



OPT Web Services

Presented By:

OPT Business Services

OPT Business Services, Inc.



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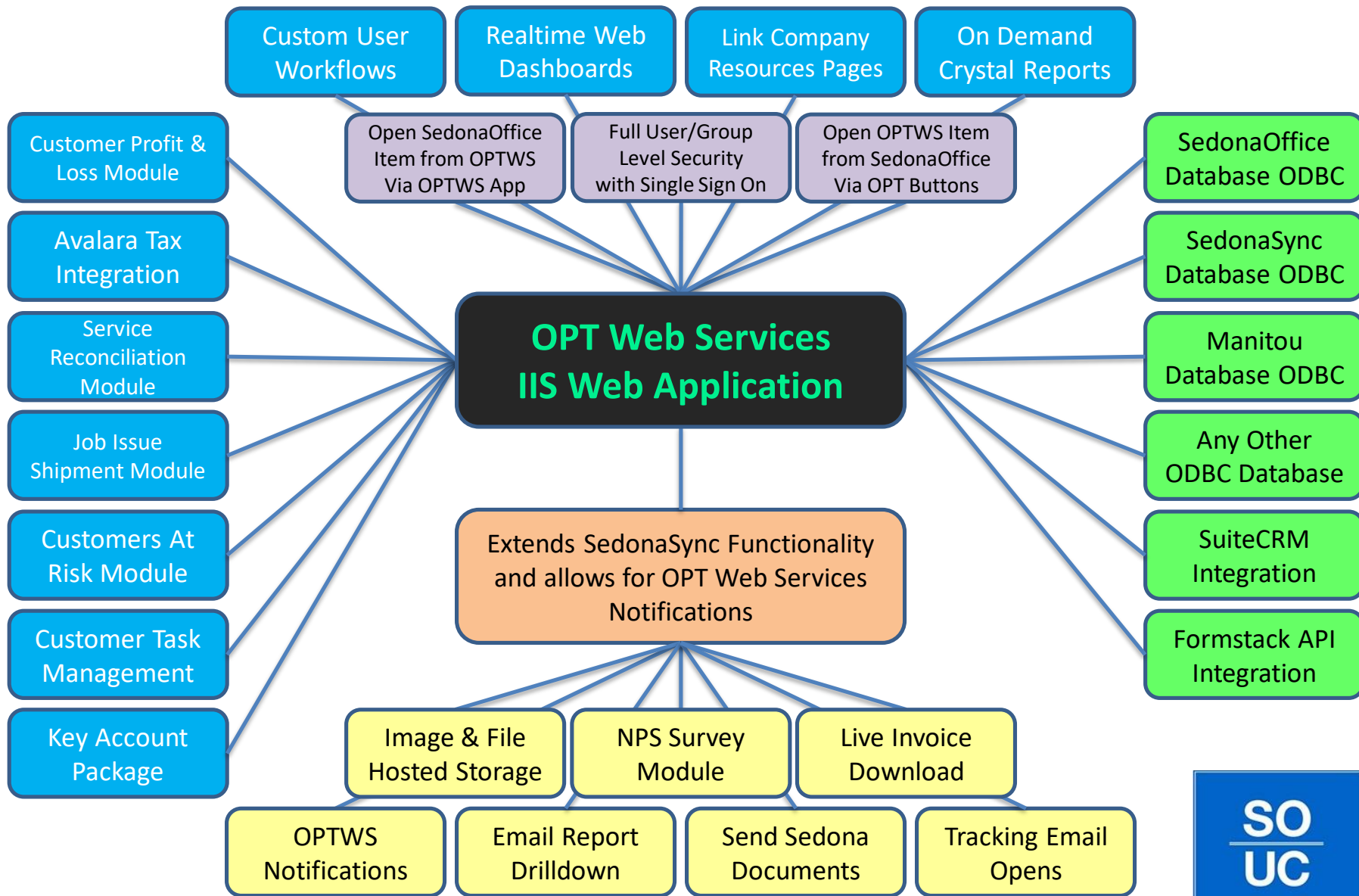
"Keeping Your Business in Sync!"

(727) 258-7229

www.OPTBusinessServices.com

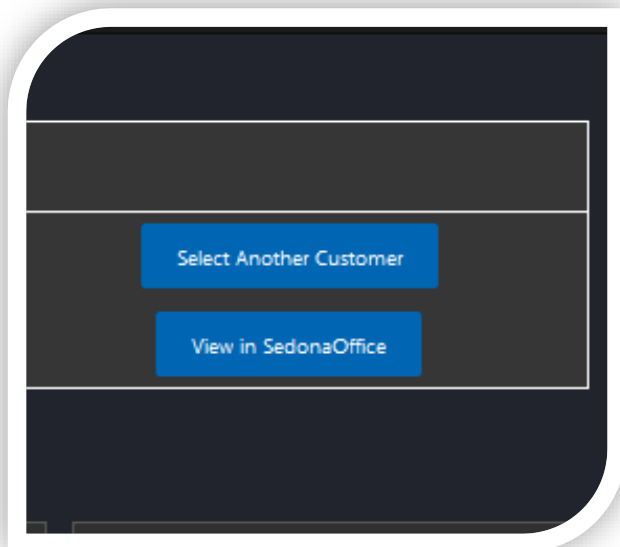
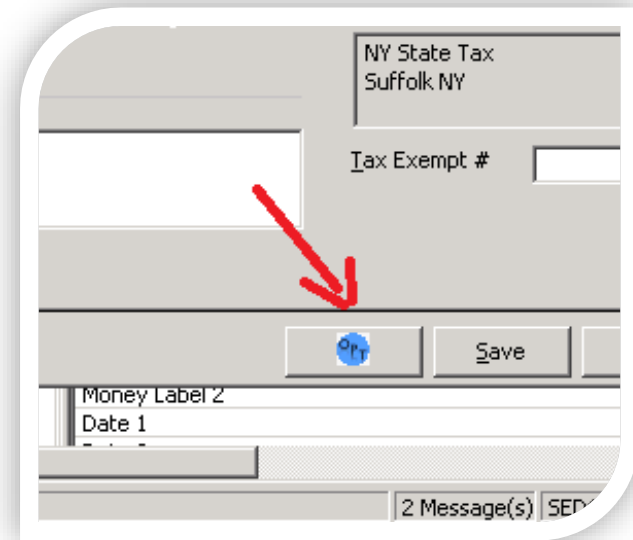


OPT Web Services



Expanded SedonaOffice Integration

SedonaOffice now contains OPT buttons throughout the application for quick access to OPT dashboards and modules. Each button will bring you to a page that shows you specific and customizable information relevant to the area you launched from.



Quickly switch back and forth between applications as well, you can now open customer, site, system, and many other records in SedonaOffice directly from OPT Web Services.

Service Reconciliation Module (SRM)

OPT has created a module to allow you to quickly and accurately compare each of your vendors bills with your accounts in SedonaOffice.

Protect your profits by reconciling your bills more frequently then ever before!

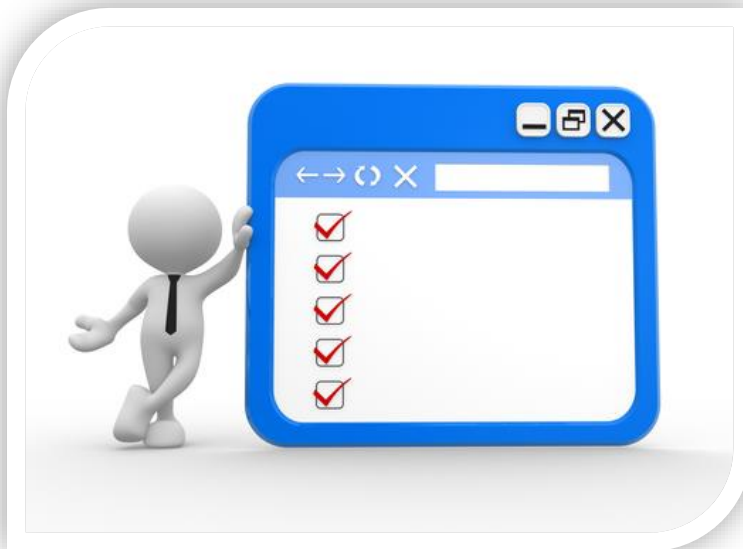


Customers At Risk (CAR)

Customers at Risk cases allow you to manage potential customer issues before you risk losing the customer. Assign users to a case to receive notifications and updates. Escalate to a service ticket or sales lead. All details are reported back to SedonaOffice.



Customer Task Management



Create Customer at Risk case tasks or general customer tasks for items that need to be completed. Assign a user to the task and they will receive notifications reminding them when it is past due.

Avalara Tax Module (ATM)

OPT now offers a convenient process to use an Avalara Tax Sheet to load and assign SedonaOffice tax groups.

Current tax rates will be loaded into each tax group and the correct tax group will be assigned to new accounts based on a zip code lookup.

If more than one possible match was found then the correct tax group can be selected in OPT Web Services.

SedonaOffice tax groups are only loaded as new customers go online that are covered by those tax groups.



Net Promoter Score (NPS) - Survey

06/23/2015

Steven James
123 Main Road
Anytown, NY 11557

Dear Steven James (steven@james.com),

We were privileged to have the opportunity to serve you, and we greatly value your business. We look forward to continuing our relationship with you in the future, and if you should have any other issues arise, please do not hesitate to contact us. If you would not mind taking a few minutes and completing this short survey to let us know how we did and if there is anything we can do to better assist you.

Based on recent services, how likely are you to recommend us to family, friends, or colleagues?

Not at all likely

Extremely likely

0	1	2	3	4	5	6	7	8	9	10
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Our commitment to providing you with the very best service is our primary goal. For your reference your account number is **010128**. If you have any questions please feel free to give us a call at (123) 456-7890.

Sincerely,

Service Department

Service@AnyCompany.com

Any Company, Inc.
123 Main Avenue
Anytown, NY 11111
Phone: (123) 456-7890
www.AnyCompany.com

Sign up or log on to [Bill Pay](#) and you can set up your credit card or bank draft to automatically pay your monitoring or other cycle invoices.

Don't have access to a computer? No problem, just call us at the number listed below, and we'll get you signed up!

Give us a call or email and we can set up your credit card or bank draft to automatically pay your service invoices as well.

NOTICE: This email address Service@AnyCompany.com is covered under the Electronic Communications Privacy Act, 18 USC 2510-2521, and is legally privileged. It is intended for use only by the person to whom it is addressed. If the reader of this message is not the intended recipient, or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified, that any usage, dissemination, distribution, or copying of this communication is strictly prohibited. If you have received this in error, please notify the sender only of the error and then destroy the original message and all copies. Thank you.



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Customer Satisfaction Survey

How are we doing?

We would like to thank you for giving us the opportunity to serve you. Please take a moment to answer the following questions, however if you prefer speaking to us you may call (727) 258-7229.

Your Name

Steven James

Email

steven@james.com

Considering your overall experience with our company, how likely are you to recommend our services to other colleagues or security companies?

☐ 0 - Very Unlikely ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☒ 7 ☐ 8 ☐ 9 ☐ 10 - Very Likely

Additional Feedback

Thank you for your response. If you would like to provide us any additional feedback that will help us better serve you, please feel free to let us know below.

Additional Feedback

1024/1024

Thank you for your feedback. We sincerely appreciate your honest opinion and will take your input into consideration when providing service in the future.

Would you like this survey to be anonymous?

☒ No ☐ Yes

Submit Form

Net Promoter Score (NPS) - Dashboard

