### SedonaWeb Home Page

Last Modified on 07/10/2023 1:13 pm EDT

# 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,



### 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.

Home	Site Listing	Invoices	E Payments 🗸	📌 Service 🗸	🖉 Documents	🏟 Se	tings 👻	🗭 Logout			
es/Syster	ms										Ba
										Show Inactive Sit	es
ı a column he	eader and drop it here to group by th	hat field								Show Inactive Site	es
	eader and drop it here to group by th	hat field	55		City	:	State	Phone	:	Show Inactive Sit     MonthlyCharges	es
		: Addres	ss Nayne Road		City Salem	:	State : Michigan	Phone 7343519822			ies I

## 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.

									Hello: carolynj@	bolugiou
🈚 Home	Site Listing	C RMR	Invoices	E Payments -	📌 Service -	🖉 Documents	🗘 Settings -	🗭 Logout		
e - 1   A	shley, Victoria									
Site #	1				Serv	ice Information:				
Site Name	Ashley, Victoria				Last	Visit 12	30/1899			
Site Addre	rss 1022 Wayne Road				Oper	Tickets 1				
Billed to	Ashley, Victoria									
RMR Total	\$1,714.91									
Systems	Rmr Contacts	Documen	ts							
		Documen	ts						Inactive System	stems
Systems									□ Inactive Sy	stems
Systems	Rmr Contacts	o it here to gro		i	System Code		Description		Inactive System	stems
Systems Drag a co	Rmr Contacts	o it here to grou : Sy	up by that field		System Code Intrusion		Description		Inactive Syr	stems :
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# 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.

	Site #	4	Site Name		1	Address		:		City	1		State :	Phon	e	8	MonthlyCharges	- 1
2	1		Ashley, Victoria			1022 Wayne Roa	d			Salem			Michigan	7343	519822		\$228.77	
	Alarm A	Icco	unt	÷	System Code		÷	Panel Type		- 1	Monitored By			- 1	Warranty		:	^
	105				Intrusion			N/A			StagesRapid				Full Warranty			
	184				CCTV			N/A			StagesRapid				Full Warranty			
	(H)		1 • •												1-	2 0	f 2 items 🔿	÷
	3		Victoria Rose Flow	er Sl	100000	136 N Main			l	Plymouth		l	Michigan			1	\$188.87	

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Home	Site I	isting 2 RMR	Invoices	E Payments	- 🎤 Servi	ice 🕶	📕 Dor	cuments	🌣 Settin	gs 🗸 🗭 Logo	ut		
tem . 2	Acct. #	105											
	171001. 1	100											
System A	count	2				Serv	ice Inform	ation:					
Account N	umber	105				Last	Visit						
Site		Ashley, Victoria				Oper	n Tickets		0				
Location						Last	Inspection	н. — — — — — — — — — — — — — — — — — — —					
Monthly C	harges	\$810.80				PO N	lumber		5678				
Status		Active											
	ontacts	Documents											
Rmr ) C	lumn header	and drop it here to gro	oup by that field										
		mer Name		Monthly \$	Pending \$	: 0	ycle\$:	Next Cy	cle :	Cycle Start Date		Last Cycle Date	:
	: Custo			10.75	0.00	4	2.75	Fri Dec	01 2017	Tue Nov 01 201	6	Wed Nov 01 2017	
Drag a co		y, Victoria		42.75	0.00								

### 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.

M								Hello: carolynj@boldgroup.c
🕈 Home 🛛 🕈 Si	te Listing 2 RMR	Invoices	Payments 🗸	🖋 Service 🗸	📕 Document	s 🗘 Settings -	🗭 Logout	
IR - 114904   N	Ionitoring							
Billed to	Ashley, Victoria			Sta	itus	Active		
Site	Ashley, Victoria			Re	curring Start	11/01/2016		•
RMR ID #	114904			Re	curring End	01/31/2018		
Alarm Account	105			Ne	xt Cycle	12/01/2017		
Description	Monitoring							
Monthly Charges	\$42.75							
Cycle Amount	\$42.75							
	м							
Billing Cycle	M							

### **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 gro	up by that field			
Name	: Title	: Phone	: Email	:
Jack Ashley		73424870012245		
Carol Johnson		7344140760	carolynj@boldgroup.com	
	items per page		1 - 2 of 2 i	tems 🔿

#### **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.

Rmr Contacts Documents Drag a column header and drop it I	ere to group by that field	1				(	Upload Docume	nt
Document ID	: File Name	: File Size	:	File type	:	Download	:	
	10 🔹 items per pa	ge				No items to	display 🖒	÷

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.

Upload Document					÷ -	- 🗆 ×
				Submit	Close	2
System	105 🗸	References	0			
Document Type	Diagram 👻	Reference 1	Ref 1			
File Name	Elephant Bar-floor plan.pdf	Reference 2	File Upload Status	- -	×	
User Description	Site map for system 105	Reference 3	File Uploaded Successfu	illy.		
		Reference 4	Ref 4			
Elephant Bar-floor plan,	Click or	drag and drop document here				

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

									Upload Docur
)rag a column beader and	drop it here	to group by that column							
)rag a column header and Document ID	drop it here	File Name	:	File Size	:	File type	:	Download	

#### **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.

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🕈 Home	Site Listing		Invoices		Payments 👻	🖋 Service 🗸	┛ Docur	nents 🏼 🏟 Se	ttings <del>-</del>	🗭 Logout			
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MR													Bac
MR												Cancel	Back led RMRs
	n header and drop it	here to group b	iy that field									Cancel	
	n header and drop it		ıy that field	:	Site Name		:	Alarm Account		Monthly \$	:		
rag a columi	: Bill T		y that field	:	Site Name Ashley, Victo	ria	1	Alarm Account 105		Monthly \$	:		

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.

									Hello: carolynj@boldgroup.co	om
🖨 Home	Site Listing		Invoices	Payments +	🖋 Service 🗸	🗐 Document	s 🗘 Settings -	🗭 Logout		
RMR - 1215	Ashley,					tus	Active		B	Back
Site RMR ID #	Ashley, ' 121587	Victoria			Re	curring Start curring End	02/01/2018		•	
Alarm Acco	unt 105				Ne	xt Cycle	12/01/2017			
Description	501									
Monthly Ch	arges \$33.78									
Cycle Amou	int \$33.78									
Billing Cycl	e M									
PO Number	4378									
								© 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.

M											1	Hello: carolynj@bi	oldgroup.cor
希 Home	Site Listing	C RMR	Invoices	E P	Payments 🗸	🖋 Service -	┛ Docur	nents 🔅 Set	tings	- 🕩 Logout			
RMR										_			Back
												📂 🗹 Cancelle	u RMRS
Drag a colum	n header and drop it	here to group b	y that field										
Drag a colum RMR ID	n header and drop it		ry that field	1	Site Name		:	Alarm Account	1	Monthly \$	;	Cycle \$	
-	: Bill T		by that field		Site Name Ashley, Victor	ria	:	Alarm Account	:	Monthly \$ \$35.00	:	Cycle \$ \$35.00	
RMR ID	: Bill T Ashle	о О	by that field				:		:		:		

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

	Hello: carolynj@boldgroup.com								
倄 Home	Site Listing	C RMR	Invoices	Payments -	🖋 Service 🗸	Documents	s 🔅 Settings -	🗭 Logout	
R - 65474	Monitoring	J							Back
Billed to Site RMR ID # Alarm Accoun	Ashley, Ashley, 65474 105				Rei	curring Start curring End	Active 04/01/2014 09/30/2015 11/01/2015		
Description Monthly Char Cycle Amount Billing Cycle PO Number	-	ing							