

OPT Business Services, Inc.

Who We Are:

Formed in 2010, OPT has been helping companies across the country by providing solid solutions to the most common, challenging and unique problems affecting their everyday businesses. With a total of 30 plus years of experience in the security industry we understand today's trends and needs. Through the use of custom reporting tools such as SedonaSync, dashboards, and custom development projects, we have been able to help customers realize the full potential of their data.

What We Do:

OPT can help you solve your company's challenges by listening to your concerns, analyzing your business, and providing you with solutions that allow you to focus on managing and growing your company. Several of the ways we accomplish this is by helping your company improve operational efficiency, customer relations, and overall profitability by fully utilizing SedonaSync and other available tools. Real-Time customer notifications and extensive internal reporting allow for measurable improvements across your entire business. This allows you to keep your customers informed on every aspect of their installation or service experience, provides you with customer feedback, and effectively shows you how all of your departments are interacting with crucial customer events. You are able to get a true picture of where you are excelling and where there is room for improvement!

Over time we have built a library of reports, notifications, and dashboards that are available for us to install immediately into your SedonaSync system to allow you to leverage the power of this tool right out of the gate. Notifications such as emailing customers reminders about appointments or sending them a survey, to performance reports showing you statistics for the month and daily progress reports; these are just the beginning. With complete workflow suites such as emailed Invoices and automatic collection notifications, we can add extended functionality to the core SedonaOffice application. These tools not only report information from SedonaOffice, but communicate back to indicate that these actions have been taken and update the necessary fields.

In addition to these off the shelf products, we also perform custom development for our customers to build tools and reports to assist their specific needs. We are pleased to provide simple reports and notifications to entire workflow processes and dashboards or simply some minor modifications to our prebuild products. We aim to help your business put these tools at your disposal to work for you. Let us know how we can help your business or visit our website at www.OPTBusinessServices.com for more information.

How We Help:

"Signal Service Inc. installed and set up SedonaSync in the beginning of 2013. It wasn't until we were introduced to Chris and Brad and their team at OPT that we were able to utilize the software. Chris has been easy to work with and offers suggestions to make the Sync Events more useful. I would recommend anyone installing SedonaSync to contact Chris to set up their Events."

--Sarah Wilson, Signal Service Inc.

"We're grateful to have a company like OPT Business Services to call on day or night. We have a large fast-paced company, and now with SedonaSync we have a tremendous amount of data being delivered to us and to our customers. We are learning things about our company every day that help us improve service to our customers and improve our bottom line. Our own IT department doesn't have the time or resources to administrate SedonaSync. Using OPT to completely manage this for us has allowed us to really focus on the data being reported rather than having to focus on how to get that information. We can call their office and layout an idea or a problem and we usually have a working solution in just hours. Their extensive knowledge of the industry further supports their ability to understand and identify with the exact issues we are having."

-- Steve Roy, Select Security



Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229
2926 28th Avenue North
Saint Petersburg, FL 33713
www.OPTBusinessServices.com

All of our events are specially coded to give you maximum control over the look and feel, as well as the content of your event.

Profile Details

Save & New Custom Save & Close

Profile Id Profile Number

Profile Description
Aqua

Attachment_Path Image

Message_Headers

Content-Type: image/png
Attachment-Disposition: inline; filename=logo.png

CSS_Style_Code

```

style-type="text/css">
myTable { border-top: 1px solid #000000; background-color:#A0D9F3;border-
collapse: collapse;}
myTable th { background-color: #B2E2DC; border-top: 1px solid #000000; }
myTable th { padding: 5px; border-bottom: 1px solid #000000; }
</style_header>
```

Header_Code

Footer_Code

<center>If you have any questions, please don't hesitate to call our office at (832) 272-
4000 or email us "logo.png" /></center>

Record - 3 of 3 < > << >> Update Search

Message

Save & New Custom. Save & Close

Message Number
12

Message Name
Holiday Message

Start Date
12/24/2013

End Date
1/2/2014

Message
Hi> Please note our offices will be closed from 12/25/2013 thru 1/1/2014. We want to wish you a safe and happy holiday.<@>

Record - 3 of 3

API Worksheet

API Description

Event 1231 - New Ticket

API URL

<http://c27.aws.amazon.com/acton/form/1234/0056/6-act-0001>

API Columns	Data Columns
Event_ID	Sdkondevnet_Event_ID
Event_ID	User_Created
Street_1	Street_1
State_2	State_2
City	City
State	State
Zip	Zip
Registered_By_Phone	Registered_By_Phone
Company_Name	Auto_Notify
Svc_Name	Company_Name
Service_Type	Business_Name
Ticket_Number	Service_Type
	Ticket_Number

Save Item

Remove Item

API Data String

```
{
  "Event_ID": "Sdkondevnet_Event_ID",
  "Event_ID": "User_Created",
  "Street_1": "Street_1",
  "State_2": "State_2",
  "City": "City",
  "State": "State",
  "Zip": "Zip",
  "Registered_By_Phone": "Registered_By_Phone",
  "Company_Name": "Auto_Notify",
  "Svc_Name": "Company_Name",
  "Service_Type": "Business_Name",
  "Ticket_Number": "Service_Type",
  "Ticket_Number": "Ticket_Number"
}
```

API Call Preview

Manual Event

OPT Business Services, Inc.
 "Keeping Your Business in Sync!"
 (727) 258-7229
 www.OPTBusinessServices.com

Proud Business Partners of VineyardSoft Corporation

SedonaSync

Event:	1229-Technician Stop Summary
Status:	

1229 Run Event

[illegible][illegible]

Want to re-run that last event? No problem! Our interface allows you to run any enabled event manually with the press of a button.

Now you can access your dashboards from within the OPT Sync Interface allowing you even easier access to your data, and restrict access by user too!

Add email addresses for:
Branch, Vendor
Warehouse, Install Co,
Sales Departments
for event delivery. You can
also set the Email Reply To.



“Keeping Your Business in Sync!”

2926 28th Avenue North
Saint Petersburg, FL 33713
www.OPTBusinessServices.com

Financial Flash Reports

Whether you are a business owner or a general manager, one thing remains the same... Time is money. Most of us receive reports, and spend far too much time wading through them to find the 5% that actually interests us. With our **Financial Flash Reports**, we deliver only the data that is needed to make informed decisions. We take the time to find out what it is that you need to see.

We offer a wide array of options to choose from when constructing your customized flash reports. From deposit figures to payments, any ledger account can be reported on. Pick and choose the data that is necessary for your job function or select it all to get a clear picture on how your business is performing. You can add in cancellations, additions, and even data entry statistics.

In addition to the financial flash reports, our installation and service flash reports can give you an overview of how your company is performing in these areas.

The following is your daily financial flash report for 12/20/2013

TOTAL OF TODAY'S DEPOSITS: Citibank \$18,864.16
* DEPOSITS MONTH TO DATE: \$98,808.76

TOTAL OF TODAY'S PAYMENTS: Citibank Operating Account \$770.00
* PAYMENTS MONTH TO DATE: \$28,373.30 (Which includes payroll totaling \$0.00)

THE CURRENT BALANCE OF LOAN REVOLVER IS: (\$3,814,196.56)

THE CURRENT VALUE OF INVENTORY IS: \$395,421.93 WHICH IS **DOWN (\$2,677.31)** FROM YESTERDAY

ACCOUNTS TO BE CANCELED THIS MONTH: 10

* REDUCTION IN RECURRING FROM CANCELED ACCOUNTS: \$862.67
* BALANCE OF CONTRACT DUE FROM CANCELED ACCOUNTS: \$7,987.36

NEW SITES ADDED THIS MONTH: 3

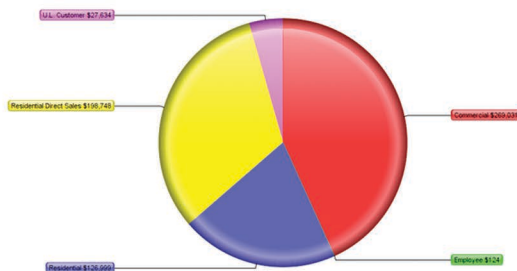
* ACCOUNTS ALREADY BEING BILLED RMR: 2
* ADDITIONAL RMR FROM THOSE ACCOUNTS: \$50.00

THERE ARE CURRENTLY 248 CONTACTS WHO CREATED A USER ACCOUNT ON SEDONA WEB

* CONTACTS WHO HAVE NOT ACTIVATED THEIR USER ACCOUNT: 67

THERE WERE 40 DOCUMENTS SCANNED INTO THE SEDONA DOCUMENT SERVER TODAY
THERE WERE 13 ADEMCO PANELS DOWNLOADED TODAY

RMR Totals by Customer Type as of 12/20/2013 7:00:21 PM



The following is your daily service flash report for 7/9/2013

TOTAL OF TODAY'S SERVICE BILLING: \$2,635.53
* THERE WERE 10 SERVICE TICKETS BILLED TODAY
* THERE WERE 17 SERVICE TICKETS CLOSED TODAY

TOTAL OF THIS MONTH'S SERVICE BILLING: \$14,613.50
* THERE WERE 73 SERVICE TICKETS BILLED THIS MONTH

THERE ARE CURRENTLY 279 OPEN SERVICE TICKETS
* THERE WERE 37 SERVICE TICKETS CREATED TODAY, OF WHICH 23 HAD NO CONTACT INFO

The following is your daily installation flash report for 7/9/2013

TOTAL OF TODAY'S INSTALLATION BILLING: \$8,402.81
* THERE WERE 3 JOBS BILLED TODAY
* THERE WERE 6 JOBS CLOSED TODAY

TOTAL OF THIS MONTH'S INSTALLATION BILLING: \$35,633.59
* THERE WERE 15 JOBS BILLED THIS MONTH

THERE ARE CURRENTLY 244 OPEN JOBS

* THERE ARE 3 JOBS READY TO CLOSE
* UNBILLED INSTALL AMOUNT: \$340,938.81
* UNBILLED RMR AMOUNT: \$2,330.46

The following is your daily installation flash report

There are currently 922 open jobs
* There were 19 jobs closed today
* There are 6 jobs ready to close
* Unbilled install amount: \$167,173.56
* Unbilled RMR amount: \$6,527.13

Type	Billed Today	Daily Amount	Billed This Month	Monthly Amount
Commercial	8	\$6,332.34	22	\$24,897.97
Other	0	\$0.00	3	\$297.08
Residential	2	\$994.58	4	\$3,219.46
TOTALS	10	\$7,326.92	29	\$28,414.51

The following is your daily service flash report

Total of today's service billing: \$6,712.24

* There were 36 service tickets billed today

* There were 66 service tickets closed today

Total of this month's service billing: \$36,535.45

* There were 128 service tickets billed this month

There are currently 595 open service tickets, and 468 open inspection tickets

* There were 29 service tickets opened today, of which 2 were inspection tickets, and 6 had no contact info
(Employee tickets were excluded from this report)

Branch Sub-Problem Breakdown (PI, RTI, RTR)

Branch	PI			RTI			RTR		
	Inspection	Service	Total	Inspection	Service	Total	Inspection	Service	Total
Branch 1	3	54	57	0	97	97	4	18	22
Branch 2	0	0	0	0	0	0	0	0	0
Branch 3	0	2	2	5	18	23	3	4	7
Branch 4	0	4	4	0	20	20	0	2	2
Branch 5	5	8	13	0	11	11	0	3	3



Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

2926 28th Avenue North

Saint Petersburg, FL 33713

www.OPTBusinessServices.com

Service Flash Reports

Gain new insight into your service and inspection departments! With our service and inspection flash reports you can see how your departments are performing over time. You will be able to keep track of service related sales, along with service ticket resolution performance figures. We also track the percentage of service tickets resolved on the first attempt, as well as tickets closed without requiring a service visit. Trend analysis is now available from year to date and also includes the previous years figures. Once a month, all of this information is delivered to you on a easy to read report.

Monthly Service Flash Report

Last Month Service Statistics
From 12/01/2013 thru 12/31/2013

Service Company	Open Tickets on 12/01/2013	Tickets Opened Last Month	Tickets Closed Last Month	Net Change	Open Tickets on 12/31/2013	Tickets Invoiced Last Month	Total Sales in Parts	Total Sales in Labor	Total Sales in Other	Total Sales	Currently Open Tickets	Resolved, No Service	Total Serviced	Serviced In Single Appointment	Average Opened Per Week	Average Closed Per Week
Service	600	1312	1314	-2	598	187	\$9,298.50	\$20,934.75	\$157.00	\$30,390.25	619	1054	450	421 (93%)	263	263
Guards	113	145	160	-15	98	66	\$0.00	\$6,377.00	\$0.00	\$6,377.00	102	15	204	204 (100%)	29	40
Inspectors	31	21	20	1	32	10	\$1,065.00	\$2,529.03	\$0.00	\$3,594.03	32	50	294	204 (69%)	55	56
CCTV	48	29	29	0	48	18	\$2,819.78	\$4,327.25	\$1,545.00	\$8,692.03	48	4	31	22 (70%)	5	6
Installers	160	112	118	-6	154	61	\$7,608.06	\$13,355.66	\$1,633.50	\$22,597.22	154	20	169	110 (65%)	23	27
ALA10	1	0	0	0	1	0	\$0.00	\$0.00	\$0.00	\$0.00	1	0	0			
Monthly Totals	953	1619	1641	-22	931	342	\$20,791.34	\$47,523.69	\$3,335.50	\$71,650.53	956	1143	1148	961 (83%)	365	385
(2014) YTD	931	25	0	25	956	0	\$0.00	\$0.00	\$0.00	\$0.00		0	1	1 (100%)	25	
(2013)	964	21219	21252	-33	931	4100	\$250,574.92	\$556,592.97	\$9,087.28	\$816,255.17		14481	10418	8338 (81%)	454	461
(2012)	528	22891	22455	436	964	4039	\$266,885.50	\$509,730.25	\$6,074.47	\$782,690.22		15793	9413	7973 (84%)	486	475
(2011)	927	24780	25179	-399	528	4446	\$253,208.41	\$586,788.65	\$34,078.53	\$874,075.59		17491	10611	8780 (82%)	522	540
(2010)	827	24834	24723	111	927	1856	\$90,108.25	\$247,336.03	\$6,812.62	\$344,256.90		21645	4088	3411 (83%)	499	485
(2009)	576	23918	23663	255	827	0	\$0.00	\$0.00	\$0.00	\$0.00		23663	0		451	446

Open Service Tickets by Month/Year

Now (1/1/2014)	12/1/2013	11/1/2013	10/1/2013	9/1/2013	8/1/2013	7/1/2013	6/1/2013
956	953	611	810	759	803	616	509
1/1/2014	1/1/2013	1/1/2012	1/1/2011	1/1/2010	1/1/2009	1/1/2008	1/1/2007
931	964	528	927	827	576	725	581

When utilizing real time dispatching in SedonaOffice, our "Daily Technician Audit Report" will allow you to keep track of your technicians individual performance. You will be able to track the number of service calls and work orders preformed along with how much time was spent on tickets, work orders, and the travel between stops. You can even monitor the technicians first and last stops, giving you the total time for the day. This is a great way to audit your payroll!

Daily Technician Audit Report (1/10/2014)														
Tech	First Dispatch	First Arrival	Job Stops	Service Stops	Total Stops	Job Travel	Service Travel	Total Travel	Job Time	Service Time	Total Time	Last Departure	Total Time by Dispatch	Total Time by Arrival
Jim C.	1/10/2014 7:32:00 AM	1/10/2014 8:08:00 AM	0	6	6	00:00	03:19	03:19	00:00	02:46	05:46	1/10/2014 4:49:53 PM	09:17	08:41
John C.	1/10/2014 7:58:00 PM	1/10/2014 8:39:00 PM	0	2	2	00:00	01:06	01:06	00:00	00:40	00:40	1/11/2014 12:16:00 AM	04:20	03:37
Sam C.	1/10/2014 8:01:50 AM	1/10/2014 8:01:51 AM	0	2	2	00:00	00:00	00:00	00:00	00:20	00:20	1/10/2014 2:34:37 PM	06:22	06:22
John D.	1/10/2014 7:33:00 AM	1/10/2014 7:58:00 AM	0	5	5	00:00	03:06	03:06	00:00	03:42	03:42	1/10/2014 2:32:00 PM	06:59	06:34
James D.	1/10/2014 9:06:53 AM	1/10/2014 9:06:55 AM	1	0	1	00:00	00:00	00:00	06:57	00:00	06:57	1/10/2014 4:04:07 PM	06:57	06:57
Thomas D.	1/10/2014 7:05:19 AM	1/10/2014 8:10:20 AM	0	8	8	00:00	02:28	02:28	00:00	03:44	03:44	1/10/2014 2:56:00 PM	07:30	06:45
Jim E.	1/10/2014 7:01:49 AM	1/10/2014 7:01:50 AM	1	2	3	00:00	00:25	00:25	00:32	04:07	08:00	1/10/2014 3:10:49 PM	10:09	10:06
Engine E.	1/10/2014 6:30:00 AM	1/10/2014 6:30:00 AM	1	0	1	00:00	00:00	00:00	08:29	00:00	08:29	1/10/2014 2:59:53 PM	08:29	08:29
Bob F.	1/10/2014 7:30:00 AM	1/10/2014 7:39:00 AM	2	0	2	00:09	00:00	00:09	09:49	00:00	09:49	1/10/2014 3:56:00 PM	08:26	08:17
Demetri G.	1/10/2014 7:32:00 AM	1/10/2014 8:10:00 AM	0	1	1	00:00	00:38	00:38	00:00	08:04	08:04	1/10/2014 4:14:22 PM	08:42	08:04
Bobby G.	1/10/2014 6:58:29 AM	1/10/2014 7:29:11 AM	1	2	3	00:30	00:00	00:30	06:43	01:06	07:49	1/10/2014 3:10:00 PM	08:11	07:40



Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

2926 28th Avenue North

Saint Petersburg, FL 33713

www.OPTBusinessServices.com



Business Services, Inc.

"Keeping Your Business in Sync!"

Service Reconciliation Module (SRM)

Basic Features

Reconciliation Support for Over 15 Industry Leading Service Providers

AES, Alarm.com, AlarmNet, AlarmPath, Bold, Bosch, Connect24, iViewNow, Kore, NearNet, SecureCom, StarLink, TelGuard, Telit, Uplink, WebEye

Upload Invoices or Account Lists in CSV or Excel Formats

Quickly and easily upload your monthly service-provider invoices for reconciliation.

Customizable and Flexible Mapping System

Mapping of the uploaded invoice or account lists can be easily customized by using the mapping editor to extract, transform, and load data such as receiver line prefixes and group numbers to build the account number that will be used in the reconciliation processes.

Invoice and Account List to SedonaOffice System Account Matching

SRM performs an initial match to SedonaOffice by using the customizable mapping rules to find accounts in the invoice or account list that are not loaded in SedonaOffice.

OPT System Services

The Initial matching process will create a service associated to the matched system in SedonaOffice. These services will be checked going forward on future SRM uploads, allowing you to only address items that are exceptions.

Exceptions Dashboard

Using this dashboard you can identify accounts on the invoice that are not in SedonaOffice, and Services loaded that are no longer on the invoice. Manually reconcile any exceptions quickly by adding/removing the service within the OPT dashboard. Add temporary comments as you go, or create an OPT Customer Task and assign it to another user to follow up on the exception, or simply choose to ignore the exception until the next reconciliation.

System Service Upload History

View your upload history for each SedonaOffice system in OPT Web Services. Quickly identify each bill line item for each month such as service fees and add on services.

Advanced Features

Reconciliation Support for Custom Service Providers

Create your own service providers and services. Run reconciliations using your own lists of accounts, services, and other items against the SedonaOffice database.

Pricing

*SRM Basic or Advanced Requires OPT Web Services v16.2 or Newer

(OPT Web Services is Sold Separately or is Included in the OPT POP Gold and OPT POP Platinum Plans)

SRM is NOT included in any POP plans, nor is it eligible for any POP Module discounts.

Basic

Advanced

Included

Included

Included

Included

Included

Included

Included

Included

Included

Included

Included

Included

Included

Included

Basic

Advanced

Included

Basic

Advanced

\$3495
(\$199pm)

\$4995
(\$299pm)



Basic Features - Phase 2 (Available in Q2)

Basic Customer System RMR to Total Bill Cost Comparison

SRM will identify if the total cost on the bill is greater than the RMR you are billing on the customer system in SedonaOffice. Three options will be available for the comparison:

Option 1: Is the total cost greater than or equal to the RMR.

Option 2: Is the total cost greater than the RMR.

Option 3: Is the total cost greater than the RMR by (X%).

Customer System Reconciliation Status and Total Cost

Quickly get the reconciliation status and last total of all 3rd party services for the customer, site, and system in SedonaOffice from the OPT Web Services dashboards.

Profit & Loss Module Addon

Use total 3rd party service costs as a factor in the OPT Customer Profit & Loss module.

Advanced Features - Phase 2 (Available in Q2)

Use Supported Services Providers API's for Bill Retrieval

Retrieve data from supported providers directly from their API instead of having to upload the invoice each month.

(Note: Supported providers to be determined).

Database Connection to Supported Systems for Data Retrieval

Establish a direct connection to another system to retrieve an account list and services for reconciliation against the SedonaOffice database.

Examples include AES's Network Management System and Bold Manitou.

Load your own custom query to other databases such as MAS, Stages, Dice, etc.

(Note: These systems have not been evaluated or tested and may require support from the vendor).

Customer System RMR to Line Item Bill Cost Comparison

SRM will identify if the line item on the invoice is greater than the associated RMR item you are billing on the customer system in SedonaOffice. Three options will be available for the comparison:

Option 1: Is the line item cost greater than or equal to the associated RMR item.

Option 2: Is the line item cost greater than the associated RMR item.

Option 3: Is the line item cost greater than the associated RMR item by (X%).

Create Vendor Bill From a Completed Reconciliation

After an invoice is uploaded, reconciled, and then approved, the option will be available to load the invoice into SedonaOffice as a Vendor Bill.

Invoice can be loaded as a total to a single GL Account, or grouped by item category (Recurring, One Time, and Overages).

Create Customer Bill Back Invoices From a Completed Reconciliation

After an invoice is uploaded, reconciled and then approved, the option will be available to create invoices to the primary bill-to on the customer or to the bill-to of the site containing items identified as eligible for bill-back as long as the customer system is also eligible.

Bill-back items are items that fall into one of these categories (One-Time and Overage Charges) and will have a price set either as (Fixed-Price or Markup).

Pricing

*SRM Basic or Advanced Requires OPT Web Services v16.2 or Newer

(OPT Web Services is Sold Separately or is Included in the OPT POP Gold and OPT POP Platinum Plans)

SRM is NOT included in any POP plans, nor is it eligible for any POP Module discounts.

Basic

Advanced

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Basic

Advanced

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Included
(Coming Soon)

Basic

Advanced

\$3495
(\$199pm)

\$4995
(\$299pm)



SedonaSync Email Invoice Options

Invoice Comparison

SedonaSync Events Options and Features

SedonaOffice's Free HTML Body Sync Event

OPT's 1118 HTML Body Email Invoice Sync Event

OPT's 1118 PDF Email Invoice Sync Event

Invoice Formats / Options			
Emails Cycle Invoices	X	X	X
Emails Service, Job, Misc. & Finance Charge Invoices		X	X
Supports Roll Up Items	X	X	X
Supports Due Date Based on Terms and or Term Code	X (Due Date Only)	X	X
Supports Auto Pay Invoices, Showing ACH Info	X (1)	X	X
Supports ACH Hold Dates		X	X
Includes Attached PDF of Invoice			X (2)
Email Filter Options			
Only Capture the Last x Days of Invoices For Emailing via Issue Date	X	X	X
Email Invoice Flag is Checked	X	X	X
Invoice Must be Completed (Optional)		X	X
Invoice Date is Not Future (Optional, per Invoice Type)		X	X
Checks if Email is Valid Format		X	X
Filter by Branch, Invoice Type, and Master vs. Standard Accounts		X	X
Email Customization Options			
Manually Edit HTML Code for Customizations	(Required)	(Not Required)	(Not Required)
Invoice Company Branding	Text Only	Text or Image	Text or Image
Supports Dynamic Branding by Branch		X	X
Supports OPT Sync Interface - Easy Editing of Event Wording Without Any Coding using the Microsoft Style Editor; Supports:		X	X (3)
<ul style="list-style-type: none"> 7x Static/Dynamic Messages 4x Dynamic AutoPay Sales Messages 			
Invoice Processing			
Manually Remove Each Invoice From Print Queue	X		
Entire Customer's "Print Cycle Invoices" Flag Must be Turned Off	X (4)		
Automatically Remove Invoices from Print Queue When Processed by SedonaSync and Adds Them to the OPT Email Queue		X (5)	X (5)
Re-Queue Invoice for Email Delivery		X (5)	X (5)
Record Event Log Entries to SedonaOffice When the Invoice is Queued and Emailed Including Who it Was Sent To		X (5)	X (5)
Setup and Configuration			
Installation Performed by	Self-Install	OPT Installs	OPT Installs
Works Out of the Box w/ Custom Configuration by OPT	No (6)	Yes	Yes
SedonaOffice Purchase Requirements			
SedonaSync Module Licensing	Alerts	Alerts & Actions	Alerts, Actions & Reports

(1) Displays message when customer is setup for ACH AutoPay with the details of which method is configured and an estimated date when the customer's payment will be processed, as opposed to the exact date with the OPT 1118 events based on the ACH hold date.

(2) Requires SedonaSync Reports License and Crystal Reports License.

(3) OPT Sync Interface can be used to configure the body of the email only. All data in the PDF invoice has to be hard coded, except for the important messages section. Development time is included to make changes to our standard format if needed.

(4) By turning off the customer's "Print Cycle Invoices" flag, you will prevent the invoices from showing in the print queue. However, this will require the entire customer to have

all of their cycle invoices set to email otherwise they will never be delivered. This process currently only works with cycle invoices.

(5) Requires SedonaSync Actions License

(6) SedonaOffice's email invoice event will require manual installation and configuration of the HTML code, in order to complete the setup. The event is delivered with gaps in the code to be filled out by the customer with their own information. The OPT 1118 email invoice event pulls the company information from the SedonaOffice setup tables to provide an out of the box solution. Once the OPT 1118 event is installed, customizations may be done via the OPT Sync Interface using the Microsoft Word style editor.

**OPT Event 1118
Now Includes:
Events 1134 & 1135
Email & Print Queue
Tracking Reports**



Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229

2926 28th Avenue North

Saint Petersburg, FL 33713

www.OPTBusinessServices.com



Customer Billing Packages

Our email invoicing and collections suites will not only save you time and money, but are a multifunctional solution that will greatly benefit you and your customers! There are many settings and formats to choose from, of which are all completely customizable.

These suites include extra events and reports to track your invoicing and collections progress. OPT has also added extended functionality to our events by using the SedonaSync Actions Module to communicate with SedonaOffice. This allows you to indicate that the invoice or statement has been emailed resulting in a cost savings verses the traditional method of printing and mailing.

Both suites allow you to include an attached PDF version and/or additional attachments, such as a stuffer! Please scan the QR code below or visit our website and click on "Customer Billing Packages" to see additional information. This includes a video demonstration of how these events work along with all our sample formats.

06/15/2014

Shree's Liquors, Inc.
24 E. Main Street
Watsonville, NY 11793

Dear Shree's Liquors, Inc.:

Our records indicate your account is past due in excess of 90 days with this office. OPT Business Services wants to make sure that everything regarding your account is handled correctly. It is our goal to provide you with the best possible service. If this is just an oversight, please act now to bring your account current.

Statement:

Business Services, Inc.

2020 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229
Fax (727) 258-7229

Statement

Date	Customer
06/15/2014	1234567
Due Date	06/15/2014
Due Amount	\$1,000.00

To: Shree's Liquors, Inc. Attn: Mr. Smith
24 E. Main Street
Watsonville, NY 11793

From: OPT Business Services, Inc.
2020 28th Avenue North
St. Petersburg, FL 33713
(727) 258-7229

Customer Name	Customer Number	Statement Date	Due Date
Shree's Liquors, Inc.	1234567	06/15/2014	06/15/2014

Date	Invoice #	Description	Amount	Balance Due	Status
06/15/2014	00101	Service Fee	\$100.00	\$100.00	90 Days Past Due
06/15/2014	00102	Recalling Charges	\$200.00	\$300.00	90 Days Past Due
06/15/2014	00103	Recalling Charges	\$200.00	\$500.00	90 Days Past Due
06/15/2014	00104	Recalling Charges	\$300.00	\$800.00	90 Days Past Due

Period	Start Date	End Date	Amount	Balance Due
1-90 Days	06/15/2014	09/14/2014	\$800.00	\$800.00
91-180 Days	09/15/2014	12/14/2014	\$0.00	\$0.00
181-270 Days	12/15/2014	03/14/2015	\$0.00	\$0.00
271-360 Days	03/15/2015	06/14/2015	\$0.00	\$0.00

OPT Business Services, Inc.
"Keeping Your Business in Sync!"
(727) 258-7229
www.OPTBusinessServices.com

Account Information

Customer Name: Mary Smith
Customer Number: 001234
Invoice Number: 00101234
Invoice Date: 06/15/2014
Terms: Net Due in 30 Days

Important Messages

Test Your Systems Regularly
Sales (727) 258-7229

Summary of Charges

Description	Amount	Balance Due
Monthly Service, 07/01/2014 - 07/01/2014	1.00	27.00
Sales Tax	0.00	0.00
Payments/Credits Applied	0.00	0.00
Invoice Balance Due	\$27.00	

Date: 07/01/2014 Invoice # 00101234 Description: Recalling Charges Amount: \$27.00 Balance Due: \$27.00

For Billing Inquiries, please contact (727) 258-7229 or sales@optbusinessservices.com.
To pay with your credit card or bank account, please contact us.
Please check our website for your payment information.

INVOICE

Customer Name: Mary Smith
Customer Number: 001234
Invoice Number: 00101234
Invoice Date: 07/01/2014
Terms: Net Due in 30 Days
Amount Enclosed: \$

Please verify your Customer Number (CIN) on your check.
We will not accept checks for OPT Business Services, Inc.

Payment Service Requested:

☐ Please check if your billing address has changed.
Provide your new address below:

Mary Smith
123 Main Street
Any Town, NY 12345

OPT Business Services, Inc.
2020 28th Avenue North
Saint Petersburg, FL 33713

Email Invoice Suite	Email Collections Suite	Billing Package	PDF Billing Package
1118	1109	1118 & 1109	1118 & 1109
Introductory SedonaSync email invoice package. Choose from our numerous formats and customized workflows!	Collections event with cascading verbiage based on aging buckets. Event can include a statement within the email notice.	Get the best of both suites and create a complete billing solution for a great bundled price!	PDF allows unmatched flexibility! We will work closely with you to customize the format to suit your needs.
Package Includes: 1118-Invoice Events 1134-Invoices in Print Queue 1135-Email Queue Log 5115-Action Pak for Event 1118 Remove Invoices From Print Queue, Email Queue Workflow, and SedonaOffice Notes.	Package Includes: 1130-Statement Preview Event 1109-Statement Event 5115- Action Pak for Event 1109 Re-Age Customers, Set Last Statement Date, Email Queue Workflow, and SedonaOffice Notes.	Package Includes: 1118-Invoice Events 1134-Invoice in Print Queue 1135-Email Queue Log 5115-Action Pak for Event 1118 1130-Statement Preview Event 1109-Statement Event 5115- Action Pak for Event 1109	Package Includes: 1118/1109 Suites Plus 1118.9-Invoice PDF 1109.9-Statement PDF Requires Crystal 2008 Reports License



Business Services, Inc.

"Keeping Your Business in Sync!"

(727) 258-7229
2926 28th Avenue North
Saint Petersburg, FL 33713
www.OPTBusinessServices.com

