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.

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🛠 Home 🛛 오	Site Listing	ices 🖃 Payments 🗸	🖋 Service 🗸	Documents	🗘 Set	tings - (Logout		
Sites/System	S Ler and drop it here to group by that field							Show Inactive Site	Back
Site # :	Site Name :	Address	:	City		State :	Phone	MonthlyCharges	1
•1	Ashley, Victoria	1022 Wayne Road		Salem		Michigan	7343519822	\$228.77	
▶ 3	Victoria Rose Flower Shoppe	136 N Main		Plymouth		Michigan		\$188.87	
H ()	▶ ► 10 ▼ items per pag	9						1 - 2 of 2 items	¢ Ĵ

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.

🕈 Home	Site Listing	C RMR	Invoices	📰 Payments 🗸	🖋 Service -	Documents	🗘 Settings -	🗭 Logout	
e - 1 As	shley, Victoria								
Site # Site Name Site Addre Billed to RMR Total	1 Ashley, Victoria ss 1022 Wayne Road Ashley, Victoria \$1,714.91	ι.			Serv Last Ope	ice Information: Visit 12/3 n Tickets 1	0/1899		
Systems	Rmr Contacts	Documen	ts						
Systems	Rmr Contacts	Documen	ts						Inactive Systems
Systems Drag a co	Rmr Contacts	Documen	tsup by that field						Inactive Systems
Systems Drag a co Custome	Rmr Contacts lumn header and drop sr #	Documen p it here to grou : S)	ts up by that field rstem ID		System Code		Description		Inactive Systems
Systems Drag a co Custome Ashley, V	Rmr Contacts lumn header and drop er # Tictoria	Documen p it here to grou : Sy	ts up by that field rstem ID 33550	:	System Code Intrusion	1	Description Intrusion System		Inactive Systems
Systems Drag a co Custome Ashley, V Ashley, V	Rmr Contacts Iumn header and drop r # Tictoria Tictoria	Documen p it here to groo : Sy 11	up by that field rstem ID 13550 13566	I	System Code Intrusion CCTV	I	Description Intrusion System CCTV		Inactive Systems

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 #	÷	Site Name		:	Address		8	City	:	State :	Phor	ie	1	MonthlyCharges	-
1	Ashley, Victoria			1022 Wayne Road			Salem		Michigan	7343	519822		\$228.77			
١	Alarm Ad	cou	unt :		System Code	:	Panel Type		1	Monitored By		- 8	Warranty		1	^
	105			þ	Intrusion		N/A			StagesRapid			Full Warranty			
	184			ŀ	CCTV		N/A			StagesRapid			Full Warranty			
			1 • •										1-	2 0	f 2 items 🔿	
	3		Victoria Rose Flower S	Shr	onne	136 N Main		T	Plymouth		Michigan	_		1	\$188.87	

N													Hello: carolynj@bol	ldgroup
🕈 Home 🛛 🕈 Si	te Listing 2 RMR	Invoices	Payments -	🖌 🎤 Ser	vice •	- 🔊	Docu	ments 📢	Setting	is • 🕩 I	Logout			
stem - 2 Acct.	# 105													
System Account	2				s	ervice Info	mat	ion:						
Account Number	105				L	ast Visit								
Site	Ashley, Victoria				0	pen Ticket:		0						
Location					L	ast Inspect	ion							
Monthly Charges	\$810.80				Ρ	O Number		567	8					
Status	Active													
Rmr Contacts	Documents													
Conducto	boouncing													
Drag a column head	ler and drop it here to grou	up by that field												-
RMR ID : Cu	stomer Name		Monthly \$	Pending \$:	Cycle \$:	Next Cycle	:	Cycle Start	Date	:	Last Cycle Date	:
114904 As	hley, Victoria		42.75	0.00		42.75		Fri Dec 01 20	17	Tue Nov 01	2016		Wed Nov 01 2017	
114905 As	hley, Victoria		59.37	0.00		59.37		Fri Dec 01 20	117	Tue Nov 01	2016		Wed Nov 01 2017	

System Details

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

RMR Tab

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

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🕷 Home 🛛 🛛 Si	te Listing 2 RMR	Invoices	Payments 🗸	🖋 Service 🗸	🗐 Documents	🗘 Settings 🗸	🕞 Logout	
RMR - 114904 M	Ionitoring							Back
Billed to Site RMR ID # Alarm Account	Ashley, Victoria Ashley, Victoria 114904 105			Sta Re Re Ne	itus curring Start curring End xt Cycle	Active 11/01/2016 01/31/2018 12/01/2017		
Description Monthly Charges Cycle Amount Billing Cycle PO Number	Monitoring \$42.75 \$42.75 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 group	by that field		
Name :	Title :	Phone :	Email :
Jack Ashley		73424870012245	
Carol Johnson		7344140760	carolynj@boldgroup.com
	ems 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.

Rmr Contacts Documents Drag a column header and drop it I	ere to group by that field			U	ہ pload Document
Document ID	: File Name	: File Size	: File type	E Download	:
	10 • items per page			No items to dis	splay 🔿

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			
Einsbert Der Bergelen	Click or	drag and drop document here				

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

Rmr Contacts Doc	uments									
								Upload	Docu	nent
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		*		
	н 10	▪ items per page						1 - 1 of 1 items	Ċ	

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	ments 🗘 Se	tings 🗸	🕞 Logout			
MR													Bac
												Canaalla	d DMD+
an a column	n header and dron	it here to group h	y that field									Cancelle	ed RMRs
ag a column MR ID	n header and drop : Bil	it here to group b	by that field	:	Site Name		:	Alarm Account	: 1	Aonthly \$		Cancelle	ed RMRs
ag a column MR ID 21582	n header and drop : Bil As	it here to group b To hley, Victoria	by that field	1	Site Name Ashley, Victo	vria	:	Alarm Account	: 1	Monthly \$:	Cycle \$	ed RMRs

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.com
倄 Home	Site Listing		Invoices	Payments -	🖋 Service 🗸	🗐 Document	s 🗘 Settings -	🗭 Logout	
RMR - 1215	87 501	Viotoria			64	stuc	Antiun		Back
Diffed to	Ashley,	Victoria			30	itus	ACIIVE		
DMD ID #	ASIIIEy, 121597	victoria			Re	curring Start	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.

												ł	Hello: carolynj@	boldgroup.com
倄 Home	Site Listin	g C RMR	Invoices		Payments 👻	🖋 Service -	┛ Docur	ments	🔅 Sett	ings ·	- 🕞 Logout			
RMR Drag a colum	n header and droj) it here to group I	by that field								•		Cancell	Back
RMR ID	: Bi	ll To		- 1	Site Name		:	Alarm	Account	÷	Monthly \$		Cycle \$	+
65474	A	shley, Victoria			Ashley, Victo	ria		105			\$35.00		\$35.00	
65498) A:	shley, Victoria			Ashley, Victo	ria		184			\$35.00		\$105.00	
65580	A	shley, Victoria			Ashley, Victo	ria		184			\$37.50		\$112.50	

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

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🖀 Home	Site Listing	C RMR	Invoices	Payments -	🖋 Service 🗸	Documents	s 🔅 Settings -	🗭 Logout	
RMR - 65474	Monitoring	J							Back
Billed to Site RMR ID # Alarm Accou	Ashley, Ashley, 65474 nt 105	Victoria Victoria			Sta Rei Nei	tus curring Start curring End xt Cycle	Active 04/01/2014 09/30/2015 11/01/2015		
Description Monthly Chai Cycle Amoun Billing Cycle PO Number	Monitor rges \$35.00 tt \$35.00 M	ing							