circled in red), and Logout. A dropdown menu is open under Settings, showing options: My Account, Link New Customer Account, Manage Customer Accounts, and Manage Customer Logins (circled in red). Below the navigation bar, there are three main sections: Customer Name (Lyons, Francesca), Address Info (63 Coleman Road, Novi, MI 48375, 7344364287), Current Balance (\$2,253.69) with a 'Make a Payment' button, and Credits (\$146.69). Payment history is shown at the bottom: Last Payment: \$197.32, Received on: 6/10/2017, Amount Past Due: \$2,253.69.

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.



The screenshot shows the 'Customer Logins' section with a table. The table has columns: Customer ID, Customer Name, Registered User, and Status. The first row contains: 52193, Leo Lyons, YES, and a blue 'ENABLED' button (circled in red). Below the table is a pagination control showing '10' items per page and '1 - 1 of 1 items'.

Customer ID	Customer Name	Registered User	Status
52193	Leo Lyons	YES	ENABLED



The screenshot shows the 'Customer Logins' section with a table. The table has columns: Customer ID, Customer Name, Registered User, and Status. The first row contains: 52193, Leo Lyons, YES, and a red 'DISABLED' button (circled in red). Below the table is a pagination control showing '10' items per page and '1 - 1 of 1 items'.

Customer ID	Customer Name	Registered User	Status
52193	Leo Lyons	YES	DISABLED