SOUC 2018

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All About the Customer

Presented by:
Lisa Gambatese and Kaitlyn Denninger

PERENNIAL SOFTWARE

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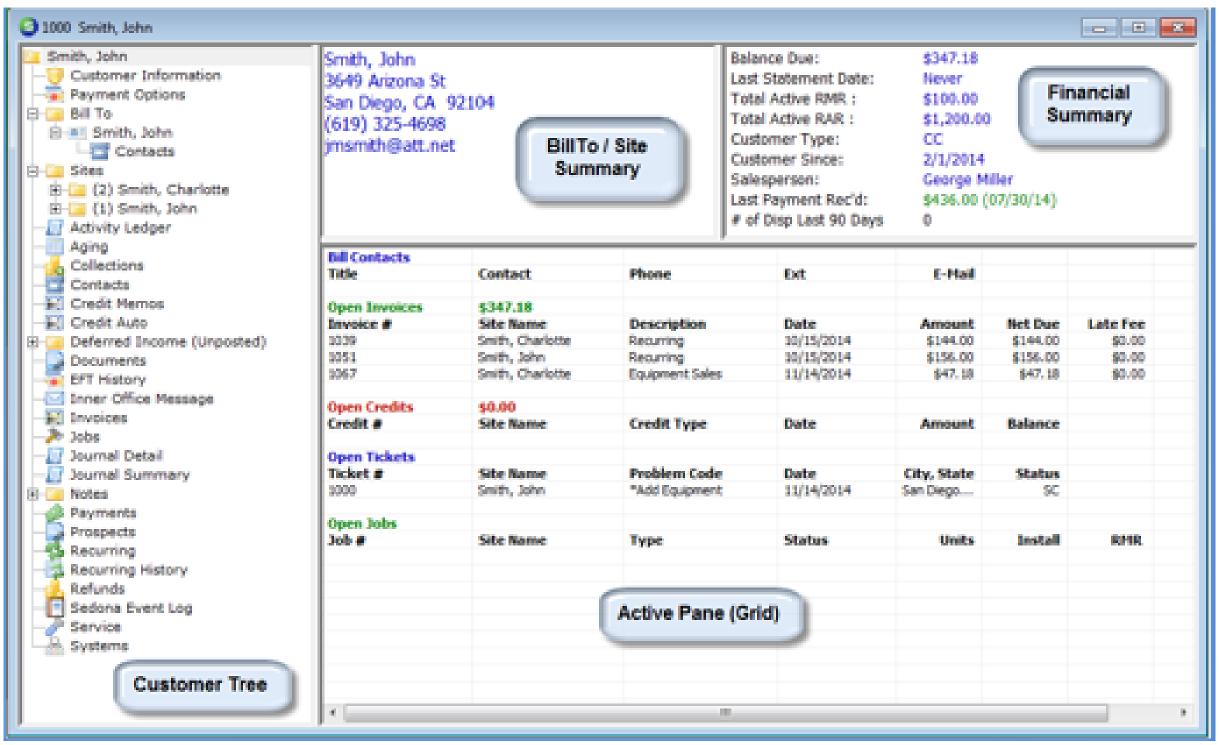
The Customer Explorer

Understanding the layout and navigation within the Customer Explorer will enable users to find and access information quickly. Information displayed within the Customer Explorer enables the user to answer nearly any customer inquiry. Navigating within the Customer Explorer is easy once the design concept is understood. The Customer Explorer is a window divided into four panes:

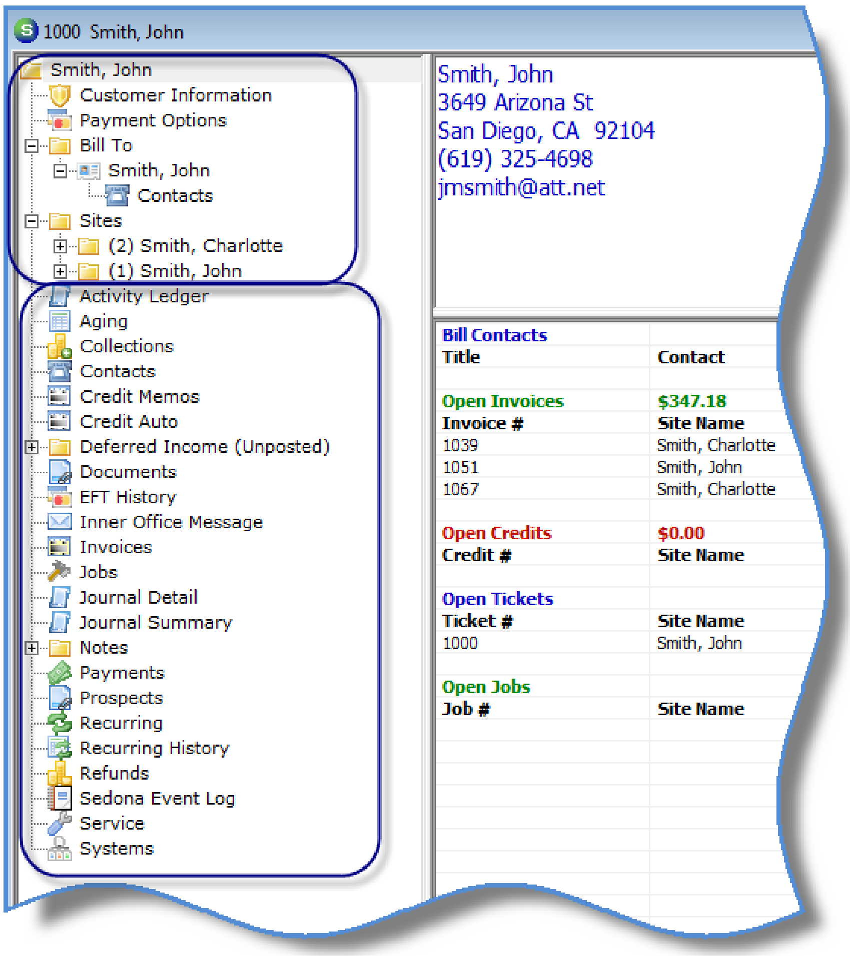
- Customer Tree
- BillTo/Site Summary
- Financial Summary
- Active Pane (Grid)



Notes:

The Customer Tree

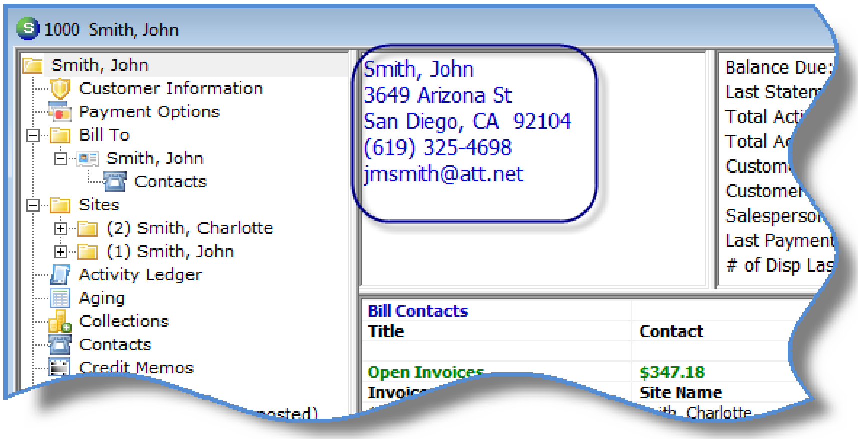
The Customer Tree is comprised of two major components, the Customer Structure and Customer Options and Activities.



Notes:

BillTo / Site Summary

When you first open a customer in the Customer Explorer, the primary BillTo information will be displayed. When clicking on a Site within the Customer Tree, the Site information will be displayed.

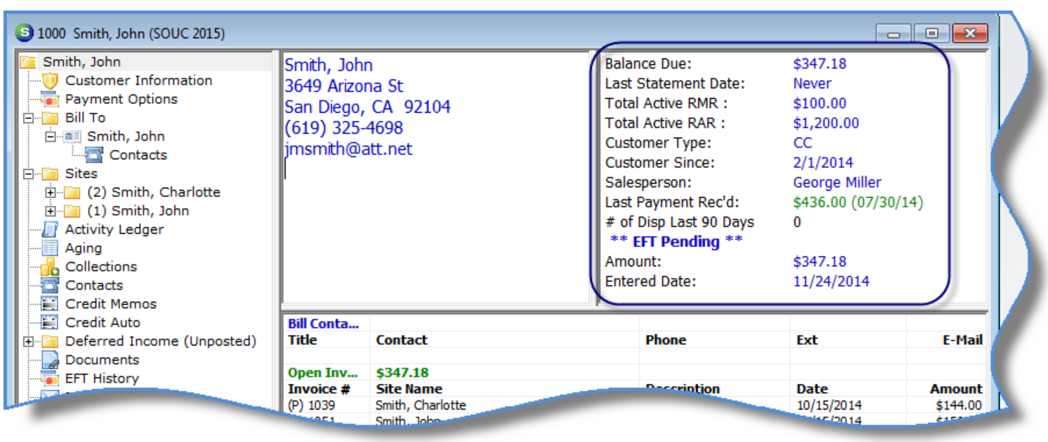


Notes:

Financial Summary

The Financial Summary pane displays the following information:

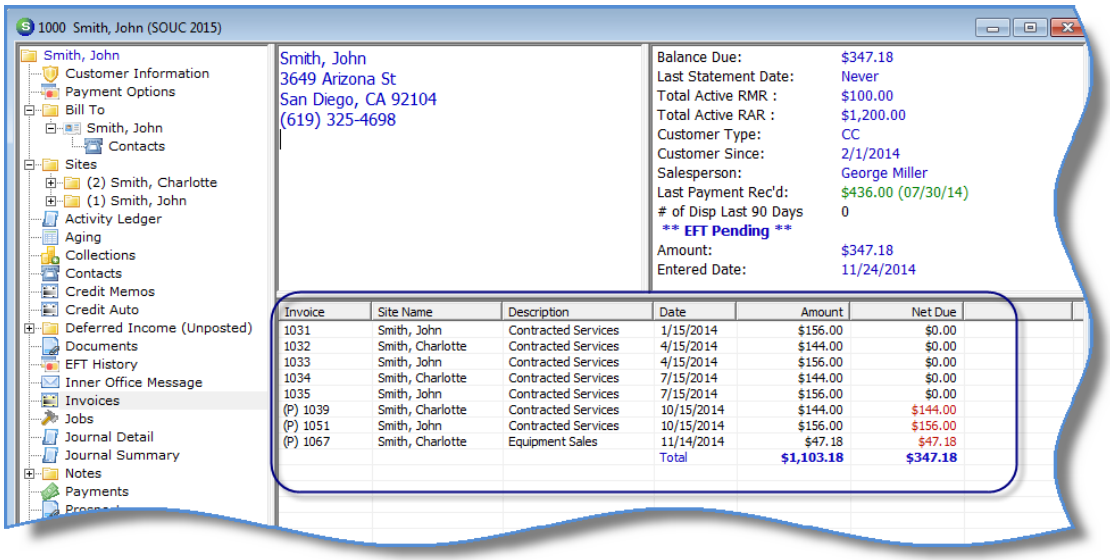
- Balance Due – the net of all customer invoices and unapplied payments/credits
- Last Statement Date
- Total Active RMR – the total monthly recurring for all sites/systems for the customer.
- Total Active RAR – the total annual recurring for all sites/systems for the customer (RMR x 12).
- Customer Type – information displayed from the customer setup.
- Customer Since (date) – information displayed from the customer setup.
- Salesperson – information displayed from the customer setup.
- Last Payment Received – date of the most recent payment entered for the customer.
- # of Dispatches – the number of technician dispatches from service tickets in the last # of days. This setting is maintained in SedonaSetup/Service Setup Defaults.
- EFT Pending – If the customer has a pending (un-posted) EFT payment, the amount along with the date the EFT was entered by a User will be displayed.



Notes:

Active Pane (Grid)

When clicking on an option from the Customer Tree, information will be displayed in the Active pane. If clicking on an item where there has been no history, the Active pane will be blank.



Notes:

Customer Structure

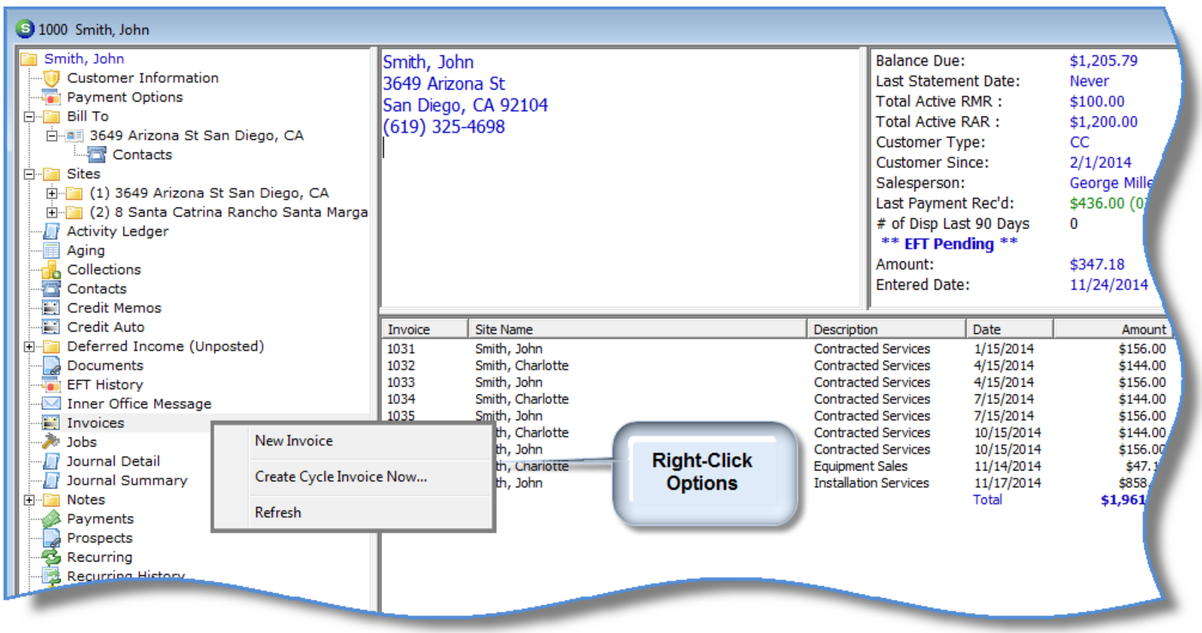
The Customer Structure section of the Customer Explorer is designed in a menu tree fashion with sub menus below some menu tree items. Clicking on the "+" sign to the left of each menu item will expand the menu tree to reveal additional information and menu options. Additional information will be displayed in the Active Pane as each menu tree item is highlighted. If no activity has occurred for the menu tree item selected, the active pane will be blank.

Notes:

Customer Options & Activities

The Customer Options & Activities consists of all customer tree options below the Customer Structure. When clicking on a tree option, any activity for that item will be displayed in the active pane.

Depending upon the User's permissions, certain transactions may be performed within the Options and Activities area. When right clicking on a tree option, additional options, if any, are exposed.



Notes

Regular Customers vs. Master Accounts

Data Retrieval

The Master Account Customer structure was specifically designed to handle the retrieval of large amounts of data quickly and efficiently. When a Regular Customer record is retrieved, the software is loading into memory, all the data linked to the Customer including its sites, systems, equipment, invoices, credits, payments etc.

For Customers with a large number of sites and/or a huge volume of historical data transactions, loading a Regular Customer could take several seconds or minutes, which may cause frustration to Users.

When a Master Account is retrieved, the software loads data related to the Master Account only and presents a listing of attached Subaccounts. A User selects one Subaccount at a time to retrieve the information and transactions pertinent to the Subaccount. Users may have multiple Subaccount records open at the same time.

Notes

Structure of a Master Account

The best way to describe Master Accounts and Subaccounts would be a parent-child relationship. The Master Account is the parent while the Subaccounts are the children related to the parent. A Master Account structure does not contain Site or System records; the Master Account is designed to group several Customers together under one account and simplifies the account management for these individual customers.

A Master Account contains three levels: the Master Account [Customer], Bill To, and Subaccounts. Each unique Subaccount linked to the Master Account typically has four levels to the structure; at least one Bill To, at least one Site and optionally but most likely at least one System.

Accounts Receivable may be maintained separately for the Master Account and for each Subaccount if needed. This all depends upon whether the Subaccount invoice is billing to the Master Account or to the Subaccount.

The Master Account

The Master Account is a business or individual with whom your company has established a business relationship under which your company will provide products and/or services. A Master Account may be responsible for paying the invoices generated for any type of services incurred with a Subaccount or the Subaccount itself may be responsible for all or some invoices generated by the Subaccount.

The Subaccount

Attached to each Master Account record are one or more Subaccount records. A Subaccount is a Regular Customer record attached to a Master Account. The Subaccount consists of its own Bill To’s, Sites, Systems and RMR.

Notes:

Below is a very simple graphical representation of the Master Account/Subaccount structure.