Business Services, Inc.

"Keeping Your Business in Sync!"

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www.OPTBusinessServices.com

Chris Edgar and Brad Swindell (Co-Founders)

WHO WE ARE…

Originally started as a consulting firm in 2010, Oh Picture That, LLC provided security companies across the country with a necessary outside look at their business operations. After identifying and analyzing a need within the organization, Chris Edgar (a former **SedonaOffice** user) would provide consultation and assistance in utilizing the tools at the customer's disposal to accommodate their needs. During the 2013 **SedonaOffice** Users Conference, Chris and Brad Swindell (also a former **SedonaOffice** user) sat down and discussed some of the challenges faced by the industry and the custom solutions we had each created to solve those problems. It was immediately clear that if we joined forces we could provide creative and innovative solutions, to both common and complex problems faced by our customers. OPT Business Services, Inc was formed later that year.

WHAT WE DO…

SedonaOffice has proven itself to be the industry's most advanced accounting and enterprise resource planning (ERP) software platform available. OPT partnered with **SedonaOffice** to provide resources to its customers to help them realize the full potential of their data. With over 40 years of combined experience in the security industry we can identify with our customer's needs and provide tailored solutions. We each bring our own unique skillset to the table and collaborate regularly so that we always look at a problem from all angles. Using a tool called **SedonaSync** and our OPT Web Services™ platform, we have created a robust library of event notifications, scheduled and on-demand reports, real-time dashboards and custom modules based on customer's financial and operational data. These products focus on virtually every area of the business including accounts receivable, accounts payable, inventory, service, installation, data entry and more. We place emphasis on solutions that promote operational efficiency, customer relations, and overall profitability. Our automated email invoicing and collections platform is an excellent example of how a company using these products could simultaneously improve on all three of these business goals.

OUR PRODUCTS AND SERVICES…

REPORTS AND NOTIFICATIONS

SedonaSync, is a very powerful business activity monitoring (BAM) tool however we find that most customers do not have the time nor the expertise to utilize it to it's potential. Additionally, for most companies it is simply more cost effective to use our prebuilt products than to develop it on their own.

We provide our customers with access to hundreds of prebuilt notifications and reports that can snap into the **SedonaSync** platform. We professionally install, configure, test, and maintain all our products once they are installed.

OPT WEB SERVICES DASHBOARDS AND MODULES

We have developed our own reporting and dashboarding toolkit, called OPT Web Services™, which allows our customers to access data in real time. OPT Web Services™ has evolved over the years to be a very powerful toolkit allowing our customers to view and interact with their data. We even extend the functionality of what can be done inside of **SedonaOffice** due to the powerful integration between our two products.

While customers with their own development staff can take advantage of the OPT Web Services™ toolkit, we also provide many prebuilt modules. Many of our customers have taken advantage of our Customers at Risk™ and Customer Task Management™ modules to improve customer service and reduce attrition. Customers can leverage our Customer Profit and Loss and Services Reconciliation Modules™, to help protect their bottom line, ensuring they do not leave any money on the table. OPT Web Services™ also provides a platform to integrate data from different software databases under a unified interface as we can connect to much more than just **SedonaOffice**.

CUSTOM DEVELOPMENT

Much of our vast product library is the result of development projects requested by our customers. We are constantly evolving our products to meet customer demand and to address emerging trends. We collaborate with each of our customers to identify and understand the process first, and then make recommendations as we design the scope of development. Whether the need is for a minor adjustment to one of our prebuilt products, a custom notification, report, or an entirely new workflow process, we can leverage the tools we have and build whatever else may be needed.

CONSULTING SERVICES

We are frequently called upon by potential and established **SedonaOffice** customers to lend our expertise in both the software and in the industry. Based on the customers needs we have provided implementation planning, **SedonaOffice** setup and configuration, data conversion assistance, business process auditing, workflow management, database cleanup, onsite support, and even coffee delivery services.

OUR FUTURE…

OPT looks forward to continuing to provide our products and services to the **SedonaOffice** clientele. As our customers and the security industry continues to evolve, so will OPT Business Services, Inc. We are always looking for ways to make our customers even more successful, while providing personalized attention to address their ongoing needs.

The versatility that our OPT Web Services™ platform provides is just the beginning, as we continue to build more tools into the platform that will allow the system to grow with new technologies. With our expanding list of integrations, we will continue building new products and offerings for our customers.

A FEW NOTEWORTHY PRODUCTS…

Accounts Payable and Vendor Notifications
Emails purchase orders, repair orders and inventory receipts to vendors and warehouse staff. Keeps track of inventory by analyzing stock counts and purchase price variances.

Appointment Notifications and Workflow
Customers can receive notifications for every stage of an installation, inspection, or service ticket including entered, scheduled, in route, milestone cleared, and resolution. Allows customers to interact with the notifications to prevent unnecessary technician visits.

Avalara Tax Integration
Imports and synchronizes changing sales tax rates by customer's zip code from the Avalara tax rate file.

Customer Level Profit and Loss Module
Analyzes customers, to identify issues that may be resulting in lost profits. Quickly compares expenses against income, down to the customer level.

Customer Satisfaction Surveys and Dashboards
Sends customers a survey, collects and then analyzes the results to find potential issues that need to be addressed. All response data is integrated into SedonaOffice and ranked according to the account setup, technician visits and other statistical data.

Customers at Risk™ Module
Identify and get ahead of issues that may result in the loss of the customer. We provide an entire workflow to help resolve the issues before they result in customer attrition.

Email Billing and Collections Notifications and Workflow
Emails customers their invoices as well as open balance information, statements, payment receipts and failures. OPT tracks the customer's interaction with these notifications.

Financial Statistics Reports and Dashboards
Analyzes company statistics from different areas of the business with an emphasis on financial data.

Internal Job and Sales Notifications, Reports and Workflows
Technicians, salespeople, managers and users can receive notifications and reports of subscribed progress updates, statistical performance data, and relevant financial data. Workflows can be created to direct users in their daily duties.

Key Account™ Notification Module
Create notification groups for important customer notifications. Customize user notification subscriptions to opt in and out of specific notifications. Using the Key Account™ Module creates a personalized experience with your VIP customers.

Services Reconciliation Module™
Quickly compares each of the vendors service bills with the accounts in the customer's database to identify potential issues that may result in inaccurate billing, lost revenue, or financial liability. We support all the major vendors including but not limited to Honeywell, Alarm.com, DMP, Uplink, TelGuard, and many more. This can be used to reconcile any data file including bills from Central Stations.