

SedonaSync Pre-Built Events Overview

This tab outlines a list of pre-configured (“pre-canned”) SedonaSync events available for setup on your behalf, or alter

Please note:

Configuration hours reflect the time required by a Bold consultant for standard setup. Additional hours may be required for multi-branch setups or customizations.

Training and configuration are billed on a Time and Materials basis.

SSRS Reporting is required for specific events

All custom events require a signed SOW and are a billable service

Area	Recipient	Event Name
Accounts Receivable	Internal	Report - Active RMR by Type
Accounts Receivable	Internal	Billing Summary by Item Past 12 Months
Accounts Receivable	Internal	Billing Summary by Item YTD
Accounts Receivable	Customer	Bridgestone Invoice
Accounts Receivable	Customer	CC Expired
Accounts Receivable	Internal	CC Expired List
Accounts Receivable	Customer	CC Expiring In X Days
Accounts Receivable	Internal	CC Expiring In X Days List
Accounts Receivable	Customer	Collections (Oldest Bucket 1 - 5)
Accounts Receivable	Internal	Collections Activity Summary With MTD
Accounts Receivable	Internal	Running Total Collections Pre Statement Aging

Accounts Receivable	Internal	Current Aging by Branch
Accounts Receivable	Internal	Invoice & Payment Summary
Accounts Receivable	Customer	Standard Invoice
Accounts Receivable	Customer	Master Invoice
Accounts Receivable	Internal	Top 10 Customers By Invoiced
Accounts Receivable	Internal	Top 10 Customers By RMR
Accounts Receivable	Internal	Top 10 RMR Types By Current Revenue
Inventory	Internal	Part Below Warehouse Min Warning
Jobs/Inventory	Internal	Jobs Scheduled For Next Week Missing Non-Stock Parts
Jobs	Internal	Jobs Task Approved Alert
Jobs	Internal	Jobs Time At Status Report
Jobs	Internal	New Job Created
Jobs	Internal	Same Day Job Appointment Change/Addition
Job	Internal	Todays Project Notes
Service	Customer	New Service Ticket Created
Service	Internal	New Service Ticket Created By Customer Via SedonaWeb

Service	Customer	Next Day Appointment Reminder
Service	Internal	Open Tickets Older Than X
Service	Internal	Same Day Srv/Insp Appointment Change/Addition
Service	Customer	Service Technician On The Way Notice
Service	Internal	Simple Tech Weekly Report
Service	Internal	Tickets Missing Times - Scheduler
Service	Internal	Tickets Status Go Back
Service	Internal	Tickets Status Open
Service	Internal	Tickets Status Resolved
Jobs and Service	Internal	Next Day Full Schedule

able for use. Each event requires a specific number of hours to configure. Alternatively, we can provide training for your internal staff to handle the configuration.

9.

Brief Description of Event	to Configure for Client
Current totals for all active RMR as of a specified date	1
12 month retroactive billing summary by invoice item type	1
YTD billing summary by invoice item type	1
Bridgestone standard formatted invoice that is devliered as a PDF for recurring, jobs or service	3
Notification to the customer that there cc has expired, this can be sent as one email or multiple until the cc is updated	1
Internal report sent to key stakeholders listing of customers and expired cc	1
Notification sent to the customer x days before a cc expires	1.5
Internal emailed report listing customers who have a cc on file expiring withing x days	1.5
5 customer facing notifications based on the collection bucket the customer is in	3
Management report - activity on accounts in collection status w/ mtd running total	1
Management report	1

Management report - Aging by branch	1
Management report - total of invoice payments in last 365 days, total of past due invoices, total of open credit memos, total of unapplied cash, total of invoices not yet due	1
Standard formatted invoice that is devliered as a PDF for recurring, jobs or service	3
Master Account formatted invoice that is devliered as a PDF for recurring	1
Management report - Top 10 customers invoiced all time	1
Management report - Top 10 customer based on total rmr	1
Management report - Top 10 rmr invoice item type by total rmr for entire customer base	1
Internal notice to purchasing agent that a part has reached a minimum threshold for a specific warehouse	2
Job has appointment scheduled but missing parts for job	1
Job task has been approved and next respondent	1
List of all open jobs and the current number of days they have been sitting at their current status.	1
Internal notification that a new Job has been created	1
Notification to tech of appointment change or add that day	2
Internal summary to PM of project notes for projects for the current day	1
Customer notification that a new ticket has been created for them	1
Internal notification that customer created a new service ticket via the SedonaWeb web portal	1

Customer notification 24 hrs in advance of an appointment schedule	2
Internal report listing all open tickets older than x days	2
Notification to tech that appointment was changed or added to the schedule that day	1
Customer *Text/Email* to your customer letting them know the tech is on the way	2
Management Report	1
Internal notification of list of tickets missing times and past scheduled date	1
List of tickets flagged as go-back and go-back appointment not scheduled	1
Internal Report - Tickets with open status as of x date	1.5
Internal Report - Tickets resolved by tech within x time period	1.5
Email to technician of there full appointment schedule for the upcoming work day (delivery schedule is adjustable)	1.5

These hours can be purchased for a Bold Group Consultant to complete the integration independently.

Notes

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

This takes longer due to changes to the form

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

In addition to the typical modifications, customer may also want multiple events a reminder at 30 and 7 days (X is the variable here and may drive up billable hours)

In addition to the typical modifications, customer may also want multiple events a reminder at 30 and 7 days (X is the variable here and may drive up billable hours)

Email From, text modifications, schedule event will run and subscribers who receive - these are 5 events and changes may be needed to the SSRS form

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

This takes longer due to changes to the form

Bridgestone invoice, standard invoice and statement is installed

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Hours may increase if the customer needs help in figuring out that threshold that makes sense based on some initial evaluation

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Hours can increase if customer does not have email addresses in for their technicians

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

If this involves a SMS (Twilio account for text messaging) 2 additional hours are needed to configure

Time may be needed to determine the correct # of days

Email From, text modifications, schedule event will run and subscribers who receive

If this involves a SMS (Twilio account for text messaging) 2 additional hours are needed to configure

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

Email From, text modifications, schedule event will run and subscribers who receive

In addition to the typical modifications, customer may also want multiple events a reminder at 30 and 7 days (X is the variable here and may drive up billable hours)

In addition to the typical modifications, customer may also want multiple events a reminder at 30 and 7 days (X is the variable here and may drive up billable hours)

Email From, text modifications, schedule event will run and subscribers who receive Hours can increase if customer does not have email addresses in for their technicians