SedonaOffice

The #1 Financial Software for Security Companies

SedonaOffice
Implementation Guide

Last Revised:

December 13, 2008

About this Guide

This Guide is for use by SedonaOffice customers only. This guide is not meant to serve as an operating or training manual, its purpose is to overview the content contained within, and to be used as a reference guide only.

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This guide may be updated periodically, be sure to check our website at www.sedonaoffice.com for the most current version.

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Introduction

From everyone at SedonaOffice, congratulations on your purchase of the SedonaOffice software application the number one accounting and business management software for the security companies. This Implementation Guide contains all the information you need to successfully implement SedonaOffice. This guide is designed to prepare you for and guide you through the installation and implementation processes and allow you to realize the maximum value of your investment by taking full advantage of all the features and benefits SedonaOffice has to offer. Please take time to read this guide and learn about the services SedonaOffice has that are available to you as a SedonaOffice user.

Using This Reference Guide

Not only have you purchased the leading accounting and business management software solution for the security industry, but you have also joined the most comprehensive implementation program available. This guide covers just some of what SedonaOffice offers to help you integrate SedonaOffice software into your business environment. Serving as a roadmap to guide you through the implementation process, this guide along with the input and guidance from your SedonaOffice implementation team, will help you successfully implement your system on schedule.

SedonaOffice recommends completely reading this guide in its entirety first. The best way to complete any project is to know what you face from beginning to end. After reviewing the entire guide, SedonaOffice recommends you re-review each section as you prepare to embark on that particular phase of the implementation.

This guide is a planner and workbook that allows you to submit required information (forms) to SedonaOffice, note additional information provided by SedonaOffice, and track the progress of the project with provided checklists. SedonaOffice encourages you to write in this guide and take notes that will be as useful as possible during your implementation.

This guide was not designed to provide all the answers for the unique circumstances that each SedonaOffice customer faces. Rather, it is a general guide to explain the SedonaOffice Software methodology and to assist you in getting your business running on SedonaOffice. Your SedonaOffice implementation team will provide you with additional information to help make your implementation a productive and successful experience.

SedonaOffice General Information

The following briefly describes the scope of SedonaOffice Software products and services and provides contact information for the company and corporate staff.

About SedonaOffice

SedonaOffice specializes in creating integrated accounting and business management solutions for the security industry. Founded in 1996 by Michael Marks and Don Faybrick, SedonaOffice is privately held and operates internationally. Operating from offices in Chagrin Falls, OH, and Plymouth, MI, SedonaOffice continues to grow and expand. A leader in application software solutions for the security industry, SedonaOffice provides an array of services including installation, implementations, support, training and educational tools. The entire SedonaOffice staff is dedicated to providing high quality products and services.

Our goal is to establish and maintain strong partnerships with our customers that result in the reduction of our customers operating costs and increased earnings. To accomplish this goal, we continually increase our expertise in the traits of the security industry and in the existing and emerging technologies that are most conducive to running a security and service company. From your purchase of the SedonaOffice solution to helping expand your knowledge and use of technology, all of SedonaOffice's departments and services function with this partnership philosophy, which implies a relationship that contributes to the growth and prosperity of both parties.

Mission Statement

Our mission at SedonaOffice is to provide our customers with superior products and outstanding customer service. Our goal is simple; satisfaction of our customers. To achieve this goal, we have and will continue to create an environment which encourages, empowers, challenges and nurtures our employees so that they can work to their greatest potential and best serve our customers.

Our business practices, decisions and policies will be based on a shared system of values and beliefs. We will be guided by these principles in our interactions with each other, with our customers, and within our community.

We value intellect and innovation and those who are eager to explore, question, challenge and be challenged. We will embrace new technology, maximizing its potential in our company and for our customers.

Each individual will take responsibility for practicing and promoting the values and beliefs of SedonaOffice in all activities. We will view our jobs and our day-to-day workplace challenges within the larger context of our families, our community, and our lives.

In all of these things, we will maintain a relaxed and positive atmosphere of enjoyment of our work, our accomplishments, and each other.

Administration Contact Information

The contact information listed below shows our national contact numbers, addresses of the corporate offices, website, and the contact information for staff members who work with customers.

Corporate Offices Contact Information

Mailing Address: SedonaOffice 547 East Washington Street Chagrin Falls, OH 44022	Telephone / Fax / Website / Email: Telephone: (440) 247-5602 Fax: (928) 441-9986 Website: www.sedonaoffice.com Email: support@sedonaoffice.com

SedonaOffice Departments

Functioning with a partnership philosophy, the departments of SedonaOffice involved with system implementation are listed below.

• Your first experience as a SedonaOffice customer will be with your Project Manager, who will oversee all aspects of your system implementation from the time of your purchase through your go live with SedonaOffice.

• The SedonaOffice Sales Department assists customers with handling their ever-changing technology needs.

• The Data Conversion department works with you to plan, coordinate, and load your existing data into the SedonaOffice system efficiently and comprehensively.

• In the SedonaOffice Support department, the staff ensures that any interruptions to customers' systems and resulting workflow are reduced to the minimum.

• SedonaOffice Professional Services provides training; teaching the necessary skill sets for customers to expand their knowledge and implement their systems in productive and profitable ways.

Content Overview

A brief description of each section in this guide follows below.

Section 1

Project Planning helps you create a clear and concise path to get your company up and running on the SedonaOffice system, explaining resources you need and the tasks to accomplish this. This section provides an overview of the entire process and provides information to help you track your progress throughout your system implementation. This section also provides the flow and overview, while the following sections provide the details on the specifics of the implementation cycle.

Section 2

System Installation explains the details of what must occur before, during, and after the installation of your software.

Section 3

Database Planning & Building explains the variety of methods that SedonaOffice recommend for loading data into SedonaOffice database. The Database Conversion Techniques section explains the methods used to transfer data electronically from your current system to the SedonaOffice system.

Section 4

Go-Live on SedonaOffice section contains specific information about the processes needed to go live. It details how to plan, prepare, and make the transition to SedonaOffice, giving action steps critical to the process.

Section 5

Training provides information on the training options available to you and your staff to become trained, knowledgeable, and experienced with SedonaOffice. The section focuses primarily on training during the implementation process.

Section 6

Beyond the Basics covers what you can do to enhance your business and operations after completing the Go-Live process. The Educational Resources Section provides information on other avenues SedonaOffice offers for keeping you up to date on SedonaOffice features and developments. Finally, the Support Departments section summarizes your options for continued support.

Section 1 – Project Planning

Planning Before You Begin

There are five steps to planning that are highly recommended to ensure you gain the most from your utilization of SedonaOffice.

Analyze

This step requires you to state your goals and truly understand what you are trying to achieve. Take a look at your business and how you currently operate it. Determine your strengths and where you need improvement. Look at your complete business, everything from the way you service your customers to the information you analyze on how your business is performing.

Design

After you have finished learning how to use SedonaOffice, you will develop a design of how you want to incorporate it into your business. This step includes both the physical design (hardware, workstation and people), and the process design (how you are going to operate your business).

Develop

Next you should develop what is necessary for your system. Flow-chart your processes, everything from generating your monthly recurring revenues through the process of handling service calls. This step also includes the task of setting up all the setup tables and preferences in the SedonaOffice application.

Implement

This is the step in which you begin using the SedonaOffice system to operate your business.

Evaluate

Look back at all the previous steps and evaluate whether you have achieved your goals. Then begin the process all over again.
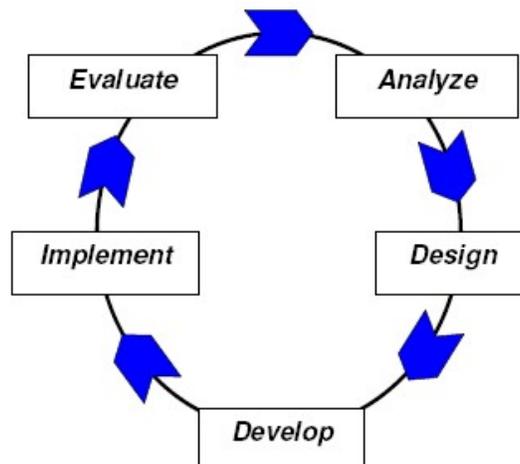
Implementation Strategies

For most companies, implementing a new software system is not a part of their regular business process. It is something that may occur only a few times within a normal business life cycle. Therefore, many SedonaOffice customers are not familiar with the process of implementing a software system.

SedonaOffice developed the SedonaOffice Implementation Guide to help guide you through this process. Based on many years of company experience in the industry, with implementations, and with the SedonaOffice Implementation Team's expertise, the guide is designed to get you up running on the SedonaOffice system as quickly and efficiently as possible.

Two primary goals are presented with the SedonaOffice Implementation Guide:

• Goal #1: To get your business running on the SedonaOffice system as quickly as possible, but within a timeframe that does not overburden your business. The technological edge that our software provides allow you to not only meet your customers' needs but increase the scope of provided services and operations. The sooner you realize these advantages, the better your business will be.

• Goal #2: To combine your business with the functionality, features, and technology that SedonaOffice has to offer. Your SedonaOffice Implementation Team will advise you on how to maximize the value of your investment. SedonaOffice staff will show you how to put the technological advantages you purchased with SedonaOffice into practical use within your organization.

SedonaOffice Project Organization

This diagram shows the primary contacts and their roles in a SedonaOffice internal project team. The table below allows you to record the name and contact information for your implementation team.
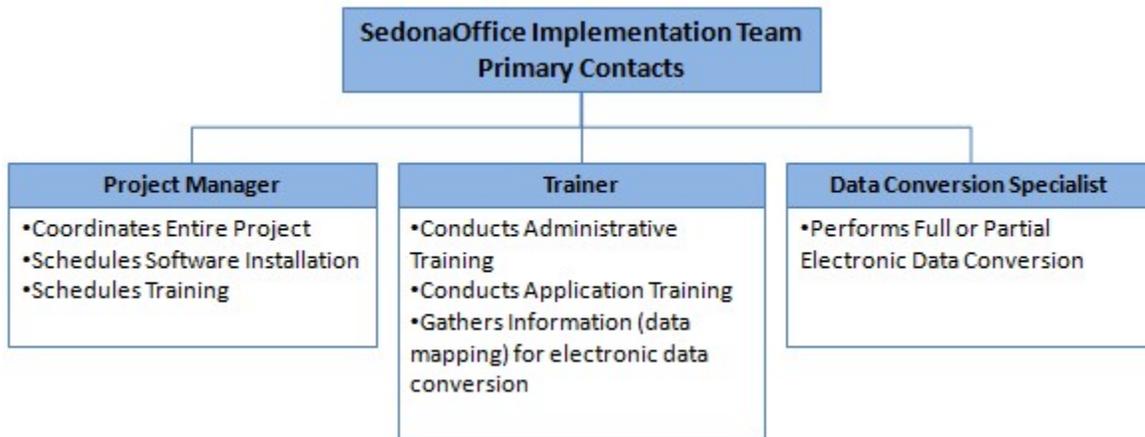
You will be contacted by phone or email with the name of your SedonaOffice Project Manager, who will advise you of the names of your implementation team members. Please write those team members down in the spaces below. If you need assistance and are not sure which team member to contact, please contact your SedonaOffice Project Manager.

Your SedonaOffice Implementation Team

Position	Team Member Name	Contact Information
Project Manager		
Data Conversion Specialist		
Trainer		
Salesperson		

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Implementation Resources

Your Employees

Assigning roles to your staff is important for setting up and maintaining stable system operations. The suggested roles described below will facilitate a smooth transition to SedonaOffice. For additional information about assigning duties by employee roles, refer to the chart shown below.

Sample Responsibility Matrix

Position	Responsibilities
System Administrator	• Adding new users • Maintaining setup tables • Maintaining user security • Performing daily/weekly/monthly database backup operations
Department Managers	• Generating departmental reports • Auditing work of data entry or clerical staff • Creating/maintaining departmental policies and procedures as they pertain to the SedonaOffice application
Data Entry / Clerical	• Entering new account information • Handling edit requests • Miscellaneous clerical duties

System Administrator

In order to have a successful implementation of your SedonaOffice system, we require that you have an internal point of contact, a System Administrator. This person may or may not actually be working for your organization in a system administration capacity; however, this person should be technologically proficient. Your System Administrator acts as the counterpart to the SedonaOffice Project Manager and is in charge of organizing your resources so that the implementation can be completed on time. This person must have the ability to mobilize and assign resources as needed to complete the implementation. In addition, the System Administrator must have the authority to make company decisions.

The System Administrator's responsibilities include tracking the progress of the project from start to finish; this person must participate in the start of the planning phase to organize implementation tasks such as installations, on-site training, and go-live preparation and make the necessary decisions related to the organization of tasks. The System Administrator should be involved with the training for all areas of the system, and to function as your company's first line of support and information and be familiar with the workings of all major areas of the system. The System Administrator is responsible for maintaining the equipment and the system and will have to communicate all issues to the SedonaOffice Project Manager. To assist you in choosing the right person for this role, see the list below of some of the desirable traits found in a qualified System Administrator. Please consider these traits when determining what employee within your company will be your best choice. Keep in mind that the person must have the time to devote to the successful implementation of the system. This decision is critical and we urge you to think carefully about your choice.

The desirable traits in a System Administrator:

- Problem Solving – analytical with computer troubleshooting skills
- Decisive – ability to make choices quickly and accurately
- Authority – enlist the help of others and assign jobs and roles to employees
- Project Management – ability to plan a project and complete it on schedule
- Communication – strong communication skills and a "people person"
- Experience – general knowledge of the entire company's functions
- Organized – ability to organize, track, and analyze parts of complex projects
- Motivated – desire to be successful and work through problems
- Dedicated – a team player with a high level of professionalism
- Versatile – can wear many hats
- Secure – has job security in your company
- Technological Savvy – high level of literacy with software and computer systems

Data Conversion Coordinator

The first step in the database conversion process involves assigning a Data Conversion Coordinator. This role is much like your System Administrator except this person focuses solely on your database conversion. Like the System Administrator, the Data Conversion Coordinator may or may not actually work for your organization in a database administration capacity. Some System Administrators may also serve as data conversion coordinators, depending on multiple factors including the complexity and size of the project.

The Data Conversion Coordinator will be in charge of organizing your internal efforts so that the conversion can be completed on schedule. This person will work closely with your System Administrator and jointly communicate all conversion issues to SedonaOffice. When assigning a Data Conversion Coordinator, SedonaOffice recommends that a candidate meet the following criteria:

- Have the ability to mobilize and assign resources as needed and have the authority to make company decisions.

- Have time to work with SedonaOffice staff during the conversion.

- Have a good working knowledge about your existing data.

- Attend the SedonaOffice Administrative Training Classes.

- Read, understand and become familiar with the procedures in this chapter.

- Have a sufficient degree of technical literacy, which provides the technical ability to assist SedonaOffice staff with data capture and data conversion.

President / Owner

As the primary decision maker of a company, the president or owner often focuses on issues other than the daily operation of the computer system. One additional role of the president is to empower the people who use the system to make the decisions necessary to get the system up and running. Also, the owner's posture and dedicated attitude toward the implementation of the SedonaOffice system is a valuable motivating factor during the development of this challenging project.

User Team (Power Users)

In some cases, SedonaOffice customers implement user teams as a way of defining an internal educational structure. These teams often come to the administrative training classes with the System Administrator and can be used to train other employees. Selected for greater expertise, faster learning curves and/or their abilities to teach other employees, these users may spend more time learning and practicing on the SedonaOffice system than most other users, at least, before full system implementation. For this reason, in addition to the System Administrator, they become another primary means of internal support and training in their specific areas of expertise. If you choose to have a user team in your company, you may divide the user team by job type, by location, or you may have one expert in each functional area or in each branch location.

Creating a Project Implementation Process

After assigning internal team members to the project and speaking with your SedonaOffice Project Manager, you must define a project implementation process for beginning using your new SedonaOffice system. Go-Live is the term used from this point – when you start actively running your business with SedonaOffice.

Data Conversion

Multiple options are available to allow your business to reach the Go-Live point with SedonaOffice. The best conversion option for your organization and setting a Go-Live date depends on numerous factors, including your overall business needs, the availability of your dedicated resources, which software modules you will be implementing, and how you wish to build your database. Your SedonaOffice Project Manager will discuss your options, helping you to define the most appropriate process and set a Go-Live date.

The table below provides several simplified example options typically followed by most SedonaOffice customers. Please review these options and discuss your particular needs in detail with a member of your SedonaOffice Implementation Team before proceeding with any other decision-making activities. The method you choose to complete your implementation and Go-Live is one of the most important decisions you will make throughout the course of your implementation. SedonaOffice urges you to understand these options and the implications on your overall implementation.

Example Option 1 – Electronic Data Conversion	Example Option 2 – Manual Data Conversion
1. Kick-off meeting -establish goal for go-live date	1. Kick-off meeting -establish goal for go- live date
2. Schedule all Training Classes	2. Schedule all Training Classes
3. SedonaOffice representative to Install SedonaOffice database & provide instructions on installing the application on workstations	3. SedonaOffice representative to Install SedonaOffice database & provide instructions on installing the application on workstations
4. Conduct on-site Administrative Training	4. Conduct on-site Administrative Training
5. Customer to send data for 1st conversion	5. Customer to complete setup tables
6. Customer to complete setup tables	6. Customer to manually enter dynamic data
7. SedonaOffice to deliver 1st data conversion	7. Conduct on-site Application Training
8. Customer reviews 1st data conversion- communicate any issues to SedonaOffice Project Manager	8. Go-Live with SedonaOffice
9. Customer to send data for 2nd conversion	
10. SedonaOffice to deliver 2nd data conversion	
11. Customer reviews 2nd data conversion- communicate any issues to SedonaOffice Project Manager	
12. Conduct on-site Application Training	
13. Customer conducts software testing on converted data	
14. Customer to send data for final conversion	
15. SedonaOffice to deliver final data conversion	
16. Go-Live with SedonaOffice	

Issues to Consider

The two listed example options for implementation above are simplified example options. The exact path that you choose may vary, especially in terms of data mapping and pre-training with the test data.

Statistically speaking, an average implementation cycle for the SedonaOffice system is approximately four to six months. The time does not depend on the size or complexity of the installation but rather the time and resources your company will dedicate to the project.

As with any project, if you do not dedicate specific resources to this project, then your employees must take time from their daily jobs to complete it. How much time you and your employees can put into the implementation is the number one factor in determining the project duration.

Setting a realistic, attainable Go-Live date is extremely important. If you set dates too aggressively and they cannot be met, may result in problems; affects SedonaOffice's ability to schedule the necessary staff and resources, causes problems with your customer base, or lessens your employees' opinion of their abilities to work effectively with the new system.

Look for future milestones to set the Go-Live date. Companies will often time their Go-Live dates with annual events such as the end of a fiscal accounting year, end of an accounting period, or around the time of a physical inventory. However, you need to consider the extra workload created by combining your Go-Live date with another business event. In addition, the Go-Live date for most accounting systems is usually set at the beginning of the month.

Take into consideration peak and slow periods in your business. If your business tends to be cyclical, you will want to consider these cycles in your implementation schedule. A substantial effort is involved in getting any software system up and running. You might not have the resources available during your busy season. In addition, during the busy time of year, your employees will have many more things on their mind than just the new system.

Steps of the Implementation

The following flowchart provides a general road map to guide you through the implementation process.

Note: It is important that you understand the big picture of the entire process before you Begin. Therefore, it is vital for you to read the remainder of this section in its entirety.

While showing a linear path through the process, numerous tasks need to take a parallel path to the primary flow. The first step in the implementation cycle is project planning – shown first in the flowchart. Once you become familiar with the process flow and have discussed your specific situation with the SedonaOffice Implementation Team, you should review the remaining sections in the guide, each detailing the steps outlined below.

Example Linear Project Implementation Timeline

Project Planning → Project Installation and Implementation → Go-Live → Review Project Results
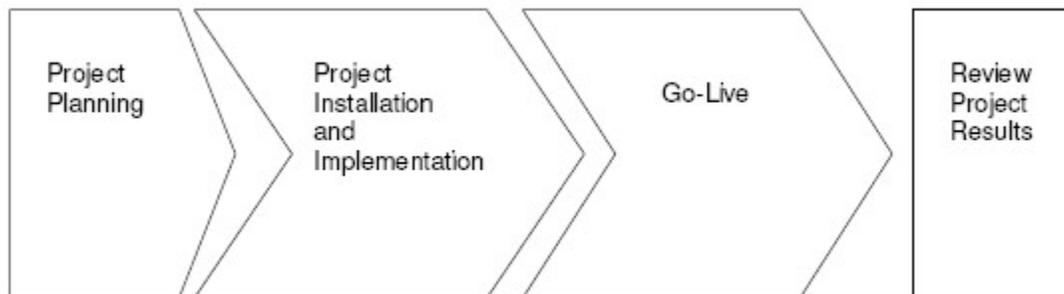
Implementation Project Planning

After your initial contact, your SedonaOffice Project Manager will be sending you documentation that will assist both you the customer and SedonaOffice staff in the implementation process. One of these documents is a New Customer Questionnaire, which provides SedonaOffice with valuable information about your company and how you do business. Filling out and returning this questionnaire is very important for the SedonaOffice staff to determine the best manner in which to instruct you on setting up your SedonaOffice system that will meet your company expectations and needs. Your implementation team will make recommendations for the project plan based on their experience. From there, they will work with you to develop an implementation plan.

Example Implementation Process

While this guide gives you an idea of the general steps involved in a typical implementation, your implementation team will assist you in exploring the specifics of the process and developing appropriate steps in your implementation plan. The following information highlights some of the steps involved in a typical implementation.

1. Software Installation

During your software installation, a member of the SedonaOffice Support Team will assist you in setting up the software on your server and provide you with instructions on how to install the software on the individual workstation clients. At any time, if you need assistance in installing the client software, you may contact the SedonaOffice Support department for help in this area.

2. Administrative Training

Becoming knowledgeable about the basics of SedonaOffice is vital to a successful implementation. To become familiar with the database, setup tables, and setup preferences, SedonaOffice suggests that the System Administrator along with any other key individuals in a decision making role attend this training session. During this course, the SedonaOffice trainer will walk through each setup table and discuss with you the functionality of each element as well as provide examples on how to use and implement each setup table for your particular business model. Once you and the members of your staff complete this course, you will be better prepared to enter data, receive end-user level training on the SedonaOffice application, and successfully complete your implementation.

3. Data Conversion

This optional service allows an electronic conversion of data from your current system to the SedonaOffice system. A representative from our data conversion department will assist you with this process and guide you through the steps of "mapping" your data. While you are learning about the setup tables in your database, you should be looking at what data you can convert electronically.

4. Data Entry

As you go through the Administrative Training and data conversion steps, you may find tables in SedonaOffice that you do not have in your current system, or tables in your current system that are too small to convert. For these types of items, you will need to enter this data manually.

This process can be done parallel to the data conversion. Your Trainer will help you to determine what data you will need to enter. This information is also covered during the Administrative Training class. Finally, to verify all appropriate data has been entered prior to the Go-Live date, fill out the Go-Live Checklist in Appendix D: Checklists and Forms.

5. The Conference Room Pilot

The Conference Room Pilot is a highly recommend step in the implementation process. Typically this exercise is completed at least once after Administrative Training has been completed and all setup tables/application preferences have been populated. This exercise involves a representative from each department in your organization. The goal of the Conference Room Pilot is to step through each functional module of SedonaOffice in the lifecycle of a customer – from Prospect through Service billing. Please refer to Section 4: Go-Live on SedonaOffice for more detailed information in this area.

6. Application Training

This is a required class which instructs you how to use SedonaOffice to run your business. You can consider numerous options when you decide how to use SedonaOffice training; your Project Manager will help you develop a plan that meets your particular needs. For more information about training services, please consult with your Project Manager.

7. Go-Live

The Go-Live date is the culmination of all the work you and your SedonaOffice Implementation Team completes during the project implementation. The date that you select to go live should be at the beginning of a new business year, quarter or accounting month so that the transition will be seamless to your general ledger and have a minimal impact on your daily operations.

Section 2: System Installation

An installation of SedonaOffice is comprised of two main elements; hardware and software. Although SedonaOffice does not normally sell hardware to our customers, we have established minimum requirements and recommendations for your hardware installation. This section is designed to assist our customers in making the appropriate choice of hardware and instructions for the installation of your SedonaOffice software.

Client / Server System

SedonaOffice was built using a Client / Server model. The client / server model provides SedonaOffice with a solid foundation that has been proven reliable and scalable. It also allows for easy migration to new technologies when advances are made in hardware and operating systems.

Client Workstation

The client is the computer that runs the SedonaOffice program. It is what you see on your monitor. Client workstations must be connected to a network so they can talk to the file-server.

Server System

The SedonaOffice Server is recommended to be operated on a dedicated file-server. The Server components include the database and the server utilities. Many functions in SedonaOffice actually are being performed on the Server system, in order to maximize the efficiency of the applications.

Hardware
The File Server

When selecting a file server there are many factors to consider; the size of the network, the number of users connected to it, the applications it will be hosting, the systems and databases it will be operating. As a rule of thumb your server should last your organization for 3 years. That doesn't mean you have to retire it then; but if your business is expanding you may just out grow it by then. There is no need to buy a server today for what you might need 2 to 3 years from now. Technology will change; prices will decrease and performance will increase. (Remember Moore's Law; every 18 months the price vs. performance will increase 100%; so for the same dollars today you can purchase twice a powerful machine 18 months from now.) Remember as soon as we publish this document, changes are being made to file server configurations. So please discuss any hardware purchases with us or consult with us if you have any questions.

File Server Configurations

Any SedonaOffice system that will be supporting 5 or more users simultaneously should be on a dedicated file server; although the server can be used for other office activities if it is configured for those services accordingly.

Here are the recommendations and/or requirements:

Server Type

Your server is the most important machine in your business as it hosts your data. The last thing you should do is save a few dollars on this machine by not buying a named brand server. Our recommendation is for a *Dell™* server. Although any major server should be fine.

Configuration

Basic Server (Up to 20 workstations)*

- Intel or AMD Server Class CPU (Multi Core) 2.0 GHz+ (example: Intel® Xeon® Processor E5-4603)
- Microsoft Windows 2008, 2008 R2, 2012 or 2012 R2 Server Standard x64
- SQL 2008 R2, 2012, 2014 or 2016 Standard x64
- 8+ Gigs of Ram
- Raid 1 (or better) Hard Drive for Operating System (+120GB)
- Raid 1 (or better) Hard Drive for Databases (+160GB)
- 10/100/1000Mbs Network Card (TCP/IP)

Advanced Server (21 to 50 workstations)*

- Intel or AMD Server Class CPU (Multi Core) 2.4 GHz+ (example: Intel® Xeon® Processor E5-4640)
- Microsoft Windows 2008, 2008 R2, 2012 or 2012 R2 Server Standard x64
- SQL 2008 R2, 2012, 2014 or 2016 Standard x64
- 16+ Gigs of Ram
- Raid 1 (or better) Hard Drive for Operating System (+120GB)
- Raid 5 (or better) Hard Drive for Databases (+300GB)
- 10/100/1000Mbs Network Card (TCP/IP)

Enterprise Server (51 to 100+ workstations)**

- Dual Intel or AMD Server Class CPUs (Multi Core) 3.0 GHz+ (example: Intel® Xeon® Processor E5-1680 v3)

- Microsoft Windows 2008, 2008 R2, 2012 or 2012 R2 Server Standard x64

- SQL 2008 R2, 2012, 2014 or 2016 Standard x64

- 24+ Gigs of Ram

- Raid 1 (or better) Hard Drive for Operating System (+120GB)

- Raid 5 (or better) Hard Drive for Database (+300GB)

- 10/100/1000Mbs Network Card (TCP/IP)

These recommendations should only be used as a basis when purchasing equipment. Similarly configured hardware is known to be currently running SedonaOffice under listed user loads. As long as your server meets or exceeds Microsoft's recommended minimum requirements to run SQL Server 2008 R2 and up then you will be able to run SedonaOffice. Failure to follow these recommendations could result in SQL performance that does not meet exceptions. If you have questions regarding hardware configuration, please feel free to contact our support department before purchasing.

SedonaOffice uses a 'Client /Server' architecture (also called Fat, Thick or Heavy Client). Due to the network requirements of the SedonaOffice client (*~20Mb per client, TCP/IP ports 1433/4992, Named Pipes, latency <100ms to the SQL Server*), **direct operation of the application is NOT supported over ANY type of VPN**. This includes web based services like Amazon AWS and Microsoft Azure. The workstation(s) must be on the same local network as the SQL Server.

Terminal Services / Remote Desktop Services (installed on the same network as the SQL Server) are the only supported and recommend ways to access SedonaOffice remotely.

** Configurations supporting 100 or more workstations should consider the Enterprise editions of both SQL and OS

External Backup Device

You are going to want to put into place a backup routine in the event of a major system failure or catastrophic event. Therefore you will need a tape backup device either as part of your file server configuration or elsewhere on your network. Our recommendation is that you purchase a DAT tape device with sufficient backup capabilities to handle your hard drive and database files. While you may want to purchase tape backup software, we have found the Windows supplied Backup utilities are fine (especially when used in conjunction with a SQL-Server Maintenance Plan).

The Rest of the Configuration

Besides the above mentioned criteria, your file server should be configured with a 100 Megabit NIC, CD ROM drive, keyboard and mouse. The monitor should be a minimum of 15"; but larger if you plan on using this machine for any application processing. (See the monitor issues as discussed in the Client section of this document.)

Operating System

The file server must operate Microsoft **Windows 2003 Server**. Windows 2003 Server is a well proven operating system; and our experiences with it have been excellent. For each computer that will be connected to the file server on your network you will need to purchase a Client Access License (CAL). If you have a network with 10 client workstations; you will need 10 CAL's for your Windows 2003 Server.

The Database

You must operate Microsoft **SQL-Server 2005** database on your file server. SQL-Server 2005 is a Database Management System (DBMS); and is the program that will be operating on your file server which stores all the data for SedonaOffice. For each computer that will be connecting to the DBMS on your network *at any one time* you will need to purchase a CAL for SQL-Server 2005.

The Client Workstation

The client workstation is the actual computer on which you will be operating SedonaOffice. It is important to note that SedonaOffice has been developed utilizing the latest and most advanced development technologies available. Our commitment is to stay on these new technologies so our application will not become legacy; and unable to take advantage of the new technologies as they are introduced in the years to come. Because of this; we strongly recommend you use new technology workstations to operate SedonaOffice on. While older technologies may work; their performance cannot be guaranteed.

If you have existing computers, they can be used with SedonaOffice; we recommend you follow the guidelines below to upgrade these machines to the specification as outlined. To ensure the best user experience, follow these guidelines.

Workstation Type

While we recommend that you utilize a name brand workstation such as an IBM, Dell or HP. Our experience has been, especially with the price of computers today, the benefits of a name brand are worth every penny. Especially the support services and next business day on-site maintenance contracts these manufacturers offer.

Configuration

Basic Workstation

- Intel or AMD CPU (Multi Core) 2.0 GHz+ (example: Intel® Core™ i5-4430 Processor)
- Windows Windows 7, Windows 8, Windows 8.1 or Windows 10
- 2 Gig of Ram
- Hard Drive 60Gb+ (minimum of 250 megs free)
- Monitor capable of 1024 by 768 resolution
- 10/100Mbs Network Card (TCP/IP)

The Monitor

The monitor is the most important piece of the client workstation. It is the main point of interaction with the application as this is where the user interacts with the application. SedonaOffice was designed to be used on a monitor operating a screen resolution size of 1024x768. (This is larger than the 800x600 used in older applications; although it has become the new standard for Windows applications). By using a larger resolution the user can display more information on their monitor at one time. We strongly recommend all workstations have a 19" monitor to properly display a 1024x768 resolution. (Using a smaller monitor can be difficult on one's eyes.) If you plan on using TFT Flat Screen monitors (this would be our recommendation), a 17" is recommended (A 17" TFT Flat Screen monitor is comparable to a 19" regular monitor).

The Rest of the Configuration

Besides the above mentioned criteria, your file server workstation should be configured with a 100 Megabit NIC, CD ROM drive, a floppy drive, keyboard and mouse. Your hard drive should have at least 500MB of free space. While SedonaOffice utilizes less than 100MB; you may need some additional space for add on products such as mapping software. Generally speaking most workstations today come with such large disk drives that space is not an issue.

Operating System

We strongly recommend operating Microsoft **Windows XP Professional** or **Windows Vista**. Windows XP Professional is a well proven operating system and is our preferred choice. Other operating systems may work; but are not supported by SedonaOffice.

Networking

SedonaOffice operates on a Microsoft network environment; utilizing TCP/IP protocol. Each workstation connected to the File Server will need to be configured to operate on your network.

Local Area Network (LAN)
The LAN is your local network; normally thought of as the network at your office. Each computer connected to the LAN would be connected via CAT 5 cable to a network hub. We recommend you operate a LAN speed of 100 Megabits for SedonaOffice.

Wide Area Network (WAN)
A WAN is expanding your LAN beyond your one physical location, so that additional workstations can access your file server from other locations. There are numerous ways to create a WAN. We recommend you hire a local systems integrator that can work with you to establish a WAN that would be best suited for your needs. Following are two different types of WAN scenarios to explore.

Virtual Private Network (VPN)
A VPN allows you to connect to your LAN from outside your physical location just as if you were a user on the LAN. A VPN is constrained by the connection speed to your main office; and usually requires a high speed data connection; such as a T1. From our experience anything less than that is generally unacceptable to operate the SedonaOffice system.

Terminal Services
Terminal Services is a function of Windows 2003/2000 Server that allows you to connect to a host server running Terminal Servers and provides you a virtual work session for you (allow the processing is being done on the Terminal Server machine). SedonaOffice operates well under this configuration. With Terminal Server you do not need high speed access; although DSL is preferable.

If you plan on making either a VPN or Terminal Services connections there are security concerns you must consider; especially if you plan on using the Internet to make the connections. Again, speak with your systems integrator on the best solutions for you.

Questions
This guide was designed to assist you in configuring your SedonaOffice system. If you have any questions please contact us at (440) 247-5602 or email support@sedonaoffice.com.

Software

Since SedonaOffice operates in the Client/Server environment, you will need to install SedonaOffice on your server and also install the SedonaOffice client application on each of the workstations where users will be logging into the system.

During your software installation, a member of the SedonaOffice Support Team will assist you in setting up the software on your server and provide you with instructions on how to install the software on the individual workstation clients. At any time, if you need assistance in installing the client software, you may contact the SedonaOffice Support department for help in this area.

During this phase of the implementation, the support team member will provide information on the utilities available at the server level and explain each of the functions to you in detail. The support team member will also discuss your plan for backing up your database to ensure a secure and backed up system every night.

You will have the capability to create an unlimited number of "companies". SedonaOffice recommends that you create a "Sandbox" company to be used for testing your setup values and testing the various processes in SedonaOffice to familiarize yourself and staff with the database and to learn how to navigate throughout the application prior to going live.

Section 3: Database Planning & Building

The data you use to run your business is the foundation of your SedonaOffice system. As with many other systems, the results you achieve with SedonaOffice rely greatly on the data used to populate the database and the method used to convert the data to SedonaOffice. Transferring and entering complete and correct information into your SedonaOffice system is critical for making the transition smooth and successful, while minimizing disruption to live operations.

The data conversion process requires teamwork and you should expect a high level of communication while this work transpires. During the conversion process, SedonaOffice is responsible for converting your existing data in a timely manner based on the specifications you provide. The Data Conversion department offers guidance so you can make the best use of your current data as it applies to SedonaOffice. Your company is responsible for working with SedonaOffice to convert your existing data to the SedonaOffice data structure accurately and in a timely fashion.

To ensure that you can make the best use of your current data, please read and become familiar with the procedures outlined in this section. SedonaOffice strongly recommends that you review all issues related to the database conversion in detail both internally and with your SedonaOffice conversion representative. Remember, your data conversion will only succeed if all are working as a team.

Standards for Conversion

SedonaOffice conversions typically include three data captures and three data conversions. The first capture and conversion is generally a test conversion. However, conditions may exist that require additional captures; these conditions can be one or more of the following.

- Major database changes occurred since SedonaOffice received the original data.
- The original data was incomplete or contained errors.
- Considerable time has passed since the data capture and the data is not up-to-date.

You may send data to SedonaOffice any time after signing a contract. You should provide data in an electronic format compatible with the SedonaOffice database. The most preferred formats are Excel spreadsheets or an Access database.

For the final data conversion, you should provide the data capture to the Data Conversion department a full three days in advance of the Go-Live date. This gives SedonaOffice the time necessary to convert the data and import it into your system in time to bring it live on schedule.

It is your responsibility to verify that the data conversion is acceptable and meets your needs. Therefore, a knowledgeable person or persons on your staff should review the data and verify that SedonaOffice converted all the data properly. SedonaOffice is not familiar with the idiosyncrasies of your data and cannot be held responsible for inconsistencies occurring because someone within your company did not verify the data. However, SedonaOffice will do its best to ensure a proper conversion of data.

Database Conversion Techniques

Before deciding which method or combinations of techniques of database conversion are appropriate for your organization, you must first discuss the actual database conversion techniques and the process your organization must follow.

Note: SedonaOffice may need to convert a single database three times before the data transfers exactly as specified; this is not unusual and in most cases is the norm.

Questions for Review

To determine the best conversion technique for your organization, review the questions below. These questions do not necessarily have to be answered; they are posed with the intent of stimulating thought. The question of how to build your database has multiple answers depending on the issues specific to your organization. The eight questions below are just a few of the many important questions to consider before moving forward.

- Does your company have too much data to enter in manually?

- Does your company have mission critical data in your current system that you cannot afford to lose?

- What output formats can you use to provide your data to SedonaOffice? Are these formats compatible with SedonaOffice for conversion purposes?

- What is the integrity of the data on your current system? Is it accurate? Do you have data that you do not want to convert?

- Do you have multiple databases to clean up during the data conversion?

- Do you want to implement new processes or business rules as a part of your new system implementation?

- Does your System Administrator have the time, business knowledge, and technical ability to work with the SedonaOffice Data Conversion Representative to complete the conversion successfully? If not, can you appoint someone in your organization who meets these criteria?

- Other than SedonaOffice, what software applications will you continue to use and how will this impact this implementation?

Description of Conversion Methods

SedonaOffice provides two primary methods to help you populate your SedonaOffice database tables: manual conversion, and full electronic data conversion. The information below details each of these methods.

Note: Most SedonaOffice customers use a combination of methods; however, the methods customers decide upon vary depending on the situation.

Summary of Conversion Methods

In most cases, SedonaOffice customers can use a combination of manual and electronic data entry methods. However, the methods customers use vary with each implementation. SedonaOffice generally recommends this approach so you can tailor the conversion to your specific data needs. Regardless of this decision, SedonaOffice recommends that you create a detailed and organized approach to building your database. The organization and approach of database conversion are discussed in further detail in Data Mapping later on in this chapter.

Note: If you are currently using Bold Theos or Manitou software, the data conversion worksheets are not necessary for your data conversion.

Types of Data that may be converted

Your SedonaOffice database can be built on various pieces of dynamic data if these data elements are available in your current system and can be exported into a file structure with which our Data Conversion Representative will be able to use. Since SedonaOffice is primarily a financial software application, historical transactions from your general ledger cannot be converted into your SedonaOffice database. Only new business transactions entered into SedonaOffice after your go-live will record to the general ledger. The following data elements may be converted into your SedonaOffice database:

- Customer information – contains customer names, billing addresses, phone numbers.

- Site information – contains the name, address, phone numbers of the physical property location of where you have installed equipment or are providing services.

- System information –the types of systems install and/or serviced at a customer's site. Systems are described as intrusion, fire, access control, CCTV etc.

- Billing contacts – names, phone numbers and email addresses for your customer billing contacts.

- Site contacts - names, phone numbers and email addresses for the individuals you may contact at the site; typically for installation or service.

- Recurring lines – the types of services, amounts, billing cycle for services billed to your customers on a recurring basis.

- Customer Invoices – any invoice with an open balance at the time of data conversion.

- Customer Credits – any cash or credit memos on a customer account that have not been applied to a customer invoice at the time of data conversion.

- EFT information – if you company processes automatic payments using bank draft or credit cards, this information can be converted.

- Custom Fields – if you currently have customized fields or need to transfer data elements for which SedonaOffice does not have a field for the same purpose, this data can be mapped to SedonaOffice custom fields. Custom fields are available at the customer, site, system, vendor, and inventory part level.

- Notes – any miscellaneous information about the customer stored in a note file may be converted.

- System Equipment – if you currently keep track of the inventory parts used when a system is installed, this equipment list may be converted provided the part numbers exist in your master inventory parts list.

- Service Ticket – all service tickets either open or closed may be converted. You may specify a date cut-off if you do not want to convert the entire service ticket history.

- Inspections – if your company performs periodic system inspections and have an electronic file with the necessary information, this may be converted.

- Central Station System information – contains detailed information about an installed system such as passcodes, panel phone numbers, and secondary account numbers. If your company has its own central station you will probably not convert this information.

- Zone List – zoning information for monitored systems. If your company has its own central station you will probably not convert this information.

- Call Lists – contact information of whom to call if an alarm signal is received. If your company has its own central station you will probably not convert this information.

- Inventory Parts – listing of all parts your company uses for installation and service.

- Vendors – listing of all accounts payable vendors.

- Vendor Bills – all vendor bills with an open balance at the time of data conversion.

- Vendor Credits – all vendor credits with an open balance at the time of data conversion.

Conversion Method #1: Manual Conversion

SedonaOffice usually recommends converting as much data as possible electronically to ensure data integrity from one system to another. However, due to the vast nature of SedonaOffice, manually entering data is often the best way to take full advantage of the features within SedonaOffice. Also, depending on the structure and accessibility of your existing data, electronic conversion may not be feasible.

Generally, three reasons determine why you may need to enter data manually, as follows.

• The most common reason for manual entry is that your existing system might not contain the same information the SedonaOffice system requires. Because of the depth of the SedonaOffice system, many fields may not exist on your current system. In these instances, you need to enter the data into SedonaOffice manually.

• A second reason concerns database size. The small size of your database might make electronic conversion impractical. For example, it may take far less time and fewer resources to enter information for 100 customers manually than it would to have the SedonaOffice Data Conversion Representative convert the data.

• A third reason for manual entry is necessity. Regardless of size or complexity, any system cannot output every data element it contains. When this occurs, it usually only affects certain portions of data, but depending on how the data is used, this can be a significant issue. Because of this situation, advance conversion planning is of the utmost importance for your company.

Conversion Method #2: Electronic Data Conversion

Electronic data conversion allows you to download database files from your old system and format the data into Excel spreadsheets, Access databases, or comma delimited files that will be delivered to the SedonaOffice Data Conversion Representative. Many reasons determine why this method is a good one to use, including the following:

• Selection – from your existing data, you can select only the data that is necessary to convert.

• Control – you can control what fields to send to SedonaOffice for conversion.

• Speed – it is faster to use electronic data conversion than trying to manually enter large amounts of data.

In order for SedonaOffice to convert data using this method, you must be able to use one of the following transfer protocols:

• Writeable CD

• FTP – Contact SedonaOffice for connection instructions to our secure ftp site.

If you are not sure you can provide files in the transfer protocol needed for an electronic data conversion, contact your SedonaOffice Project Manager for further discussion.

Data Mapping

Since the data from your legacy system is a critical asset for your operations, it is very important that you carefully consider how to handle this asset and its conversion into the SedonaOffice database. Regardless of the conversion method you use, you can be limited in your ability to convert certain data elements successfully. These potential limitations are important to address before deciding on a conversion methodology and more importantly, before any conversion work commences.

Now that you have reviewed the methods for database conversion into SedonaOffice and its database structure and have read an overview of the conversion process, you should take notes, ask questions, and complete the database worksheets required for conversion. The data sheets will help you map where the data from your current system belongs in SedonaOffice and help you pinpoint and resolve any potential conversion issues before they become problems. Remember, your data is an asset and having this data converted in a planned and organized manner saves your organization time, effort and money.

To complete the data conversion worksheets, follow the instructions provided in Appendix A: Data Mapping. This appendix contains all of the information you need to complete the required database worksheets SedonaOffice needs before conversion work begins.

Data Auditing

When you receive the converted data from your SedonaOffice Data Conversion Representative, the first thing you must do is audit the data – this step is critical in the data conversion process. Although SedonaOffice employees are experts on the types of data generally used in the security industry and in SedonaOffice, they do not know every detail of how you use data in your environment. Since you know the specific idiosyncrasies of your data, you need to audit and verify that the data sent back is complete and accurate. Proper planning by both SedonaOffice and your organization will prevent inaccurate data conversions, but if discrepancies occur, the SedonaOffice Data Conversion Representative needs to be aware of this well in advance of the planned Go-Live date.

Appendix A: Data Mapping, although designed primarily for data mapping, also aids in data auditing. When submitting the completed worksheets to SedonaOffice, you should keep a copy of them for reference. When SedonaOffice sends data back for auditing, these sheets serve as a checklist to verify that the transfer was comprehensive, accurate, and completed to your specifications. Since each sheet generally corresponds to a database table in the SedonaOffice database, comparing the sheets allows you to comprehensively examine each table. Also provided within this workbook is a checklist for data auditing. The items on this list are by no means a complete checklist of areas to audit, rather a guideline to help you check critical areas. Please refer to the Data Auditing Checklist found in Appendix D: Checklists & Forms.

Note: It is your responsibility to verify that the transferred data is correct. SedonaOffice cannot be responsible for inaccurate data on the Go-Live date if you did not audit the data after conversion.

A few other issues to consider regarding database auditing follow.

- You should plan to make copies of your SedonaOffice database before and after the data conversion.

- Do not make manual edits in SedonaOffice until your company has verified the converted data. If additional conversions are required, any manual editing will be overwritten.

- Remember that dynamic data may change on your legacy system since the time you sent SedonaOffice your system data. When verifying your data, you must verify it from the same time that the files were sent.

- Checking data against printed reports generally ensures that you verified the correct data. When sending data for conversion you should run reports on your legacy system to be used for comparison when your data is returned. Reports such as accounts receivable aging, accounts payable aging, recurring revenue are key in your data audit.

- If you are unfamiliar with some of the SedonaOffice modules for which you had data converted, consult a member of your SedonaOffice Implementation Team for guidance.

Understanding the SedonaOffice Relational Database

SedonaOffice is a relational database system. All of the tables in your database are linked to one or many other tables by means of an index record. It is important that you understand our method of linking when formatting your data for conversion. Please read the following sections thoroughly prior to commencing any data formatting into the Excel spreadsheets.

Definitions

Customer: The person or company that is responsible for the accounts receivable invoices created in SedonaOffice.

Bill To: The name and address of where invoices and statements will be sent. You may have multiple bill to records for one customer.

Site: The physical location of where equipment is installed and/or services are provided.

System: The system that is installed at the site. This may be a burglar alarm system, fire alarm system, CCTV or any other unique type of system. You must have a system record to be able to invoice the customer for recurring services (this is referred to as *cycle billing* in SedonaOffice terms).

Each customer is assigned a customer number. Each site is assigned a site index number and is linked to one customer number. A system is assigned a system index number and is linked to the customer with a site index number and a customer number. Each recurring line is linked to a customer, site and system record. Please see the diagram below that illustrates this linking of customer, site, system and recurring records. The example provided is a very simple sample of how linking is performed.

Sample Customer / Site / System / Recurring Links

Customer Record	Site Record	System Record	Recurring Record
Customer Number: 1234	Customer Number: 1234 Site Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234 Invoice Item: Monitoring
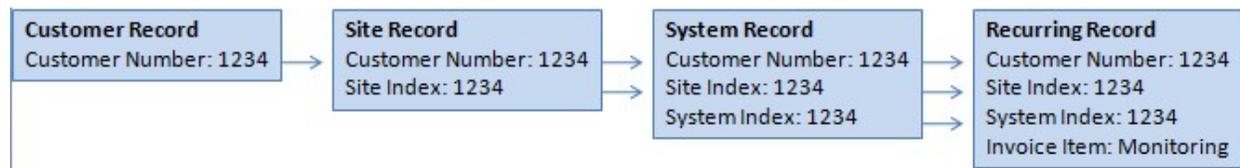
Many SedonaOffice customers have more complex customer/site linking situations. The diagram below provides an illustration of how the Excel spreadsheets would appear for more complex situations. This example illustrates the following:

• One customer

• Three sites for which the customer is responsible for A/R

• Three Systems are installed at one site and two systems are installed at two other sites

• Multiple Recurring Lines for each system

BillInfo Table (Customer Record)

Customer Number	Name	Address 1	Address 2	Address 3	City	State	Postal Code
1234	ABC Plumbing	100 Main St	Suite 101	Attn: Accounts Payable	Plymouth	MI	48170

SiteInfo Table (Site Records)

Customer Number	Site Index	Name	Address 1	Address 2	Address 3	City	State	Postal Code
1234	1234	ABC Plumbing	100 Main St	Suite 101	Attn: Accounts Payable	Plymouth	MI	48170
1234	1235	ABC Warehouse 1	255 Mill St			Plymouth	MI	48170
1234	1236	ABC Warehouse 2	1220 Ford Rd			Canton	MI	48188

SystemInfo Table (System Records)

| Customer Number	Site Index	System Index	System Type Code
1234	1234	1234	Burg
1234	1234	1235	Fire
1234	1234	1236	CCTV
1234	1235	1237	Burg
1234	1235	1238	Fire
1234	1236	1239	Burg
1234	1236	1240	Fire

RecurringInfo Table (Recurring Line Records)

Customer Number	Site Index	System Index	Item Code	Item Description	Invoice Cycle	Monthly Amount	Cycle Start Date	Next Cycle Date
1234	1234	1234	MON	Monitoring, Intrusion	M	89.95	02/01/2006	02/01/2009
1234	1234	1234	SVCCONT	Service Agreement	M	15.95	02/01/2006	02/01/2009
1234	1234	1235	MON	Monitoring, Fire	M	119.95	02/01/2006	02/01/2009
1234	1234	1236	SVCCONT	Service Agreement	M	24.95	02/01/2006	02/01/2009
1234	1235	1237	MON	Monitoring, Intrusion	M	49.95	02/01/2006	02/01/2009
1234	1235	1238	MON	Monitoring, Fire	M	79.95	02/01/2006	02/01/2009
1234	1236	1239	MON	Monitoring, Intrusion	M	49.95	02/01/2006	02/01/2009
1234	1236	1240	MON	Monitoring, Fire	M	79.95	02/01/2006	02/01/2009

Other Links for Data Formatting

In addition to the above illustrations on linking customers, sites, systems and recurring lines, there are other tables that your SedonaOffice Data Conversion Representative is capable of converting electronically. Below are illustrations of how to link these tables to your customer, site and system records. If you have any questions regarding linking or index records, please contact your SedonaOffice Data Conversion Representative for more information.

ServviceInfo Table (Service Ticket Record)
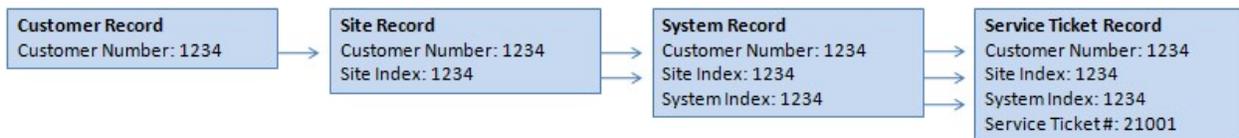
EFTInfo Table (Customer Credit Card and Customer EFT Bank Records)

This file contains the information needed for various electronic funds transfers; checking account debits, savings account debits and credit card transactions.

Sample ACH Bank Record
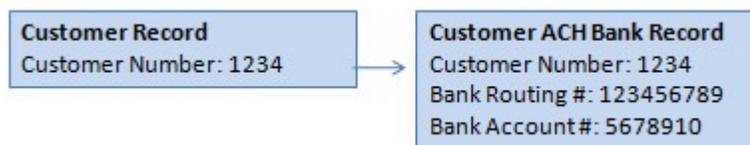
Customer Number	Bank Description	Rank Routing	Account Number	Checking or Savings	Name on Account	Payment Method	Use Auto Processing
1234	Bank of America	123456789	5678910	C	George Miller	EFT	Y

Sample Customer Credit Card Record

Customer Record	Customer Credit Card Record
Customer Number: 1234	Customer Number: 1234 Credit Card #: 1234567890123456 Expiration Mo/Yr: 10/11 Card Type: Visa
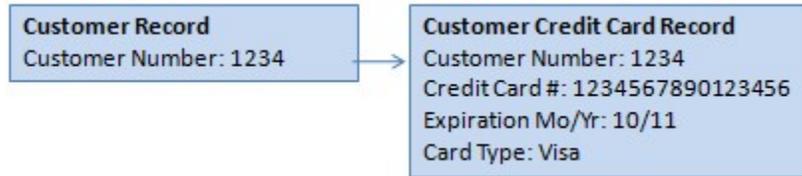
Customer Number	Card Type	Card Number	Expiration Month	Expiration Year	Name on Account	Payment Method	Use Auto Processing
1234	VISA	1234567890123456	10	11	George Miller	Credit Card	Y

InvoiceInfo Table (Customer Invoice Records)

This file contains one record for each Accounts Receivable invoice (or credit memo) that still has a remaining balance. Unapplied cash on a customer account is converted as an open credit memo.

Customer Record	Site Record	Customer Invoice Record
Customer Number: 1234	Customer Number: 1234 Site Index: 1234	Customer Number: 1234 Site Index: 1234 Invoice Number: 72105
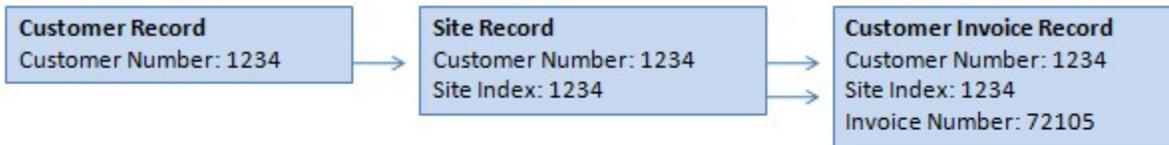
Customer Number	Site Index	Invoice Date	Description	Balance
1234	1234	12/15/2008	Monitoring Services	79.95

ContactInfo Table (Billing & Site Contact Records)

This file contains the Contact names, addresses, phone numbers, etc. for both the Customer billing contacts and the Site contacts.

Customer Record	Site Record	Contact Record
Customer Number: 1234	Customer Number: 1234 Site Index: 1234	Customer Number: 1234 Site Index: 1234 Contact Name: George Miller
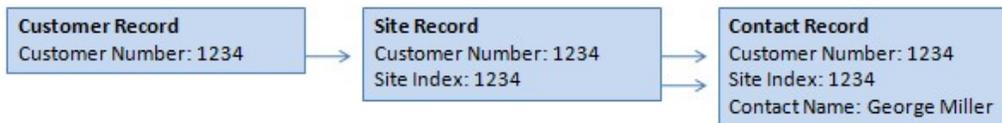
Customer Number	Site or Bill	Site Index	Contact Name	Title	Phone	Fax	Email	All Sites
1234	B	1234	George Miller	Owner	7344140760	7344144825	gmiller@abcplumbing.com	Y

EquipmentInfo Table (System Equipment Records)

This file contains the Equipment installed for a particular system.

Customer Record	Site Record	System Record	Equipment Record
Customer Number: 1234	Customer Number: 1234 Site Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234 Part Code: 5890PI
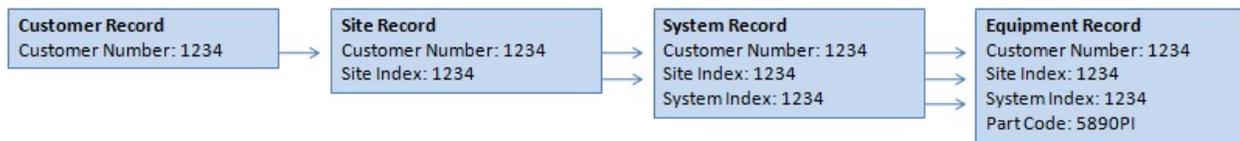
Customer Number	Site Index	System Index	Part Code	Quantity	Sales Price	Date Installed	Location
1234	1234	1234	5890PI	1	49.95	02/01/2006	Hallway

NotesInfo Table (Customer Notes Records)

This file contains generic information for the customer. There can be multiple notes per customer.

Customer Record	Note Record
Customer Number: 1234	Customer Number: 1234

Customer Number	Note	User Name	Date	Type
1234	Contact George Miller regarding past due invoice.	Mjones	02/01/2006	GEN

ZoneInfo Table (System Zone Records)

This file contains information about Zones for the Central Station Alarm section.

Customer Record	Site Record	System Record	Zone Record
Customer Number: 1234	Customer Number: 1234 Site Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234	Customer Number: 1234 Site Index: 1234 System Index: 1234 Zone Code: 01
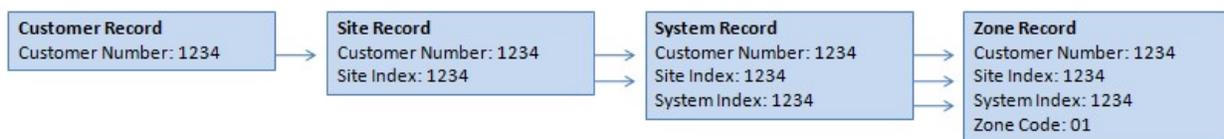
Customer Number	Site Index	System Index	Zone Code	Description	Signal Type
1234	1234	1234	01	Front Door	Intrusion

Data Conversion Process

The following information provides you with a high-level view of the actual database conversion process. However, this information does contain details that allow your organization to gain a superior understanding of the importance, significance, and detailed planning required to successfully convert and build your new SedonaOffice database. The process can be broken down into chronological segments, each of which is described below. The actual completion of many of these segments requires other tasks to be completed first (e.g. worksheets, questionnaires, and data maps). For more information, see Appendix A: Data Mapping.

Summary of the Database Conversion Process

It is your responsibility to make sure that SedonaOffice converted the correct data. It is also your responsibility to provide the data in a format SedonaOffice can use in the conversion process. You have the most knowledge about your data and you are the most knowledgeable about how your legacy system uses this data. You will need to act as an advisor to help convert the data correctly: you should work closely with SedonaOffice through the conversion and then verify that the data is correct.

In general, you will go through the following steps to complete a conversion, as specified in your project planning.

1. Send data to SedonaOffice for receipt and verification. SedonaOffice verifies that media is readable and convertible ascertains a rough count of records.

2. Schedule conversion, including completion of conversion based on proposed Go-Live date. SedonaOffice works on the data as planned and scheduled, including the following:

   - Prepares initial data for conversion files.
   - Writes conversion scripts based on your company's data mapping rules.
   - Performs data conversion, completing data interpretation and mapping and importing prepared data into SedonaOffice standardized conversion files.
   - Sends the converted data files to the customer and attaches the files once the customer downloads the files.

3. Review inconsistent data with SedonaOffice. SedonaOffice corrects inconsistencies to finish data conversion, and continues to work through the conversion plan as follows.

   - Performs data conversion, instituting global database changes.
   - Performs data conversion, merging the converted data into active SedonaOffice tables.

4. Review and approve data.

5. Advise SedonaOffice of any necessary changes.

6. SedonaOffice makes any final changes and completes the conversion.

Steps in the Database Conversion Process

As stated above, the conversion process contains chronological steps. The steps illustrated below reflect the entire process, opposed to the summary above, which summarizes the final stages of the process (the actual conversion). If you have any questions about the steps in this process, please contact your SedonaOffice Data Conversion Representative.

Step 1: Assign a Data Conversion Coordinator

The first step in the database conversion process involves assigning a Data Conversion Coordinator. This role is much like your System Administrator except that this person focuses solely on your database conversion. The Data Conversion Coordinator is in charge of organizing your internal efforts so the conversion can be completed on schedule. This person will work closely with your System Administrator and communicate conversion issues to SedonaOffice. For more information, see Data Conversion Coordinator under the section Implementation Resources: Your Employees.

Step 2: Plan for the Cutoff Time

In order to plan the data conversion and confirm a cutoff date with SedonaOffice, you must understand the critical implications of the cutoff date. SedonaOffice conversion representatives require lead-time of five to seven days from the time they receive your final data and return your completed data and load it into your system. Also, the more data being converted, the longer the conversion process may take.

All data that you enter into your legacy system between the time your data is captured and the time the converted data is loaded on your system must be logged and recorded manually. For example, if you change the address of 500 customers during this time, then 500 changes must be kept in a manual log and 500 data entry updates must be completed by your staff in SedonaOffice after you go live. It is your responsibility to plan for this situation and delegate the data entry tasks.

Also, please be aware that from the time that you load the converted static data until you go live on SedonaOffice, it is imperative that you maintain the SedonaOffice database to keep it current. For example, if you add a new customer to your legacy system, you also need to add the customer into the SedonaOffice customer database. Again, it is your responsibility to plan for this situation and delegate the data entry tasks.

Step 3: Read Standards for Conversion

Located in Appendix A, Data Mapping, these standards provide your organization with basic information needed to plan the conversion. Review this information in addition to reviewing the issues listed in Question for Review, should give you an idea of what legacy data needs to be transferred and the steps needed to accomplish a successful transfer. After reviewing this information as well as the information in this section, you will have the information needed to continue the process.

Step 4: Complete the Data Conversion Worksheets

Your SedonaOffice Trainer will assist you in mapping your data, typically on the last day of your Administrative Training. You will receive a copy of the determined data mapping rules and a copy will be forwarded to your SedonaOffice Data Conversion Representative. Retain and keep readily available your data mapping rules; your SedonaOffice Data Conversion Representative may need to discuss the options and rules specified in your mapping spreadsheets. Data conversion worksheets are found in Appendix A: Data Mapping.

Step 5: Send Data to SedonaOffice

Once your data mapping has been completed, you should send the data to SedonaOffice for conversion. Before shipment, please complete a data checklist inventory, which verifies you are sending all required data. Depending on the size of your data files you may email your data or post the files to our secure ftp site. If you need to post data files via ftp, please contact your SedonaOffice Project Manager for ftp site information. Files that can be emailed (5MG file size limitation) should be sent to the email address listed in your SedonaOffice Implementation Team contact list.

Step 6: SedonaOffice Receives Data and Performs Conversion

As already noted, SedonaOffice requires lead-time of five to ten days to complete the first data conversion. The more data SedonaOffice converts, the longer the process may take. If you do not provide all of your data and must ship supplements to the initial shipment, the SedonaOffice Data Conversion Representative may have to redo the entire conversion. If this occurs, SedonaOffice will have to reschedule your conversion and restart the five to ten days lead-time – this can cause further repercussions including the delay of your Go-Live date. In order to prevent these types of scheduling delays, it is up to you to make sure the SedonaOffice Data Conversion Representatives have everything and that it is in a format suitable for conversion.

When SedonaOffice receives the data, your SedonaOffice Data Conversion Representative will verify that the medium you have provided is compatible and that you have provided all the necessary data files. We will then review the data sheets and contact you with any questions. To perform the actual conversion, the SedonaOffice Data Conversion Representative writes custom programs to convert your existing data into the SedonaOffice table structure, converts it, then verifies that your data was converted as specified in the data sheets provided by you. See Summary of Conversion Methods for more detail about steps in the actual conversion.

Section 4: Go-Live on SedonaOffice

The date you choose to go live is the culmination of all the project work that you, your staff, and the SedonaOffice representatives have completed during each phase of your system implementation. Regardless of how much preparation and time you devote to the system, the actual day of your Go-Live may still seem hectic. For this reason, SedonaOffice encourages advance preparation to prevent the most typical problems customers encounter. As the specifics of every customer's Go-Live day vary, you need to review your company's Go-Live date with your SedonaOffice Implementation Team, who will provide additional information and assistance to prepare your staff.

Preparation & Planning Recommendations

The following information briefly highlights several recommended tasks for planning and preparing to go live on SedonaOffice software. You need to discuss these tasks with your SedonaOffice Implementation Team.

Choosing a Date to Go-Live

As discussed previously, you will most likely determine your Go-Live date near the beginning of your project implementation. Many SedonaOffice customers choose to go live on a Monday, primarily because it allows your company to use the weekend to prepare the system. When making this decision, you should consider the method you select for converting and entering data. You need to consider when the data is being returned to you (if SedonaOffice is converting part or all of your data) and take into consideration any downtime associated with data conversion. Your SedonaOffice Implementation Team can help you review these issues and then target a good time for your Go-Live date.

Who Will Be Involved on the Go-Live Date

Your entire company will be involved on your Go-Live date. This is an important issue to emphasize because many organizations fail to recognize that large projects like system implementations are resource intensive. Even if your company is not implementing all of the SedonaOffice application modules, migrating to new software affects everyone in your organization. Do not underestimate the level of involvement required by your staff in order to effect a smooth transition. SedonaOffice staff will help you with this transition, but it is your responsibility to plan for your employees' involvement.

Preparing to Go-Live

Once you reach the Go-Live phase of your implementation, you must follow several critical action steps to prepare your system. You must also understand how these action steps can affect your business if the steps are not performed correctly. Regardless of whether the steps were completed before your Go-Live date, you should double check to make certain all steps have been completed.

The Conference Room Pilot

This is a very important step in the implementation process that SedonaOffice strongly recommends you complete prior to going live on the SedonaOffice system. As you test your data and the functionality of your new system, you may find that your current business workflow will change. If you have not already documented your workflow, this is a prime opportunity to re-engineer your business from the top down. What is the Conference Room Pilot? The Conference Room Pilot is an exercise focused on testing your business workflow as it relates to SedonaOffice. In a conference room setting, one staff member from each functional department will participate in simulating the entire life-cycle of a customer using SedonaOffice. This exercise will also serve as a period of discovery during which you will document each step of your business flow as well as which department and who within the department is responsible for completing that function. The results of the conference room pilot will also serve as a foundation for you to create your internal company policies and procedures documentation. Please take the time to perform the conference room pilot so that you and your staff will be as prepared as possible to begin working in the new SedonaOffice environment. Refer to the Checklists and Forms section of this document for an example of what areas to cover during this exercise.

Training Preparation

In addition to Administrative Training and Application Training, SedonaOffice offers Go-Live Training & Support. You may need a SedonaOffice trainer on-site during your Go-Live process for Go-Live Training and Support. Post Implementation (advanced) training is all available after going live on the software.

The first step in setting up Go-Live training is to complete the Training Checklist found in later in this document under the section titled Checklists and Forms. After completing and submitting the form, discuss the information with a member of your SedonaOffice Implementation Team to schedule a Go-Live trainer. For additional information on the training services SedonaOffice contact your SedonaOffice Project Manager or the SedonaOffice Software Sales office.

Critical Go-Live Action Steps

The following critical go-live action steps pertain to customers for whom SedonaOffice has performed an electronic data conversion. Please note that the following list of action steps does not necessarily conform to a specific chronology. Many of the steps can be completed simultaneously and it is possible that some of the steps might already have been completed (depending on the choices you made relating to your data conversion).

1. Before you go live on your new software, SedonaOffice strongly recommends completely verifying all manually entered data. Some areas of the system might seem optional. Even so, if you do not set them up before going live, they could affect your future reporting needs.
2. Ensure the data related to modules that were converted electronically was converted properly. SedonaOffice often completes conversions in advance of Go-Live dates. However, if you have scheduled a final conversion for delivery just before your go-live date, then this is an important task to verify the completion.
3. If you entered any vendors, customers, parts, or other data elements into your legacy system since the time of your conversion, you must make certain that you add these records to the SedonaOffice database before going live.
4. The data that SedonaOffice converted electronically must be loaded before generating any new transactions in the SedonaOffice system. You must also verify that the data matches what exists on your current system. If problems are not corrected by the Go-Live date, these problems become more difficult to correct.

Important Note: It is your responsibility to verify your data before going live.

5. SedonaOffice recommends that you run reports to test the accuracy of data converted by SedonaOffice. As previously stated, it is extremely important that you fix any problems with the data before going live on SedonaOffice. By running reports and comparing these results to similar reports in your legacy system, you can identify and correct any problem areas before they become obstacles to productively moving forward. At a minimum, you should run the following reports and talk to your Implementation Team to discuss any issues including if you should run other reports as well.

- Client Management Customer List
- Accounts Receivable Aging
- Accounts Payable Vendor Summary (vendor listing)
- Accounts Payable Aging
- Inventory Parts Status Report (inventory parts/on-hand quantities/values)
- General Ledger Accounts List

6. Reconciling and balancing any differences between SedonaOffice and your legacy system before entering any new information into SedonaOffice is extremely important. Adding new entries makes it virtually impossible to reconcile differences between the two systems – you may find reconciliation difficult and may never be able to reconcile your data. This is especially of concern as it relates to financial reporting.

Note: If you do not complete action item number 6 as requested before going live and assistance is required from the SedonaOffice Support staff, this service will be billable.

7. You must test all system hardware such as printers, backup devices, etc. before you go live and ensure that your equipment for all remote locations is in place and will be functioning on the Go-Live date. Printers usually require the most attention and you should pay close attention while testing them in advance. This testing should include printers at all remote locations as well. As part of this testing, you should attempt to print all of the SedonaOffice reports that your company will use in advance of your Go-Live date. Also test all forms such as invoices, statements, purchase orders, job tickets, service tickets and accounts payable checks well in advance.

8. You should start testing your automatic backup procedures and begin using any other set procedures to verify that everything is working correctly. Your nightly backup media should be stored off-site in a fireproof location that will be available for quick retrieval in the event of a catastrophic situation.

9. Make sure all SedonaOffice users in your company know how to use the system for all of their day-to-day business functions. As discussed in the following section, Procedural Manual Information, you should document all procedures in a method specific to your business policies and needs.

Additional Implementation Options

In addition to the SedonaOffice application that you have purchased and are in the process of installing, SedonaOffice has developed other solutions to help you meet your business needs as listed below.

- Field Service Units (for Service Technicians to remotely transmit service data)
- BFIS – Out-source for your invoice, statement and other document printing
- EFT Processing – Automatic transmission and approval for debit and credit card transactions
- SedonaDocs – Capability to scan and link documents to your customer records within the SedonaOffice application.
- Sage-Quest GPS – Hardware and software for use in tracking your service vehicles
- Consulting Services – Advanced SedonaOffice training and business consulting

Some of these options are more involved than others and require extra planning or training. Most of these options should be considered a Phase II project after you go live with SedonaOffice. If you are interested in any of these additional options, please contact a member of your SedonaOffice Implementation Team or contact the SedonaOffice Sales office for additional information.

Section 5: Training

SedonaOffice offers various levels of SedonaOffice application training that is tailored to the individual customers needs. Our training staff can train students on-site or at an outside facility if you desire. Information in this section focuses on the training services SedonaOffice provides during the implementation process. SedonaOffice offers additional training options that you may purchase any time after your Go-Live date. For more information, please contact a member of your Implementation Team, or the SedonaOffice Sales office.

Training Objectives

The global objective of all types of SedonaOffice training is to make users comfortable and familiar navigating and using the new SedonaOffice software. However, as with anything new, only practicing and working with the application will make users experts. During most software conversions, employees may experience some frustration because in old legacy systems, they knew how to find information, run reports, and essentially get things done. The SedonaOffice software may seem very different to what your staff is accustomed to using, but will quickly become second nature to each participant, especially after training. It will not take long before your staff is able to accomplish their tasks and work more efficiently.

Your managers and employees should set realistic expectations and support the learning that will take place, regardless of the type of training being conducted. In addition, you should understand and communicate the minimum objectives of training to your staff. The minimum objectives for SedonaOffice training follow:

- Create an understanding of the SedonaOffice system.

- Review and practice the high-priority events each trainee encounters in their job duties.

- Provide hands-on training for the key functions of each job.

- Review information that can be found in the on-line help and manuals.

Preparing for Training

The training segment of the implementation process allows you to learn the capabilities of SedonaOffice and how it can enhance your business. While SedonaOffice provides certain guidelines for the training, you may consult with your SedonaOffice Project Manager to develop a plan to best use your training time. Training sessions may be conducted by your staff or you may contract with SedonaOffice to provide these services. If you elect to employ the services of SedonaOffice for your application training needs, please remember you are responsible for all expenses associated with the travel to your training location as well as the daily fee for these services. If the trainer cannot perform the training according to schedule because the training facilities are not in working order or your site is not fully prepared at the time of training, additional costs will be incurred by your company if the training days need to be extended or rescheduled in order to complete the training.

Before proceeding with planning your application training, you should complete the Training Checklist found in this document under the section titled Checklists and Forms. In addition to filling out the Training Checklist, to maximize the training resources reserved for this project, your System Administrator in conjunction with your SedonaOffice Project Manager needs to review the issues noted below before making final plans for training.

- How long should the training last?

- How many people will attend training and what facilities are available?

- Do you have employees working different shifts?

- Which staff members (if any) will cover for employees during their training sessions?

- What skill levels do the employees being trained have? Are the employees experienced? Will they have new roles after the system is fully implemented?

- How far in advance of the Go-Live date should training be held?

- Should trainers be on-site during the Go-Live period?

- What is your budget for training? Does it include only Administrative and Application Training or are you interested in on-site go-live application training and post implementation advanced training?

- When will data that is appropriate for training be available (i.e. example data or live test data)?

Who Goes to Training?

The SedonaOffice training staff will initially focus on making certain your managers and supervisors are trained on the SedonaOffice software and that they clearly understand the commands and procedures needed to use the SedonaOffice application. The first training session or sessions will be held for managers and supervisors, who will then often be responsible for training the rest of your employees. The SedonaOffice training staff will continue to assist while you train the rest of your staff, answering any questions and providing any information that your supervisors or managers may not be able to provide.

The more staff and management that can participate in training, the more successful the overall system implementation will be. However, note that mixing and matching the classes can sometimes be difficult due to the different capabilities of the varied employees and training groups. Therefore, SedonaOffice recommends that employees participate in training focused towards their specific functions while managers participate in all training, including sessions focused on reporting, overall software functionality, and system maintenance.

Training Environment

When a SedonaOffice trainer is conducting classroom-style training at your site, an effective environment is very important. SedonaOffice requests and recommends that you set up your training environment to meet the following criteria.

• Ideally, each student in the class should have access to a terminal/PC, or a minimum of two to a workstation. If this is not feasible, you may conduct the class in a conference room setting and employees may take turns at the trainer's keyboard for hands-on training.

• The physical location of training should be an interruption-free room, equipped with a white board or easel chart for writing down issues and describing complex features and ideas.

• If you elect to use a conference room setting for training, you will need to have a projector or a monitor large enough for all of the students to be able to easily view the application training being conducted. You will also need to have one of your PC's in the room that has access to your SedonaOffice testing database.

• Employees should come to training classes prepared to learn. They should bring writing materials for taking notes and be prepared to ask questions and interact with the trainer.

• When selecting training class participants, try to group employees with similar knowledge, skills, and job functions together so each training class will move at a pace all employees can manage.

- When you create an internal schedule for training, it is important to make certain that the employees who are participating are as focused as possible. This allows your employees to concentrate on the training and not let other issues disrupt their concentration. Please ensure that the employees' normal business duties are taken care of by others to limit training interruptions.

- Training should take place in an area away from the employee's normal work area.

- Additionally, you need to test the workstation(s) that you will use for training in advance of the training dates. Remember, it is your responsibility to ensure that all equipment is in good working order before training begins.

Overview of Training Services

With a commitment to providing training to fit your needs, SedonaOffice offers multiple options for learning and using SedonaOffice software. Generally SedonaOffice trains companies using a phased approach. To illustrate, a company will start with the Administrative Training, move on to application training during the system implementation and prior to Go-Live, and sometimes be on-site for the Go-Live date. Post implementation training and customized training for SedonaOffice's optional packages is also available to you. You should work with your SedonaOffice Project Manager to decide what training options will work best for your situation.

System Administrator Training

This training is conducted over the telephone by one of our SedonaOffice staff members. Your company's System Administrator and any other key IT staff members should take part in this training. The SedonaOffice staff member will cover a list of topics to educate your staff on maintaining your system, including such topics as:

- Maintaining your data

- Maintaining your backup system

- Restoring your databases

- Installing new software updates and releases

Types of Training

For several years SedonaOffice has been supplying security companies with software to run their business; SedonaOffice staff has implemented hundreds of new systems. In that time, some implementations were instantly successful and other initially struggled. Using these observations, SedonaOffice created and developed a phased approach to training services. Each of these services is purchased separately and when combined according to your needs, these services represent a complete a total training solution for you and your staff.

Administrative Training

The Administrative Training class is a required course for all customers who purchase the SedonaOffice software. During this intensive two-day class, the SedonaOffice trainer will provide a thorough overview of the SedonaOffice software. In addition, you will learn the main setup, configuration, and basic processing procedures. At the conclusion of this class, your staff will be prepared and ready to set up your system in a manner that works best with your business practices and policies.

Basic Application Training

In Basic Application Training, the SedonaOffice trainer will focus on individual modules of the application as they relate to various job functions in your organization. Students will be given hands-on experience learning to navigate through the application and be able to perform their various job functions as they pertain to the software. The goal of this training is to make the student comfortable with the application and have a thorough understanding of how the tasks for which they are responsible affect other users of the system.

Go-Live Training & Support

The primary focus of Go-Live Training & Support is front line support during the Go-Live process. A trainer from SedonaOffice is on-site and active in troubleshooting problems and answering employee questions. In addition, the SedonaOffice representative works with our support department in Michigan to solve any problems that may arise which require additional assistance.

Post Implementation Training

When most customers go live with SedonaOffice, they use less than 60% of the functionality of the product. The Post Implementation Training phase is useful to increase system usage as both your employees and your business become more adapted to the software. In these sessions, training identifies the business processes used in your company and matches the software features with those processes. Instead of learning an overview of how to use SedonaOffice software, you will learn how to use the software to complete the specific tasks your regularly perform.

Customized Training & Consulting

This service greatly enhances your organization's use of the SedonaOffice system. Many SedonaOffice clients find it valuable for creating policies, using more software features, more effectively, and analyzing business strategies and project management techniques. Training is helpful for not only further identifying the business processes used in your company and matching the software features with those processes but also refining your business processes for more efficient operation.

Section 6: Beyond the Basics

After Training: Practice, Simulations, and Procedures

Due to the nature and complexity of SedonaOffice, it will take some time before you fully grasp how the system operates. Practicing with actual data allows you to see the whole picture. You will learn how to navigate the system and design procedures that best suit your company's needs. All staff members who will be using the system need practice, whatever their roles. Setting aside practice time for all users gives them the opportunity to learn the procedures in the new system. This allows everyone to be involved in the implementation of the system and provides a sense of teamwork during the system implementation process.

Years ago, it was common practice to run dual systems for a period of time as a way of checking the integrity of the new system. This practice has changed greatly in recent years. Turnkey software solutions such as your new SedonaOffice system along with the increased efficiency of workers have led to these changes. However, you should try to use some type of simulation on the SedonaOffice system to minimize any issues that may arise prior to go-live. For a period of about a month before you go live, you may want to require all employees to duplicate a small percentage of their daily transactions in the SedonaOffice testing database (The Sandbox). Several advantages result from this practice, as follows.

- Your employees are forced to practice with SedonaOffice using realistic examples
- With a sense of familiarity from using SedonaOffice, employees can be more focused and have specific questions ready when learning from a SedonaOffice trainer.
- You are able to test your data to make certain it is accurate and complete in SedonaOffice.

Developing a Procedural Manual

Another advantage of practicing with SedonaOffice before your Go-Live date is that you can develop a procedural manual to use for training and development purposes internally in your organization. The development of a procedural manual for internal purposed is very important for the ongoing training and development of your staff. It is your responsibility to create a procedural manual. Your procedural manual will be an invaluable source of how-to information since it can be customized for your organization's business practices. During practice situations and immediately after training are ideal times to begin developing such a document, as it will enable transactions to be documented while the steps are fresh in your mind. Regardless of whether practicing on SedonaOffice before going live or relying on SedonaOffice trainers to assist you in teaching your staff the basics, we encourage you to dedicate a specific resource or resources to the task of completing your procedural manual, as it is an important task. Again, please note that this manual is your responsibility to create, not SedonaOffice, as the manual is not a software system manual, but rather a user manual specific to your organization.

Having a procedural manual available for employees makes a significant difference in an employee's comfort levels while learning the new SedonaOffice system and for training new employees.

Educational Resources

In addition to understanding options for expanding your SedonaOffice system, it is important that you understand how to use the resources SedonaOffice provides. If you have any questions regarding any of our support tools or educational resources, please contact a member of your SedonaOffice Implementation Team.

Built-In Help

The SedonaOffice application contains various levels of help information. You can press F1 at anytime while logged into the application to access the SedonaOffice help windows. You have the option of searching by key word or phrase from the search tab; by module by selecting the contents tab or search from the entire list of help topics by accessing the index tab of the help window.

SedonaOffice Website

The SedonaOffice website located at www.sedonaoffice.com contains valuable information about SedonaOffice software and products and services that we provide. We encourage our customers to visit our website frequently to keep abreast of the latest news surrounding SedonaOffice and other SedonaOffice products. Some of the areas of interest found on our website are:

- Downloads – a section containing important and valuable reference documents for our customers.
- Events – from time to time SedonaOffice hosts user events directed at educating our existing customers and announcing new software features. We encourage you to participate in any or all of these events which provide our customers the opportunity to meet each other and share information and experiences in an effort to gain a better understanding of SedonaOffice and use the application to its fullest capabilities.

Additional Resources

SedonaOffice encourages you to take advantage of all the resources that we have to offer. Staying actively involved in the security and service industry, SedonaOffice employees are experience IT professionals who deliver high quality products specific to their expertise and actively participate in nationally recognized security organizations. This involvement allows us to produce products that meet the evolving needs of our customers.

Informational Email Announcements

SedonaOffice sends out periodic email announcements to customers who wish to keep up on the latest offerings, service changes, software developments, and upcoming events. If you would like to be a part of this email distribution group, please send an email to support@sedonaoffice.com with your name and email address, or contact your SedonaOffice Sales Representative.

User Group Meetings

SedonaOffice hosts an annual User Group Meeting. This meeting is an open invitation to all SedonaOffice customers who wish to participate in this annual event that serves as an educational and networking resource to all of our customers. Discussions generally cover topics such as recent enhancements to the SedonaOffice application, customer support, recent changes within SedonaOffice, and technological innovation. We strongly encourage all customers to attend this annual conference.

SedonaOffice Support

SedonaOffice knows having access to the support you need allows you to maintain a stable and successful business. Although SedonaOffice is committed to providing you with the most reliable software, unfortunately, computer systems have problems. If you experience any difficulties with the SedonaOffice system, our support staff is there to help.

The SedonaOffice Support department can answer general and specific questions about the SedonaOffice software as well as questions about your specific system. Questions that you may have on how an entire module functions or how to do system setups for various modules are considered training. These types of questions are handled by our training department and not considered part of application or system support. If you have training needs, please contact the support desk who will forward your request to our Training Department to schedule training.

Committed to providing a high level of customer service, SedonaOffice makes the support staff available when you need help, offering contact through any of the following methods listed below. We encourage you to use SedonaOnline as you primary means of contacting our support department. By using SedonaOnline, a support ticket is immediately created into our system and routed to the appropriate support member to handle the situation.

- SedonaOnline web support request http://www.sedonasupport.com/online/
- Support telephones calls (440) 247-5602
- Support request via email to the support department: support@sedonaoffice.com
- Support request via fax (928) 441-9986

When requesting support by any of the options available, you are requested to provide as much information as possible to assist in resolving the issue in an expedient manner. If you have received an error message, it is extremely important that you describe the keystrokes that you used to arrive at the problem in your communication to us. Providing us with this information helps us to determine whether the problem is system or data related. Please take the time to research your issue prior to contacting the SedonaOffice Support Department.

SedonaOffice Email Support System

When submitting support issues to SedonaOffice via email, to help us better serve you please format your emails as follows:

- All support issues should be emailed to: support@sedonaoffice.com
- In the Subject line please include a short description of the problem. Do not explain the problem in the Subject line.
- In the body of the email, please provide a description of the problem. Please be as descriptive as possible.
- Always include the following information in your email:
  o Your Name
  o Company Name
  o Best phone number to reach you
  o Email address for us to respond to
  o Current SedonaOffice Version number (This is very important)
- If applicable, please attach any screen shots to the email.

Upon receipt of your email, the SedonaOffice Support Department will evaluate the nature of the request for support email and prioritize your request. SedonaOffice also uses the SedonaOffice application to conduct business. Our support staff will open a service ticket to track your request and log all pertinent information that you provide to us. Depending on the nature of your support request, a SedonaOffice Support staff member will respond via email, telephone the requestor and/or request an internet Support session to address your issue. Your SedonaOffice Support Representative will provide you with a ticket number for your request. Whenever calling or emailing to check the status of your request, always reference the provided ticket number for faster service.

Telephone Support

By calling the telephone number listed below, you may contact the SedonaOffice Support Department. SedonaOffice Telephone Support is available Monday through Friday, public holidays excluded, from 9:00 am to 6:00 pm eastern standard time. SedonaOffice Support accepts support requests during these hours. If the support lines are busy, you will be transferred to our voicemail system to leave a message for a support staff member to return your call. When recording your message please provide the same information as mentioned above under SedonaOffice Email Support System. Before contacting our support department, you should research the problem; the more information you can provide, the easier it will be to resolve your issue.

SedonaOffice Support Telephone Number: (440) 247-5602

Appendix A: Data Mapping

It will be helpful for you to prepare printouts of the current fields in your system. These exercises allow you to indicate which SedonaOffice fields most closely match the fields in your legacy system. You need to generate reports for all the data in your system, mark up the reports (see below), and refer to these sheets when formatting your data that will be sent to SedonaOffice for conversion.

SedonaOffice Software has developed spreadsheets for each table of data that may be converted which contains all the columns of data that are available for conversion. We prefer that you format your data into these spreadsheets; this enables the conversion representative to convert your data easier and faster, and most importantly more accurately. If you do not have the technical capability to format you data into our spreadsheet templates, you may send your data electronically in its current format and then complete the software mapping sheets that will provide the information required for your conversion representative to interpret your data.

Using Excel Spreadsheet Templates Method for Data Conversion

If you choose the option of using our Excel Spreadsheet Templates for formatting and delivering data to your conversion representative, please notify us and we will send you a complete set of templates for your use. The Master Template Workbook contains a tab for each file to be converted. Each of these sheets contains descriptive information for each field or column in the file to be converted as well as one sample row of data. The fields for each file are color coded to indicate 1) source data fields, 2) default value fields and 3) data that is driven by a SedonaOffice setup table value. Please refer to the Field Types section below for a definition of each color code. Fields that are required are labeled as such in the descriptive portion of each spreadsheet. The following illustration provides a sample excel spreadsheet template for contact information to be converted.

Sample Master Template – CONTACTINFO tab

SITE OR BILL	INDEX	CONTACT NAME	TITLE	PHONE	EXTENSION	FAX	PAGER	EMAIL	ALL SITES	MOBILE	COLLECTION CONTACT	INVOICE CONTACT	NOTES
B	1234	George Miller	Owner	7344140760		7344144825		gmiller@abcplumbing.com	Y	7345551212	Y	Y	

Sample Master Template – Field Definitions - CONTACTINFO tab

Item	Type	Description	Required
CONTACTINFO		This file contains the Contacts for both the Customer and Sites.	
CUSTOMER NUMBER	15 ANC	This is the Customer Number. It is an alphanumeric field, and recommended not to be the "alarm monitoring account number"	Yes
SITE OR BILL	1 FV	If this is a Billing Contact enter a 'B', if it is a Site Contact enter a 'S'. If the Contact is a Billing Contact and also should be a contact on all the Sites, enter a 'B'.	Yes
INDEX	INDEX	If you entered a 'S' above enter the Site Index that this System belongs to. It must match a Site Index that was created in the SITEINFO file.	Yes
CONTACT NAME	50 ANC	Enter the Name of the Contact.	Yes
TITLE	50 ANC	Enter the Title of the Contact.	
PHONE	Phone	Enter the Phone Number of the Contact.	
EXTENSION	5 ANC	Enter the Phone Extension.	
FAX	Phone	Enter the Fax Number for the Contact.	
PAGER	Phone	Enter the Pager Phone Number for the Contact.	
EMAIL	Email	Enter the Email Address for the Contact.	
ALL SITES	Y/N	If this Contact should be assigned to all the Customer Sites enter a 'Y'.	Yes
MOBILE	Phone	Cell phone number	
COLLECTION CONTACT	Y/N	Use this contact for collections	
INVOICE CONTACT	Y/N	Use this contact for invoice questions	
NOTES	255 ANC	Notes about this contact	

Using Data Mapping Sheets Method for Data Conversion

As mentioned previously, if you do not have the technical ability to use the Excel Spreadsheet Template method mentioned above, you may send your data in the format produced by your system; excel format or comma delimited. If you choose to deliver your data to SedonaOffice in this format, you will have to complete the Data Mapping Sheets so our conversion representative will know how to interpret your data.

Below, under the section titled Files to Convert, is a listing of all required and recommended files to convert into your SedonaOffice database. Individual Data Mapping Sheets are provided for each required file for data conversion. The fields for each file are color coded to indicate 1) source data fields, 2) default value fields and 3) data that is driven by a SedonaOffice setup table value.

This method is more time consuming for our conversion staff, so please allow an additional two to three days lead time when using this method for conversion. Your conversion representative will be able to provide a more accurate time estimate once the data has been received and reviewed.

If you select this method for conversion, you will need to identify the corresponding SedonaOffice file name and field name for each segment or column in your data files. If you deliver your data to us in an excel spreadsheet , you will use the Data Mapping Sheets found below to map your data fields to the SedonaOffice data fields; a column is provided for you to enter the corresponding table name and field name found in your company's source data.

Delivering Data in Comma Delimited Format

If you deliver your data using a comma delimited file format, you will need to provide your SedonaOffice Data Conversion Representative with a map that defines each value (field) separated by a comma. See the example below for instructions on how to map comma delimited file data into the Data Mapping Sheets.

Sample Comma Delimited File – Customer Billing Record

"123456","Kinko's","120 Main Street","Suite 101","Store 203","Plymouth","MI","48170",
"USA","7345551212","7345551000","kinkos203@kindos.com"

Field 1: Customer Number
Field 2: Customer Name
Field 3: Address Line 1
Field 4: Address Line 2
Field 5: Address Line 3
Field 6: City
Field 7: State
Field 8: Postal Code
Field 9: Country
Field 10: Phone 1
Field 11: Fax
Field 12: Email

Data Files that may be Converted

File Name	Description	Required
BILLINFO	This file will contain the customer billing information. Each row will be a new customer	Y
CUSTINFO	This file contains miscellaneous customer information. There will be one row for each customer.	Y
SITEINFO	This file contains the site information for each customer. There is a minimum of one site for each customer.	Y
SYSTEMINFO	This file contains the systems for each site.	Recommended
RECURRINGINFO	This file contains the recurring line information for each of the customer's systems.	**Must convert SYSTEMINFO to create this file**
EQUIPINFO	This file contains the equipment list for the customer systems.	**Must convert SYSTEMINFO to create this file**
CONTACTINFO	This file contain the contacts for both customers and sites.	N
SERVICEINFO	This file contains service tickets for each system.	**Must convert SYSTEMINFO to create this file**
EFTINFO	This file contains customer bank and credit card information for customers using automatic payments.	N
NOTESINFO	This file contains note information for the customer. There may be multiple notes for each customer.	N
PARTSINFO	This file contains the basic inventory part information.	**Must convert VENDORINFO to create this file**
VENDORINFO	This file contains the vendor information for accounts payable.	N
VENDORBILLS	This file contains vendor bills and credits with an open balance.	**Must convert VENDORINFO to create this file**
INVOICEINFO	This file contains customer invoices, credit memos with an open balance. This file also contains any unapplied cash on a customer account.	N

File Name	Description	Required
CUSTOMCUSTINFO	This file contains customer related fields that can hold information that will not fit elsewhere. There will be on entry in this file for each customer.	N
CUSTOMSITEINFO	This file contains site related fields that can hold information that will not fit elsewhere. There will be on entry in this file for each site.	N
CUSTOMSYSINFO	This file contains system related fields that can hold information that will not fit elsewhere. There will be on entry in this file for each system.	N
ZONEINFO	This file contains a system's zone list.	N
CALLLISTINFO	This file contains the central station call list for this system.	N
CSSYSTEMINFO	This file contains the central station systems information for each System.	N

Data Field Types

Each data file contains fields (or columns) of data related to the data file. Each Data Mapping spreadsheet provides the specifications on the type of each field within the data file.

Type of Field	Description
ANC	Alpha Numeric - Can contain any type of valid characters, not to exceed the total length specified.
FV	Must contain one of the "Fixed Values" listed, not to exceed the total length specified.
NC	Numeric – This field can only contain numbers.
PH#	This is a phone number field and must be in the following formats; field cannot contain any punctuation such as (or -. NNNNNNNNNN – This is the standard 10-digit phone number.
Y / N	This is a Yes or No field; the only acceptable values are Y or N.
EML	This is an email address field. The value should contain a valid email address such as johndoe@yahoo.com.
Currency	This is a dollar value field and should be in the format: NNN.NNN. Leading zeros are not necessary.
Date	This is a date only field and should be in the format MM/DD/YYYY.
Index	An index field will contain a numeric length of up to 20 characters. Indexes are used to identify how to associate the different files to be linked to each other. Customer, Site, System indexes must be unique for each Site, System, etc. for a given customer.

Color Code Map for Data Fields

[ ] = Customer's Source data (yellow)

[ ] = We can default a value in for all records (aqua)

[ ] = Must be a valid choice from the SedonaSetup table (pink)

Data Conversion File Definitions

Your SedonaOffice Project Manager will deliver to you an excel workbook titled Master Template V5. This workbook will have a separate tab for each data file and the column specifications for each file of each data file we are able to convert. Below is a sample file specification for the BillInfo file.

BILLINFO

This file will contain the Customer Address Billing Information. Each entry in this file will create a new Customer record.

Item	Type	Description	Required
BILLINFO		This file will contain the Customer Billing Information. Each entry in this file will create	Yes
CUSTOMER NUMBER	15 ANC	This is the Customer Number. It is an alphanumeric field, and recommended not to be the "alarm monitoring account number"	Yes
NAME	60 ANC	This field is for the Name of the customer. Names of people should be in the form of Last, First Middle with the middle name/initial being optional.	Yes
ADDRESS 1	30 ANC	This is the first address line, it usually contains the street number and name, but it can contain a dba, corporate name or attention line for mailing purposes.	Yes
ADDRESS 2	30 ANC	This is the second address line, and is optional.	
ADDRESS 3	30 ANC	This is the third address line, and is optional.	
CITY	50 ANC	This is the City.	Yes
STATE	2 FV	This is the two (2) character state code. Use the standard state abbreviations.	Yes
ZIP CODE	5 NC	This is the Zip Code; include leading zeros (0).	Yes
ZIP PLUS 4	4 NC	This is the Plus 4 for the Zip Code. This field is optional.	
COUNTRY	2 FV	This is the Country Code for the Customer. Valid options are, US – United States, UK	Yes
PHONE 1	12 PH#	This is the primary phone number for the Customer.	
PHONE 2	12 PH#	This is the secondary phone number for the Customer.	
FAX	12 ANC	This is the fax number for the Customer.	
COMMERCIAL	1 Y/N	If this is a Commercial Customer the value must be 'Y', otherwise enter a 'N'.	Yes
IS PRIMARY	1 Y/N	Is this the primary Billing address for this customer? Default to "Y" for single Bill	Yes
INACTIVE	1 Y/N	Is this Billing address currently active?	
BILL INDEX	INDEX	Each BILL INDEX for this Customer must be unique.	Yes

Appendix B: Procedural Manual

Policies and procedures are an important element of managing your business. With the implementation of your new SedonaOffice system, you may be making changes in your organization's workflow and business practices. Documenting how your do business using the SedonaOffice system is a crucial step in the implementation process. Writing documentation takes time and you should make certain you have budgeted enough time to complete this task. Each procedure should be written by the individuals that are most familiar with the particular module of SedonaOffice and who is familiar with the goals of management.

Not documenting and implementing policies and procedures could be a serious and expensive mistake. If important business process knowledge is undocumented then the next employee has to start from scratch down a new learning curve. Owners and managers must pay for these increased training costs, turnover, and needless inefficiencies, which all effect the bottom-line.

Each procedure that you write should contain elements to clearly and effectively communicate management's expectations for specific job tasks. Each individual business process should contain a policy, purpose, scope, responsibilities, definitions and step-by-step procedures that will:

- Save the company money – Reduce the learning curve of new employees and high cost of lengthy one-on-one training.

- Improve Productivity – Employees who have documents that provide concise and clear instructions are more productive and make fewer errors.

- Eliminate Employee Confusion – Employees who understand what is expected of them perform better in their individual job roles.

- Reduce Training Time – If properly written, using your procedure manuals will greatly reduce the amount of time it takes to train existing and new employees.

On the next page titled SedonaOffice Modules / Processes, is a listing of each SedonaOffice module for which procedures should be written. Also included is a list of processes within each module that should be documented according to your individual company business practices.

SedonaOffice Modules / Processes

Module	Process
Sales Management	• New Prospects • Sales Opportunities • Salesperson Events (Tasks)
Client Management	• New Customers/Sites/Systems/Contacts • Customer/Site/System/Contact Maintenance • Recurring Lines (new entry) • Recurring Lines maintenance • Collections • Cancellations
Accounts Receivable	• Cycle Invoicing • Miscellaneous Invoicing • Credit Memos • Credit Requests • Bulk Invoice Printing • Payment Processing • Unapplied Cash / Credits • Statements • Finance Charges
Accounts Payable	• Vendor Creation /Maintenance • Entering Bills • Entering Credits • Paying Bills • Printing Checks • Writing Miscellaneous Checks • Recurring Payable Items
Inventory	• Parts Maintenance • Warehouse Maintenance • Part Receipts • Part Issues • Part Returns • Transfers • Repair Orders • Return to Vendor • Physical Inventory • Purchase Orders • Printing Purchase Orders

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SedonaOffice Modules / Processes (continued)

Module	Process
Job Management	• Creating/Managing Jobs • Job Queue • Scheduling • Timesheet Entry • Issuing Parts • Ordering Parts • SedonaDocs • Job Invoicing • Change Orders
Service Management	• Creating/Managing Service Tickets • Appointment Summary (scheduling) • Dispatching Technicians • Technician Absence • Inspections
General Ledger	• Maintaining Accounting Periods • Account Register • Journal Entries • Month-End-Close • Fiscal Year Close • G/L Query Builder

Appendix C: Month-End Closing Procedures

The following procedures should be performed on a monthly basis to ensure the stability, reliability, and efficiency of your SedonaOffice system. These procedures will be covered during the training portion of your implementation. You should define who is responsible for each of these procedures. If you have any questions relating to these procedures, please contact the SedonaOffice Support department.

Month-End Procedures

Unlike most other accounting applications; SedonaOffice does not have a "hard close". This means you can close your books virtually at any time; at the end of the month or days later if necessary.

Accounting Periods

When you first setup your Company database; one of the first things you must do is create your Accounting Periods. SedonaOffice supports a 12 period fiscal year; with each calendar month representing an Accounting Period. SedonaOffice always maintains two fiscal years of Accounting Periods active at all times; known as the Current Fiscal Year and the Next Fiscal Year. (The process of closing a Fiscal Year will open the next year when it closes the current fiscal year.)

Note: Once you have created your Accounting Periods and process your first financial transaction you will no longer be able to change or modify your Accounting Periods.

Remember, SedonaOffice is an Accrual based accounting application which means income and expenses are recorded based in the Accounting Period of the transaction date.

Opening & Closing Accounting Periods

You can only generate financial a transaction in SedonaOffice in an Accounting Period if that period is Open. By allowing you to close your Accounting Periods you can lock out users from creating or modifying transactions in that period which would affect your financial statements. Under the General Ledger menu item select the Accounting Periods option to open and close your accounting periods.

SedonaOffice allows you to maintain multiple Accounting Periods open or closed at any time. An Accounting Period that is labeled as Future, is actually closed, the reference is that it has not been opened yet. You may Open or Close an Accounting Period at any time including reopening a closed period. It is highly recommended that you do not open a period until you are ready to process transaction into that period. Also if you re-open a period and make any changes they will affect your financial statements; both in the modified period and all future periods.

Additionally, if you have any unrecognized income (deferred revenues not recognized) you cannot close that Accounting Period until such time you recognize the income.

Once you have finalized all the financial transactions for a period, you should close that accounting period. It is highly recommended you close the period prior to running any financial reports as users can modify the data as long as the period is still open. If you re-open a closed period for adjustment purposes, be sure to close it after the adjustments have been made to avoid any transactions which may be inadvertently posted to that period.

The Monthly Close

The monthly close in SedonaOffice is fairly simple. Below is a suggested series of steps to follow to close your books each month; please add any additional steps necessary for your business.

- Process your recurring invoices: This is usually done during the month before the invoices go out. Most alarm companies produce their recurring invoices between the 15th and 25th of the preceding month.
- Create invoices for all the completed Jobs and Service Tickets.
- Reconcile your Bank Accounts. (Sometimes it is difficult to do this until the bank statements arrive; if this is the case you may want to close the accounting period then re-open it when you reconcile the accounts.)
- Record any GL Journal entries including any accrual entries.
- Recognize your deferred income.
- Close the current Accounting Period and set the Current Period to the next Accounting Period.
- Print your financial reports.

Financial Reporting

Each business uses a variety of financial reports to measure their business. Nearly all the reports in SedonaOffice may be run by Accounting Period so it is not necessary to print all the reports when you close your books as they may be generated at any time. To run your financial reports select the Reports Manager option and run the reports you desire.

Note: The AR Customer Aging report (and the AP Vendor Aging report) is a snap shot in time report. Therefore if you want a customer aging report to balance to your Accounts Receivable at the closing of your month end, you must run this report prior to processing any new transactions for future periods.

Appendix D: Checklists and Forms

This appendix contains checklists and forms used to make the installation and implementation process as successful as possible. If you have questions or need more information on how to complete these forms, please contact your SedonaOffice Project Manager.

Hardware Checklist

The Hardware checklist should be completed prior to your Administrative Training Class. Ensuring that each of these items is complete is important prior to any training or testing activities.

Data Auditing Checklist

If your company has opted to have SedonaOffice Software perform an electronic data conversion, you will find this checklist helpful in auditing the data that has been converted. This is by no means a complete checklist of everything that must be reviewed prior to Go-Live, rather this checklist serves as a guideline of suggested areas that your staff should verify.

Training Checklist

The Pre-Training Checklist is a tool to help SedonaOffice trainers meet the needs or your company. The information that you provide here will prove beneficial in the training of your staff, allowing your trainer to adequately prepare for your on-site training environment. Fill out and submit these forms to your SedonaOffice Project Manager while preparing for the training phase of your implementation.

Conference Room Pilot Checklist

Used during the Conference Room Pilot exercise, this checklist will assist your staff in recognizing key areas of functionality for which departmental and job duties will need to be assigned. If you have any questions on the SedonaOffice flow, please contact your SedonaOffice Project Manager for assistance.

Go-Live Checklist

Used during the Go-Live process, this three-page checklist contains a listing of steps required to take the SedonaOffice system live and serves as a final verification before taking the system live. For each step, if the process was completed successfully, check off the corresponding box and write down any notes about the step in the space provided. If a problem occurred in one or more steps, do not check the associated check box; list and explain any problems experienced with the step in the space provided. When all the steps on the checklist have been completed, submit the sheet to your SedonaOffice Project Manager.

Hardware Checklist

A successful SedonaOffice implementation relies on various steps being accomplished prior to the Go-Live date. Your hardware installation is a very important element of the entire implementation process. This checklist serves as a guide for you to review your hardware and network to ensure all systems are go.

Item Verified	Item	Notes
	Network design has been completed, tested and is functioning properly.	
	Internet connectivity has been established and is functioning properly at the Sedona Server and Client workstations.	
	SedonaOffice file server has been installed, configured and tested.	
	SQL Server software has been installed, configured and tested.	
	If using Terminal Services, connections have been tested and users are successful in connecting to the SedonaOffice Server.	
	Back-up devices have been installed, configured and tested.	
	All client workstations have been installed with or upgraded to Windows XP Professional and meet the minimum RAM recommendation (1GB)	
	All client workstations are able to login to the SedonaOffice application.	
	Client workstations that will be printing documents have been tested with all forms that will be printed including but not limited to: invoices, statements, service tickets, job tickets, accounts payable checks and reports from the Report Manager.	

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Data Auditing Checklist

Although SedonaOffice employees are experts on the types of data generally used in the security industry and in SedonaOffice, they do not know every detail of how you use data in your environment. Since your company knows the specific idiosyncrasies of your data, the SedonaOffice Data Conversion Representative needs you to audit and verify that the data sent back is complete and accurate. This checklist is intended to be used as a guideline to assist you in your data verification efforts, and is not to be considered a complete listing of every area or element that needs to be audited. It is your responsibility to validate all converted data prior to your Go-Live date.

The first data conversion may be using default values in some fields that are normally driven by a SedonaOffice setup table. At the time you deliver your first set of data, you most likely will not yet have been through the Administrative Training Class where you learn how to populate these setup tables. For the second or any subsequent data conversion deliveries, you should pay particular attention to auditing the setup tables as well. If you deliver data to us that should have a valid entry in one of the setup tables and your value is not found, we will add your "setup value" into the appropriate setup table. Sometimes words are spelled in a slightly different manner in your source data, so be very careful to review your source data files prior to sending them to your SedonaOffice Data Conversion Representative for conversion. With this said, please remember to verify your setup table values during the auditing process.

You should also print reports from the SedonaOffice Report Manager to assist in your data validation. Following the Audit Item Checklist is a recommended list of items to verify.

Data Audit Checklist

Item Verified	Item	Notes
	The total number of Customer records expected has been verified.	
	The total number of Site records expected has been verified.	
	Customer and billing information (including user defined fields) is correct and in the correct field.	
	Master Account information (if applicable).	
	Sites are linked to the correct customer.	
	Site Information is correct and in the correct field. Remember to check the tax group.	
	System Information is linked to the correct site.	
	System Information is correct and in the correct field.	
	System Zone information is correct (if converted).	
	System Equipment list is correct (if converted).	
	System Inspection information is correct (if converted).	
	Recurring Line Information is correct including the following: • Invoice Item Codes • Billing Cycle • Monthly Amount • Cycle Amount • Next Cycle Date • Bill on Day • Last Cycle Date • Recurring Start Date	

Data Audit Checklist (continued)

Item Verified	Item	Notes
	Accounts receivable invoices are correct including: • site • aging date • amount • terms • tax group	
	Accounts receivable credits are correct.	
	EFT (automatic payment) information is correct for each customer (both ACH and Credit Card information).	
	Contact information is correct.	
	Service History information is correct and linked to the correct system.	
	Vendors list is complete and correct including: • Tax Agency Vendors (sales tax remit to vendor). • If the vendor is a 1099 vendor, verify that the "Issue 1099" checkbox is checked. • Federal ID is correct if applicable to the vendor. • Social Security number is correct if applicable to the vendor.	
	Accounts Payable Bills & Credits are correct including: • vendor • category • branch • terms • bill date • payment due date • reference (vendor invoice number) • amount	
	Inventory Parts list is complete and correct including: • product line • manufacturer • on-hand quantity in each warehouse • sales price for jobs and service • primary vendor and cost • warehouses are linked to the part	

Reports Checklist

At the minimum, you should print these SedonaOffice Reports and verify against similar reports in your legacy system.

Item Verified	Item	Notes
	Accounts Receivable Aging	
	Accounts Payable Aging	
	Customer RMR Master List	
	General Ledger Trial Balance	
	Customer List	

Training Checklists

The Training Checklist is a tool to assist your SedonaOffice trainer in meeting the needs of your company. The information you provide here will prove beneficial in the training of your staff. As with all new software, your staff will go through a period of adjustment. It would be next to impossible to learn everything your new software has to offer in the initial basic application training sessions. Advanced training may be necessary after you become more familiar with the day-to-day operation of the SedonaOffice Software.

This checklist is divided into two sections; the first section applies to the initial Administrative Training class and the second section applies to Basic Application Training classes. The Administrative Training class typically involves individuals in your organization who have key roles and decision making authority on how to set up your system. The Basic Application Training involves managers, supervisors and possibly some clerical staff and is typically a larger training group that is divided into functional areas of business.

To ensure a smooth and problem-free training class, please read the following instructions and make certain all tasks have been accomplished prior to your training sessions. A projector is highly recommended for use during training; if your company does not have one, please let us know at least one week in advance of your trainer's arrival, and we will try to accommodate your need. If you have any technical difficulties, please contact your SedonaOffice Project Manager for assistance.

Please have the appropriate staff member available at least 20 minutes prior to the beginning of training on day 1 to ensure hardware and software are ready and functioning properly for the training sessions.

Administrative Training Readiness Checklist

Completed	Task
	SQL Server installed and configured
	SedonaOffice database installed on server
	SedonaOffice application installed on server
	SedonaOffice application installed on workstation to be used for training
	Training workstation mapped to a printer (in training room or nearby)
	Internet access available in training room
	Training workstation: able to login to SedonaOffice as Administrator
	Training workstation: printer tested and is functioning properly
	Projector hooked up to training workstation and functioning properly
	White Board w/markers
	Connectivity to Legacy System in Training Room

Application Training Readiness Checklist

Completed	Task
	SQL Server installed and configured
	SedonaOffice database installed on server
	SedonaOffice application installed on server
	SedonaOffice application installed on workstation to be used for training
	Training workstation mapped to a printer (in training room or nearby)
	Internet access available in training room
	Training workstation: able to login to SedonaOffice as Administrator
	Training workstation: printer tested and is functioning properly
	Projector hooked up to training workstation and functioning properly
	White Board w/markers
	Connectivity to Legacy System in Training Room
	Data conversion 1 (or 2) has been completed and loaded onto your SedonaOffice Server
	A copy of the data conversion has been made and is ready for use during training.

Last Revised: December 14, 2008

Conference Room Pilot Checklist

This checklist contains each major module of the Sedona Office application and functions within each module that should be walked through during this training exercise. Space is provided for your staff to enter which department and/or job role will be assigned to the particular function.

Module	Function	Responsible Department / Job Role
Sales Management	• New Prospects • Sales Opportunities • Salesperson Events (Tasks or Activities) • Sold System – convert to customer/job	
Client Management	• New Customers/Sites/Systems/Contacts • Customer/Site/System/Contact Maintenance • EFT setup for a customer • Recurring Lines new and maintenance • Cancellations • Collections	
Accounts Receivable	• Cycle Invoicing • Miscellaneous Invoicing • Credit Memos • Credit Requests • Bulk Invoice Printing • Finance Charges • Statements • Payment Processing • Managing Unapplied Cash/Credits	
Accounts Payable	• Vendors; new and maintenance • Entering Bills • Entering Credits • Paying Bills • Printing Checks • Writing Miscellaneous Checks • Recurring payable items	

Conference Room Pilot Checklist (continued)

Module	Function	Responsible Department / Job Role
General Ledger	• Accounting Period Maintenance • Chart of Accounts Maintenance • Account Register Lookup • Journal Entries • Deferred Income Recognition • Reconcile Bank Statement • Commission Payments • G/L Query Builder	
Inventory	• Part Creation and Maintenance • Warehouse Creation and Maintenance • Part Receipts • Part Issues • Part Return to Stock • Transfers • Repair Orders • Return to Vendor • Purchase Orders • Bulk Purchase Order Printing • Physical Inventory	
Job Management	• Creating/Managing Jobs • Using the Job Queue • Scheduling • Timesheet Entry • Issuing Parts • Ordering Parts • SedonaDocs • Job Invoicing; full and progress invoicing • Change Orders • Job Ticket Printing	
Service	• Creating/Managing Service Tickets • Appointment Summary (scheduling) • Managing the Service Ticket Queue • Dispatching Technicians • Technician Absence • Inspections	

Go-Live Checklist

Serving as final verification of required steps for taking SedonaOffice live on your Go-Live date, this checklist should be completed before taking the system live. For each item, check the corresponding box if the step was successfully completed and write down any notes in the space provided. If a problem occurred during a given step, do not check the associated box; list and explain any problems experienced. When you have completed this form, submit it to your Sedona Office Project Manager.

Verified	Item	Notes
	All setup tables have been completed and reviewed for completeness.	
	All Users are able to login to the SedonaOffice application from their workstation.	
	Forms ordered have been received and tested (Invoices, statements, checks)	
	Conference room pilot exercise has been completed.	
	Data has been converted, placed on the SedonaOffice server, audited and verified.	
	Manually entered data has been verified and tested.	
	All requested data conversion corrections have been completed by SedonaOffice.	
	Any Sedona Office application errors that were discovered have been corrected.	
	Application training for staff has been completed.	
	All servers are installed properly and fully functional.	
	All network printers are installed and operational at all client workstations.	
	Nightly backup has been verified and is working.	
	Balance Sheet beginning balances have been loaded via Journal Entry and verified. This may be done at a later time if you have not yet closed your previous accounting period.	
	The accounting period you will begin business has been set to the status of Open and the current accounting period is set to the same accounting month.	

Go-Live Checklist (continued)

Verified	Item	Notes
	All catch-up data has been entered including: • Customers / Sites / Systems • Inspection Schedules • Recurring • Customer Invoices (invoice must be dated as of conversion date; aging date may be the appropriate aging date) • Customer Credit Memos (must be dated as of conversion date) • Unapplied Cash – must be entered as a credit memo (must be dated as of the conversion date) • Open Jobs • Open Jobs scheduled • Open Service Tickets • Open Service Tickets scheduled • Payments (must be dated as of conversion date) • Vendors • Vendor Bills (must be dated as of conversion date; due date may be the appropriate date) • Vendor Credits • Inventory Parts • Physical Inventory completed and Posted.	