



SedonaOffice Users Conference

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All About the Customer

Presented by:

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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)

The screenshot shows the Customer Explorer window for 'Smith, John'. The window is divided into four panes:

- Customer Tree:** A sidebar on the left containing a hierarchical list of customer-related items, including 'Smith, John', 'Payment Options', 'Bill To', 'Contacts', 'Sites', 'Activity Ledger', 'Aging', 'Collections', 'Credit Memos', 'Credit Auto', 'Deferred Income (Unposted)', 'Documents', 'EFT History', 'Inner Office Message', 'Invoices', 'Jobs', 'Journal Detail', 'Journal Summary', 'Notes', 'Payments', 'Prospects', 'Recurring', 'Recurring History', 'Refunds', 'Sedona Event Log', 'Service', and 'Systems'.
- BillTo / Site Summary:** A pane at the top center displaying customer details for 'Smith, John', including address (3649 Arizona St, San Diego, CA 92104), phone ((619) 325-4698), and email (jmsmith@att.net).
- Financial Summary:** A pane at the top right displaying financial data, including Balance Due (\$347.18), Last Statement Date (Never), Total Active RMR (\$100.00), Total Active RAR (\$1,200.00), Customer Type (CC), Customer Since (2/1/2014), Salesperson (George Miller), Last Payment Rec'd (\$436.00 (07/30/14)), and # of Disp Last 90 Days (0).
- Active Pane (Grid):** A large grid at the bottom center displaying various data tables. The first table is 'Bill Contacts' with columns: Title, Contact, Phone, Ext, E-Mail. The second table is 'Open Invoices' with columns: Invoice #, Site Name, Description, Date, Amount, Net Due, Late Fee. The third table is 'Open Credits' with columns: Credit #, Site Name, Credit Type, Date, Amount, Balance. The fourth table is 'Open Tickets' with columns: Ticket #, Site Name, Problem Code, Date, City, State, Status. The fifth table is 'Open Jobs' with columns: Job #, Site Name, Type, Status, Units, Install, RMR.

Notes:

The Customer Tree

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

S 1000 Smith, John

- Smith, John
 - Customer Information
 - Payment Options
- Bill To
 - Smith, John
 - Contacts
- Sites
 - (2) Smith, Charlotte
 - (1) Smith, John
- Activity Ledger
- Aging
- Collections
- Contacts
- Credit Memos
- Credit Auto
- Deferred Income (Unposted)
- Documents
- EFT History
- Inner Office Message
- Invoices
- Jobs
- Journal Detail
- Journal Summary
- Notes
- Payments
- Prospects
- Recurring
- Recurring History
- Refunds
- Sedona Event Log
- Service
- Systems

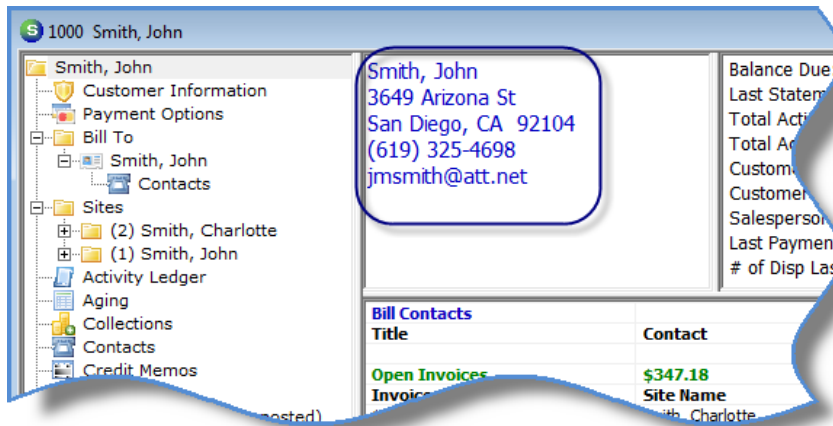
Smith, John
 3649 Arizona St
 San Diego, CA 92104
 (619) 325-4698
 jmsmith@att.net

Bill Contacts	
Title	Contact
Open Invoices	\$347.18
Invoice #	Site Name
1039	Smith, Charlotte
1051	Smith, John
1067	Smith, Charlotte
Open Credits	\$0.00
Credit #	Site Name
Open Tickets	
Ticket #	Site Name
1000	Smith, John
Open Jobs	Site Name
Job #	Site Name

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.

1000 Smith, John (SOU 2015)

Smith, John
3649 Arizona St
San Diego, CA 92104
(619) 325-4698
jmsmith@att.net

Balance Due: \$347.18
Last Statement Date: Never
Total Active RMR : \$100.00
Total Active RAR : \$1,200.00
Customer Type: CC
Customer Since: 2/1/2014
Salesperson: George Miller
Last Payment Rec'd: \$436.00 (07/30/14)
of Disp Last 90 Days: 0
**** EFT Pending ****
Amount: \$347.18
Entered Date: 11/24/2014

Bill Conta...	Contact	Phone	Ext	E-Mail
Open Inv...	\$347.18			
Invoice #	Site Name	Description	Date	Amount
(P) 1039	Smith, Charlotte		10/15/2014	\$144.00
1051	Smith, John		11/25/2014	\$155.18

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.

The screenshot displays the SedonaOffice interface for customer "1000 Smith, John (SOU 2015)". The left pane shows a tree view with categories like Customer Information, Payment Options, Bill To, Sites, Activity Ledger, Aging, Collections, Contacts, Credit Memos, Credit Auto, Deferred Income (Unposted), Documents, EFT History, Inner Office Message, Invoices, Jobs, Journal Detail, Journal Summary, Notes, Payments, and Properties. The main pane is divided into three sections: Customer Information, Summary, and an Invoice Grid.

Customer Information:
Smith, John
3649 Arizona St
San Diego, CA 92104
(619) 325-4698

Summary:
Balance Due: \$347.18
Last Statement Date: Never
Total Active RMR : \$100.00
Total Active RAR : \$1,200.00
Customer Type: CC
Customer Since: 2/1/2014
Salesperson: George Miller
Last Payment Rec'd: \$436.00 (07/30/14)
of Disp Last 90 Days: 0
** EFT Pending **
Amount: \$347.18
Entered Date: 11/24/2014

Invoice Grid:

Invoice	Site Name	Description	Date	Amount	Net Due
1031	Smith, John	Contracted Services	1/15/2014	\$156.00	\$0.00
1032	Smith, Charlotte	Contracted Services	4/15/2014	\$144.00	\$0.00
1033	Smith, John	Contracted Services	4/15/2014	\$156.00	\$0.00
1034	Smith, Charlotte	Contracted Services	7/15/2014	\$144.00	\$0.00
1035	Smith, John	Contracted Services	7/15/2014	\$156.00	\$0.00
(P) 1039	Smith, Charlotte	Contracted Services	10/15/2014	\$144.00	\$144.00
(P) 1051	Smith, John	Contracted Services	10/15/2014	\$156.00	\$156.00
(P) 1067	Smith, Charlotte	Equipment Sales	11/14/2014	\$47.18	\$47.18
Total				\$1,103.18	\$347.18

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.

Customer Information:

Smith, John
 3649 Arizona St
 San Diego, CA 92104
 (619) 325-4698

Balance Due: \$1,205.79
Last Statement Date: Never
Total Active RMR : \$100.00
Total Active RAR : \$1,200.00
Customer Type: CC
Customer Since: 2/1/2014
Salesperson: George Miller
Last Payment Rec'd: \$436.00 (0)
of Disp Last 90 Days: 0
**** EFT Pending ****
Amount: \$347.18
Entered Date: 11/24/2014

Invoice	Site Name	Description	Date	Amount
1031	Smith, John	Contracted Services	1/15/2014	\$156.00
1032	Smith, Charlotte	Contracted Services	4/15/2014	\$144.00
1033	Smith, John	Contracted Services	4/15/2014	\$156.00
1034	Smith, Charlotte	Contracted Services	7/15/2014	\$144.00
1035	Smith, John	Contracted Services	7/15/2014	\$156.00
	Smith, Charlotte	Contracted Services	10/15/2014	\$144.00
	Smith, John	Contracted Services	10/15/2014	\$156.00
	Smith, Charlotte	Equipment Sales	11/14/2014	\$47.18
	Smith, John	Installation Services	11/17/2014	\$858.00
		Total		\$1,961.00

Right-Click Options:

- New Invoice
- Create Cycle Invoice Now...
- Refresh

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.

