

**Alarm 7 SQL**  
**Office Management Software**  
**Z-Micro Technologies, Inc.**



**Users Guide**

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## Chapter 1: Overview

### Introduction

The software that you have purchased provides you with a set of tightly integrated tools to help manage your office. Tasks such as billing, service scheduling, technician scheduling, customer profiles, inventory control, purchase orders, letter writing, collections, and much more are handled efficiently. You will be able to review the history of any customer within seconds. Monthly, quarterly, semi-annual or annual bills will be generated, saving you many hours of manual labor. Easily accessible customer information such as support notes, detailed equipment list, document images list, zones and emergency contacts (Alarm edition), and recurring service reminders make this program a valuable asset to your business. The reports included allow you to look at information about your customers in ways that would be almost impossible if done manually. You will be able spend more time managing your business by reducing the time needed to perform office tasks.

The software has been designed for both the computer novice and those experienced with the day to day operation of a computer system, incorporating pop-up windows and scrollable validation tables to greatly enhance data entry time and reduce keying errors. Completely menu driven, you will never need to remember a specific command in order to utilize any specific function within the software.

This manual has also been designed to allow anyone with little or no background to be using the software within a very short time. The best way to learn any system is to get 'hands-on' experience, so it is advisable to start using the software as soon as possible to get a feel for the way the program works. If you are interested in additional training aids, Z-Micro Technologies provides numerous training services including training cd's, webseminars, regional seminars and on-site training. Please call us for additional information on these available training services.

***Since Alarm and Service Express are nearly identical programs (Alarm is specifically for the security industry whereas Service Express is for all other service professionals), please note that throughout this documentation, the term 'this software' or 'this program' will be used instead of the names Alarm or Service Express. Where there are features specifically for Alarm, it will be noted.***

Z-Micro Technologies is always interested in hearing from our clients about any enhancements that you would like to see appear in future updates. If there is enough demand for a new feature, then it will be incorporated into a future update.

A license agreement is included at the end of this manual. Please read before installing the software. You are licensed to use our software products under the terms outlined in the license.

## **Features And Benefits Highlights**

Features normally used on a day-to-day basis within your company include:

- q Customer Billing (recurring, servicing, installation)
- q Service Scheduling and Work Orders
- q Technician scheduling
- q Purchase Orders
- q Inventory Control (including multiple location warehousing)
- q Customer Profile tracking including areas for vital customer data including recurring charges, items sold/installed, conversation log, service reminders, contact list and much more (Alarm edition also includes additional lists for zones, responsible parties, and alarm history log).
- q Mail Merge for mailing letters or postcards for service reminders, collection notices, panel update notices, plus any other type of correspondence you require.
- q Rolodex section for keeping track of names, addresses and phone numbers of all of your contacts (vendors, associates, friends, technicians,...).
- q Numerous reports - both management and financial - with many options found within each report for flexible processing – all with individual security authorization.
- q Comprehensive payment and credit processing
- q Help Desk Log to store common questions you receive from your customers and the way to respond to those questions. This is particularly helpful for office staff that normally need to contact a technician out in the field to answer questions.
- q Plus many additional features.

Designed using Windows MDI function, you can have many screens open on top of each other at one time. This eliminates the need to close out of one customer's account before going into another customer's account. You may now look up a customer's account, create an invoice for another customer, look up a service ticket for a third customer, and check inventory - all at the same time. You may also easily switch between any of these open screens immediately.

Many browse lists (customer, inventory, equipment list, service scheduling, rolodex, etc) have multiple sort tabs that immediately change the order of the information displayed in the list simply by pressing the appropriate sort tab on the top of the list. In addition, you may search for a particular record based upon the sort tab selected. For example, the inventory list displays inventory by part number and may be searched by a particular part number. However, clicking on the sort tab for part description, the inventory list will immediately sort by part description order and you may now search for a particular part based upon the part description.

True-Type fonts are used for all printed materials generated. This gives your reports, service tickets and invoices a highly professional appearance. Color is also utilized on reports to highlight specific areas of a report. These colors are seen when displaying a report to the screen. If you have a color inkjet printer, your reports will come out in color as well. There is also an invoice style called COLOR that will print an invoice on plain paper in color using a color inkjet printer.

Invoices that print on plain paper (laser, color, and plain invoice selections) can include your own graphic logo. By creating a bitmap file (BMP) of your logo and saving under the file name of NAME.BMP, your invoices will automatically print your logo in the upper left-hand corner of the invoice.

Copy customer name and address information to other Windows-based application by using the clipboard cut and paste operations. In addition, a special feature is the ability to copy a customer's name, address, phone number, account number, and contact name with one simple click of the mouse to the clipboard. You may then go into any windows-based application such as a word processor and paste this customer information onto a document.

Integration with a number of popular software systems is included. These include integrating with the Quicken accounting system (Use with Quickbooks to make a comprehensive accounts receivable, accounts payable, and general ledger system), the NAPCO downloader software (Alarm Edition), ADI's parts catalog on disk (import the parts catalog into your inventory file), and electronic funds transfer services for debiting customers checking accounts automatically for recurring fees.

Also in the Alarm edition, integrate with the RapidLink dealer access system from Rapid Response Monitoring. Z-Micro Technologies and Rapid Response Monitoring Corporation have worked together to create an integrated environment between our two systems. The net result is seamless transfer of information from one system to the other thereby eliminating the need to enter customer data more than once. For more information on Rapid Responses RapidLink dealer access system and monitoring services please contact Mr. Jeffrey Atkins at 1-800-237-2670.

Available for Windows™, and in a true 32-bit version for Windows 95™, Windows 98™, Windows XP™ and Windows NT™ . This ensures compatibility with today's popular operating system environments and, unlike DOS-based programs, provides you with a platform that will be around into the foreseeable future.

## **System Requirements**

### **Workstation Requirements**

This program will run on any workstation that meets the minimum requirements of the Windows operating system installed on that system. However, here are some guidelines:

- OS:**                      **Client:** Windows 98, Windows 2000, Windows 2003 Server, Windows XP, Windows Vista  
**Server:** Windows 2000, Windows 2003 Server, Windows XP, Windows Vista
- Memory:**                **Client:** At least minimum amount recommended for the OS running on the workstation.  
**Server:** 1 GB minimum with 2 GB RAM recommended for Server
- Drives:**                 **Client:** A minimum of 250 MB of disk space.  
**Server:** A minimum 2GB free space
- Video:**                 Windows supported graphic adapter and monitor. Minimum 800 x 600 resolution (1024 x 768 or higher recommended).
- Printer:**                 Any printer such as a Laser, Inkjet, Color Ink-Jet or Dot Matrix, (as long as the printer is supported by Microsoft Windows printer drivers), can be used by the Alarm for Windows program.

## New Features List in Alarm 7 SQL Edition

For a video tour overview of this latest version, visit our website at [www.z-microtech.com](http://www.z-microtech.com)  
(Click on Software/Alarm 7 SQL New Features Video Tour)

### Alarm 7 SQL New Features List

#### *System Wide New Features*

- Windows Vista Compatible
- Chat between workstations running Alarm on same network (requires chat to be open)
- Font typeface, size, color and other font attributes end-user selectable for most forms and lists
- Screen resize feature for most lists and forms to accommodate higher resolution monitors such as 1920 x 1200
- System administrator 'Alarm Shutdown' utility to close Alarm remotely on all workstations on network
- Financial reports optimized for much faster processing
- Recurring billing process optimized for much faster processing
- Security profile copy feature to easily setup new user profiles based upon existing user profiles
- Email authentication now supported for compatibility with ISP's requiring outgoing email authenticatin
- Automatic Alarm 7 maintenance release notifications and downloads when new maintenance releases available from our web server.
- Toolbox sidebar allows users (individual by workstation) to take any menu item and place it in toolbox for fast selection of often-used sections of Alarm
- Starting with Alarm 7, updates will be much more frequent in order to bring new features to market much faster (several times a year rather than every 3 years as in past updates). \* Support Contract Required for Updates. (Updates are new versions of Alarm with new features. Maintenance releases are free to everyone)

### ***Customer Management New Features***

- Primary account number field expanded to 15 characters instead of 7 characters
- Unlimited account numbers (and description of account number) may be associated to an account
- New customer search buttons include:
  - Search by all email addresses associated with an account
  - Search by all contact names associated with an account (including the contact list section)
  - Search by all account numbers associated to an account
  - Search for all linked accounts (subaccount) related to a master (dealer) account
- Customer query section now includes boolean queries on customer name
- Phone field labels user-definable on a system-wide or per account basis (ie: Premise, Home, Work, etc.) for both customer main account screen and contact list screens.
- View all recurring charges from subaccounts being billed to a master (dealer) account from within recurring charges area of the master account
- Display customer map location via GoogleMaps integration
- Display directions to customer site via GoogleMaps integration
- Outlook integration capability provides automatic export of customers and contacts to Outlook (which in turn allows integration with many mobile devices on the market through Outlook synchronization).
- Outlook integration capability also provides automatic export of Rolodex contacts and Vendor contacts
- Quickbooks integration capability provides automatic export of new customers to Quickbooks so that invoices may also be exported to Quickbooks as well for tighter Quickbooks integration.
- Customer restrictions field expanded to 255 characters
- Contact name field now supports 30 characters
- Unscheduled service tickets now included in customer pop-up screen
- Alarm history log list on customer screen can be sorted in ascending/descending modes with default setting.
- Contract amounts on customer accounts now supports up to \$999,999.99

- Cost fields in equipment list can be hidden based upon user profile in security administration
- Merge list and search now independent per workstation (one inquiry/mail merge search does not affect another)
- Accounts without recurring charges can be searched in Inquiry/Mail Merge section
- Account number added to letters in Inquiry/Mail Merge section

### *Invoicing New Features*

- Button to copy any existing invoice to a new invoice for any account
- Recurring invoices can be assigned a salesrep ID automatically for commission assignments
- Recurring charges ‘bill amount’ may now be entered as a cycle amount or monthly amount (system default option).
- Bi-monthly statistics added to recurring revenue projection report
- Payment comments field lengthened to 150 characters
- Service and/or Monitoring contracts (or any other type of contract document) can be created as a Master Contract template and then selected to print (with specific merged customer data) when printing invoices.
- Labor charge can be excluded from part selections on invoice
- Unlimited price levels supported per item on invoice when selecting from inventory
- Quickbooks integration exports new invoices to customer account in Quickbooks
- Recurring Charges Taxable Yes/No can be searched in Inquiry/Mail Merge section
- Cash receipts report can be selected ‘By Bill-To Account’
- Company logo can now be included on emailed invoices if preprinted forms are being used.
- Ticket number automatically inserted into ‘Description On Statement’ section of related invoice
- Apply checks to all unpaid invoices now virtually instantaneous (improvement for Enterprise Edition)

### ***Service Management New Features***

- Outlook Integration exports appointments to Outlook calendar
- Service tickets now support multiple date range entry for jobs spanning more than one day
- Service and Monitoring contracts (or any other type of contract document) can be created as a Master Contract template and then selected to print (with specific merged customer data) when printing service tickets.
- Appointment Calendar now supports multiple date range entry
- Unscheduled service tickets included in customer pop-up screen

### ***Inventory Management New Features***

- Unused inventory items can be flagged and hidden from the main inventory list
- All items in inventory that have not been sold can be found and flagged as 'hide' through an automated utility.
- Inventory item screen shows purchase history of that item.
- Cost averaging calculation built into inventory / purchase order system
- Unlimited vendor tracking per inventory item (no longer need to create separate parts in inventory based upon which vendor part is purchased from)
- Unlimited price levels per part in inventory
- Cost fields can be hidden based upon user security profile

### ***Additional SQL Benefits*** (for users not already using an SQL database version such as Alarm Enterprise Edition):

- Extremely high data reliability and protection against network crashes, system errors, power failures, etc.
- Remote access capabilities. Install Alarm on remote workstations and log directly into your office Alarm database (requires broadband internet access and static ip address for office server).
- Automated backup capabilities built into SQL database even when database is open and being used
- Compatible with all new and upcoming Z-Micro Technologies software products and updates including:  
(non-SQL versions of Alarm can not be compatible with these new products or any updates):



- ClientWeb (client access to their account via any web browser)
  - Service Board (monitor open service tickets remotely on a monitor-style Service Board)
  - TechWeb (management and technician access to Alarm database via any web browser including handheld device web browsers). (*upcoming product*)
  - Inspector Express (*upcoming product*)
  - Updates of existing products from this point forward such as Pursuit, TouchBase, Multicom, eService
- Availability of reporting tools to query the SQL database from outside the Alarm software
  - SQL is a well-known data access language with an open architecture to allow your IT staff, consultants and developers to write applications that tie into your Alarm data.

Used by virtually all major corporations, web-based applications, and many small businesses for mission-critical applications due to robustness and flexibility of SQL technology.

Note: This list of new features is subject to change.

## Installation

There are two parts of the software installation – a Client installation and a Server installation. The Client installation will be performed on all workstations that will be using the program. The Server installation will be installed on the one computer which you designate as the ‘Server’ (the computer where the database will be stored). The software must be installed onto your hard disk before it can be used.

Please read the Software License Agreement near the end of this manual before opening the disk envelope. Use of this software is your agreement of the license.

In order to facilitate the installation, an installation program has been included. This program will prompt you during the installation process as to where to install the software. If for some reason this procedure is interrupted, you may just start the process over again. A complete set of instruction to install the Client and Server portions of the software are included with your order.

To start the installation procedure, please follow these steps:

1. Start up your Windows system if it is not currently open.
2. Insert the Program CD into your CDROM drive usually D: (this is the default drive letter. Check with your IT department if you are unsure).
3. The CD will automatically start to run the installation.
  - a. If it does not, select Run... from the Program Managers File Menu. Type D:\SETUP (or the drive letter of your CDROM). The installation process will ask for the drive and directory to install into. You may select the default values (recommended) or enter your own. Follow the prompts to complete the installation.

In the program group for the software you will now see menu items for the software, as well as Backup Data Files, File Recovery (Rebuild), Uninstall, Archive Utility and this documentation.

Please refer to the appropriate chapters in this documentation for an explanation of these functions.

Please take the original program CD and store it in a safe place. If you ever need to reload your software, you will need this CD along with a latest copy of your data file backup disk.

In order to run the software, double-click on the Alarm or Service Express menu selection. This will run the program and bring you to the program’s logo screen. If you have security turned on within the software, you will be prompted to log in with your User ID and Password (passwords are case sensitive).

## Installation on a Network

### Setting up the Server or Data Location

You will first need to determine which computer on your network will be dedicated as your server. In most cases you have purchased a "server" computer, or you will be using the fastest workstation on your network as your server machine. Just as you would install the Alarm for Windows program on your original workstations, you will need to install the program on your network server or main workstation. If you need to restore your data from an original workstation, use the Backup/Restore procedure included with the Alarm for Windows Software.

### Sharing the application (Data)

In order for Alarm for Windows to be properly utilized across your network, you will need to "share" the application for your other machines. To share the application (or program) you will need to access the Windows Explorer program (NT Explorer if you are using Windows NT). Go to the C: drive or the drive letter where you have installed Alarm for Windows.

(This is extremely important that you are aware of which drive you have installed the program).

Right click on the C:\Alarmwin folder (or C:\Express folder), and left click on SHARING (see figure 1.) If you do not have the option to SHARE the folder, your server may not be configured for file sharing (see your Windows documentation for the proper network setup).

A window will then open with that folders Properties (see figure .2). Click on the Radio button marked SHARED AS (see figure .3) The shared name will be filled automatically (you may change this to another name if necessary). Under Access Type click on the radio button marked Full. Click Apply then OK. Do NOT set a password, unless you are concerned about unauthorized file access (see your network administrator).

Figure 1.

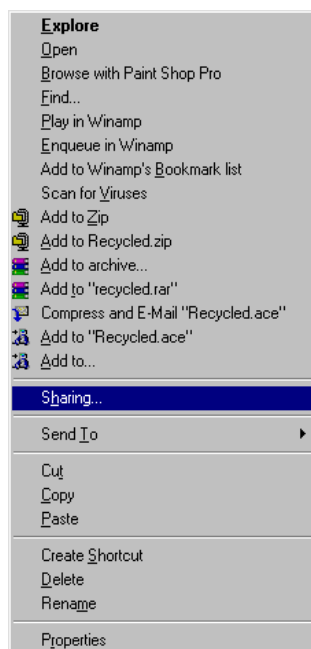


Figure 2.

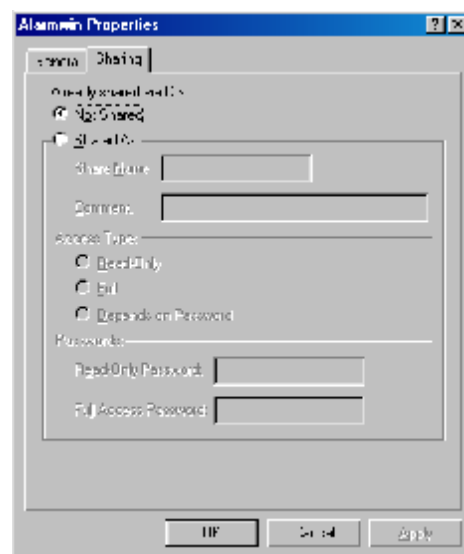
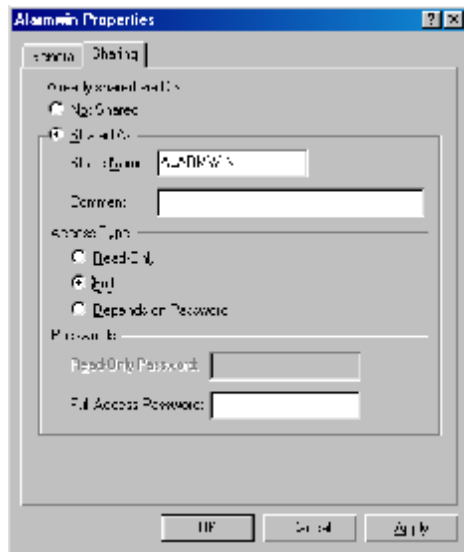


Figure 3.



### Setting up the Workstation (Client)

Install the program on each workstation that you wish to have access to the program data. This is important to help maximize the functionality and speed of how the program operates. It is more effective to install a copy of the software onto each of your workstations, which allows for only the data to migrate to the workstation when accessed. Instead of having the entire program broadcasted across your network, the program will simply only send over the applicable files it needs each time the program is utilized.

Double left click the Network Neighborhood icon on your desktop, then double left click on the SERVER NAME (see figure .4). In our example picture, MAIN is the server. A window will open showing the SHARED resources for the MAIN computer. Right click on the shared folder (usually Alarmwin or Express), then left click onto MAP NETWORK DRIVE (see figure .5). Select the drive letter to assign to the shared resource (see figure .6). In our example we will use the Drive letter G:\. The path will show [\\SERVERNAME\Alarmwin](#) or the name of your program folder. Make sure there is a check mark in Reconnect at Logon. This will make sure that each time you log into your network, these settings will be saved.

Figure 4.

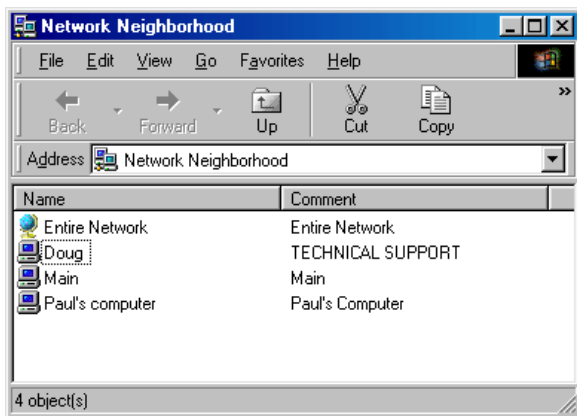
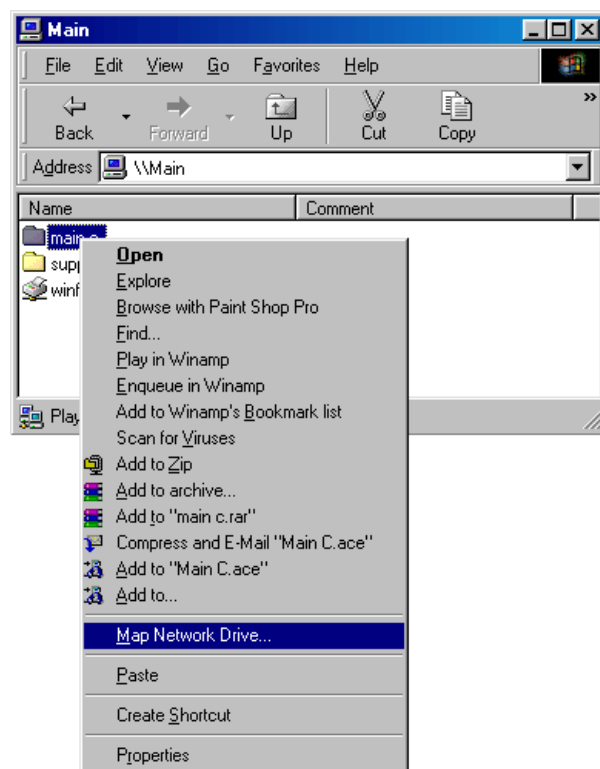
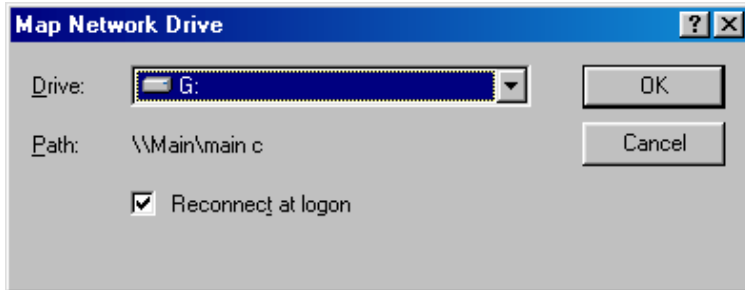


Figure 5.



Create a shortcut on the Desktop to the program on the LOCAL drive, this is usually C:\Alarmwin or C:\Express. Right click on the shortcut and left click on properties (see Figure .7)

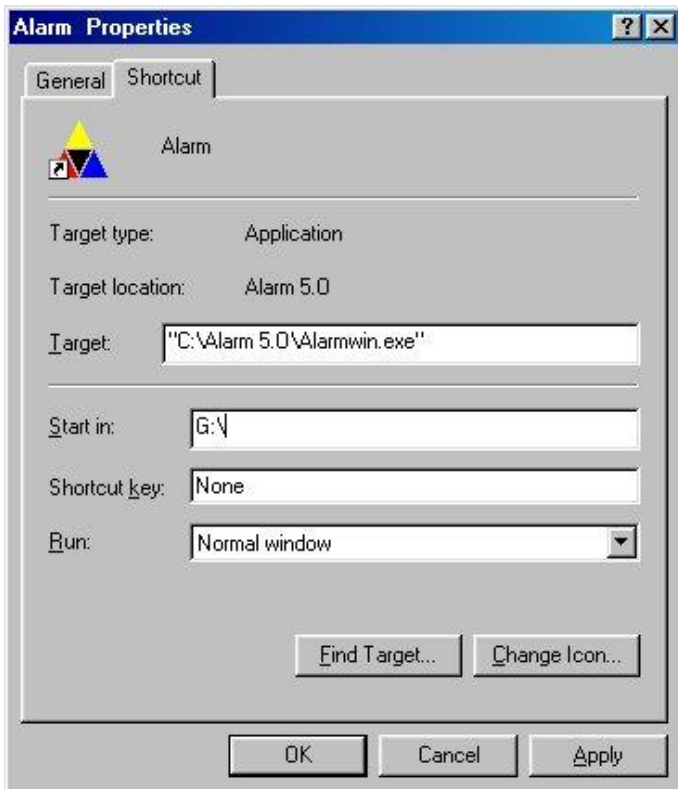
Figure 6.



A window titled Alarmwin or Express Properties will open. Check the TARGET box, this should point to the LOCAL drive usually C:\Alarmwin\alarmwin.exe (or C:\Express\alarmwin.exe). Change the START IN to point to your mapped (in our example G:\).

Once that has been completed, double left click on the program icon, which now appears on your desktop and the program will startup. If your company header appears in the first splash screen your system is now accessing your server's data and you have successfully linked your workstation to the server. If it does not, you will need to recheck your networking connections.

Figure 7.



## Set Company Header (Company Setup Screen)

If this is the first time you have started up Alarm or Service Express, you will be presented with a Company Setup screen. This screen allows you to set defaults to various system options, such as:

**Company Name & Address Setup**  
Record will be Changed

**Company Setup Options**

Company: All Security, Inc.  
Street: 3590 Commerical Drive  
Street 2:  
City: Anytown  
State: AZ Zip Code: 80102  
Phone 1: 480-998-3453 Phone 2: 480-998-3398  
License#: 23432-A-13 Merchant#:  
Country: United States

Activate Password Protection: YES  
Track Stock In Inventory: YES  
Turn On Multi-Location Inventory: NO  
Deduct Inventory When Invoicing: NO  
Deduct Inventory On Serviced Items: NO

**Invoice Setup Options**

Late Fee: 5.00 Balance Below Minimum  
Min Balance: 300.00  
Late Rate: 18.00 Balance Above Minimum  
Net Term: 30 Days (Default=30)  
Late Period: 28 Days (Default=28)  
Invoice Form: LASER2 Color: Blue  
Statement Form: LASER2  
Print CreditCard Box: [Laser2 Invoice] YES  
Print Barcode On Invoice: YES  
Using Preprinted Forms: N  
Print Statements With Invoices: YES  
Print Balance Forward Only: NO  
Recurring Invoice Sort: ACCOUNT

**Wallpaper Options**  
Optionally set your own corporate logo or graphic image to be used as wallpaper  
Wallpaper Background: C:\afw2004\LOGO.BMP  
Wallpaper Position: Center

OK  
Cancel

### Company

Enter your company name and address. Your company name will then appear on the top of each screen. The address will also printout on invoices and service tickets.

### Address

Fill out the STREET, CITY STATE and ZIP CODE (**WARNING: Only use 5 digit zip code**). If you need to use the ZIP+Four format or if your company is outside of the United States of America, call Z-Micro Technologies Technical Support or e-mail: [support@z-microtech.com](mailto:support@z-microtech.com).

### Activate Password

If you would like to provide password protection from Protection upon future entries into the program to sign-in with a userid and password, otherwise you will be denied access to the system. In addition, you may setup each individual userid with various access levels so that various persons can have access to different parts of the program but not to others. See the Security Administration chapter in this documentation for a detailed explanation.

<b>Track Stock In Inventory</b>	There are two fields that determine if you want to use inventory control (keep track of on-hand stock counts). Select 'YES' for the Inventory Tracking question to keep track of inventory on-hand. Select 'YES' for the multiple location question if you maintain inventory in more than 1 location (warehouse and trucks, etc.).
<b>Multi-Location Inventory</b>	If you store inventory in more than one location i.e. Sales Office, Warehouse, Truck. Select YES here.
<b>Deduct Inventory Invoice</b>	Select Yes if you wish inventory to be deducted when creating an invoice. Select No if you wish inventory to be deducted manually and not when invoiced (useful when using Inventory/Transfer menu to transfer inventory manually out of warehouse).
<b>Deduct Inventory Serviced</b>	Select Yes to deduct inventory when entering NEW items or REPLACED items on the Serviced Items section of a service ticket. Select No to bypass inventory deduction when entering New or Replaced items (useful if you will be deducting inventory via invoicing or when using the Inventory/Transfer menu to manually transfer inventory out of warehouse).
<b>License#</b>	If your business requires a license, you may enter your license number in this field. All invoices and service tickets will print your license number under your company name.
<b>Merchant#</b>	Not Currently Used.
<b>Late Fee</b>	<p>If you wish to charge a late fee for outstanding invoices, you may enter the amount of the late charge here. The first field 'LATE FEE' is to be used if you charge a set dollar amount each month, based upon a predetermined 'minimum balance'. If a customer outstanding balance is greater than this minimum balance, then the LATE RATE percentage will be used to calculate the late charge. The percent entered here would be the annual percent. For example, 21% per year would be entered as 21.</p> <p>If you do not wish to charge any late fees, then leave both fields 0.</p>
<b>Charge Fee</b>	The 'Charge Fee If Open Balance Under' question pertains to the maximum open balance a customer should have in order to charge a late fee based upon the 'Late Fee' field. For example, if this field has an amount of 200.00 and the Late Fee field above has an amount of 5.00, then any customers that are billed with an outstanding balance of \$200 or less will be assessed a late fee of \$5.00, regardless of the outstanding balance. If a customer's outstanding balance is greater than the 200.00, then the late fee will be calculated based upon the Late Rate field described below.
<b>Late Rate</b>	Enter an annual percentage that will be used to calculate the amount of late charge that will be billed to a customer's outstanding balance. If an annual rate of 18% is entered, then the customer will be assessed

a 1.5% per month late charge based upon their outstanding balance (any invoice over 28 days past due). If you use the 'Charge Fee If Open Balance Under' field above, then the late rate will only be used if the customer's outstanding balance is greater than this amount.

**Net Terms** Enter the number of days that your invoices are due. If any customer has not paid you within these number of days, then a statement will be sent out to them, along with any late fees you may be charging.

**Net Terms** Enter the number of days open until a large charge is applied.

**Invoice Form** Select the type of invoice you will be using. Please refer to the catalog enclosed with your order for available formats. You may also receive samples through the form catalog. Select CUSTOM if you purchased custom invoices from Z-Micro Technologies. (Press [...] button for list of available forms).

**Color** Only available if LASER2 selected as Invoice Form.  
Allows selection of main color for LASER2 plain paper invoice form.  
If Custom is selected as Color, HEX field will appear just below  
Allowing a hex value to be entered to represent a specific color.

A few invoice styles (BLANK, LASER, COLOR and 301L) can automatically print your own logo in the upper left-hand corner of the invoice form. To accomplish this, save your logo (any picture, plus your name and address as you want it to appear on the invoice) as a bitmap (BMP) graphic file. The name of this file must be NAME.BMP and it must be stored in the program directory that you use. Most scanners can scan your logo and save it as a bitmap file, as can most drawing programs (coreldraw for example).

**Statement Form** Select the type of Statement form you will be using. Refer to the catalog included with your order for samples of forms. If you enter an incorrect statement form, a list of valid forms will be displayed. The program usually uses the same form for both invoices and statements to save on form costs. (Press [...] button for list of available forms).

**Print Barcode On Invoice** If you would like the 'Invoice Number' to be printed as a barcode, select 'Y' Yes.

**Using Pre-printed** If your invoices do not have your name already imprinted, then select 'N'. This will print your name and address onto your invoices. If your invoices already contain your name, then select 'Y'.

**Print Statements** The normal processing for recurring invoices will include statements automatically for any customer that has open invoices ('YES' selected). However, if you do not wish to print any statements with the recurring invoices, then select 'NO'.

**Balance Forward Only** If you select 'NO' (the default) then all open invoices will be printed as individual detail lines on a customers statement. Although this type of statement clearly explains all outstanding charges to a customer, it could become lengthy for commercial accounts where numerous invoices are outstanding. If you wish to only show a 'Balance Forward' line on your



statement that represents a total of all outstanding invoices, then select 'YES'.

#### **Recurring Invoice Sort**

This selection allows you to select what order you would like your recurring invoices to be printed in. The current default is ACCOUNT. If you select ZIPCODE then you can take advantage of bulk mail rates. The recurring invoice section will allow you to enter a starting and ending zip code range. If you select NAME then the recurring invoices will be printed in alphabetical order. You may enter a starting and ending name, but you will be restricted to the first 7 letters of the customer name. Keep in mind that the invoices will be printed for any account whose name starts with the same 7 letters. For example, if you enter the letter A for the starting name and the letter D for the ending name, then all invoices for customer names starting with A through D will be printed.

#### **Wallpaper Options**

Wallpaper is the background graphic that you can display in the gray area of the software screen. Uses for wallpaper would be to display your company logo, a graphic notice that you may want your staff to see when bringing up the software. Some users even put holiday graphics as wallpaper and change it as necessary.

Select the graphic file you wish displayed (click on the [...] to select from your network drive). Then select the positioning of the graphic By selecting from the Position field.

The Set Company Header screen options may be changed at any time by selecting System Utilities - Set Company Header from the Main Menu.

## Selecting a Printer

This software uses the printer driver(s) that are already installed in your Windows system. You do not need to setup any printer selection before using this program for the first time. It will use the default printer driver you have set in Windows.

All areas that allows printing (reports, invoices, service tickets, etc) includes a Print Setup button. You may use this button to change the default printer that will receive the printed output. The following examples show how you can fully utilize the windows printer drivers if you have more than 1 printer:

Choose your main printer as the default printer within the Windows Control Panel (Printer icon). All printing done will automatically be routed to this printer.

If you wish to print invoices to a different printer, you may choose a different printer from the Windows printer selection list by clicking on the Print Setup button on the invoice printing screen, then choose the appropriate printer.

If you have a fax/modem with fax software already installed in your windows system, you can take advantage of this by faxing invoices, service tickets, and any other printed materials. To do this, select your fax software listed in the windows printer selection as the current printer (you may choose this by clicking on the Print Setup button found on all print areas). Once the fax software printer driver has been selected, any printing you perform will automatically call up your fax software. Most fax programs will ask for the fax phone number to call, then dial the fax number and transmit the printed material to the fax machine. This gives you the ability to fax service tickets to technicians in the evening before the next days work, fax invoices to customers and thereby save labor and mailing costs, fax central station notices directly to the central station (Alarm users), and fax service reminder post cards/letters directly to customers, just to name a few possibilities. You can now also email invoices, tickets, central station notices, purchase orders, and mail merge letters or collection letters directly out to your customers as well.

The Windows printer selection list lets you choose which printer port you will be printing to. If you have more than 1 printer, it is usually recommended to have both printers listed in the Windows printers selection list with the appropriate printer port selected for each printer.

You may also set default printers specifically for your invoices and service tickets if those forms are to be sent to a different printer than your Windows default printer. See Set System Defaults chapter for more information on these settings.



## Chapter 2: Getting Started

### Setup Wizard

The Setup Wizard was designed to aid in the initial setup of the software, in addition to assisting existing users with a 'review' tool to ensure the software is setup properly. Since there are many areas throughout the system that utilize user default settings for easier data entry as well as validation tables, the use of the Setup Wizard provides the best way to guarantee these areas are filled in properly.

The following sections can be setup in the Setup Wizard (except where noted, these sections are described in detail in the standard documentation).

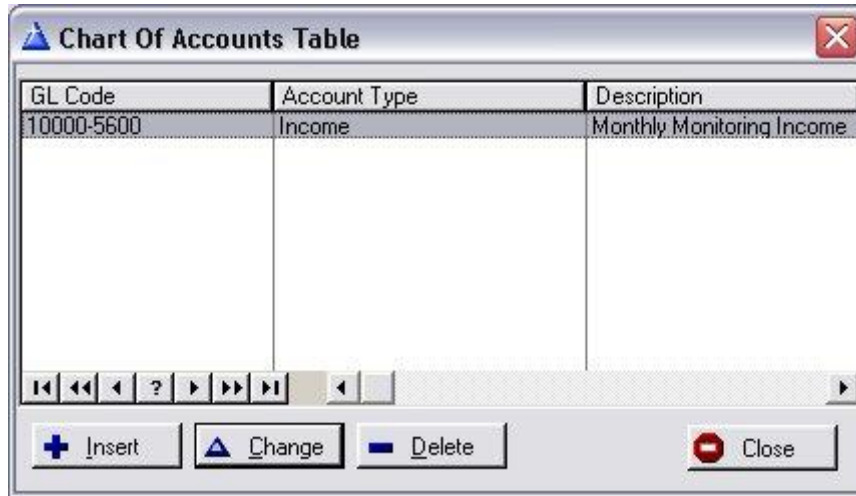


**Company Header** This section contains the initial setup information, including your company name and address, late charge settings, invoice and statement print forms, invoice options, and inventory tracking selections. See Company Header section for more detail.

**Security** This accesses the security administration section, which allows setup of UserID codes and passwords to control various levels of access for each user. It is HIGHLY recommended that every user sign-on with a userid and password. See Security Administration Section for more detail.

## GL Table

If general ledger codes are to be tracked for every financial transaction, then a chart of accounts table must be created. If you do not intend to utilize the tracking of general ledger codes, then you may leave this section blank.



The chart of accounts table consists of a General Ledger code (check with your accountant if necessary for the appropriate code structure for your company), the account type (accounts receivable, income, asset account, COGS accounts, etc.), and a description of the account. In addition, you may select if an account is a sub-account of another account code.

Once you have created your chart of accounts table, you may enter the appropriate chart of account code in the various section of the software that request this code. These areas include Inventory, Sales Tax Table and Credits.

Since this system is an 'Accounts Receivable' system, you will usually not utilize any expense accounts, just income and revenue accounts. You may get a report on all financial transactions using this table from the General Ledger report found in the report section.

To setup the various areas of the software that use GL Codes, please make sure to carefully go through this setup wizard and fill in the appropriate GL Codes in any area that requests them.

## System Defaults

This is an especially important area that should be setup based upon the way your company will be using the software. If setup properly, it will make using the software much easier for all users.

**NOTE:** *Since setting up the System Defaults is vital to your company for the proper use of this software and for ease-of-use, we have included a complimentary video training section for each tab in this section. To view the video (internet connection required, broadband preferable), click on the Video Training button that appears on the bottom of each tab.*

The screenshot shows the 'Set System Defaults' dialog box with the following settings:

- Account Status: Client
- Late Fee: Y
- Tax Code: [Empty]
- State Code: [Empty]
- Billing Method: Printer
- Property Type: RES
- Dealer Access: [Empty]
- Tax Code Field Label: TaxCode
- Recurring ProRating: N
- Default Invoice Style: Product
- Recur Amount Entry: [Empty]
- Central Sta.: [Empty]
- Monitored Label: Monitored
- Restrictions Label: Restrictions
- Activate Account Auto-Numbering: No
- Default To Monitored Status:
- Customer Phone Label Defaults:
  - Primary Phone Label: Premise
  - Secondary Phone Label: Alt Phone
  - Fax Phone Label: Fax
  - Allow Customer-Specific Labels:
- Contacts Phone Label Defaults:
  - Phone 1 Label: Home
  - Phone 2 Label: Work
  - Allow Contact-Specific Labels:

### Customer Defaults Tab

- Account Status** Selects default status for each new customer (should normally be set to Client).
- Late Fee** Selects default Yes/No setting for late charge calculation on each new customer.
- State** Enter your 2 character State code where most of your customers reside. This state code will then be filled in on each new customer.
- Tax Code** Select your default tax code (county code in prior versions).

<b>Billing Method</b>	Select the standard way you bill your customers (Print Invoice, credit card charges, etc.).
<b>Property Type</b>	Select default for type of account (Residential/Commercial).
<b>Dealer Access</b>	Usually left blank. If you are using a dealer access program such as Maslink or RapidLink (RapidLink is from Rapid Response Monitoring), then select either of those from the drop-down list. Using one of those dealer access programs allows you to view the event log of that dealer access system directly from within an account in Alarm. ALARM Use Only.
<b>Tax Code Label</b>	If you wish to use a word other than 'County' to represent your tax table, enter the word here. Example: TaxCode
<b>Recurring Prorate</b>	Select YES if you normally pro-rate all new customers for recurring charges. Select NO if you normally do not prorate. This is the setting that will then appear automatically whenever you add a new recurring charge in a new customer's account. You may always override this setting for each recurring charge.
<b>Default Invoice</b>	Select the type of invoice you usually produce (Product/Recurring). This setting determines the type of invoice you will normally create from within the customers account. Normally defaults to Product.

***NOTE: WE HIGHLY RECOMMEND ONLY USING PRODUCT INVOICES. SERVICE INVOICES ARE INCLUDED FOR BACKWARD COMPATIBILITY WITH OLDER VERSIONS OF THE SOFTWARE, BUT SHOULD NOT BE USED EXCEPT IN UNUSUAL CIRCUMSTANCES.***

<b>Optional 4</b>	This is a user-definable field (usually represents your Central Station). Enter the name of the central station most of your customers are connected to. This name will then default on all new customers.
<b>Monitored Label</b>	Indicator on the customer screen that can be used to view ONLY those customers on the main customer list screen. If left blank, defaults to the label 'Monitored' on the main customer screen. Depending upon your industry, you may change this label to represent any indicator important to you. If you wish to have new customer records defaulted with this indicator checked on, put a checkmark in the 'Default To Monitored Status' checkbox.
<b>Restrictions Label</b>	The customer account screen has a Restrictions field that is used to highlight an important event regarding this customer (ie: COD Only, Do Not Sell, etc.). The Customer Reminder Pop-Up can be used to display the contents of this field if it is filled in. If you wish to use this field for something other than Restrictions, enter the new label of this field here.
<b>Activate Numbering</b>	By default, the account number of every new customer account is entered manually. If you wish the program to automatically generate a new account number for each new customer, select YES. Account numbers automatically generated start at 100,000 and are assigned a random number in ascending order (not sequentially numbered in increments of one).

## Service Rates Default Tab

These default rates will be used to determine the rate codes that are to be used by default when charging for billable work on service tickets.

The screenshot shows a software dialog box titled "Set System Defaults" with a blue title bar and standard window controls. The dialog has a tabbed interface with the following tabs: Dealer Invoices, Report Settings, Central Station Notice, Equipment Installed, Support Log, Email Settings, Default GL Codes, Customer, Service (selected), Inventory/PO, Tickets, and Invoices. The "Service Rates" section is expanded and contains the following text: "Set The Service Rate Field Descriptions And Default Customer Rate Codes For Standard, Overtime And Travel Service Rates". Below this text are three rows of input fields: "Standard Rate Label" and "Default Standard Rate" (with a validation button "..."), "Overtime Rate Label" and "Default Overtime Rate" (with a validation button "..."), and "Travel Rate Label" and "Default Travel Rate" (with a validation button "..."). The "Appointment Auto Escalate" section is also expanded and contains the following text: "The Auto-Escalate feature keeps open appointments current. Any appointments still open but prior to the current date, will be automatically moved forward to the current date. This ensures that open appointments are not missed." Below this text is a "NOTE: If you have many previous appointments still open, it is recommended that you run the 'APPTCLOSE' Utility in Additional Utilities to close them out now. Otherwise, you may have a large number of open appointments now rescheduled to today's date." At the bottom of this section are two dropdown menus: "Auto-Escalate Open Appointments" and "Auto Escalate Open Tickets", both currently set to "NO". At the bottom of the dialog are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Service Settings Default Training Video".

**Standard Rate Label** Enter the name that you wish to use to refer to standard service rates (Leave blank to use program default of 'Standard')

**Default Rate** Using the validation button ([...] button), select the appropriate rate code you wish to use as a default for Standard Service. The screen below describes the Rate Code Validation Table:

**Overtime Rate Label** Enter the name that you wish to use to refer to overtime service rates (Leave blank to use program default of 'Overtime')



<b>Overtime Rate</b>	Using the validation button, select the appropriate rate code you wish to use as a default for overtime service.
<b>Travel Rate Label</b>	Enter the name that you wish to use to refer to any travel time charges you wish to charge the customer.
<b>Travel Rate</b>	Using the validation button, select the appropriate rate code to use as a default for travel charges.
<b>Auto-Escalate Appointments</b>	<p>You may choose to have open appointments automatically carried forward to the next day. By selecting Yes, appointments not closed out in the previous day will be forwarded as an open appointment on today's appointment list. Select NO if you wish open appointments to remain open on past days that they were scheduled for.</p> <p>NOTE: If you select YES to this field and already have many appointments on your appointment calendar, we highly recommend that you run the utility 'APPTCLOSE' found in the Utilities/Additional Utilities section. This will scan all past open appointments and move them forward to today's date for you.</p>
<b>Auto-Escalate Tickets</b>	You may choose to have open service tickets (the scheduled date of the ticket record itself) carried forward to the current date if it was not closed on the previous date it was scheduled. This would ensure that open tickets that were not completed will always appear as still open for the current date. Select NO if you wish the original scheduled date of a ticket to remain untouched even if it is still open past its scheduled date.
<b>Customer Phone Label</b>	<p>You have the option of using your own user-defined phone labels for the phone fields found on the main customer screen. Labels entered in these default fields are global to all accounts.</p> <p>Check the 'Allow Customer-Specific Labels' if you also want the option to change the phone labels on a per customer basis.</p>
<b>Contact Phone Label</b>	<p>As with the Customer Phone Label defaults, you have the option to use your own user-defined phone labels in the Contact list section of a customer account.</p> <p>Check the 'Allow Contact-Specific Labels' to allow specific phone labels on a per contact basis.</p>

## Service Rate Profile

Service Rate Profile

Record will be Changed

Rate Code: Standard

Rate Description: Standard Billing Rate

Initial Service Rate: 75.00 For The First: 30 Minutes

Service Rate: 25.00 Every: 15 Minutes Thereafter

Rounding Factor: Up (Up For Next/Down For Previous)

Taxable Service: Yes

Description To Print: Labor Charges

GL Code: 100001-01

OK Cancel

### Rate Code

Enter a name to identify this particular rate code. You may have an unlimited number of service rates in this table for a variety of purposes. For example, you may have STANDARD1 as your main standard service rate, and STANDARD2 to a different service rate structure. Recommended codes include OVERTIME for overtime service rates, and TRAVEL for travel rates.

### Rate Description

Describe the purpose of this particular service rate

### Initial Service Rate

Enter the dollar amount that you charge for the initial time period when you service an account. For example, enter 30.00 if you charge \$30.00 for the first 30 minutes (the time period is entered in the next field).

**For The First** Enter the time period that you charge an 'initial' service rate. For example, if you charge \$30 for the first 15 minutes, and then \$60 for each additional hour, the initial time period is 15 minutes, therefore enter 15 in this field. If you do not have a different 'initial' charge, then leave these two fields blank.

### Service Rate

Enter the dollar amount you charge for service (after the initial rate specified above). For example if you charge \$60 per hour, enter 60.00 in this field, and then 60 (for 60 minutes) in the next field

### Every

Enter the time period you charge the above service rate for on an on-going basis. For example, if you charge \$60 per hour, enter 60 (minutes) in this field. If a service job (using service tickets/timecards) is a 2 hour job and there is no initial service rate specified above, then the service rate calculation will be \$60 for every 60 minute time period, which in this example would equal \$120.00.

<b>Rounding Factor</b>	Specify if this rate code is to be rounded up or down from the actual time spent on the job. Rounding UP will calculate the service rate to the nearest NEXT time period (example: 45 minute actual work will round up to 60 minutes in the previous example). Specify DOWN to calculate this service rate to the PREVIOUS time period (example: 1 hour 15 minutes will round down to 1 hour (60 minute) in the previous example). Specify EXACT if you wish the calculation to be based on the actual time spent (45 minutes will calculate 45 minutes. In the above example, this would be \$1 per minute therefore the service charge is \$45.00)
<b>Taxable Service</b>	Select the default setting of YES or NO if your service charges are taxable.
<b>Description to print</b>	When creating an invoice from service tickets, you may include a detailed listing of labor charged on the job. If this option is selected, this field determines how this labor rate will be printed on the invoice.
<b>GL Code</b>	If you are using general ledger codes for financial transaction tracking, enter the code used to track this service rate.

## Inventory/Purchase Order Default Tab

This section determines the default settings for new inventory items, and the PO area.

**Set System Defaults**

Dealer Invoices | Report Settings | Central Station Notice | Equipment Installed  
Support Log | Email Settings | Default GL Codes  
Customer | Service | **Inventory/PO** | Tickets | Invoices

**Inventory Defaults**

Default GL Code [ ] ...  
Default Cost Of Goods GL Code [ ] ...  
Default Asset Account GL Code [ ] ...  
Default Vendor Name [ ] ...  
Post To Equipment List YES Taxable Default Y  
Hide Unused Items On Parts List  [Run 'Mark All Unused Items' Utility To Identify and Mark All Unused Parts](#)  
Subtract Part Labor Charge From Part Price On Invoices [ ] \*Default No

**Cost Averaging**

Use Cost Averaging Yes  
Cost Averaging Based On Manual Costs

**Purchase Order Defaults**

PO Display Order Ascending Using Preprinted PO NO  
Include Repaired/Installed Item On PO If Not In Stock No  
Purchase Order Form Title [ ]  
Print Or Email Purchase Order Print

OK Cancel Inventory Defaults Training Video

### Default GL Code

If you wish to assign a default general ledger code to this part then select the appropriate code in this field. Each time this part is sold on an invoice, it is tracked by the general ledger report.

### Default COGS

Enter a Cost Of Goods sold account code in this field if you are tracking general ledger codes. Refer to your accountant for the appropriate codes for your company. You may run the general ledger report based upon the COGS code.

### Default Asset

Enter an Asset Account code in this field if you are tracking general ledger codes. Refer to your accountant for the appropriate codes for

your company. You may run the general ledger report based upon Asset codes.

- Default Vendor** Enter the vendor name (selected from the vendor list) that you typically purchase your items from.
- Post To Equipment** This field should normally be set to YES. This determines if a part that is sold on an invoice should also be added automatically to the customer equipment list. Usually most items should be added, unless it is an inconsequential part in which case you would select NO in the inventory screen for those parts.
- Taxable Default** Select YES if you would like to calculate tax or No to NOT calculate tax on a purchase order.
- Hide Unused Items** Check this box if you want the inventory list by default to hide unused inventory items or leave unchecked to show your entire parts list everytime you bring up the Inventory list. You may always override the default when viewing the Inventory List. Hidden items can be marked manually on the part screen or through a utility (Utilities/Hide Unused Items) which scans your entire purchase history and hides inventory items not used on invoices or customer equipment list.
- Subtract Part Labor** If your selling price for an item in inventory is a combination of your material selling price and labor selling price, you can elect to have the labor selling price deducted from the overall part price when included on an invoice.
- Cost Averaging** Part costs can be updated automatically based upon purchased made from your vendors using the Purchase Orders section of the software. If 'Manual' is selected, the cost of each item is based upon your manual entry of the cost. If 'Purchase History' is selected, then the cost of an item in inventory will be calculated according to the cost of each purchase on a purchase order for that item.
- PO Display Order** You may select ASCENDING to display purchase orders from oldest purchase order to most recent, or select DESCENDING to display purchase orders from most recent to the oldest.
- Using Preprinted PO** Select YES to have your company name and address printed on the purchase order form, otherwise select NO if you are using your own company letterhead paper (to use your own company letterhead, letterhead must appear in upper left corner of paper only).
- Include Repaired Or Installed Item On PO If Not In Stock** Select YES to include repaired or installed items on a purchase order if the item is not in stock.
- Purchase Order Title** The default title for purchase orders is 'Purchase Order'. To use a different title (or to have multiple titles available to use), enter another title in this field (you will be prompted to ADD the title if it is new). Examples of additional titles you may want to add include:  
*Request For Bid*

*RFP*

When creating a purchase order, you will then be able to select from a drop-down menu which title to use for that specific purchase order.

**Print Or Email**

Select the default method of generating a purchase order when clicking on the PRINT button. Email selection will automatically display the email address that is on file for the vendor selected (it can be overwritten with another email address if required).

## Ticket Default Tab

This section determines the default settings for creating and printing service tickets.

The screenshot shows the 'Set System Defaults' dialog box with the 'Ticket Defaults' tab selected. The dialog has a title bar with a warning icon and standard window controls. Below the title bar are several tabs: Dealer Invoices, Report Settings, Central Station Notice, Equipment Installed, Support Log, Email Settings, Default GL Codes, Customer, Service, Inventory/PO, Tickets, and Invoices. The 'Tickets' tab is active. The dialog is divided into several sections:

- Print Ticket Defaults:** Contains seven settings, each with a dropdown menu: Print Company Letterhead (YES), Print Zone Descriptions (YES), Print Equipment List (YES), Print Customer Notes (NO), Print Event History (blank), Maximum Events To Print (0), and Print Contract (blank).
- Invoice From Ticket Defaults:** Contains six settings: Invoice Style (PRODUCT, with a blue link 'Default=Product'), Copy Service Text (YES), Date (Yes), Copy Repair List (YES), Calculate Labor (YES), Labor Description (Summary), and Apply Discounts (BOTH).
- Default Service Rates On Timecards By:** Technician (dropdown).
- Print Ticket Or Email Ticket:** Print (dropdown).
- Name Of Service Ticket Printer (Optional):** Empty text field.
- Post Open Tickets To WhiteBoard:** Yes (dropdown).
- Print Balance On Ticket:** Yes (dropdown).
- Post Close Date On Ticket Upon Invoicing:** Yes (dropdown).
- Print C/S # On Ticket:** Yes (dropdown).
- Repair List Price Defaults:** Contains three text fields with dropdown menus: Installed Item (Installation), Replaced Item (blank), and Repaired Item (Service).

At the bottom of the dialog are three buttons: a green checkmark icon followed by 'OK', a red X icon followed by 'Cancel', and a button labeled 'Ticket Defaults Training Video'.

### Print Company Letterhead

Select YES to print your company name and address on the top of service tickets, select NO to leave top of service ticket blank.

### Print Zone Description

Select YES to include the customer zone list on service tickets, otherwise select NO.

### Print Equipment List

Select YES to include the customer installed equipment list on the service ticket (including part id, description, qty, serial #, and location of installation), otherwise select NO.

### Print Customer Notes

Select YES if you wish to print the customer notepad area onto

the service ticket. Usually this is set to NO. If set to YES, only the first 6 lines of the customer notepad will print. It is recommended that any special instructions for service work being performed should be entered in the Service Instructions area of the main customer screen.

<b>Print Event History</b>	Include a summary of previous alarm signal events. Alarm only
<b>Maximum Events To Print</b>	If printing event history, how many events to print. Alarm only
<b>Print Contract</b>	Select if by default a contract should be created and printed (or emailed) along with a Ticket when printing the ticket.
<b>Print Balance On Tickets</b>	If you wish to print the customer's open balance on the service ticket select YES.
<b>Print C/S#</b>	Print the Central Station account number (reference#) on ticket
<b>Invoice Style</b>	When creating an invoice from a service ticket, this determines the default invoice style to be created (Product or Service).

***NOTE: IT IS HIGHLY RECOMMENDED YOU ALWAYS CREATE A PRODUCT INVOICE. SERVICE INVOICES SHOULD ONLY BE USED IN UNUSUAL CIRCUMSTANCES.***

<b>Copy Service Text</b>	<p>If you wish the 'Service Performed' text of the service ticket to be copied onto the invoice, select YES.</p> <p><b>Date:</b> If Yes selected above, you have the option of including the date of the actual service job (Completed date of the service ticket) included on the invoice service description area.</p>
<b>Copy Repair List</b>	To include the items entered in the repair list onto the invoice, select YES. If indicated, those items that are billable will include pricing on the invoice automatically.
<b>Calculate Labor</b>	Select YES if you wish labor to be calculated automatically when creating an invoice from the service ticket. Labor calculation is determined by the hours entered and service rate codes selected in the timecard area of the service ticket.
<b>Labor Description</b>	Select DETAIL to print a detailed list of each technician, hours, and service rates billable for this service job on the invoice. Select SUMMARY to print a one line item showing Labor Charges and total labor billed.
<b>Apply Discounts</b>	Select YES if you wish a customer discount to be applied to billable service jobs. Customer discounts (if applicable) are entered on each customer's main screen (contract/rate tab).
<b>Default Service Rate</b>	You have the option of calculating service charges based upon customer service rates, or technician service rates. When a service ticket is created it will determine the appropriate service rates for billable work based upon Customer or Technician.



<b>Name of Printer</b>	If you wish to send your service tickets by default to a different printer than your system default printer, enter the name of the other printer EXACTLY as you have it in the windows printer driver list. If you will be using your system default printer, leave this field blank.
<b>Print Ticket Or Email Ticket</b>	Choose the default method for sending out service tickets. If you select Email, clicking on the PRINT button on a service ticket will result in the ticket being emailed to the main assigned technician's email address for that ticket (as determined in the Employee Profile for that technician).
<b>Post Tickets To WhiteBoard</b>	<p>An auxiliary program called 'WhiteBoard' accompanies this program. To have a new ticket automatically displayed on the whiteboard (for service departments), select Yes.</p> <p>The Whiteboard program is a 'bigboard' type of display useful for displaying on a large monitor (or large TV screen if you have scan converter or TV out on your computer). Typically used in a service department, it shows a list of all current open service tickets (or support log entries that are still open) along with current response times so you know what services are still open, and how long it has been since the request came in. We recommend running the Whiteboard software on a dedicated computer – displayed onto a large monitor or TV.</p>
<b>Post Close Date Upon Invoice</b>	When generating an invoice directly from the service ticket, select YES to close the service ticket automatically. Select NO if you wish the service ticket to remain open even after invoicing.
<b>Repair List Price Defaults (For Multi-Level Inventory Pricing Only)</b>	
<b>New Item</b>	Select which inventory price level to use when invoicing from the service ticket, if the serviced items list of the ticket has a billable 'New' item listed.
<b>Repaired Item</b>	Select which inventory price level to use when invoicing from the service ticket, if the serviced items list of the ticket has a billable 'Repair' item listed.
<b>Replaced Item</b>	Select which inventory price level to use when invoicing from the service ticket, if the serviced items list of the ticket has a billable 'Replaced' item listed.

## Invoice Default Tab

This section determines the default setting for creating and printing invoices.

The screenshot shows the 'Set System Defaults' dialog box with the 'Invoice Defaults' tab selected. The dialog has a title bar with standard window controls. Below the title bar are several tabs: Report Settings, Central Station Notice, Equipment Installed, Support Log, Email Settings, Default GL Codes, eService Settings, Customer, Service, Inventory/PO, Tickets, Invoices (selected), and Dealer Invoices. The 'Invoice Defaults' section contains the following settings:

- Number Of Copies To Print: 2
- Print Payments On Invoice: YES
- Print Detailed Part Descriptions: Yes
- Print Customer Phone/Fax: Yes
- Late Charge Description On Invoice: Your Late Fees
- Remark1: 1
- Remark2: 2
- Name Of Invoice Printer (Optional):
- Invoice Display Order: Descending
- Ad ID: ...

The 'EFT Defaults' section contains:

- EFT Service Being Used (Credit/ACH): ICVerify
- EFT Transaction Date Based On: Invoice
- EFT Payment Date: Invoice

The 'Post Payment Defaults' section contains:

- Default Invoice Type: R
- Unpaid Balance Default Response: Yes
- Default Entry Field: Invoice
- Credit Default Response: Yes
- Default Income Type: Check
- Default Payment To Invoice Amt: YES
- Use Enter Key For Payment Postings: YES

At the bottom, there is a text field for 'Description Of Labor Charges In Summary Mode' with a note '(When Creating Invoice From Tickets)'. The dialog has 'OK', 'Cancel', and 'Invoice Defaults Training Video' buttons.

## Invoice Print Defaults

**Number Of Copies** Set the number of copies to print for each invoice. Typically set to 1 or 2. (Multiple copies must be supported by your printer)

**Print Payments On Invoices** Select YES to normally print existing payments on invoices.

**Print Detailed Descriptions** If you are using the detailed description section of inventory items, select YES if you wish those detailed descriptions to print on an invoice when it's item is selected.

**Print Customer Phone** To print the customer phone number and fax number on the customer

invoice (right below the customer name/address area) select Yes.

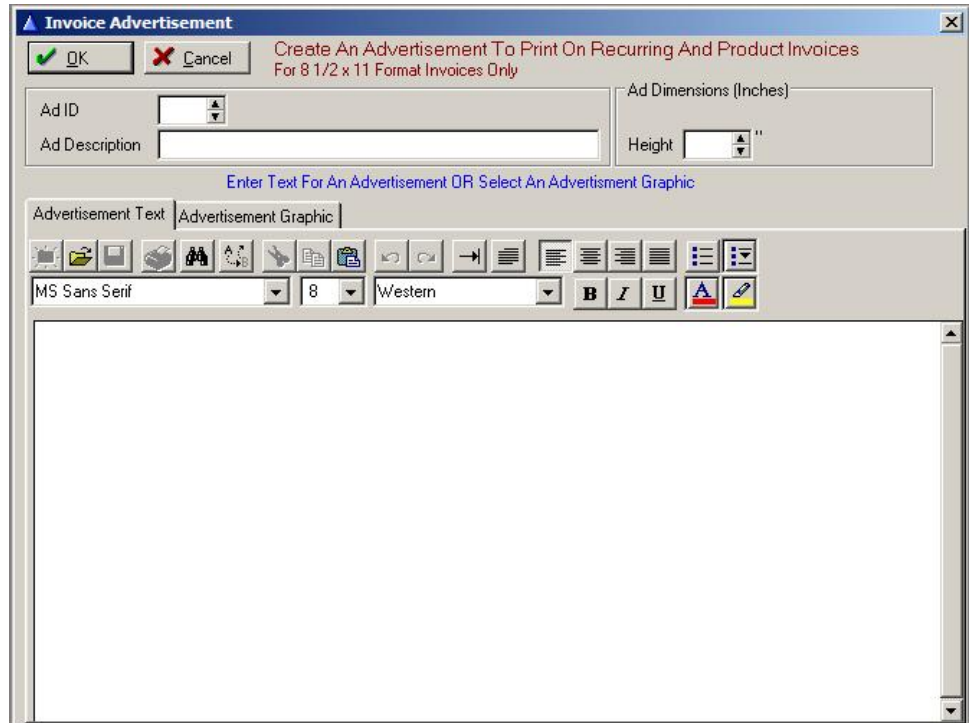
**Late Charge Description** If you apply late charges to past due invoices, enter the description that you would like to appear on those statements to identify a late charge (leave blank to use the default of 'Late Charges')

**Remark 1 / 2** To have up to two remark lines to appear on all invoices by default, select the Remark ID for Remark 1 and Remark 2 Lines (Remarks are created in the Invoice section).

**Name Of Invoice Printer** If you wish to send invoices to a different printer than your system default printer, enter the name of that printer EXACTLY as it appears in your windows printer driver list, otherwise leave blank to send invoices to your system default printer.

**Invoice Display Order** When displaying a list of invoices in the Invoice History screen of a customer account, you may select to display that list in ascending order (oldest invoice displayed first), or descending order (most recent invoice displayed first).

**AD ID** You can include an ad within the main section of invoices (just below the detail section of an invoice). Ads can be graphical or textual as described below:



- Ad ID:** Unique number to identify this ad
- Description:** Descriptive text to identify this ad
- Height:** Height (in inches) that this ad will take up on invoice
- Ad Box:** For Text tab, enter ad (RTF Formatting supported)  
For Graphic tab, select graphic image to use as ad

## EFT Services

If you are using a credit card processing service for processing recurring invoices (Visa, Master Card, Amex, Discover, EFT Checking, EFT Savings), you may now select the appropriate service, which Alarm has been programmed to work with. Selections include:

**ICVerify:** A software program that you may use to process credit card payments with your merchant bank. Go to [www.icverify.com](http://www.icverify.com) for information on this program.

**Electronic Funds Inc:** A processor of EFT transactions (checking / savings ACH). Call us for contact information on this service.

**ACH Direct:** A processor of credit card and EFT transactions. Call us for contact information on this service.

To select an EFT service, go to Utilities/Set System Defaults/Invoices and in the EFT Service field select the appropriate EFT service you will be using.

**EFT Transaction Date** Depending upon your accounting methodology, select INVOICE to use the Invoice Date (date of actual invoicing) as the transaction date of when the payments will be processed by the above processing service. Select NEXT BILL to use the date of the 'Next Bill' field on recurring charges for the transaction date that will be used for processing by the above processing service.

**EFT Payment Date** If you choose to have payments automatically posted when performing EFT recurring charge payments, select which date you wish to use as the payment date recorded on the invoice. Select INVOICE to use the date of actual invoicing as the payment date. Select NEXT BILL to use the date of the 'Next Bill' as the payment date.

## Post Payment Defaults

**Default Invoice type** Select the type of invoice style that you normally post MOST of your payments on. For recurring billing users, this would typically be R for recurring invoices. Select R for recurring invoices, S for service invoices, and P for product invoices. This field will determine the Invoice Type default that will appear when selecting an invoice to post payments against.

R	–	Recurring
P	–	Product
S	–	Service <b>(NOT RECOMMENDED)</b>

**Default Payment To Invoice Amount** As part of the Quickpay feature incorporated into the software, you may select YES to have the invoice amount automatically appear in the Amount Paid field as you are paying a recurring invoice (this feature is active only in the PAYMENT button area of the software). With this feature activated, it is possible to post payments to invoices with 2 simple entries (invoice number and check number).

**Default Entry Field** When posting payments in the PAYMENT button area, you may select

an invoice to be paid by customer name, customer account number, or invoice number. For the fastest payment processing, select INVOICE in this field and the cursor will automatically start at the invoice field when posting payments. This essentially will allow payments to be posted by simply entering the invoice number (or using a bar code reader, scan the bar code that can be printed on the invoice stub), hit enter, and then enter the check number (if Default Payment To Invoice Amount option is set to YES above).

- Description Of Labor** Enter the way you wish to have labor charges described on an invoice if you bill service work from a service ticket to an invoice.
- Unpaid Balance Default Response** If, after payment a customer still has an unpaid balance. You are asked by the Alarm program if the customer is required to pay the balance. This will be the default response to the unpaid balance question. 'Yes' means the customer is required to pay the balance. 'No' means the customer is not required to pay the balance and the amount will be written off.
- Credit Default Response** This is the default response when a customer has a credit to apply and the alarm software asks if you would like to apply the credit to the open invoice.
- Use Enter Key** When entering payments onto an invoice, select YES if you wish to be able and use the ENTER key to navigate from field to field (helpful if you use the numeric keypad on the right side of the keyboard for numerical input). Select NO to keep the default windows-standard of using the TAB key to navigate from field to field.

## Dealer Invoices Default Tab

This section determines the default settings when printing dealer invoices.

The screenshot shows the 'Set System Defaults' dialog box with the 'Dealer Invoices' tab selected. The dialog has a title bar with standard window controls. Below the title bar are several tabs: Report Settings, Central Station Notice, Equipment Installed, Support Log, Email Settings, Default GL Codes, eService Settings, Customer, Service, Inventory/PD, Tickets, Invoices, and Dealer Invoices. The 'Dealer Invoices' tab is active and contains two sections of settings. The first section, 'Dealer Invoice Print Default Settings', includes: 'Are The Forms Preprinted' (dropdown set to NO), 'Select Dealer Form To Use' (dropdown set to PLAIN), 'Print Dealer Charges In Smaller Font' (dropdown set to YES), 'Print Billing Period Line' (dropdown set to YES), 'Print An Alignment Test' (dropdown set to NO), and 'Number Of Copies To Print' (spin box set to 1). The second section, 'Dealer Billing Setup', includes: 'Always Use Dealer Address Default For Product Invoices' (dropdown set to YES). At the bottom of the dialog are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Dealer Invoices Print Defaults Training Video'.

**Are Forms Preprinted** Select NO to print your company header on the upper-left corner of the dealer invoice. Select YES to leave the upper left corner blank.

**Select Form To Use** Select PLAIN to use plain paper, select 301L to use the 301L or 312 preprinted forms.

**Print Using Smaller Font** Select YES to use a smaller font to print detail lines on dealer invoices. This will allow more detail lines to print per page (useful for multi-page dealer invoices). YES uses an 8 or 9 font size. Select NO to use the standard font size of 10.

**Print Billing Period Line** Select YES to print the billing period date range below each recurring charge listed on the dealer invoice (ie: For Period 01/01/04 To 01/31/04). To turn off the printing of this additional line per charge, select NO.

**Print Alignment Test** Only select YES if you are using a dot matrix printer. Laser and Inkjet printers do not require an alignment text.

**Number Of Copies** To print multiple copies of dealer invoice printed, enter the default number of copies to print for each dealer invoice (printer must support multiple copy command).

**Always use Dealer Address** When creating product invoices on accounts that are linked to a dealer account, select YES if you always want to use the dealer address on the product invoice. Select NO to use that subaccounts address instead.

## Email Settings Defaults Tab

This section determines the default settings for email and invoice (email invoice) settings.

Before you can use the emailing capabilities of this program, you must setup the email settings with the appropriate values that pertain to your particular email capabilities. The System Defaults may be set from within the Setup Wizard, or by going to Utilities/Set System Defaults. Click on the eInvoice Settings tab to bring up this screen.

**NOTE:** At the end of this tab chapter, a detailed description of how to setup and use invoice is included.

Set System Defaults

Report Settings | Central Station Notice | Equipment Installed | Support Log

Customer | Service | Inventory/PD | Tickets | Invoices | Dealer Invoices

Email Settings | Default GL Codes | eService Settings

Sender Address: youremailaddress@youremailserver.com

From Header Address: youremailaddress@youremailserver.com

From Header Name: youremailaddress@youremailserver.com

Sender Domain: Your Company URL Address

SMTP Server: smtp.west.cox.net

Account Name: Password:

For Authentication: \*These settings may be found in your email program Account settings

SMTP Port: 25 (Default = 25) Email Copy To Sender: No

Select Email Format: HTML (PDF Attachment Is Preferred Method)

eInvoice Template: STANDARD.HTM

Contact Z-Micro Technologies For Custom eInvoice Templates For Your Company

eInvoice Subject Line: Invoice From All Security Inc. Attached

Email Ticket Subject: Service Ticket

Product Invoice Email: EMAIL

Subject Line: Invoice From Your Company

Email Body Text: Please find attached your current invoice. If you have any questions on the invoice, please feel free to contact customer service at 877-888-8888

OK Cancel Email Defaults Training Video

**Sender Address** Enter a valid email address that indicates who the sender is. Typically this would be an email address for your company. (i.e.: [accounting@yourcompany.com](mailto:accounting@yourcompany.com)).

**From Header Address** Enter a valid email address that will indicate where a reply should be sent. This may be the same email address as your Sender Address, or it may be a different address. This will allow you to keep a backup record of all of your eInvoices within your mailbox or another of your choosing.

(i.e.: [payments@yourcompany.com](mailto:payments@yourcompany.com)).

- From Header Name** Enter the actual name of the person or department that the eInvoice is coming from.  
(ie: ABC Security Company Accounting Department)
- Sender Domain** If you have a website address and would like the address embedded within the header of the email message, type the full address here.  
(i.e.: [www.abcsecurity.com](http://www.abcsecurity.com))
- Account Name** If your email server (ie Internet Provider) requires authentication of outgoing email, enter your Account Name in this field (your account name can be found in the settings of the email program you use to send/receive emails)
- Password** If your email server (ie Internet Provider) requires authentication of outgoing email, enter your email account password in this field (your account password is the password you entered into your email program you use for regular send/receive of emails. If you do not know your password you will need to contact your internet provider that you use for email).
- SMTP Server** Enter your POP3 server address. You can find your POP3 server address by going into your email program and looking at your Account information.  
  
For example, if you are using Outlook Express, bring up Outlook Express and go to Tools/Accounts and look at the properties of the email address you will be using to send out eInvoices. Click on the Servers tab and use the Outgoing Mail SMTP address. You may also call your email provider and ask them for the SMTP Server address if you are unable to find it.  
(ie: uswest.mail.net)
- SMTP Port** This indicates the default SMTP port to use. Set this to 25. If you have a problem with sending eInvoices, you may check with your email provider to see if this should be set to a different number, however in most cases the default of 25 is correct.  
(ie: 25)
- Email Copy To Sender** Select Yes if you wish to have a copy of each eInvoice delivered to your email inbox (it will be sent to your Sender email address as specified in the top field of this screen). This will allow you to directly verify that the eInvoices were sent out. Another advantage allows you to also to keep a copy of each eInvoice on file, in case a customer requests a copy or a resend. If you do not wish to have an eInvoice copy sent to your inbox, simply select No.  
(ie: Yes)
- Select Email Format** When sending out recurring invoices, you have the choice of sending the invoices out as an Adobe Acrobat PDF attachment (most realistic copy of the original invoice), or as an HTML format which replicates the invoice into the body of the email.



<b>eInvoice Template</b>	Select the eInvoice template file that contains the HTML code used for your particular style of eInvoice. The program ships with the standard eInvoice template, therefore you should enter STANDARD.HTM in this field. You may also search for the eInvoice template by clicking on the File Lookup button [...] and selecting the appropriate *.HTM file listed. If you have purchased custom eInvoice templates from Z-Micro Technologies then select the appropriate custom template from this list. (ie: STANDARD.HTM)
<b>eInvoice Subject Line</b>	You may specify a specific Subject Line that will appear in the Subject field of all of your eInvoice emails. You may change this line before each months billing, or leave a standard subject line. (ie: Invoice From ABC Security Company)
<b>Email Ticket Subject</b>	Enter the text that is to appear in the subject line of service tickets emailed out to your technicians.
<b>Print Or Email Invoice</b>	For product invoices, select the default method for sending out product invoices when the PRINT button is selected on the invoice. If Email is selected, the main email address on file for the customer will be used as the email address (this may be overridden).
<b>Subject Line</b>	If emailing product invoices, enter the subject line text that should appear on the email.
<b>Email Body Text</b>	If emailing product invoices, enter text that is to appear in the body of the email (the invoice itself will be generated as an Adobe Acrobat PDF document and attached to the email.)

Click on OK to save these settings or Cancel to abort.

***A Note About EInvoice:***

This program features a revolutionary new method to have your recurring invoices sent to your customers. Called eInvoice, it takes advantage of the speed and efficiency of the Internet to deliver your recurring invoices to your customers via email.

With eInvoice, the following benefits are available:

- Virtually immediate delivery of recurring invoices to your customers email box
- Eliminates stamps, forms and envelopes
- No labor required to get invoices out in the mail
- Process and send approximately 1000 eInvoices per hour (speed varies on processor speed and internet connection).
- Copies of each eInvoice can be delivered to your email inbox for verification

In addition to these standard benefits as listed above, our Z-MicroNet division can custom design your eInvoice templates with the following features:

- Give your eInvoices a unique company look and style
- Include on-line payment links from within your eInvoice for fast payment

- Include e-marketing materials such as newsletters, 'flash' brochures, and advertisements – all embedded within your eInvoice.

eInvoices work in a similar fashion as the printed recurring invoices. Open invoices (based upon the settings within the Set Company Header screen) will also appear along with any new recurring charges. In addition, any partial payments applied against open invoices will also be detailed within the eInvoice. eInvoices may be rebroadcast during a recurring invoice reprint session, and you will then have the option to confirm the rebroadcast of those eInvoices. You may also resend a particular eInvoice at any time by going into your Inbox of your email program and forwarding the appropriate eInvoice to the proper recipient ('Email Copy To Sender' option must be set to YES as described below in order to have eInvoice copies in your inbox).

The following pages describe the proper setup and use of eInvoices.

## Setting Up eInvoice Recurring Charges

For each of your customers that will be receiving eInvoices, you will need to setup their specific recurring charge(s) to reflect Email as the Billing Method. (The full description of the Recurring Charge Profile screen can be found elsewhere in this documentation).

### Billing Method

The Billing Method for eInvoices needs to be set to Email. When Email is selected, you are prompted to enter the email address the eInvoice is to be sent to as described below.

### Email Address

If you selected Email as the Billing Method for this recurring charge, enter a valid e-mail address for the recipient of the eInvoice. If have already entered your customer's primary email address, within the customer screen, this field

will automatically fill-in by default. You may then keep that primary email address or change it to another valid email address.

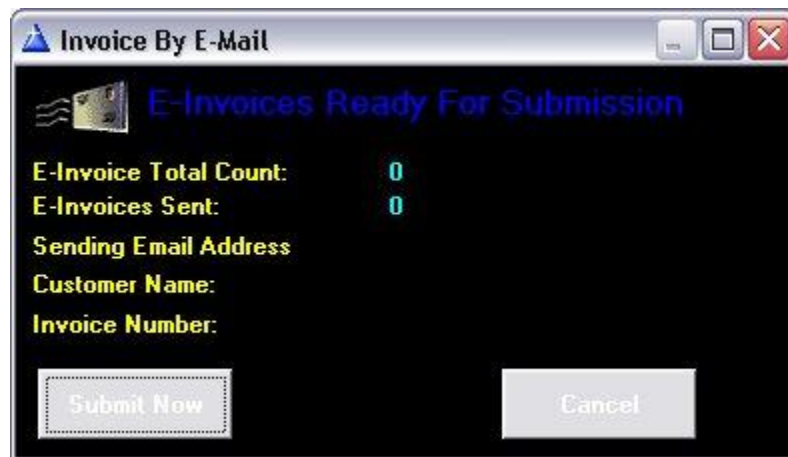
All other selections on this screen are standard to the recurring billing process and are described in the Alarm documentation manual.

## Processing eInvoices

When you perform recurring billing (Invoices/Recurring Invoices), the system searches for customers that are being billed by eInvoice and processes those eInvoices after the printed recurring invoices are processed.

If an eInvoice has already been generated for the month, performing the eInvoice process again (and clicking on the Submit Now button) will resend the eInvoices. If you do not wish to resend eInvoices during a recurring invoice reprint session, click on Cancel.

Once the printed recurring invoices have been processed, the following screen will appear for eInvoice processing if any customers were found to be eligible for an eInvoice during this recurring invoice session:



If you wish to cancel the sending of eInvoices, click on Cancel.

To submit the eInvoices, click on Submit Now. The eInvoice screen will then update the information during the *eInvoice Send Process* as to the total number of eInvoices to be sent this session. This section will also be updated with the number of eInvoices currently sent along with displaying the current eInvoice being sent.

(This will show the respective email address, customer name, and invoice number of the current eInvoice being delivered.)

Based upon your processor speed and internet connection speed, eInvoices take approximately 2 to 5 seconds per eInvoice to send, therefore making it possible to process approximately 1000 eInvoices per hour. Once the Submission of eInvoices has begun, you cannot stop the process unless you abort the task within Windows.

If you wish to resend just one particular eInvoice, you may do so by going into your Inbox of your

email program and forwarding the appropriate an eInvoice copy that is stored in your inbox to the proper recipient. In order to do this, you must have the 'Send Email Copy To Sender' option selected to YES in the eInvoice settings screen described in the beginning of this chapter.

If you wish to resend your entire monthly recurring invoices, you may easily do so by running the EINVOICE.EXE within the ALARMWIN directory from your Windows Run command. The processing file for the recent month eInvoices is stored until the following month process so you may resend eInvoices at any time. It is advisable that you perform this process on the machine that your Alarm for Windows database information resides. (i.e. your network server)

### **Possible Error Causes During eInvoicing**

If for any reason, your eInvoice happens to receive an error during processing, check for the following:

1. Make sure you have a valid Internet connection (try sending an e-mail from your email program)
2. Check the settings in the eInvoice Settings Tab (Utilities/Set System Defaults/eInvoice Settings). You must have a valid Sender Address, SMTP Port (defaults to 25), From Header Address, SMTP Server and an eInvoice template selected (the default is STANDARD.HTM).
3. Verify the e-mail addresses you are sending happen to be currently valid. Do a test email from your email program to one of the email addresses you are having a problem with to ensure its validity.
4. If you are still having a problem sending emails, try putting your email address in the 'From Header Name' field of the email settings tab in system defaults. Some email servers require the from name to also be the email address.
5. If your email provider requires authentication of outgoing email (you can check this within the settings area of your email client program), enter your correct Account Name and Password in the appropriate fields of the email settings tab.

Email addresses that are invalid during the sending of eInvoices will be returned to you via your email provider as 'undeliverable' mail within your inbox. You will want to contact those specific customers and have them update their email addresses in the recurring charge(s) section of that customer before processing new eInvoices. In these situations, you can simply forward a copy of the eInvoice from your inbox to the new email address, without the difficulty of completely having to rerun your recurring invoices.

## Default GL Codes Tab

This section determines the default general ledger codes to be used for credits

The screenshot shows a software window titled "Set System Defaults" with a tabbed interface. The "Default GL Codes" tab is active. It contains several input fields for GL codes and a "Taxable" checkbox. The "Late Charge GL Code" field contains "LateCharges". The "Prepaid Credit GL Code" and "Discount Credit GL Code" fields both contain "3000001". The "Services GL Code\*" field is empty. The "Taxable" checkbox is checked. Below the input fields is a note: "\*GL Code And Taxable Status For Services Added As Text Items On Product Invoices". At the bottom of the dialog, there is a "Date To Use When Credits Applied\*\*" dropdown menu set to "Date Received", and two explanatory notes: "\*\*For Date Applied, use Prepaid GL Credit Code Type as 'Other Current Liability'" and "\*\*For Date Received, use Prepaid Credit GL Credit Code Type as 'Income'". The dialog has "OK", "Cancel", and "GL Code Defaults Training Video" buttons at the bottom.

**Late Charge GL Code** If are tracking general ledger codes for financial transactions, enter the chart of account code used for late charges. Please consult with your accountant to determine the appropriate general ledger code to use.

**Write Off GL Code** If are tracking general ledger codes for financial transactions, enter the chart of account code used for write offs. Please consult with your accountant to determine the appropriate general ledger code to use.

**Prepaid Credit GL Code** If you will be tracking general ledger codes for financial transactions, enter the chart of account code used for prepaid credits (prepaid credits are basically payments that have been entered into the system before an invoice is created to post the payment against, such as Deposits). Please consult with your accountant to determine the appropriate general ledger code to use.

**Discount Credit GL Code** If are tracking general ledger codes for financial transactions, enter the chart of account code used for discounts. Please consult with your accountant to determine the appropriate general ledger code to use.

**Credit Date To Use** Depending upon your accounting methods, select which date is to be used when this credit is posted as a payment. DATE RECEIVED will use the current date as the payment date when the prepaid credit is applied (and therefore will show up on cash receipts report as income received today even though the actual payment was received as a credit at an earlier date). DATE APPLIED will use the date the original payment was applied as a credit, therefore the cash receipts report will only reflect this as a payment based upon the date it was originally received, not today's date.

## eService Settings Tab

*(Only Available with The Purchase Of the eService Module)*

*(Not Displayed Without Installation Of The eService Module Add-In)*

The eService optional module for Alarm/Service Express expands the emailing capabilities of the service tickets section of this software. While Alarm/Service Express comes with the ability to email a service ticket to the main technician assigned to the service job, eService extends that capability in the following ways:

- One button access (eTicket button on ticket screen) to automatically broadcast the service ticket to ALL technicians assigned to that service job (or just the main technician)
- Batch Email Broadcast option that allows the emailing of ALL service jobs assigned that day (or date range) to ALL technicians assigned to those jobs
- Rather than a PDF attachment of the ticket as the standard programs does, eService creates the service ticket as a standard text within the body of the email. This allows the service ticket to be emailed to all types of email devices (blackberry rim, laptops, palm pilots, pocketpc, etc.) that may not have the ability to read PDF attachments.

This section determines the settings for the eService add-on module if it is installed:

**Set System Defaults**

Report Settings | Central Station Notice | Equipment Installed | Support Log  
Customer | Service | Inventory/PO | Tickets | Invoices | Dealer Invoices  
Email Settings | Default GL Codes | **eService Settings**

Select Default Settings For eService Tickets  
Also Fill Out eInvoice Settings Tab For Email Attributes

Include Zone List  Include Equipment List   
Include Site Directions  Include Service Instructions   
Include Expanded Notes  Include Service History   
eService Recipient  First = Only Main Technician Assigned To Ticket  
All = All Technicians Assigned To Ticket  
Email Copy To Sender

eService Template  ...

Contact Z-Micro Technologies For Custom eService Templates For Your Company

[eService Defaults Training Video](#)

**Include Zone List**      Include the customer zone list within the email service ticket.

**Include Site Directions**      Include the customer site directions within the email service ticket.

- Include Expanded Notes** Include the expanded service ticket notes section within the email.
- Include Equipment List** Include the customer's equipment list within the email.
- Include Service Instructions** Include the customer's standing service instructions (that are entered on the main customer screen) within the email.
- Include Service History** Include the last 3 service job histories (date/tech/summary).
- eService Recipient** Select ALL for all technicians assigned to that service ticket to receive an email, or select FIRST to have only the first (main) technician assigned to each service ticket to receive the email.
- Email Copy To Sender** Send a copy of each service ticket emailed back to the sender's inbox as a copy.
- eService Template** Select the template (HTM file) that will be used to generate the email of the service tickets. Default is eservice.htm. An experienced web designer can modify this HTML template file if you wish to have a different look to the ticket email.



## Detail Report Default Tab

This section determines the default settings when printing a customer detail report.

The screenshot shows the 'Set System Defaults' dialog box with the 'Report Settings' tab selected. The 'Send Reports To' dropdown is set to 'Screen'. Under the 'Customer Detail Report' section, there are five dropdown menus: 'Print Passcodes', 'Print Alarm History', 'Print Definable Fields', 'Print Customer Notepad', and 'Print Notification List'. The 'OK' button is highlighted with a green checkmark, and the 'Cancel' button is highlighted with a red X. A 'Report Defaults Training Video' button is also visible.

- |                                |  |
|--------------------------------|--|
| <b>Print Passcodes</b>         | Include passcodes next to each contact on the notification list portion of the customer detail report. |
| <b>Print Alarm History</b>     | Select YES to include the event history log on the detail report                                       |
| <b>Print Definable Fields</b>  | Select YES to include the customer definable fields on the report                                      |
| <b>Print Notepad</b>           | Select YES to print the customer notepad section on the report   |
| <b>Print Notification List</b> | Select YES to print the contact (notification) list on the report                                      |

## Central Station Notice Defaults (ALARM Only)

This section determines the default settings for Central Stations Notices.

**Set System Defaults**

Customer | Service | Inventory/PD | Tickets | Invoices | Dealer Invoices  
Email Settings | Default GL Codes | eService Settings  
Report Settings | **Central Station Notice** | Equipment Installed | Support Log

Purpose Of Notice: UPDATE  
Print Passcode: YES  
Include Notification List: YES | Include Access User List: YES  
Use Letterhead Paper: NO  
Print Customer Copy: NO | Print Office Copy: NO  
Signature Required Line: YES  
Print or Email Report: EMAIL

OK Cancel Notice Defaults Training Video

### Purpose Of Notice

Select the purpose of the Central Station Notice:

*Disconnect*  
*Reconnect*  
*Update*  
*Memo*

### Print Passcodes

If you select YES the customers passcodes will be printed on the notice.

### Include Notification List

If you select YES the customers notification list will be printed on the notice.

### Use Letterhead Paper

If you select YES the your company name and address will not be printed on the Central Station Notice. Select NO if you want your company name and address to be printed.

### Print Customer Copy

Select YES to print a copy of the Central Station Notice for the

customer.

**Print Copy Office**

Select YES to print a copy of the Central Station Notice for the office.

**Signature Required Line**

Select YES to print signature line.

**Print Or Email Report**

Select the default setting to send out the central station notice report. If Email is selected, the email address on file within the Central Station Profile record will be used. This may be overwritten.

## Equipment Installed Default Tab

This section determines the field labels for fields found in the customer equipment list

The screenshot shows the 'Set System Defaults' dialog box with the 'Equipment Installed' tab selected. The dialog contains several tabs at the top: 'Email Settings', 'Default GL Codes', 'eService Settings', 'Customer', 'Service', 'Inventory/PO', 'Tickets', 'Invoices', 'Dealer Invoices', 'Report Settings', 'Central Station Notice', 'Equipment Installed', and 'Support Log'. The main area of the dialog contains six text input fields with the following labels: 'Equipment List Title', 'Date Installed Heading', 'Part Category Heading', 'Serial Number Heading', 'Location Heading', and 'Secondary ID Heading'. At the bottom of the dialog, there are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Equipment Defaults Training Video'.

- Equipment title** If left blank, the customer equipment list will be referred to as Equipment List. If you wish to change the title of this list (and its reference throughout the software), then enter a new title here. **DO NOT ENTER THE WORD LIST AFTER THE TITLE AS THIS IS REDUNDANT IN THE SYSTEM.** For example, if you wish to call this list 'Parts', then references to this area in the software will be as 'Parts List' instead of the standard 'Equipment List'.
- Date Installed** Leave blank to default label to Date Installed, otherwise enter new label.
- Part Category** Leave blank to default label to Part Category, otherwise enter a new label.
- Serial Number** Leave blank to default label to Serial Number, otherwise enter a new label.
- Location Heading** Leave blank to default label to Location, otherwise enter a new label.
- Secondary ID** This is a 'free' field that has no particular purpose other than as a definable field for your purposes.

## Support Log Default Tab

This section determines the default settings when entering a new support log entry

**Set System Defaults**

Email Settings | Default GL Codes | eService Settings  
Customer | Service | Inventory/PO | Tickets | Invoices | Dealer Invoices  
Report Settings | Central Station Notice | Equipment Installed | **Support Log**

Incoming/Outgoing: Incoming  
Call Priority: 2  
Call Disposition: Closed  
Call Status: Talked  
Use UserID For Tech Name Default: Yes

[\(For Password Protection Users Only\)](#)

OK Cancel Support Defaults Training Video

### Incoming/Outgoing

If most of your phone calls that are being logged in the support area are incoming calls, select Incoming as your default. Otherwise select Outgoing.

### Call Priority

Select a standard priority for most calls that are logged. Typically you would select 2 so that you may have room above and below this number to prioritize for special types of logged calls.

### Call Disposition

Select if most of your calls that are logged in the support area are closed upon completion, or are left open to be resolved by another person in your company. Open calls are automatically escalated and remain on the top of your support log list until closed out. Open calls

that are more than 1 day old are also color coded in RED to indicate the call has not yet been resolved.

**Call Status**

Select the standard type of status that you assign to a call entry. For example, your call status list may consist of:

**Talked - Busy - Faxed - Meeting - Collection - Left Msg**

If most of your calls are to be marked as 'Talked', then enter Talked in this field. Every time a new call is logged in the support area, it will be indicated automatically as Talked unless changed at that time.

**Use UserID**

With security turned on in the system, you may indicate in this area that you wish to have the User ID of this user tagged to the call being entered in the support log.

## Setup User-Definable Fields

This section allows you to create your own field labels for various sections throughout the system. This includes 20 user-definable fields in the customer area, 10 user-definable fields on the service ticket area (3 selectable as print/no-print), 5 user-definable fields in the zone list area, 5 user-definable fields in the Employee Profile area, and 5 user-definable fields in the Appointment Detail area.

**Set User-Definable Field Definitions**

Record will be Changed

This section will allow you to redefine the user-defined field definitions.

Customer User-Definable Fields | Ticket User-Definable Fields | Zones User-Definable Fields

User Define TAB Description

User Field Definition 1		Date Fields	
User Field Definition 2		User Field Definition 13	
User Field Definition 3		User Field Definition 14	
User Field Definition 4		User Field Definition 15	
User Field Definition 5		User Field Definition 16	
User Field Definition 6			
User Field Definition 7		Validated Fields	
User Field Definition 8		User Field Definition 17	
User Field Definition 9		User Field Definition 18	
User Field Definition 10		User Field Definition 19	
User Field Definition 11		User Field Definition 20	
User Field Definition 12			

**Note:** The User-Definable Fields will allow you to systematically enter any pertinent information that the software has left off of the Customer File Maintenance Screen. Use this section for any applicable resources that you would like to track or monitor for your customers.

Once you have entered a label into any of the definable fields, that label will now be displayed every time the screen that contains that user-defined field is displayed. You may also perform a search on any of the 20 user-definable fields found in the Customer Maintenance area (see Mail Merge Chapter for more information on this search capability).

## Tax Table

The tax table must be setup correctly before any transactions are recorded in the system. A different tax code should be created for each type of sales tax you will be charging. This is usually based upon municipality, however you may use any type of codeword necessary to track each sales tax rate. You may also create tax codes for 0.00 tax rate (exempt customers as an example) by simply entering a codeword such as Exempt.



It is **HIGHLY** recommended that you restrict all users from modifying and deleting the tax table. This restriction may be placed within the security administration area of the software. Once a tax code has been used for invoices, the code word should never be deleted or modifying (of course the tax rate may be changed at anytime).

The Tax Rate Screen consists of the following fields:

**County Name** Enter a code that represents this tax rate. The Code is usually the name of the municipality that charges this tax rate. The code will be placed on each customers account record to represent the default taxrate the customer will be charged.

**NOTE: Tax Codes should NEVER be changed or deleted once used.**

**Tax Rate** Enter the tax rate that is charged for this tax code. For example, if the tax rate in this municipality is 7%, enter 7.00 in this field. The tax rate may always be changed to reflect tax rate changes enforced by the taxing authority in this municipality.

**GL Code** Enter the appropriate GL Code that all sales tax amounts charged with this tax code will be posted to.

**Municipal Name** If you would like the sales tax report to breakdown the amount of sales tax charged/collected based upon each authority (ie: State/County/Local), then enter the different authorities that receive a percentage of the sales tax (up to 5 municipalities may be entered). This does not affect the tax charged to the customer. As an example, if the State receives 2% of the total 7% charged, then enter the State Name in the first field and then 2% in the Rate field to the right.



**Municipal Tax Rate** Enter the percentage of sales tax this authority receives. For example, if the total sales tax charged for the taxcode is 7.00% and the State receives 2.00% of that, then enter 2.00 in the field next to STATE municipal name.

## Employee Profiles

This section must be entered in order to track salesrep and technicians throughout the system. A salesrep and a technician is an employee that is indicated as such (see description below). You may keep on file all employees within your company. It is HIGHLY recommended that access to employment data be restricted to all unauthorized users by using the security administration area.

### Employee Profile - General Info Tab

The screenshot shows a dialog box titled "Employee Profile" with a close button (X) in the top right corner. Below the title bar, it says "Record will be Added". The dialog has five tabs: "General Info" (selected), "Employment Record", "Billing Rates", "Emergency Numbers", and "Comments". The "General Info" tab contains the following fields and controls:

- Employee ID: A text input field.
- Last Name: A text input field.
- First Name: A text input field.
- Position: A text input field with a lookup button (...).
- Street Address: A text input field.
- City: A text input field.
- State: A dropdown menu.
- Zip Code: A text input field.
- Home Telephone: A text input field.
- Pager Number: A text input field.
- Cellular Number: A text input field.
- Check Box To Display In Appropriate List:
  - Include On Technician Validation List
  - Include On Salesrep Validation List

At the bottom of the dialog are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Timecards" (with a clock icon).

**Employee ID** Enter the ID of this employee in this field. It is recommended that you use employee initials. The shorter the ID, the more likely it will appear in its entirety throughout the system.

**Last Name** Enter employee's last name.

**First Name** Enter employee's first name.

**Position** Select the employee's job position. Click on the lookup button ([...]) to choose from a list of valid positions.

- Address** Enter the street address, town, state and zip code for this employee.
- Telephone** Enter the home telephone number, as well as pager and cell phone number in the appropriate fields.
- Email Address** Enter up to two email addresses for this employee (If emailing service tickets, this is the email address that will be used).
- Technician List** Click on this checkbox to indicate this employee is a technician. Employees that are tagged as a technician will appear in the technician validation list where applicable throughout the system.
- SalesRep List** Click on this checkbox to indicate this employee is a salesrep. Employees that are tagged as a salesrep will appear in the salesrep validation list where applicable throughout the system.

## Employee Profile - Employment Record Tab

The following tab screens for the employee profile should be password protected

The screenshot shows a software window titled "Employee Profile" with a close button in the top right corner. Below the title bar, a status message reads "Record will be Changed". The window contains several tabs: "General Info", "Employment Record" (which is the active tab), "Billing Rates", "Emergency Numbers", and "Comments".

Under the "Employment Record" tab, the following fields are visible:

- Hire Date: 2/15/94
- Social Security: 873-23-9971
- Date Of Birth: 10/14/73
- Definable Fields section:
  - Work Hours: 8-4
  - Optional 2: (empty)
  - Optional 3: (empty)
  - Optional 4: (empty)
  - Optional 5: (empty)
- Termination Date: (empty)

At the bottom of the window, there are four buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), "Timecards" (with a clock icon), and "eService Email".

- Hire Date** Enter the date this employee was hired
- Social Security** Employee's social security number

**Date Of Birth** Employee's date of birth  
**Definable Fields** You may create up to 5 user-definable fields in order to track data pertaining to your employees. To setup these fields, click on the Setup Definable Fields button and then click on the Employee Definable Field tab to enter the field labels for each of these fields.

**Termination Date** Date employee was terminated from company

### Employee Profile - Billing Rates Tab

Employee Profile

Record will be Changed

General Info | Employment Record | **Billing Rates** | Emergency Numbers | Comments

Annual Salary  Commission Rate  %

Billable Rate Schedule

If employee's time is billable, select rate code that is to be charged to client, and hourly rate to be paid to employee for each rate code.

Standard	<input type="text"/>	...	Hourly Salary	<input type="text"/>
Overtime	<input type="text"/>	...	Hourly Salary	<input type="text"/>
Travel	<input type="text"/>	...	Hourly Salary	<input type="text"/>

OK Cancel Timecards eService Email

**Annual Salary** Annual salary paid to this employee

**Commission Rate** Commission percent to be paid to this employee based upon invoice sales. Basic commission calculations are based upon income (cash receipts report) or revenue (invoice history report). Salesreps being paid a commission are identified on the invoice.

**Standard Rate** If you charge service rates based on each technician (rather than based upon a customer service rate), then enter the standard rate code in this field. Click on the [...] lookup button to select from your rate code table.

**Hourly Salary** Enter the hourly rate you PAY this technician for standard hours.

**Overtime Rate** If you charge service rates based on each technician, then enter the overtime

rate code for this technician.

**Hourly Salary** Enter the hourly rate you PAY this technician for overtime hours

**Travel Rate** If you charge service rates based on each technician, then enter the travel rate code to charge customers for travel time (if applicable).

**Hourly Salary** Enter the hourly rate you PAY this technician (if any) for travel time.

## Employee Profile - Emergency Tab

The screenshot shows a window titled "Employee Profile" with a close button in the top right corner. Below the title bar, a status bar indicates "Record will be Changed". The window contains five tabs: "General Info", "Employment Record", "Billing Rates", "Emergency Numbers", and "Comments". The "Emergency Numbers" tab is currently selected. It contains six text input fields arranged in three pairs. The first pair is for the "First Emergency Contact", with fields for "Name", "Phone", and "Relationship Of First Emergency Contact". The second pair is for the "Second Emergency Contact", with fields for "Name", "Phone", and "Relationship Of Second Emergency Contact". At the bottom of the window, there are four buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), "Timecards" (with a watch icon), and "eService Email".

**Emergency Numbers** Use this tab screen to enter appropriate contact names of nearest relatives and phone numbers in case of an emergency for this employee.

**Comments** This section can be used to keep track of any comments pertaining to this employee.

## Invoice Categories

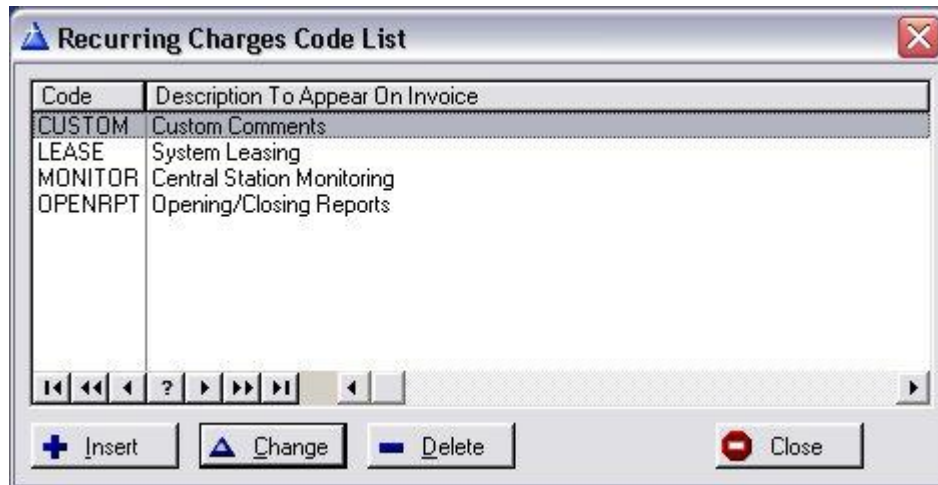
This section is used to identify the types of revenue that an invoice generates. Although the general ledger report tracks revenue on a line item basis for all financial transactions, the invoice category code tracks revenue and/or receipts on an invoice basis. Therefore an invoice category of CCTV for example can be used in the cash receipts report and invoice history report to determine all invoices that have an invoice category of CCTV. Other examples of invoice categories may include Access (for access control), Service, Repair, Telephone, etc.



**Price Level** For each invoice category, if you have multi-level pricing turned on for inventory, select the default price level to use with this invoice category.

## Recurring Charges Table

This section is used to setup the types of recurring charges to be billed to your customers.



Click INSERT to add a new Recurring Charge Code

- Recurring Charge Code** Enter a code that will identify this particular recurring charge. Examples may include Central (for central station monitoring), Lease (for leases), Open (for open/close reports), Payment (for time payments), Beeper (for beeper service), etc.
- Recurring Charge Description** Enter the description of this recurring charge as it will appear on the customer invoice. For example, Central code may have a description of 'Central Station Monitoring', which is how the invoice will print the description of this recurring charge.
- Print Billing Period** Select the YES button to have the software print the time period of the charge below the charge description (for example: For Period January 1, 1999 To January 31, 1999). Select NO if you do not wish to have a billing period printed below the charge description (you may want to select NO for special occasions such as custom comments, reminders of upcoming services, etc.).
- GL Code** Identify the general ledger code that is to be assigned to this recurring charge.
- Default Cycle** For this particular recurring code, enter the typical billing cycle that this charge is billed for. This will be the default cycle when a new recurring charge is entered for a customer.  
  
M=Monthly, B=BiMonthly, Q=Quarterly, S=Semi-Annual, A=Annual.
- Default Monthly** Enter the typical monthly charge for this recurring code. This will be the default charge when a new recurring charge is entered for a customer.
- Default Cost** If this recurring charge code has a cost associated with it, enter the monthly cost in this field. This will be the default cost for this recurring code when a recurring charge is entered for a customer.

**Taxable** Enter the default tax status for this recurring charge code.

## **Main Menu Structure**

The Main Menu is the first screen you will see upon entering the software. Through this menu, you will be able to access every feature available within the system. The Main Menu will also be the last menu that you will see upon exiting from the system. The Main Menu will be displayed on top as follows:

Highlight the menu item desired, then press the ENTER key or double-click with the mouse. (It will be assumed for the rest of this manual that the ENTER key (also known as the RETURN key) will be pressed for any menu or report selection).

- File** Drops down a menu containing the same functions as available with the buttons within the taskbar area (customers, tickets, invoices, payments, appointments, inventory, help log). In addition, printer setup and EXIT can be selected from this list.  
*Keyboard shortcut - ALT + F*
- Edit** Copy and Paste fields to and from the Windows clipboard. Copy customer name, address, phone number, account number, and contact name to the clipboard by selecting Copy Customer To Clipboard menu item.  
*Keyboard shortcut - ALT + E*
- Reports** Lists all reports available in program (management and financial reports listed separately).  
*Keyboard shortcut - ALT + R*
- Inquiry/Mail Merge** Create letters and postcards for mailing. Print Mail Merge area for selecting groups of customers to receive letters or postcards. Also used as a customer INQUIRY area for in-house reporting and telemarketing.  
*Keyboard shortcut - ALT + M*
- Rolodex** Accesses rolodex contact list. Contains names, addresses and phone numbers of various types of contacts (vendors, associates, contacts, friends, technicians, employees, etc.).  
*Keyboard shortcut - ALT + X*
- Utilities** Miscellaneous items such as Company Header (program setup options), user-definable field definitions, import/export utilities, rate increase adjustment, security administration.  
*Keyboard shortcut - ALT + U*
- Inventory** Select various inventory related functions from this menu including main inventory list, purchase orders, transfer inventory, receive inventory, physical stock count worksheets, etc.
- KnowledgeBase** Accesses the KnowledgeBase Log area. Used for storing common technical questions asked by your customers and the responses to those questions.

<b>Window</b>	Select arrangement of open windows. Select active window from list of windows. Select About Program for current version information about program. <i>Keyboard shortcut - ALT + W</i>
<b>Help</b>	On-line help system. <i>Keyboard shortcut - ALT + H</i>

The following items are available on the taskbar:

<b>Customers</b>	Accesses the Customer Maintenance area (add/modify/delete customer records) <i>Keyboard shortcut - F2 Key</i>
<b>Tickets</b>	Accesses the Service Ticket area (work orders) <i>Keyboard shortcut - F3 Key</i>
<b>Invoices</b>	Accesses the Invoice Generation area to create new invoices: <i>Product Invoices - used for billing out service work and installations</i> <i>Recurring Invoices - generates monthly billing</i>
<b>Statements</b>	Generates past due notices (also included in Recurring Invoices) <i>Keyboard shortcut - F4 Key</i>
<b>Payments</b>	Accesses the Post Payments and Post Credits areas. <i>Keyboard shortcut - F5 Key</i>
<b>Appointment</b>	Accesses the Service Appointment Calendar (Monthly view of service appointments) <i>Keyboard shortcut - F6 Key</i>
<b>Inventory</b>	Accesses the Inventory Maintenance area including receiving inventory and stock transfer. <i>Keyboard shortcut - F7 Key</i>
<b>Support Log</b>	Accesses the Support Log area which tracks all customer calls and conversations, including detailed information on topics discussed, support problem and resolutions, etc. <i>Keyboard Shortcut – F8 Key</i>

Each of the above areas are covered in detail in their appropriate chapter in this documentation.



## How To Use This Software

There are certain operational features that are found consistently throughout the software (as well as common among all windows-based applications). If you are already familiar with windows, you should be well accustomed to these features as they follow the standards used by windows. Most screens throughout this program will utilize some of these features:

### Exiting Out Of The System

To exit, select the FILE selection on the top menu, then choose EXIT found on the bottom of the File menu. This will close all active windows and ask if you wish to save any un-saved changes in those active windows.

You may also double-click on the upper left-hand box found on the window to exit (this is a standard function found in windows-based programs). If you are using Windows 95/98/NT/XP, you may select the X found in the upper-right hand corner of the window to perform the same function.

### Moving From Field To Field

In windows-based applications, the CUA-compliant method of entering information into a field is based upon using the TAB key to go from one field to the next, and the SHIFT-TAB key to go backwards from one field to the previous field. The ENTER key is used only to select the appropriate action button (OK, Cancel, Print, etc), NOT to go from field to field as is common with DOS programs.

The TAB key is used to sequence the cursor from one field to the next, as well as to highlight all tasks and buttons found on the screen.

### Keyboard Shortcuts

Although using a mouse is highly recommended in most windows-based program such as ALARM, you can use the keyboard to navigate through the program. Almost all buttons throughout ALARM have a hotkey that can be pressed to perform that function (just as if you had clicked on the button with the mouse). Buttons that have hotkeys are identified with an underscore displayed directly under a letter on the button. Usually it is the first letter (for example: Print) By pressing the ALT key and the hotkey together, that button will be activated. In the example above, you would press ALT + P to select the Print button.

*Note: Some buttons will not have a hotkey - notably the Cancel button. This is a windows suggested specification so that cancellations are not done by mistake by pressing a hotkey. If you need to select one of these buttons and do not have a mouse, you may do so by pressing the TAB key until that button is highlighted, then press Enter.*

### OK/Cancel Buttons

Clicking on the OK button (or highlighting the button with the tab key and pressing ENTER) will save the information entered. Clicking on the Cancel button will exit the screen without saving.

### Insert/Change/Delete Buttons

Found mainly on lists of information (not on data-entry forms), clicking on one of these buttons will perform the appropriate action. Normally a data-entry screen will appear when the insert or change

buttons are selected. Pressing the delete button will ask for confirmation of the delete. You may also change a record displayed on a list by double-clicking on that record or highlighting the record and pressing Enter.

### **Lookup Buttons**

These buttons can be found next to a number of fields throughout the program and are identified by a box with 3 periods inside [...]. They are selected by single-clicking on them with the mouse. The purpose of the lookup button is to list the valid entries for that field. You may add your own entries to these lists by pressing the INSERT button found on the validation list, as well as modify or delete entries on the list by pressing the CHANGE or DELETE buttons - also found on the validation list. Pressing the SELECT button from the validation list or simply highlighting the correct response and pressing the ENTER key will place that value in the appropriate field. This provides you with a very accurate means to control the data that goes into these fields.

### **Scroll Bars**

Moving the cursor to the up-arrow or down-arrow on the right-hand scroll bar will scroll the list in the appropriate direction. Lists that have a horizontal scroll bar on the bottom will also scroll left or right when their arrow keys are pressed. Clicking the mouse on the scroll square button and sliding it along the scroll bar will readjust the position of the list once the mouse button is released. This is especially evident with the horizontal scroll bar, however the vertical scroll bar is better adjusted by clicking on the up or down arrow keys found in the scroll bar region.

Lists with horizontal bars represents that additional information is available for viewing to the right of the current columns displayed. Pressing on the right arrow key of the horizontal scroll list will display this information.

### **Resizing Columns In Lists**

Most major lists of information (customer, inventory, equipment installed, etc) have resizable columns. This allows you to widen or narrow the width of a column so that other columns may appear that would normally be out of range of the displayable list (to the right). Resizable columns are usually found on lists that also have a horizontal scroll bar found on the bottom of the list.

To resize a column, move the cursor to the line immediately to the right of the column to be resized, or on the bottom, click on the mouse button and move the cursor to change the size.

### **Sort Tabs**

Sort tabs are found on several lists throughout ALARM and provide great flexibility in looking up information in that list. A sort tab can be found on the top region of these lists, with a description of the sort sequence described on the tab. By pressing one of these tabs with the mouse, the sort sequence of that list will immediately change. In addition, most of these lists have a Search field which automatically changes value based upon the sort tab selected. For example, if you are displaying an Inventory List by Part ID, the search field will allow you to search the inventory list by part id. If you then select the sort tab to display the inventory list by Vendor Name, the search field will now allow you to search the inventory list for a specific vendor (actually the list will then display starting with that vendor). You will see that the sort tabs are invaluable in being able to look up information quickly and easily.

## Clipboard Copy & Paste

Any field of information can be copied to the clipboard. This allows you to take any information and copy it to any other part of the program or to any other Windows-based application. Simply move the cursor to the beginning of the field to be copied, then hold down the left mouse button while moving the cursor to the end of that field. This will highlight the contents of that field. Then select EDIT and then COPY from the top menu. The contents of the field are now stored in the Windows clipboard. To paste this information into another field, move the cursor to the location where the information is to be pasted (copied to), then select EDIT and then PASTE.

This program also contains a feature in the EDIT menu called Copy Customer To Clipboard. This is a very useful feature that will allow you to copy a customer's name, address, phone number, account number, and contact name directly to the clipboard without having to copy each field individually. You may then go into any application (for example a word processor) and paste the clipboard into that application. This is perfect for word processing mail-merge situations where you want to place a customer's name and address into a document or envelope for addressing. Once you have pasted the clipboard to the appropriate document, you may simply remove the account number and phone number if you do not require it for the document.

## Active Window Selection

Since the program uses multi-threading techniques to allow several areas of the program to be opened at one time, you can easily select which window to bring to the front by choosing the Window menu, then selecting among the list of active windows. You will notice that customer, ticket, and invoice lists will display the name of the customer associated with that window. This makes it easier to have multiple invoices and/or tickets on the screen for different customers and easily differentiate between them.

It is generally a good idea not to keep too many screens open at one time since it does use windows resources (which are limited by windows). If you find you have too many screens open and wish to close all of them, it is best just to exit out of the program by choosing FILE and then EXIT. This will then close all of the active windows (and it will ask you if you wish to save changes if any were made within those windows), then exit you out.

## Repositioning Screens

You can move any screen displayed (assuming there is room to move it around) by clicking on the top frame of that window and moving the screen while holding down the left mouse button. Release the button when the screen is in its new position. The screen position will remain in that position until moved again.

## VCR Control Buttons

Most lists found throughout the program have VCR controls on the bottom of each list. These controls look like VCR play, rewind, fast forward, fast rewind buttons. They allow you to navigate quickly through the list by quickly going to the top (fast rewind), bottom (fast forward), one line up (rewind), or one line down (play) on each list. These same functions can be performed with the keyboard or the up and down arrows found on the right side of each list, but many people find VCR controls more intuitive. You may use any of the above mentioned controls to scroll through each list.

## Log-In / Log-Out

If you are using the password protection feature, you will be asked to enter a USERID and PASSWORD in order to get into the program. The PASSWORD field will not display the information being entered, asterisks will be displayed instead. This is to prevent someone from seeing your login password.

Passwords are case-sensitive and therefore must be entered in the same upper-case or lower-case sequence as is stored in the Security Administration area of the program. For example, the password ALARM is in all upper-case characters and therefore must be entered as such.

When you exit the software by clicking on File/Exit you are automatically logged out. If you wish to keep the software open but require another user to log in before continuing, you may log out by clicking on File/Log Out. The software will remain active on the screen, but no user may enter without first logging in at the User ID and Password prompt screen.

## Font Control On Forms and Lists

You can select an overall font for the software (on the main forms and lists, not menus) by clicking on Edit / Change Font. A window of all of the fonts installed on your current workstation will be displayed. You may select the font typeface, font size, attribute, and color from this font selection window.

The default font size is 8 point. If you select a font with a larger font size (or a font that displays larger than the default font) then you will want to resize the forms and lists as they initially come up after selecting the new font, by clicking on the right-side and bottom of the window to increase it's size.

At anytime you wish to revert back to the standard font that the software uses, go to the c:\windows folder on that workstation and delete a file called afweeanyfont.ini

## Chat Window

The software comes with a basic chat function that allows multiple users of the software to communicate with each other as long as they are on the same local network. Each user must have the chat window open in order to send and receive text messages with each other.

To open the chat window, click on File / Chat. You will see a list of all local network users of this software that also have their window open. Click on the right-side list of the user you wish to communicate with and then type your message in the 'Text To Send' field and click on Send when finished. Your messages, and replies, will appear in the Conversation section.

## Toolbox Sidebar

For easy navigation to menu items often used by the user, a 'toolbox' can be created of these common items. By holding down the shift key and then clicking on the requested menu item, that menu item will be placed in the toolbox. The toolbox can be moved around the screen, and turned on or off in Window/Display Toolbox. To remove an item, right-click on the item and select delete.

## Entering Your First Customer - A Tutorial

The tutorial is placed before the chapters describing the various program components for those who would like to dive into the program without reading the full documentation in the beginning. The tutorial will walk you through the creation of a customer, as well as show you how to set up the account for recurring billing. You will find that once you have entered a customer for the first time, you will become familiar with actions used consistently throughout the software. We also have available a series of Training CD's for the software that consist of approximately 10 hours of training. For more information please call us or visit our website at [www.z-microtech.com](http://www.z-microtech.com)

### 1) Setting Up The Default System Settings

You can set system defaults that will be used throughout the program and help aid in filling in certain fields that may almost always contain the same value. This section is accessed by selecting Utilities Menu, then Set System Defaults. Fill out all pertinent information in this area (detailed explanation of this section is found earlier in this documentation). At least for now, fill in the Customer Tab information that asks for default State, County, etc. and save the default screen.

### 2) Selecting Customer From The Task Bar

To access the customer area, move the cursor to the **CUSTOMER** button on the top of the screen and press the left mouse button to select the button. Alternatively, you may select the **CUSTOMER** section by clicking on the **FILE** menu selection on the top of the screen (or press **ALT-F** to highlight the File menu), then scroll down to the Customer item on the list and press enter. The **CUSTOMER** button may also be selected by pressing the **F2** key.

Once the **CUSTOMER** task button has been selected, a list of customers will appear. This list may be blank if this is the first time you are using the **ALARM For Windows** program, but the remainder of the screen is the same as if there were customers listed.

### 3) Adding A Customer From The Customer List

From the customer list, you may add, modify, or delete customers with the click of the mouse. To add a new customer, click on the **INSERT** button. You may also just press the **INSERT** key found on your keyboard, or press the keys **ALT** and **I** together.

A customer data-entry form will now be displayed on the screen.

### 4) Entering Information For The New Customer

A few specific fields displayed on this screen must be entered (mandatory) while most other fields may be left blank if you do not need them. If a field is mandatory you will not be able to continue to the next field or save the screen until information has been entered into that field.

**Customer File Maintenance - ABC Corporation** Record will be Changed

**General** | NotePad | Contracts/Rates | User Defined | Site Directions | Service Instructions | Email / Misc

Account	1001	Central Acct#	11-343235	<input checked="" type="checkbox"/> Monitored
Customer	ABC Corporation			
First Name				
Address	150 Main Street			
Address2				
City,State,Zip	Mesa	AZ	85201	
TaxCode,MapLC	Phoenix	...	NW-5	
Cross St.	Central Avenue And Camelback			
Contact1	Larry Thomson	Title	President	Premise
Contact2	Mary Simpson	Title	Treasurer	Alt Phone
Active Since	7/01/03	<input type="checkbox"/> Closed	Salesrep	Fax
Restrictions				

Other Bill-To:  NO  YES  REVIEW  
 Late Fee:  YES  NO  
 Account Status: Client Type: RES  
 Central Sta.: Rapid Response  
 Equipment: ADEMCO  
 Password: Ski  
 Fire Prnt: AB-342221-AC

Map  
Directions

OK Cancel

Recurring Charges Invoice History Credit History Service Reminders Service History Support Notes Contact List Document Images Equipment List Mailings Zone List Alarm Log

The first field displayed on the screen is the customer account number. The cursor will be located on this field. To enter information into the customer account screen, perform these steps:

*Enter a unique account number (all numbers or letters and numbers)  
Press TAB when done.*

*Enter a customers last name if a residential account, or a company name if a commercial account. Press TAB when done.*

*Enter a customers first name if a residential account, or leave blank if a commercial account. Press TAB when done.*

*Enter a street address then press TAB when done.  
Leave the second street address field blank. This is normally for APT # or SUITE #.  
Press TAB when done.*

*Enter the customers town, state and zip and press TAB after each field.  
The county field is a validated field. This means that the information you enter must already exist on a validation table otherwise you will be asked to choose another selection or add that information to the validation list.*

*Enter the word EXEMPT and press TAB. Since the word EXEMPT does not appear in your County validation table, the table will pop-up. We want to add the word EXEMPT to this table, so press the INSERT key (or click on the INSERT button with the mouse). Type in the word EXEMPT and press ENTER to save this entry. The validation list will now display EXEMPT as a valid selection. Press the ENTER key again to select EXEMPT from the list and the word EXEMPT will now appear in the*

county field.

*To show you another way to bring up the validation list, use the mouse to click on the [...] button found just to the right of the county field. This will also bring up the validation list. Press the TAB key to bypass the MAPID and CROSS ST. fields (we will not be using them for this demonstration).*

*If this account is a residential account, you may leave this field blank. If this is a commercial account, you can enter the full name of the main contact you deal with at this account. Press TAB when done.*

*Press TAB to bypass the TITLE field. Enter a phone number in the TELEPHONE field and press TAB when done.*

*Continue to press the TAB key until you get to the top right corner of the customer account screen (OTHER BILL-TO). Here you will find a field that has a radio button. You may choose NO, YES or REVIEW by using the mouse and clicking on the appropriate button. A bullet will appear in the chosen radio button. You may also use the right and left arrow keys to highlight the appropriate button and then press the Space Bar to select that button.*

Press the TAB button to bypass the remaining fields on the screen. When the OK button has become selected (highlighted) stop pressing the TAB key. If you went too far, press the SHIFT-TAB keys together to revert to the previous field (OR click on the OK button when finished).

## **Entering Recurring Charges Information For This Account**

At this point, we could click on the OK button to save the customer record (or press ALT & O), or simply press the ENTER key since the OK button is the default button that enter will activate. However, before we save this customer lets put some recurring charges information in so that this account will be all setup for billing:

- 1) Click on the Recurring Charges Symbol on the bottom left of the customer screen, then click on INSERT to add a new recurring charge.
- 2) Click on the [...] button for Code field. This will display the recurring charges description list. You may edit this list, but for now select CEN with the mouse and double-click on it. If this master list is empty, you may click on INSERT and add a new master recurring charge (this is described in detail in the Setup Wizard section)
- 3) Click on the down-arrow for Cycle and choose the letter M (for Monthly).
- 4) Press the TAB key to go to the Next Billing Date field. Enter the first date of the NEXT month from todays' date (ie: If today is 11/20/04, enter 12/01/04 since that is the first date of the next month) and press the TAB key when done.
- 5) Enter the amount 20.00 and press the TAB key when done.
- 6) Select Y for the taxable field by moving the mouse to the Y radio button and clicking on the mouse button. Press the TAB key when done.
- 7) Press the TAB key passed the Stop Date field.
- 8) Enter 7.00 in the Cycle Cost field.

- 9) Click on the Billing Method field and select PRINTER

We can now save this information by clicking on the OK button on the Recurring Charges screen.

Click on OK on the main customer screen to save the entire customer. You are returned back to the Customer Maintenance List.

You have now entered your first customer and assigned recurring charge information to that account. You can of course go back in to that account at any time in the future and enter additional information by simply clicking on the appropriate button picture on the bottom of the customer screen. Please refer to the appropriate chapter in this documentation for detailed descriptions.

All concepts of adding and modifying information throughout the software are consistent with the way you just entered a customer. Although the information being entered will vary from screen to screen, the concepts remain the same.

## Where Do You Go From Here

The best way to learn a program is to sit down with some real customer account information and start entering it in just as you did in the tutorial. This is a good time for you to experiment and try out the various buttons found on the screens. The taskbar located near the top of the program screen contain the major functions used throughout the program, and are displayed in the general order in which they are used. For example, a customer must be entered in the CUSTOMER section before anything else can be done for that customer (invoicing, tickets, payments, etc). A SERVICE TICKET is then normally the first action taken for a customer, with an INVOICE to be created after the service job is done, Once the invoice is created, a PAYMENT will be received and posted in the Payments section. Remember that any section of the program may be selected by simply moving the cursor to that button and pressing on the left mouse button.

Z-Micro Technologies offers a number of additional training programs to assist in your learning of Alarm/Service Express, including:

- Training CD Series consisting of 10 hours of video training, selected by chapters, covering all features of the software. This is an extremely beneficial tool for your entire staff since it aids not only in learning the software initially, but as a reference tool for users of all levels and experience.
- WebSeminars for your entire staff. The webseminars are live internet seminars that are conducted on a one-to-one basis between your company and one of our trainers. The WebSeminars consist of 8 hours of live training, separated into four 2-hour segments for more effective training. We work with you to schedule a convenient time for each segment.
- Regional Seminars are conducted usually twice a year in various areas of the county. Please Call for schedules and further information.
- Onsite Training is available to those companies that have many employees to be trained and prefer this customized training program. Consists of two days of training.

Please call us for information on pricing and availability of these additional training programs.



## Chapter 3: Customer Maintenance

### Customer Maintenance

Account#	Name	Telephone	Town	Street Ad
1001	ABC Corporation	602-555-1232	Mesa	150 Main
1001-A	ABC Subdivision A	913-225-9323	Willbrook	1021 Johr
1001-B	Monticello Subdivision	714-003-2343	Dallas	923 Venic
500	Outlook Test Customer	602-445-2343	Outlook	43234 Du
1002	Walker, Jim & Susan	602-598-2343	Anthem	35092 E C

**Customer List Tabs** The customer list screen supports a number of searchable fields, as indicated by the tab controls on the top of the list:

**Customer Name** Enter the first few letters of the customer name to start an immediate search of customers beginning with those letters. List is sorted alphabetically by customer name.

**Account Number** Click on the Account Number tab to sort the customer list by account number. Enter the entire account number or just the beginning numbers/letters and press TAB to find customers beginning with that account number.

**Street Address** Click on the street address tab to sort the customer list by street address. Enter the beginning part of the street address (ex: 150 Main) and press TAB to find customers whose street address begins with those letters. This is a FAST search which will find customers immediately.

**NOTE:** Only use the ADDRESS button on the upper right corner of the screen if you street address requires a search for letters that appear in the MIDDLE of the address (for example: if you are searching for all customers with the word MAIN in the middle of the street address then you should use the ADDRESS button, but this search may take several minutes to complete).

**Contact Name** Click on the contact name tab to sort the customer list by contact name (first contact name on record for each customer). Enter partial or full name and press TAB to search for customers beginning with

that name. Since contact names are usually entered with first name first, last name last – the search will usually be based upon first names.

- Type** Click on the type tab to sort the customer list in order of the type of account they are (residential, commercial, other).
- Status** Click on the status tab to sort the customer list in order of the status of the account (client, dealer, dead, prospect, other). Select a status from the drop down selection list and press TAB to find all customers with that particular status.
- Zip Code** Click on the zip code tab to sort the customer list in order of customer zip code (postal codes for Canadian users). Enter the zip code and press TAB to search for customers beginning with that zip code.
- Town** Click on the town tab to sort the customer list in alphabetical order of the towns. Enter a partial or full town name and press TAB to search for customers beginning with that town name.
- Central Acct/Ref#** Click on this tab to sort or search by central acct#/reference#
- Monitored** This tab displays ONLY customer accounts that have the indicator of 'Monitored' checked on the main customer screen. This is a user-definable field, so the label Monitored may be changed on the customer account to another indicator important to you in your industry so that you can view JUST that list of customers.

### Search Option Buttons

To find a customer based upon a specific lookup value, click on one of the appropriate Search Options Buttons. In the case of a lookup where more than one customer may have the same value (ie: Telephone Area Code lookup) a list of matching customers will be displayed at which point you may click on the correct customer to bring up their account.

The Customer Maintenance function consists of general information pertaining to your customers. Information such as first and last name, address, telephone number, business contact names and titles, installation and cancellation dates, among others, are contained on the main screen. In addition, the following information may be viewed for every customer:



### RECURRING CHARGES

A customer can be billed for an unlimited number of recurring charges, each charge billed on separate billing cycles or together. Each recurring charge can also be identified with a 'stop' date for payment plans. The recurring charge screen offers several billing options that may be set, including normal invoicing (Print), automatic billing by Visa, MasterCard or American Express, or

checking and savings account debiting. You may also turn off billing so invoices are generated internally but not printed or billed out to the customer in any form. EInvoice will send your recurring billing via email to your customers. We also integrate with Checkfaxx software, allowing you to print your customers checks directly on your laser printer, bypassing waiting for the checks to be mailed to you by your customers. With Checkfaxx, you deposit customers checks on the same day you perform recurring billing. Call us for more information on Checkfaxx.

### **INVOICE HISTORY**

You may display a customer's entire account history (all invoices and payments) by pressing the Invoice History button from within the customer screen. A window will appear, allowing you to review the history of all invoices generated (service, product and recurring invoices) as well as all payments received, including the age of each payment. You may also create invoices from here.

### **CREDIT HISTORY**

To review a specific customer's credit history, click on the Credit History button from that customer's main screen. If any credits have been posted to this account, a list of all previously posted credits will appear. Highlight the specific credit you wish to review and press ENTER. The original credit screen will then appear.

### **SERVICE REMINDERS**

Allows you to set up a schedule of reminders that pertain to this customer. Reminders can be one-time or recurring, such as annual service contracts, annual inspections, battery replacements, etc. All reminders get posted to the service appointment calendar and can be used within the mail merge section.

### **SERVICE HISTORY**

You may review the entire history of any particular customers' service history by selecting the SERVICE HISTORY button from the customer main screen. This list will display the dates of all scheduled appointments (any previously performed services, appointments, reminders, as well as all future scheduled appointments and services). You may scroll through this list by pressing the up and down arrow keys, pressing the page up or page down keys, or clicking on the scroll bar buttons. A number of search options are also available in this area.

### **SUPPORT NOTES**

Maintain a history of conversations or other communications between you and your customer. Each conversation record contains the date of communication, type of communication (visit, call, collect, etc), notes of the conversation and much more. This log can be printed in the support log report, as well as the aging report (suitable for printing 'collection' notations made on an account.)

### **CONTACT LIST**

Unlimited listing of parties to be contacted in case of an Alarm (ALARM version) or a master list of contacts at that site (Service Express edition). List can consist of names, companies, police, fire, medical, etc. Each name contains two phone numbers (day/evening), extension, passcode, and a comment line for additional notes.

### **DOCUMENT IMAGES**

Maintains a list of 'documents' that may be viewed from within the customers account. Documents that may be viewed include DOS text files of any type, and graphic images stored in the popular PCX or GIF file formats, and any registered windows document such as Microsoft Word, Excel spreadsheet, PDF Documents, HTML web pages, etc. The graphic images may be scanned into your computer with a scanner and it's software, or downloaded from websites, or created within any software package that creates graphic images. You have the ability to list an unlimited number of documents per customer.

## **MAILINGS**

Maintain a history of correspondences that were generated from within the program (central station notices, post cards and letters from Mail Merge section). This log is updated automatically however you may manually enter your own entries for correspondences sent out from other programs.

## **EQUIPMENT LIST**

A detailed listing of all equipment installed at the customers' site. Each listing contains the part description, part cost, amount charged to customer, warranty period, location of part, serial number (optional) and amount charged to customer on service contract to cover this part. Total value of equipment installed is displayed on the bottom of this list. The equipment list may also be printed on service tickets.

**THE DESCRIPTION OF THIS LIST AND THE FIELDS WITHIN THIS LIST MAY BE USER-DEFINED IN THE UTILITIES/SET SYSTEM DEFAULTS/EQUIPMENT LIST AREA.**

## **ZONE LIST**

In Alarm, an unlimited listing of zones set up at the customers' site. Each zone record consists of the zone id, zone description, alarm and restore codes and 5 user-definable fields.

In Service Express, this list is completely user-definable to store any type of list information required your customers.

## **ALARM LOG (ALARM Only)**

An unlimited listing of alarm calls originating from the subscriber. Each alarm call can be marked with the date and time of alarm, alarm code sent, operator responding, false alarm indicator and comments.

If you are using a 'dealer access' package from your central station, it may be possible to upload the incident file that you receive into this Alarm Call History Log (Import/Export Transfers menu within System Utilities). Please give us a call to see if your incident file is compatible with our transfer program.

## Selecting a Customer

Once you have selected Customer Maintenance from the main menu, a screen will appear listing all customers that are currently in the database. These customers will appear in alphabetical order. If there are more customers to display than will fit on the screen at one time, you may scroll the table up or down by clicking on the up or down arrow on the scroll bar until you find the customer you are looking for (you may also stretch the width and height of the customer list to show more customer records if your screen resolution allows more room). Once you have highlighted the appropriate customer, double-click on the appropriate customer or click on the CHANGE button found on the bottom of the list.

In addition to using the mouse, the following keys may be used to scroll the Customer List:

Up Arrow	Scrolls up one customer at a time
Down Arrow	Scrolls down one customer at a time
Page Up	Scrolls up one page (13 customers) at a time
Page Down	Scrolls down one page (13 customers) at a time
Home	Scrolls to the first customer
End	Scrolls to the last customer

In addition to selecting a customer by using the above keys, you may quickly select a customer by typing the customers' full or partial name above the list. As you type each letter, the first customer to match the combination of letters entered will be highlighted. Keep entering each letter of the customer name until the correct customer is selected. Press the ENTER key to retrieve that customers' profile.

## SEARCH OPTIONS

In Addition to the sort/select tabs that were described earlier in this chapter, there are a number of additional search capabilities built into the customer list to help easily and quickly identify a customer or group of customers:

**Telephone:** Selecting the Telephone button will find a particular customer by ALL phone numbers listed. (You may enter a full phone number, just an area code, or just an area code and exchange)

**Account#:** Selecting the Account# button will find a customer by their account number.

**C/S#:** Selecting the Central Acct#/Reference# button will find a customer by the central station account number or reference number.

**Address:** Selecting the Address button will find a customer by a full or partial street address. (You may enter either street address line 1 or street address line 2 for a street search)

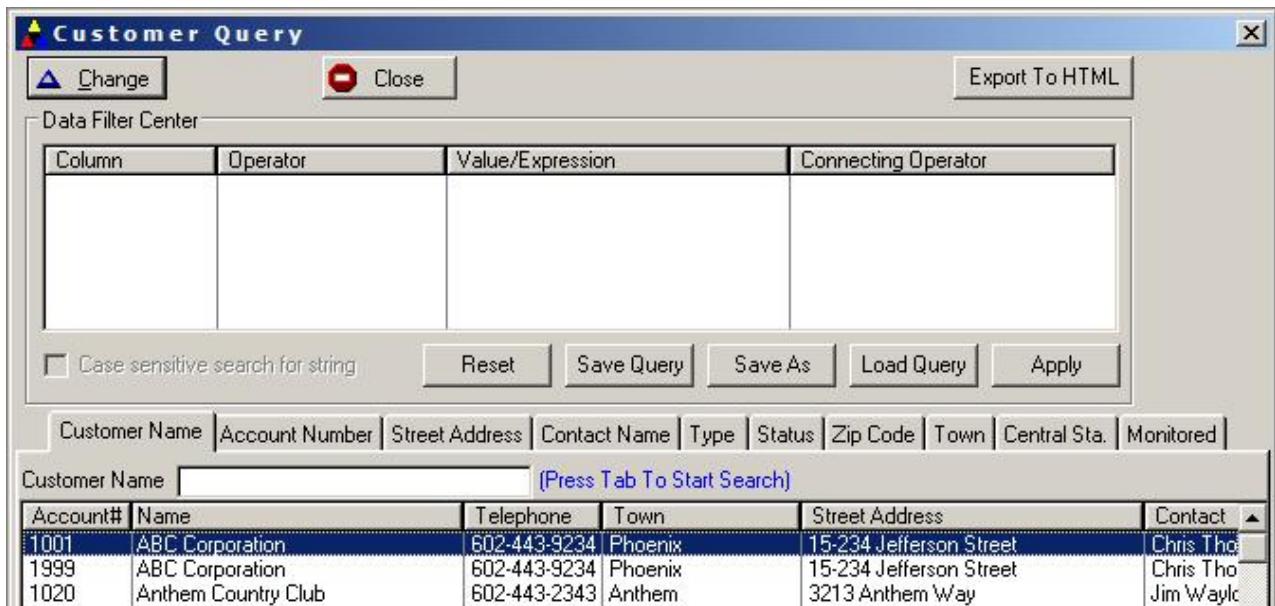
**Invoice#:** Select the Invoice# button to find a customer by specific invoice number

**Ticket#:** Select the Ticket# button to find a customer by a specific ticket number

**Check#:** Select the Check# button to find a customer or list of customers that have paid with a specific check number.

**PO#:** Select the PO# button to find a customer or list of customers that provided a purchase order number to you for their purchase.

- Email Addr:** Select Email Addr button to find a customer by an email address listed on file
- Contact Name** Select Contact Name button to find a customer based upon the full contact name entered here. All contact fields including the contact list will be searched for a matching contact name.
- Other Acct's** Since you can track an unlimited number of account numbers within each customer account, any account other than the primary account number may be searched by clicking on this button.
- Linked Accounts** Select this button to display a list of all 'subaccounts' that are linked (by their recurring charge 'Post To Account' linkage) to the master account number entered when this button is clicked.
- Query:** The Query button brings up a very powerful search engine that allows you find customers based upon numerous fields, using Boolean operators to mix and match conditions. If you can't find a customer through the normal search methods described above, click on the Query button to activate the Query screen.

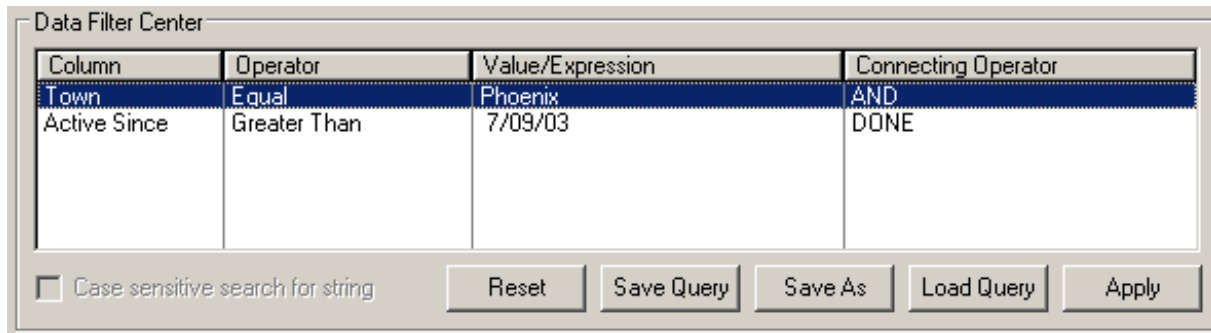


The columns along the list of customer records can be used to determine which group of customers to search for. These columns can be scrolled to the right to display all additional fields on this list.

To use the Query, find the first column you wish to search by (ie: Town), and using the mouse click and drag a record from that column up to the 'Column' field on the Data Filter Center section on top. You can either retain that value, or double-click on it in the Data Filter Center to change the value (ie: Los Angeles instead of Phoenix). By default, this will complete the requirements for the query and you just need to click on the APPLY button in order for the list of customers in the lower-half to display JUST those customers in that particular town.

The power of the query comes into play when you work with the Operators and Connecting Operator columns found in the Data Filter Center on top. Double-click on the Operator column for example brings up a list of valid operators including Greater Than, Less Than, Equal, Contains,

Begins With, Ends With, Not Equal, Null (empty), Not Null, etc. By also clicking on the Connecting Operator column, you can add additional filter lines for other columns you wish to include within the search – using And, Nor, Or, etc. The following screen provides an example of such a search:



This example above will search for all customers whose Town is equal to Phoenix AND whose Active Since date (date they were entered into the database) is Greater Than 7/9/03. You may save these queries you create for future use by clicking on the Save As button and providing a name to save this query under. Then at anytime in the future, click on Load Query to select from a list of saved queries.

To reset your Query customer list back to the beginning, click on the Reset button.

To review a customer from this query list, highlight the customer and double-click. You may also create a new customer account right from this Query list, just like you can from the main list.

### Adding Customers

If you wish to ADD a new customer to the file, press the INS key. A Customer Profile data entry screen will be displayed. After you have finished entering the data for that customer, click on OK to save that customer and return back to the Customer List. If you do not wish to save the information you have just entered, click on Cancel to abort the save and return you back to the Customer List.

If you wish to DELETE a customer on the list, highlight the appropriate customer and press the DEL key or press on the DELETE button. The Customer Profile screen will be displayed for review. Click on the OK button and then select YES to confirm the deletion, or click on the CANCEL button to abort the deletion process. You will then be returned to the Customer List.

***NOTE: Deleting a customer DOES NOT delete the associated customer invoice and service histories, or the related customer information such as equipment list, zone list, etc. Deleting a customer record in this manner deletes the main customer account screen information, plus the recurring charge information only. If you put the customer account back in using the same account number, all related records that have remained on file will automatically 'relink' to that same account number.***

## Adding a Customer Record

In order to add a new customer to the system, press the INS key from the Customer List screen. A customer profile data entry screen will be displayed with the cursor placed on the Customer Account number field.

### Customer File Maintenance - General Tab

#### ACCOUNT #

Enter a unique account number. You can use the monitoring service account number, if available, or designate your own account numbering system. The account number is vital to all related information for each customer. Account numbers may be changed to another number if a customer becomes inactive and that account is assigned to a new customer. Just enter the new number in the account number field. A screen will pop-up asking you if you are sure you want to change this number. If you say yes, then the customer record will be modified along with all related records (invoices, zones, contacts, equipment, appointment schedules, etc.). A display of the current file being converted will be displayed during this process.

**Auto Numbering Method:** You may have accounts automatically numbered for you by going to Utilities/Set System Defaults/Customer Tab and select YES to Activate Account Auto Numbering. Starts at 100,000 non-sequential. (15 characters maximum)

#### C/S ACCT#

(ALARM Users) If this customer has monitoring service, enter the account #



that the monitoring company has assigned to them (can be the same number that you had entered on the top of the screen for account #, or may be different). You may look up an account by this number by pressing the F5 key from the Customer List screen.

(Service Express User). This field is an additional 'reference number' field that you may use to enter a secondary account number.

<b>COMPANY ID</b>	<b>FOR MULTICOM OPTIONAL MODULE ONLY – SOLD SEPARATELY</b> For users of the Multicom plug-in for this software, enter the Company ID code that represents the company/branch/division of your business that this account is associated with. Entering a Company ID allows the software with the Multicom module installed, to track all customer and financial records by specific company id (for company, branch or divisional reporting).
<b>MONITORED</b>	Check the box for this account to have the Monitored indicator active. Accounts with this indicator turned on can be viewed on the main customer list by clicking on the Monitored tab. All other accounts would not be viewed on that customer list. This is a definable field for use within any industry.
<b>CUSTOMER</b>	Enter the customers' last name (if commercial account, enter the company name in this field. (35 characters maximum)
<b>FIRST NAME</b>	Enter the Customer's first name (If a company, leave this field blank). (20 characters maximum)
<b>ADDRESS 1</b>	Enter the first line street address for this customer. (35 characters maximum)
<b>ADDRESS 2</b>	Enter the second line street address, if any. This line would contain any additional information that is required by the Post Office (second floor, Suite 1500, etc.) (35 characters maximum)
<b>TOWN</b>	Enter the customer's city (25 characters maximum)
<b>STATE</b>	Enter the customer's State code (NY, CA, etc.) (2 characters maximum)
<b>ZIP</b>	Enter the customer's zip code (9 digit code allowed). (10 characters maximum including dash)
<b>COUNTY/TAX</b>	Enter the county that the customer resides in. The county field is used to determine what tax rate to charge on invoices. If the county is entered incorrectly, a validation table containing a list of valid counties will appear in a pop-up window. Select the correct response or press INS to add a new county to the validation list. When creating the tax table entry, you will need to enter the sales tax chargeable to the customer, as well as any municipal tax rate breakdowns that you would like calculated for the sales tax report. You have up to 5 municipal tax rates. (maximum 10 characters)

<b>MAP ID</b>	You may identify each customer by a geographic 'location' code. This code can be any of your own design, however many service companies use a local map grid (hangstroms', etc.) and use the page number to identify the location of the customer. Used for service routing.
<b>CROSS STREET</b>	Enter the nearest cross street to customers location.
<b>CONTACT 1&amp;2</b>	Enter the name of the person(s) or department at this company. (maximum 25 characters)
<b>TITLE 1&amp;2</b>	Enter the title of the above contacts (optional).
<b>TELE #1&amp;2</b>	Enter the telephone number of the contacts above. Dashes are entered for you automatically. You may change the label of the phone fields from the System Defaults section (Customer tab screen).
<b>FAX NUMBER</b>	Customer's fax phone number. The label of this phone field may be changed from the System Defaults section (Customer tab screen)
<b>ACTIVE SINCE</b>	Enter the date this customer was first serviced.
<b>CLOSED</b>	If you wish to identify a customer as being inactive, enter a closed date. If a date is in this field, new invoices will not be generated after the closed date (it is recommended you also clear out any NEXT BILLING date fields found on that customers' recurring charges screen. Closed accounts will not print on any customer reports, however they will still be listed on the main customer list screen.
<b>RESTRICTIONS</b>	If there are any special conditions you wish to place on this account for others to see, enter the restriction here (example: COD ONLY). This field is not validated. Any information entered in this field will appear in the customer reminder pop-up that can be activated in Utilities/Set Customer Reminder, as well as appear on the service ticket screen and ticket printout for technicians.
<b>OTHER BILL-TO</b>	You may respond Yes or No only. This field should be used if you wish any invoices that are printed for this account to be mailed to another address than the one already on file. As an example, you have a customer who owns a summer home and wants any invoices for charges against the summer home to be mailed to his main residence. For these types of situations, enter Y in this field. This will pop-up a Bill-To Name and Address screen where you may enter the name and address that should appear in the mailing address area of an invoice. In addition, you may select on the bottom of this screen whether the alarm-site (the current accounts address) should also print on the invoice (alarm site addresses will print on the right hand side of invoices so the customer knows what alarm site he is being billed for).  If you do not need a different bill-to address for this account, then select No for this field.
<b>LATE FEE</b>	If this customer is to be charged a late fee for overdue payments, specify Y, otherwise select N.

**ACCOUNT STATUS** Select the type of account (Client, Prospect, Dealer, Dead, Other).

**PROPERTY** Select whether this is a RESidential, or COMMercial property. If you have situations that do not fall into either of these two categories, you may select the OTHER selection (OTHR). Using the cursor keys, highlight the correct response and press ENTER. The RES, COMM or OTHR value will be placed automatically into this field.

The following fields that appear on the main customer screen are user-definable. You may define these fields to any description you would like in the System Utilities area. The following fields are initially preset but can be changed if necessary:

**CENTRAL STA.** Enter the company name of the Central Monitoring Station being used. This field is validated against the central station name and address file. If a central station name is entered in this field, it must exist on that file otherwise the central station file will pop-up. If the central station you are entering in this field is not currently on file, press the INS key from the list and add the central station name and address 'on-the-fly'.

**EQUIPMENT** Enter the type of alarm panel installed. Since you can use the detailed equipment list to identify each part installed at this site, you may decide not to use this field.

**PASSWORD** The customers' password may be entered in this field.

**FIRE PRMT** If the customer has a fire permit number, enter it here.

**Map Button** Clicking on the Map button will bring up Googlemaps within your default internet browser, displaying the map location of this customer. You may then use all of the Googlemaps screen functions including satellite view, traffic view, street view (if available), etc.

**Directions Button** Clicking on the Directions button will bring up Googlemaps within your default internet browser, displaying a map and directions from your office location to your customer location. Your office location is determined by the address entered in your company header screen.

All user-definable fields can be used to search for customers in the Mail Merge section. Please refer later in this chapter for information on all user-definable fields available within a customer account.

To save this customer record, click on the OK button or press CTRL-ENTER. If you wish to cancel this record without saving , click on Cancel button or press CTRL-ESC.

## Customer File Maintenance - Contacts/Rates Tab

Customer File Maintenance - ABC Corporation Record will be Changed

General **NotePad** **Contracts/Rates** User Defined Site Directions Service Instructions Email / Misc

Contracts

Contract Type	Contract Category	Starts	Expires	Value	Print On Ticket
Service	Annual	2/11/03	2/11/04	300.00	Yes
Medical	Two Year	11/15/03	11/15/04	0.00	Yes
Monitor	Annual	1/14/04	1/14/05	300.00	Yes

Current  ■  
 Expires in 30  ■  
 Expired  ■

Service Rate Profile

Standard Rate:  ...

Overtime Rate:  ...

Travel Rate:  ...

Discount Rate:  % Net Terms:  Days

Default Dealer Invoice Options

Account For Billing Address:

Post Recurring To Account:

Identity On Dealer Invoice:

Always Use Dealer Address:

This section allows you to keep track of an unlimited number of contracts for each customer. These contracts are used throughout the software, including within the service ticket area, daily reminders (when contracts expire), Contract Analysis report, as well as for customer selection criteria within the Mail Merge section. Click on INSERT next to this contract list to add a new contract to the list. Click on Change to modify an existing contract, or delete to remove a contract.

### CONTRACT TYPE

If you offer several types of service contracts under different plan names (gold, platinum, labor, parts, etc) then enter the name of the contract plan in this field (user-definable validated list). This plan name will appear on the service ticket screen and also on the service ticket printout.

### CONTRACT CATEGORY

Assign a category to the contract (validated field).  
Example: Annual

### STARTING DATE

Enter the starting period for this contract.

### EXPIRES




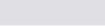
Enter the date that this service contract expires. For service contracts, this date will also be posted to the appointment calendar so that you may get a printout of which service contracts expire within any given time period. The contract expires date is also used when creating a service ticket. The current status of a customers service contract will be displayed and printed on the service ticket so that the technician

will know if a customer is covered by a valid service contract.

**CONTRACT FACE VALUE** If this service contract has a face value over the term of the contract, then enter that value in this field. For example, a monitoring contract that a customer is responsible for has a term of 5 years at \$20 per month, the face value would be \$20 \* 60 months = \$1200. This field is used by the Contract analysis report to show you how much value is left on a contract as of a certain date, which is helpful for determining your future revenue projections.

**PRINT ON TICKET** You may select up to three contracts from this list that are to be printed on service tickets and be displayed on the service ticket screen

An LED may appear above the Contract Tab depending upon the following conditions:

 Contracts/Rates	Green LED will appear if ALL contracts that are entered in this screen are current.
 Contracts/Rates	Yellow LED will appear if at least one contract is going to expire in the next 30 days.
 Contracts/Rates	Red LED will appear if any of the contracts entered in this screen are expired.
 Contracts/Rates	No LED will appear if there are not any contracts entered into this screen.

**Standard Rate** If you will be billing your customers for service performed based upon a service rate for that customer (as opposed to a service rate based upon the technician performing the work), then enter the standard rate code in this field, or click on the [...] lookup button to choose from a list of your valid service rate codes.

**Overtime Rate** To bill service jobs for overtime based upon a customer service overtime rate, enter the overtime rate code in this field.

**Travel Rate** To bill travel time on service jobs based upon a customer travel rate, enter the travel rate code in this field.

**Discount Rate** If you wish to offer this customer a discount on invoices, enter the percent of the discount (Example: 10 = 10% discount). Using this feature, every line item of an invoice will have this discount applied unless overridden at the time of invoicing.

**Net Terms** If you wish this customer to have a different net terms than the standard system net terms (system net terms found in the Company Header area in Utilities), then enter the net terms in days in this field.

**Default Dealer  
Invoice Options**

**DO NOT USE – SETUP BY PROGRAM AUTOMATICALLY**

## **Customer File Maintenance - NotePad Tab**

### *Keyboard Shortcut: ALT + N*

You may enter notes or comments about a customer (directions to site, special comments, etc), by clicking on the Notepad tab on the top of the customer main screen. A notepad window will pop-up. The notepad will scroll to allow many lines of information to be entered (the total number of lines that can be entered is based upon the total number of characters typed in this notepad section.).

The scroll bars may be used to scroll through the notepad section if more information is on file than can be displayed at one time. A Green LED will appear above the NotePad tab if there is any information currently entered into this section.

## **Customer File Maintenance - User Defined Tab**

You may define up to 20 fields to be used for any purpose you require. Out of the 20 definable fields available, 12 are available for free-form text entry, 4 are date-specific fields (which may be searched by date range within the Customer Inquiry/Mail Merge area), and 4 fields are 'validated' fields which allow the user to set a range of values that must be used in those fields.

All of the 20 definable fields are available for searching within the Customer Inquiry/Mail Merge area.

To define some or all of these fields, click on the 'Set Definable Fields' button on this tab screen. You may also define these fields from within the Utilities/Set User Definable Fields menu selection.

All definable fields may be printed on the Customer Detail Report.

A Green LED will appear above the User Defined Tab if ANY fields are used in this section.

## **Customer File Maintenance - Site Directions Tab**

This tab allows entry of specific site directions that can be specified to print or not print on this customer's service tickets.

## **Customer File Maintenance - Service Instructions Tab**

This tab allows entry of specific service instructions that pertain to this customer only. These instructions may print on service ticket.

## **Email / Misc Tab**

This tab contains email addresses for this customer, as well as their website address if they are a commercial account.

In addition, this tab supports the entry of unlimited account numbers to be assigned to this account. Each account number may be entered up to 15 alpha-numeric characters in length, and have an account category code and description also associated with it.

Customer File Maintenance - ABC Corporation Record will be Changed

[General](#) | [NotePad](#) | [Contracts/Rates](#) | [User Defined](#) | [Site Directions](#) | [Service Instructions](#) | [Email / Misc](#)

Primary Email Address:   Last Modified: 11/10/08  
 Second Email Address:    
 Web URL Address:    
 Bank Check Name:  \*For Chekfaxx

Additional Account Number References

Account Number	Account Category	Comments
23498098	Panel 2	second panel installation
490-11324	Radio Backup	Cell Backup System

Click on the Insert button in the Additional Account Number References section to start entering an additional account number. After entering the number, tab to the Account Category field and click on the [...] button to select a category from your valid account category codes (if a code you want to use is not yet entered into this list, click on Insert and add the category at this time).

The account category code can be used in the Inquiry/Mail Merge section to find customer records that have that account category code associated with their account (you may also search for the additional account number and account number range in the Inquiry/Mail Merge section as well).

Then enter Comments to describe the purpose of this additional account number for your reference.

The account numbers in this section are not unique, therefore you may have more than one customer with the same additional account number (even if they are for different categories and purposes).



## **Inquire / Edit a Customer Record**

Once a customer has been added to the Customer file, you may need to edit information such as address, service type or so on. You may also just review information about a customer.

To view or edit a customer, highlight the customer on the Customer List and press ENTER or enter the name of the customer and press ENTER. You may also search for a customer by telephone number, account #, or exact/partial street address by clicking on the appropriate button on the customer list.

Once a customer has been selected, the Customer Profile screen will be displayed in the same format as described in the previous section (ADD A CUSTOMER RECORD). To change any field press the TAB key until the cursor is placed on that field (or use the mouse to click on the field to be changed) and type in any changes. When you are finished viewing or changing the information, click on OK to save the changes and return to the customer selection list. If you wish to cancel any changes, click on CANCEL to return to the customer list without saving changes.

## **Deleting / Closing a Customer**

It is NOT recommended that you physically delete a customer from the system. If you delete a customer, all related records (records accessed from the bottom buttons of a customer screen) are still retained by the software as a precaution against an errant deletion by a user. If you re-enter that customer account using the same account number, all of those additional records will automatically relink to the account.

The best way to identify a customer as canceled is to enter a date in the Acct Closed field of the main customer screen. By entering a date in this field, this customer will cease to receive any new invoices. Inactive customers will not print on customer reports, and appear red on main list.

If you need to physically delete a customer from the system, you must first delete all related information under the Additional Information Menu (zone lists, call lists, equipment list, etc.) as well as all invoices (Invoice History button) by going into each list and pressing DEL on each item, then ENTER. Once you have done that, you may then delete the customer by selecting the customer you wish to delete from the Customer List. Once the customer is highlighted, press the DEL key. A confirmation screen will appear asking you if you are sure you want to delete this customer. If you do, then enter 'YES' and click on OK to delete. If you do not wish to delete this customer at this time, type 'NO' and click on OK.

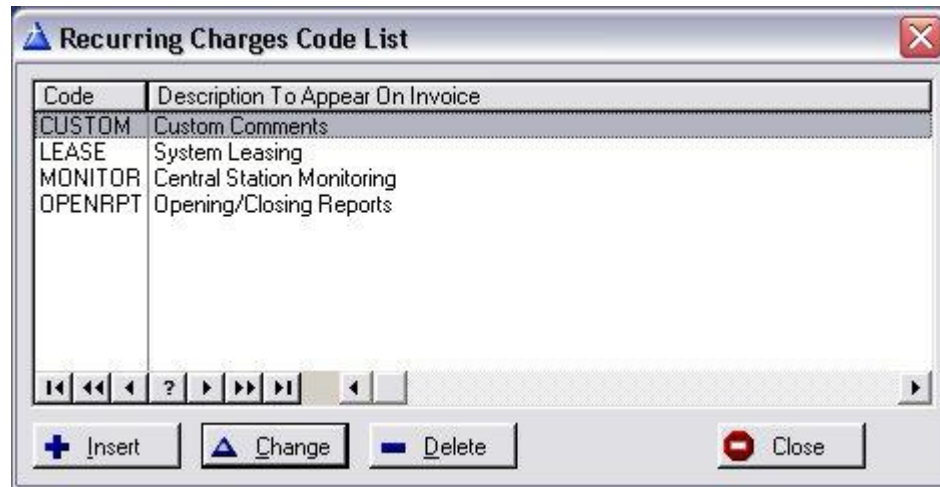
There is also an Archive utility that ships with this software. If you wish to remove inactive customers after a period of inactivity (ie: 1 to 2 years), using the Archive utility will remove those inactive customers AND their financial and historical records off the main database and copy them to an archive database that can be viewed for archival purposes. See Archive later in this documentation for details.

## **Changing Customer Account Numbers**

Again, it is recommended not to delete a customer but rather mark them as being closed. If you need to reuse the account number from this closed account to a new account, simply change the account number on the closed account to a different number (Ex: add an I at the end of the number to represent inactive). Once you have changed the account number, a screen will appear confirming the change. Select 'YES' to continue and all related information about this customer will be converted to the new account number.

## Recurring Charges Screen

*Keyboard Shortcut: ALT + F3*



One of the most important areas to setup for each customer is the recurring charges data. It is in this area that ALARM knows when, what, and how much to bill each customer for their recurring charges.

To bring up a customers' recurring charges information, click on the Recurring Charges button from within the customer main screen. A recurring charges screen will pop-up.

The recurring charges section allows you to identify up to 6 different recurring charges that are being billed to that customer. Each recurring charge may be billed on its' own billing cycle, or combined onto the same billing cycle with other recurring charges. In addition, you may place a 'stop' date on any recurring charge so that the system will no longer bill the customer for that charge after the stop date. This is especially helpful when setting up payment plans.

Click the INSERT button to add a new Recurring Charge to the customers account.

## Recurring Charge Profile

**Recurring Charge Profile**

Record will be Added

**Recurring Charge**

Code [ ] ...

Bill Cycle [ ]

Next Date [ ]

Bill Amt [ 0.00 ]

Taxable [ Y ]

Stop Date [ ]

Cycle Cost [ 0.00 ]

**Billing Options**

Pro Rate First Time [ N ]

Mail To Account Number [ ] ...

Post Charges To Above [ ]

Identity On Dealer Invoice [ ]

Next Increase Due On [ ]

Billing Method [ Printer ]

Description Override (Usually Left Blank)

[ ]

OK Cancel

The recurring charges screen consists of the following fields for each charge:

### CODE

Enter a code that represents a description of the charge being billed for. This field is linked to the Service Descriptions file. Click on the [...] button to pop-up the service description file. You may then select a code already on file or press the INS key to enter your own code and description (you may also choose to have the billing period print on the invoice by selecting YES to the 'Print Billing Period Line' - this is the default selection. The description that is entered on the service description file for this code is the description that will print out on the recurring invoice. You may enter as many descriptions as you require in the service description file, as long as each description contains a unique code. If you blank this field, all related fields for this charge will be erased automatically.

Another use for this field is if you wish to have a 'custom' message printed just on this customers' recurring bills (not an actual charge item, just a message). You may make up a unique service code that has a description of the custom message and place the code in this field. Then set up the remaining part of this charge line for recurring billing, however leave the Amount field = 0.00.

### BILLING CYCLE

Enter the billing cycle for this charge. M=Monthly, B=Bi-Monthly, Q=Quarterly, S=Semiannually, A=Annually, No=None. This field will determine how frequently this customer will receive a bill for this charge. If the customer does not receive any recurring charges at all, then this field can be left blank (make sure the Code field above is also left blank). Selecting the down-arrow button will pop-up a list of valid cycles to choose from.

**NEXT BILL** Enter the starting date of the next billing period for this charge. For example, if this charge is being billed quarterly for the period January 1, 2002 until March 30, 2002, then enter 01/01/02 in this field. Although you may actually generate the invoices in December (or any other month), this is the starting date of when the charge is being billed to the customer. The end date of the billing period will be calculated and printed automatically on the invoice.

This date only has to be entered once upon setting up the customers' record. Once it is entered, the system will automatically update this date to the next billing date every time a recurring invoice is generated for this charge.

**BILL AMT** Enter the amount that is being charged to the customer for this recurring item based upon the billing cycle. For example, if a customer is being charged \$20 a month for this recurring charge and is being billed quarterly, then enter \$60 in the bill amt field. As you will see, the monthly amount is then calculated and displayed under the \$MONTH field. Do not include sales tax with this bill amount since that sales tax will be calculated automatically at the time of billing (if sales tax is being charged).

**TAXABLE** Select Y if this charge is taxable. Select N if it is non-taxable. The actual sales tax rate will be calculated upon time of invoicing. The tax rate is determined by the tax rate associated with this customer (The COUNTY field on the main customer screen relates to the correct tax rate for this customer).

**STOP DATE** Each recurring charge may be setup with a stop date. If a date is entered, then this recurring charge will no longer be billed to the customer after that date. This can be used for payment plans being offered to the customer, or if the customer is moving in a few months and you want to make sure you don't bill them after they move (in this situation, you may also enter a date in the CLOSED field on the main customer screen. That will have the effect of discontinuing ALL recurring billing). The stop date should be a date that is within the same date of the last charge. For example, a payment plan of \$300 per month for 10 months, starting January and ending with October's payment. The stop date should be sometime within October.

**COST** If you want to track the profitability of your recurring charges, then enter the amount that is costs you to offer this service (based upon the billing cycle selected. For example, if you bill quarterly and your cost is \$18 per quarter, then enter 18.00 in this field). If a cost is entered in this field, the monthly revenue breakdown report will calculate your profit on recurring charges.

If a recurring charge is set up on the same billing cycle and billing dates as another charge, then those charges will appear together on a recurring invoice. If multiple recurring charges are each set up on different billing cycles or different billing dates, then they will be billed individually (unless they happen to occasionally fall on the same cycle, in which case they will appear on the same bill).

**Salesrep ID** If a salesrep is to identified with this recurring charge, then enter the Salesrep ID here. Each time a recurring invoice is created for this recurring charge, the Salesrep ID will be embedded on the invoice for tracking on the invoice history and cash receipts report.

**POST TO ACCT#** Invoices for this account may be posted to another account (known as dealer or multi-account invoicing). This field should be used when this account should not be billed directly, but rather any recurring charges for this account should be billed (posted) to another account, known as the DEALER account (If you just want the invoices for this account to be mailed to another address, then use the 'OTHER BILL-TO' field described above). Dealer accounts can be billed for as many other accounts as you wish by simply entering the Dealer account number in this field for all accounts the dealer is being billed for.

The account number entered into this field must already exist on the customer file. Once you have entered the account number in this field, a verification screen will appear showing the name and address of the bill-to account. If you wish to post this customers recurring invoice charges to the dealer account (multi-account invoicing) then select 'YES' when asked if you want to POST only to the billing account. If you wish only to have this customer's invoice mailed to the billing address then select 'NO' to the above questions. In addition, you will be asked if you want the alarm site to print on the customer invoice. If you say 'yes' then when an invoice is generated the billing address will appear on the invoice, and the name and address of this account will appear in the 'ship to' area of the invoice with the description 'JOB SITE:' for clarification. You also have the option not to include the JOB SITE on the invoice by answering 'NO' to the print alarm site question.

**PRO-RATE BILL** If you are entering a new customer, you may wish the ALARM program to automatically pro-rate his first recurring invoice to include charges from the date of installation until the starting date of his first billing cycle. For example, you perform an installation on September 21 but will not be sending him his first recurring bill until the October billing period. By selecting 'YES' in this field, the October bill will include not only the normal charges for the month of October, but an additional charge will print for the monitoring charges between September 21 and October 1 (the pro-rate period). Selecting 'NO' in this field will prevent pro-rate billing. Once the first invoice has been printed, this field will automatically reset to 'NO' and should be left alone at this point. Prorating not supported for Dealer Billing.

**RATE INCREASE** Enter the date that this customer will be due for a rate increase. The system will automatically notify you when the next increase date has passed when posting a payment. You may also run a customer report to show the dates when customers will be due for a rate increase. This date may also be used in the Automatic Rate Increase section (System Utilities) to determine who receives an increase.

**BILLING METHOD** You may choose from a wide variety of billing methods for each customers' recurring charges. The program supports the following billing methods:

Print Invoice (this is the normal method)  
Visa/MasterCard/American Express Credit Card  
Checking/Savings Account Automatic Debit  
No Printing (Invoices will be generated internally but not printed).  
Email invoices

If you wish to use credit card or electronic funds transfer (checking/savings account debit), you can use ICVerify software for credit card processing ([www.icverify.com](http://www.icverify.com)), or for EFT transactions on

checking and savings accounts you can sign up with Electronic Funds Inc.. Please give us a call for further information on the ICVerify and Electronic Funds Inc. application requirements.

Depending upon the billing method selected, you may enter the credit card number and expiration date, checking/savings account number, email address or no further information may be required.

## Customer Invoice History

### *Keyboard Shortcut: ALT + F3*

You may display the customers' entire account history (invoices and payments) by pressing the Invoice History button from within the main customer screen. A window will pop-up allowing you to review a complete history of all invoices generated (service, product and recurring invoices) as well as all payments received, including the age of each payment.

The account history list displays the invoice number, invoice date, invoice amount, date and amount of payment, late charges, write-offs and current open balance. Totals are displayed on the bottom of the list. The current open balance is displayed in the lower right corner.

If you wish to view a particular invoice in more detail, highlight the invoice and click on the SELECT button. A screen will pop-up displaying the invoice in its entirety. If you are authorized to do so, you may change information about the invoice (except the invoice number) and reprint the invoice by clicking on the PRINT button. To save any changes to the invoice, click on OK otherwise click on CANCEL.

## Review/Modify Credit History

### *Keyboard Shortcut: ALT + F4*

To review a customer's credit history, click on the Credit History button from within the main customer screen. If there have been any credits posted to this customer's account, then a list of all previously posted credits will appear. Highlight a credit you wish to review and press ENTER. The original credit screen will appear.

You may modify any portion of the credit screen if necessary. If the original credit amount is changed, the available credit field will automatically reflect the change in this credit.

An audit trail of how this credit has been applied may be selected by clicking on the Credit Activity button from the Credit Posting screen. A list showing which invoices this credit has been applied to will be displayed. You may delete an applied credit from this list, and the available credit field will be adjusted automatically.

**NOTE:** *If an invoice is deleted that previously had a credit applied to it, then the credit history will be deleted for that invoice as well and the Available Credit amount will be adjusted automatically.*

## Service Reminders

*Keyboard Shortcut: ALT + F6*

**Service Reminder**  
Record will be Added  
Reminder Number 2

Reminder | Notes

Starting Date 8/03/2004  
Schedule Time HH:MM  
Service Code Inspection  
Description Quarterly Inspection  
Service Fee 95.00  
Repeat Cycle Quarterly  
Repeat Until 8/03/2007  
Technician JWA  
Create Ticket YES

OK Cancel

An integral part of this program is the ability to notate service reminders (annual inspections, fire inspections, battery replacements, service contract renewal periods, etc.) for every customer. When a service reminder is entered in this section, it is automatically posted to the service appointment calendar for the day it is scheduled to be performed. You may also use the Mail Merge section of the program to print up postcards or letters that are to be sent to any customers that are due for a particular type of service, email reminders, or to send out notices explaining the benefits of having that type of service performed.

The service reminder section allows you to keep an unlimited number of service reminders per customer. To go into this section, select 'SERVICE REMINDERS' button from the customer main screen.

To add a new service reminder to the reminder list, press the INS key. If you wish to delete a reminder from the list, press the DEL key to confirm the deletion and then press ENTER (deleting a service reminder will also automatically remove any appointments that have been posted to the appointment calendar as a result of this reminder). To review or modify an existing service reminder, highlight the reminder and press ENTER.

The service reminder data entry screen consists of the following fields:

**START DATE** Enter the date that this service reminder is to start.

**SCHEDULE DATE** Enter the date that this service reminder is to be scheduled for. This reminder will be posted to the appointment calendar starting with this date.



<b>SCHEDULE TIME</b>	If you wish to include a time the service should be performed, enter the time (and select AM or PM), otherwise you may leave this field blank.
<b>SERVICE CODE</b>	<p>Enter a service code that categorizes the type of service reminder being entered. An example of service codes include FIRE, INSPECT, BATTERY, etc. You may make up your own service codes (press the [...] button to bring up the service code list). The service code field is validated and therefore a service code must be on the service code validation file before it can be entered in this field. If the code is not already on file, the service code validation file will pop-up allowing you to select from the current list of codes, or press INS to add a new code to the validation file.</p> <p>By entering a service code in this field, it is possible to print a list of service appointments by service type. In addition, the mail merge section allows you to print postcards or letters to a group of customers that are having the same type of service being performed, or notices that a particular type of service can be performed. It is therefore important that a service code be entered if you wish to use those sections of the program.</p>
<b>DESCRIPTION</b>	Enter a brief description of the type of service that this reminder is for. Allows for a more detailed explanation than the service code field above.
<b>SERVICE FEE</b>	If this service has a specific fee associated with it, enter in this field. This fee will then be carried over to the appointment calendar as a reference for the service manager.
<b>REPEAT CYCLE</b>	Enter the frequency of this service reminder by clicking on the down-arrow button or pressing the down arrow key.. 1=One time, D=Daily, W=Weekly, B=Bi-Weekly (every 2 weeks), M=Monthly, T=Two Months, Q=Quarterly, S=Semiannually, A=annually, A2=Every 2 years, A3=Every 3 years, A4=Every 4 years. For example, if this reminder is an annual inspection reminder, enter A in this field. In order for this service reminder to be posted to the appointment calendar on a recurring basis, you MUST enter a Repeat Until date as specified in the next field.
<b>REPEAT UNTIL</b>	If the repeat cycle field above is a recurring reminder (any cycle other than 1), you should enter a date in this field (the date need to be entered with the full year notation (1995, 1996 etc). When a service reminder is posted to the appointment calendar, it will automatically be posted for each occurrence of that reminder up to the date specified in this field. If you do not know how far into the future this service should be performed, then just enter a date perhaps 5 years or so into the future. You can always update this date when the time comes.
<b>TECHNICIAN</b>	If you wish to assign a technician now to perform this service when it becomes scheduled, enter the name of the technician in this field. You may also press the [...] button to activate the technician validation list.
<b>CREATE TICKET</b>	Some service reminders may require service tickets to be printed when their appointments come due. For that reason, you have the ability here to specify whether ALARM should create and print service tickets for you automatically. The tickets will be generated either when you print service tickets in a batch mode from within the Service appointment calendar (this allows you to print

all service tickets for jobs scheduled for a specific day, specific technician, specific date range, specific town, etc.). You may also print a ticket from a reminder directly from the appointment record on the appointment calendar.

To post this service reminder to the appointment calendar and then save it, press the OK button. To abort this reminder, press the Cancel button.

There is also a NOTEPAD tab available for each appointment detail record for more detailed notes.

Whenever you are modifying an existing service reminder in this area, the service appointment calendar will automatically be modified as well to reflect any changes you made. For example, if you change the Repeat Until date for a recurring reminder, the appointment calendar will automatically add or remove scheduled reminders for this customer based upon the change just made.

The mail merge section may be used to print out a list of customers scheduled for any type of service. See Mail Merge chapter in this manual for further discussions.

## Customer Service History List

**Keyboard Shortcut:** ALT + F7

You may review the entire history of this customers' service history by pressing the SERVICE HISTORY button from the customer main screen. This list will display the dates of all scheduled appointments (previously performed services and appointments, as well as all future scheduled services and appointments). You may scroll through this list by pressing the up and down arrow keys, pressing the page up or page down keys, or clicking on the scroll bar buttons.

This list is multi-faceted and allows for various views of your appointments for this customer. Each type of appointment is color-coded for simple visualization.

**Sort Tabs:** You may choose to sort the list of appointments by Ascending Date, Descending Date, Tickets Only, Appointments Only, Reminders Only, or sorted by Service Code. You may also select a default Sort Tab that will always be displayed for you (based upon the userid you log into the software with) by going to Utilities/Security Administration and click on the SERVICE tab, then select the default sort tab for service appointments (note: only supervisors can modify Security Profiles).

Scheduled	Completed	Service	Description	Technician	Ticket#	Appt Time	Appt Tow
8/03/04		Inspection	Quarterly Inspection	JWA	22,551		Phoenix
9/01/04		Inspection	Quarterly Fire Inspection				Phoenix
9/11/04		Service	Finish installation of warehou		3		Phoenix
9/14/04		Service	Motion sensor not working in f		1	12:00	Phoenix
9/26/04		Service	Service Scheduled	CPS	22,548	10:00	Phoenix
9/30/04		Talked	Ready To Sign Contract Yet?	CTR			Phoenix
10/02/04	✓ 10/02/04	Service	Service Scheduled		22,549		Phoenix
10/13/04		Service	Audio zones in bedrooms not wo	CPS	22,550	12:00	Phoenix
11/03/04		Inspection	Quarterly Inspection	JWA			Phoenix
12/01/04		Inspection	Quarterly Fire Inspection				Phoenix

**Appointment Status** Click on this drop-down field to view appointments only within a specific status (Open, Closed, Unscheduled). You may choose a default setting in your Security Administration Profile.

**Start Display From** Enter a date from which to start the display of appointments. You may choose a default setting in your Security Administration Profile.

### Adding/Viewing/Modifying Service Tickets

If a listed appointment was scheduled because a service ticket was created, you may review and/or modify that service ticket directly from within this section. Simply highlight the appointment that displays the service ticket number on the right hand side of the appointment, and select CHANGE button. The service ticket screen for that appointment will pop-up. You may now edit the service ticket and perform any function that is available from within that screen. When you are finished reviewing the list, press the ESC key to return to the customer main screen

You may also create a new service directly from within the Service History List by clicking on the 'Insert Ticket' button. The service ticket created will automatically be associated with this

customer. To insert a new appointment (not service ticket related), click on the 'Insert Appt' button. Detailed information on creating service tickets and appointments may be found in their respective chapters within this documentation.

### Support Notes

You may maintain a detailed and unlimited log of conversations with each customer. Clicking on the support list button accesses all support records associated with that customer. You may add additional support records, modify existing ones, or delete support records from this list by clicking on the appropriate button.

For a detailed explanation of the support log, please refer to the Support Log chapter.

### Contact List (Responsible Parties Notification)

*Keyboard Shortcut: ALT + F9*

**Contact Notification** Record will be Changed

Priority Sequence

Person To Contact

Daytime Phone  Daytime Extension

Night Phone  Night Extension

Password

Email Address

Special Notes

Modify Status  Modified By

(Modify status used in Central Station Notices) Modified On

Address Information (Optional)

Street Address

City

State  Zip Code

Allow For Mailing   **If Yes, mail can be sent to this person**

You may keep track of an unlimited number of emergency contacts, persons, authorities, and authorized users. Each contact may have their own day and evening phone numbers listed, individual passcodes, as well as any special comments about when to call that person. Contacts can be sorted in priority order. You may also enter each contacts' address if you wish to perform a mailing to those persons in the future.

A 'Change Control' feature is also available on the contact screen. Whenever a name is added, modified, or deleted from the notification list, you may identify the action taken (added, modified, deleted), the person making the change, and the date of the change. This change control feature is then used by the Central Station Disconnect/Update Notice to let the central station easily identify

which names are to be added/modified/deleted from their master notification list. The change control may also be printed on the Customer Detail Report in case you wish to give a customer a copy of the notification list.

To add, review, or delete contacts, click on the CONTACT LIST button. A window displaying a list of contacts for this customer will appear.

To add a new contact press the INS key. Enter a priority number, contact name, day and evening phone numbers (there is space next to each phone number for an extension number), passcode, and special comments. The priority number can always be changed so that the contact list can be sorted in the correct priority order. Select OK to save this contact to the list.

To delete contacts from the list, highlight the contact to be deleted and press the DEL key. The contact will be displayed. Press ENTER to delete the contact, or press ESC to abort the deletion.

You may print out a complete notification list for any customer by using the Customer Detail Report in the Report Facility section. A further explanation of the customer detail report is discussed in the Report Facility chapter in this manual.

***NOTE:** Any contacts with a priority number higher than 20 are automatically assigned internally as an authorized user. This allows you to use the first 20 contacts as the emergency contact list, and anyone numbered 20 or higher (up to 999) are considered access users for access control and may be selected to print as such on the Customer Detail Report.*

## Document Images

*Keyboard Shortcut: ALT + F10*

The Document Image section maintains an unlimited list of customer documents that you may view directly from within a customer's account. Documents that may be viewed include:

- q ASCII text files
- q DOS text files created within any Word Processing program
- q DOS text files created with the DOS Editor or Edlin program.
- q Graphic images stored in the PCX, GIF, JPG, WMG or BMP graphic file formats (Type of graphic file format will be determined automatically)
- q Any item scanned into your computer with a scanner (black and white or color).
- q Most scanners support saving the image in the PCX or GIF file formats.
- q Any Windows registered document created on your computer (ie: Word, Excel, PDF, etc.)

With this section, you may view customer floor plans, wiring diagrams, photographs, contracts, or any other document described above. Images may be scrolled left/right and up/down by using the scroll bars found in the document viewing area. Registered windows documents will be displayed in their original program.

To use this section, select 'Document Images' button on the customer main screen. Press INSERT to enter a document to the image list. Enter the following information into this screen:

- Document Description** Enter a description of the document as it is to appear on the list.
- Type Of Document File** If this file is a DOS text file, select TEXT.  
If this file is a graphic image, select IMAGE.  
If a windows document (ie: PDF, Word, Excel...) select it's type.
- Document File Name** Enter the exact name of this document, including the drive letter and directory name. For example, a file called FLOORPLAN.TXT in the DRAW directory would be entered in this field as C:\DRAW\FLOORPLAN.TXT.

You can search for the file by pressing the [...] button next the this field. A directory tree will pop-up. Select the appropriate file from the directory listing and click on OK to select that file.

Select OK to save this document listing.

To view any document that appears on this list, highlight the document and click on the VIEW button. The document will be displayed on the screen. Documents may be scrolled up/down, and left/right until the end of the document.

Press the OK button on the viewing screen to return to the document imaging list.

## Equipment List

**Keyboard Shortcut: ALT + F11**

(Equipment List Title And Many Fields Are Definable In System Defaults Area)

Total Profit		Total Cost	Total Price	Contract
1,226.50		1,144.50	2,371.00	

Part Description	Part ID	Qty	Tot Cost	Total Price	Contract\$	Install Date	Profit/Loss
Ademco Vista 20P Panel	20P	1.00	129.00	219.00		11/03/04	90.00
FBI Keypad	FB-5100	1.00	50.00	75.00		11/03/04	25.00
Napco English Language Ke	RP1000ELC	1.00	99.00	135.00		11/03/04	36.00
Nutone Wireless Intercom	NT-IM110	2.00	74.50	350.00		11/03/04	275.50
SpeakerCraft In-Wall Spea	SpeakerCraft24A	8.00	792.00	1,592.00		11/03/04	800.00

The equipment list will allow you to keep a detailed listing of all parts installed at a customers site. By utilizing this list you can determine service contract costs, help technicians determine the location of parts installed and keep a detailed repair history on parts that are repaired or replaced.

The equipment list is utilized frequently within the software. Service tickets can print a customers' equipment list on the ticket. Several reports can be printed showing a list of installed equipment, either by customer or by part. In addition, you may maintain a complete repair/replace/install history on all parts from within the service ticket area if desired (REPAIR button within service ticket screen). This also may be printed out to show a repair history on any part or for any customer (see Report Facility for further discussion of these reports, as well as the Service Ticket chapter in this manual).

The equipment list will display all parts that are currently installed. Any item added to the Equipment list MUST already be on your main inventory file. If not, you may enter the item into the inventory file from within the equipment list.

Record will be Changed

Part ID: 20P

Part Description: Ademco Vista 20P Panel

Date Installed: 11/03/04

Qty	Unit Cost	Price Each	Extended Price	Service
1.00	129.00	219.00	219.00	

Part Category: Panel

Warranty Period: 90 Days

Serial Number: A3902322A

Location: Basement

Secondary ID:

Print On Tickets: YES

OK Cancel

<b>PART ID</b>	Unique identification for this part. Part ID must already exist in inventory file.
<b>PART DESCRIPTION</b>	Enter the name of the part as it appears in the inventory file (see inventory maintenance chapter for further details). If you do not know the part number, click on the [...] button to bring the inventory list up. You may also enter a new part to the inventory file at this time.
<b>DATE INSTALLED</b>	Enter the date that this part was installed at the customer site. (Definable Field In System Defaults Area)
<b>QTY</b>	Enter the quantity installed for this part
<b>UNIT COST</b>	This information will be displayed automatically. You may override the cost if desired. The unit cost is based upon a unit of one and is not affected by the qty field.
<b>PRICE EACH</b>	This information will be displayed automatically. You may override this amount if desired.
<b>EXTENDED</b>	This information will be calculated automatically based upon the quantity and price each amounts.
<b>SERVICE</b>	This field represents the service contract cost for this part. This information will be displayed automatically. You may override the service cost if desired.
<b>PART CATEGORY</b>	This field may be used to identify this part with a common category, such as Panel, Detector, Switch, Battery, etc. Several reports utilize the part category field to list similar parts together, and parts may be searched by category in the Customer Inquiry/Mail Merge area. (Definable Field In System Defaults Area)
<b>WARRANTY PERIOD</b>	The warranty is displayed based upon the warranty on the inventory file for this part. You may override it if desired.
<b>SERIAL NUMBER</b>	If you wish to keep track of the serial number of this part installed, you may do so in this field. This is especially beneficial to telephone installers that need to keep track of serial numbers of all phones installed. Field is searchable in inquiry/mail merge area. (Definable Field In System Defaults Area)
<b>LOCATION</b>	Enter a brief description of the location within the customer site where this part is installed. This information will be printed on any service ticket for this customer and can help aid the technician. (Definable Field In System Defaults Area)
<b>SECONDARY ID</b>	This field may be used to enter a secondary part number for this part. Since this is also a definable field, other uses for this field may include tracking RMA number and Bar Code number to name a few. (Definable Field In System Defaults Area)



As you enter each part onto the equipment list, the total line at the bottom of the list will reflect the total prices for all parts.

The equipment list can be printed from the Report Facility.

## Mailings (Correspondence Log)

*Keyboard Shortcut: ALT + F12*

This program will automatically keep a log of any correspondences that you generate to your customers from within the software. This includes any central station notices (disconnect, reconnect, update, memo notices from within the Report Facility), as well as any postcards or letters generated from within the Mail Merge section. Past due statements that are generated are also notated in this log. In addition, you may manually add your own entries for any correspondences you send out using other programs such as word processing, desktop publishing, or label generation programs.

The correspondence log consists of fields for date of correspondence, type of correspondence (letter, postcard, central, etc.), description of correspondence, response received from customer because of that correspondence, and additional comments.

To manually add, review or delete correspondence log entries, select MAILINGS from the customer main screen. Press INS to add a new correspondence entry, or highlight an entry from the list and press ENTER to review or modify an existing correspondence entry.

To delete an entry highlight the correspondence to be deleted, press DEL and then press ENTER.

## Zone Descriptions

*Keyboard Shortcut: CTL + F2*

*Zone List For Alarm Users*

*User-Definable List For Service Express Users*

**Alarm Users:** You may enter an unlimited number of zone descriptions for each customer. Each zone description can be up to 30 characters long. You may decide to abbreviate common locations, such as front door = FD, Smoke Detector = SD, etc. Additional zones fields include zone description, code that panel sends for that zone when tripped, and the restore code.

When entering a zone id, it is recommended that you enter the id with preceding spaces so that the zones will be sorted correctly. For example, enter zoneid 1 as ' 1', not '1 '.

To add, review, or delete zones, press the ZONE LIST button from the customer main screen. Once you select this item from the menu, a window displaying a list of zones for this customer will appear.

If a list of zones appears, and you wish to add new zones, press the INS key. Just the enter the number of the zone, the description and the alarm code which is sent for this zone (optional). Press ENTER and the zone will be added to the list.

To delete zones from the list, highlight the zone to be deleted and press the DEL key. The zone will be displayed. Press ENTER to delete the zone, or press ESC to abort the deletion.

Zones may be printed on service tickets, as well as on the customer detail report.

**Service Express Users:** This list may be defined (list name, fields within list) for any purpose you may need.

## Alarm Call History Log (ALARM Only)

### *Keyboard Shortcut: CTL + F3*

You may keep track of an unlimited number of incidents that are relayed to you from the central station. The time, date, code, operator responding, false alarm status and description of action can be entered for each incident. The Alarm history list may be printed from the Report Facility Menu.

To add, review or delete calls, select ALARM LOG button from the customer main screen. If there are no calls on file for this customer, an alarm call log entry screen will automatically pop-up, otherwise press the INS key from the alarm call list to post another entry.

When entering an alarm call, the current date and time will be displayed automatically. You may override these fields with other values if necessary.

To delete an entry from the alarm call log, highlight the alarm call to be deleted from the alarm call list, press the DEL key to confirm the deletion, then press ENTER.

If you are currently downloading an incident report to your computer from your central station, you may be able to import that report into this Alarm Call Log from within the System Utilities - Import/Export Transfers section. Please give us a call for further information about this feature.

An Alarm Call History report may be run in the Report Facility. You may also use this report to determine the number of customer false alarms within a specified time period.

The Mail Merge section may be used to send letters/postcards to customers that have exceeded a certain number of false alarms within a specified time period.

This list may be sorted in date ascending or descending mode.



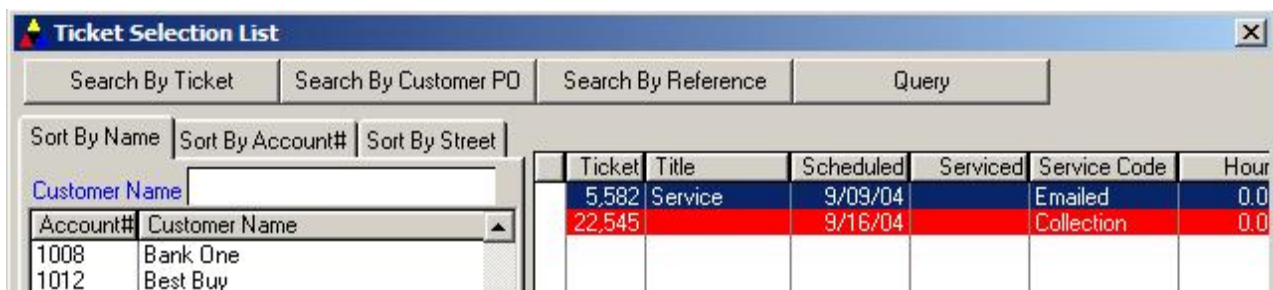
## Chapter 4: Service Tickets

### Service Tickets

One of the major features available is the ability to schedule service jobs and generate service tickets (Service Management functions). Using the service tickets allow you to keep better tabs on what work is to be performed and the status of that job. In addition, using the service tickets also allows you to keep track of part repair histories so that you can identify the repair record of any given customer, as well as the repair record of any given part.

The service tickets can also be converted directly into an invoice, allowing you to calculate service charges based upon a customer basis or a technician basis. In addition, you may enter standard service rates, overtimes rates, and travel rates to calculate the labor to be charged to the customer.

You can create a service ticket from the following list (displayed by clicking on the TICKET button on the main program toolbar) as displayed below. You may also go into a customer account, click on the Service History button, then click on Insert Ticket to go to the new ticket screen directly.



The screenshot shows a window titled "Ticket Selection List" with a search bar and a table of tickets. The search bar has four buttons: "Search By Ticket", "Search By Customer PO", "Search By Reference", and "Query". Below the search bar are three sort options: "Sort By Name", "Sort By Account#", and "Sort By Street". There is a "Customer Name" input field and a list box showing "Account#" and "Customer Name" with entries "1008 Bank One" and "1012 Best Buy". The table below has columns: Ticket, Title, Scheduled, Serviced, Service Code, and Hour.

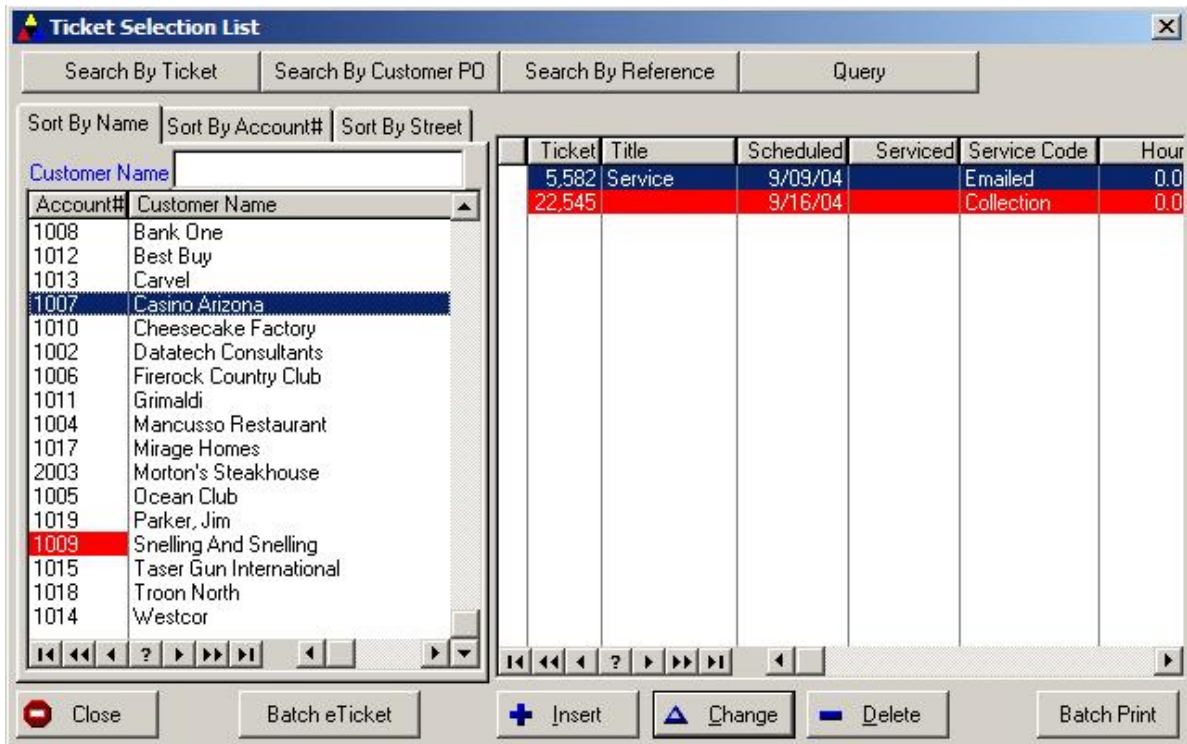
Ticket	Title	Scheduled	Serviced	Service Code	Hour
5,582	Service	9/09/04		Emailed	0.0
22,545		9/16/04		Collection	0.0

There are five ways to search for a service ticket:

- Search By Customer** Click on the Sort by Name, Sort By Account# or Sort By Street to sort the list by one of those methods, then enter an appropriate value to find the customer.
- Search By Ticket** Click on this button to find a ticket based upon it's ticket number
- Search By PO** Click on this button to find a ticket based upon customer PO number
- Search By Reference** Click on this button to find a ticket based upon a secondary reference number you may have entered on a service ticket.
- Query** The Query button activates a powerful search engine that allows filters to be created to find tickets based upon many criteria. For a detailed explanation on how the Query button works throughout the software, please review the 'Selecting A Customer' in the Customer Maintenance Chapter – Query section.

## Creating a Service Ticket

In order to access the service tickets, select the TICKET button from the main taskbar. A customer list will be displayed. Select which customer you are issuing a service ticket for. Highlight the appropriate customer, then press INS for a new service ticket or select the correct ticket to modify/review on the right-hand list. The current status of the customer's service contract will be displayed (based upon the Contract End date) as well as the status of this service ticket (open, billed, closed).



## Inquire / Edit a Service Ticket

To modify or inquire a service ticket, select SERVICE TICKETS from the main menu and then select the appropriate customer from the customer list. A list of existing service tickets will be displayed for that customer. Highlight the appropriate service ticket and press ENTER. The service ticket will then be displayed and you change any information and select OK to save the changes.

## Adding Expanded Service Notes

If you require additional room to enter service requested or service performed information, press the NOTEPAD button from the service ticket screen. This will pop-up a window that will allow a large description of service work to be entered. When are you finished entering text in this screen, select the OK button to return to the main service ticket.

You may print the additional service note on the service ticket by answering YES to this question

when printing tickets (if you do not have additional service notes for this ticket, then this question will be bypassed). Additional service notes will print on a separate ticket page.

### Service Ticket – Service Ticket Schedule Tab

Service tickets are sequentially numbered, although ticket numbers can be changed, it is **highly recommended** you use the automatic numbering system. The following fields are displayed on the service ticket screen:

**Multi-Day Ticket**

Check this box if this service ticket represents a multi-day job (if checked, a 'Scheduled Thru' field will appear below the 'Date Scheduled' field so you may enter a starting and ending date range for this ticket).

**TICKET NUMBER**

Automatically assigned ticket number.

**DATE RECEIVED**

The current date is displayed in this field. You may enter a different date if required. This date represents the date that the order came in for service.

<b>DATE SCHEDULED</b>	This date reflects when you have scheduled the service to be performed. You may look at your current appointment calendar by pressing the F6 key. This will help you decide which days are open for appointments. Once this service ticket is saved, it will be automatically posted to the appointment calendar.
<b>APPOINTMENT TIME</b>	Enter the time for the scheduled appointment.
<b>TIME RANGE</b>	To enter a description of a time range to provide this service, enter the time range in this field. It will print on the service ticket.
<b>SERVICE CODE</b>	Identifies the category of service job being scheduled. This field is validated against the service code file. Therefore it must be on the service code file before it can be entered in this field. If a service code is entered in this field, it can be used to print a schedule of service jobs that pertain to that code only, as well as the ability to print service tickets for all jobs that have that service code. Press the [...] button to active the code validation list.
<b>PRIORITY</b>	Select a priority for this service ticket.
<b>REFERENCE NUMBER</b>	If you track preprinted service tickets with a different number then the number generated by the software, enter your ticket number in this field. Service tickets are searchable by reference number.
<b>COMPLETED</b>	Once the job is finished you may re-enter this service ticket and enter the date the job was completed. Click on the date completed button to have today's date automatically entered.
<b>ETICKET BUTTON</b>	The Eticket button is <i>only displayed</i> when the optional eService add-on module is purchased and installed. It enables the service ticket to be emailed to all technicians assigned to the job. Without eService, you can always still email a service ticket to the main technician by clicking on the PRINT button and selecting Email as the print method (a PDF document will be created of the service ticket and emailed as an attachment to the technician). eService enhances the emailing capabilities of this software however by emailing a ticket to multiple technicians at one time, allowing batch emailing of ALL tickets to ALL technicians within a scheduled date range, and using HTML text as the ticket so that all pop3 email devices can accept the email even if they can not read PDF document attachments. Call Z-Micro Technologies for more information on eService.



## Service Ticket – Service Ticket Rates Tab

**Service Ticket - ABC Corporation**

Title: Service      Record will be Changed      Company ID: [ ]      OPEN

Contract Status	Client	Started	Expires
Service		2/11/03	2/11/04
Medical		11/15/03	11/15/04
Monitor		1/14/04	1/14/05

**Customer Information**

Customer: ABC Corporation      Account#: 1001  
 Telephone: 602-443-9234      Map ID: NW12  
 Street: 15-234 Jefferson Street  
 Town/State: Phoenix      AZ 85523

**Restrictions: COD Only**

Service Schedule    Service Rates    Miscellaneous    User Defined

This Area Not Available If Timecards Exist

Standard Rate	Standard	Minutes	90
Overtime Rate		Minutes	
Travel Rate		Minutes	
Under Warranty		Billable	

Technician 1: JWA    Technician 2:    Technician 3:    Service Requested: Quarterly Inspection

Buttons: OK, Cancel, Calendar, Time Cards, Notepad

### TECHNICIAN 1/2/3

You may identify up to 3 different technicians that are scheduled for this job. Using these fields allow you to print up service tickets at the beginning of the day or week for each individual technician. You will also have the ability to print a report detailing what jobs were performed by any technician. If necessary, you may also use these fields to identify the truck assigned to the service appointment. This would allow you to print out a list of appointments scheduled by truck. Technicians may also be assigned in the Time Card section (TIMECARD button) - see below. Press the [...] button to activate the technician validation list.

For technician scheduling purposes, once you have entered a technician(s) here, a timecard will automatically be created for you on this ticket – one for each tech (you may go into the timecard and modify it as necessary).

### STANDARD RATE

A standard service rate code may be entered in this field if you do not wish to track service time with timecards. There are two ways to charge for services. The basic way is to enter a service rate (and technician) in this field and enter the number of minutes to bill. A more detailed method of tracking service work is by using the Time Cards feature. If time cards are used, then all service rate codes, billable time, etc. are entered on the timecards, not in this service rate area.

### MINUTES

If using this basic service rate method, enter the number of minutes for this service ticket.

<b>OVERTIME RATE</b>	Same as standard rate, however used to track overtime charges.
<b>MINUTES</b>	Enter number of overtime minutes for this service ticket.
<b>TRAVEL RATE</b>	Same as standard rate, however used to track for travel charges.
<b>MINUTES</b>	Enter number of minutes spent traveling for this service ticket.
<b>UNDER WARRANTY</b>	Indicate if this job is under warranty (will print on ticket and searchable on ticket report).
<b>BILLABLE</b>	Specify if this service ticket is billable.

## Service Ticket – Service Ticket Miscellaneous Tab

- REQUESTED BY** Enter the name of the person at the customer site that requested this work to be performed.
- SCHEDULED BY** Enter the user that is entering this service ticket.
- CUSTOMER PO** If this service ticket is approved based upon a customer purchase order number, enter that number in this field (tickets are searchable by this purchase order number).
- HOURLY RATE** If you wish to have an hourly rate print on the service ticket, enter it in this field. This field is NOT used for any service rate calculations. **(THIS IS ONLY FOR PRINTING PURPOSES)**
- HOURLY** Enter the hours worked. **(THIS IS ONLY FOR PRINTING PURPOSES)**
- SERVICE REQUESTED** Enter a description of the service being requested by the customer. This description will appear on the service ticket when printed, along with a blank area that will allow the technician to handwrite a description of what repair work was performed. If you require additional space to enter service requested information, press the F5 key (see below for expanded service ticket notes section).
- SERVICE PERFORMED** Once the job is completed, you may enter a description of what work was performed. This description may also be copied onto the service or product invoice when you bill the customer for this job. In addition, the description in this field can be printed on the service ticket log so a printout of services performed can be generated.
- OPTIONAL 1,2,3 Definable Fields** The three fields on the right hand side may be setup for any particular purpose. Click on the Setup User-Defined button to create

your own labels for these fields. Each field may be selected to print on the service ticket.

### Service Ticket – Service Ticket User Defined Tab

The screenshot shows a software window titled "Service Ticket - ABC Corporation". At the top, there is a dropdown menu for "Title" set to "Service", a status indicator "Record will be Changed", and a "Company ID" field with a search button and an "OPEN" button. Below this is a "Contract Status" table with columns for "Client", "Started", and "Expires".

Client	Started	Expires
Service	2/11/03	2/11/04
Medical	11/15/03	11/15/04
Monitor	1/14/04	1/14/05

To the right of the table is "Customer Information" including "Customer: ABC Corporation", "Telephone: 602-443-9234", "Street: 15-234 Jefferson Street", "Town/State: Phoenix", "Account#: 1001", and "Map ID: NW12".

Below the table is a section for "Restrictions: COD Only" with tabs for "Service Schedule", "Service Rates", "Miscellaneous", and "User Defined". The "User Defined" tab is active, showing ten optional fields (Optional 4 through 10) with input boxes. A "Setup User-Defined" button is located below these fields. At the bottom left, there is a "Service Requested" text area containing "Quarterly Inspection" and a "Service Phrases" button.

On the right side of the window, there is a vertical stack of buttons: "OK", "Cancel", "Calendar", "Time Cards", "Notepad", and "Invoice".

There are ten fields on the User Defined Tab that may be setup for any particular purpose. Click on the Setup User-Defined button to create your own labels for these fields.

## Time Cards

The Time Card section keeps a detailed history of billable and non-billable time spent by technicians on a service job. The time cards can be used to calculate service charges that are billed to a customer. Time cards may also be used for technician scheduling and reporting on actual hours worked by each technician (Technician Timesheet Report). Conflicts in scheduling for each technician is also tracked.

Time Cards may also be entered for every employee from within the Employee Profile screen (Utilities/Employee Profiles).

### Time card features that are available as described below

**Timecard Category** If you wish to track this timecard with a category code, select a category from the category validation list.

**Warranty Service** Indicate if this work is warranty work.

**Billable** Indicate if the hours specified on this timecard are billable (separate selections for standard, overtime, and travel time).

**Rate Code** If this timecard is billable, specify the appropriate rate code for standard rate, overtime rate (if applicable) and travel rate (if applicable).

**Time In/Out** Specify the starting time and ending time for this time card. This also applies to the Overtime section.

**Total Time** This field is calculated automatically based upon Time In/Out.

- Travel Time** Indicate in minutes the amount of travel time.
- Start/End Mileage** In order to track miles traveled, enter the starting mileage and ending mileage.
- Total Miles** This field is calculated automatically based upon start/end mileage.

### Technician Timecards

Timecards may be entered for each service ticket by selecting the TIMECARD button from the Service Ticket screen.

You may schedule an unlimited number of technicians for work on this service job. Timecards are created for each technician, and you may have more than one timecard for each technician. Each timecard may be marked 'scheduled' or 'completed'. There is a major difference between the two and should be understood before using this section.

A scheduled timecard is one where the work is scheduled to be performed, but has not yet been performed. Scheduled timecards are also used in the appointment calendar to display technicians schedules (in list and graphical timeline formats). This is very useful for scheduling future jobs.

A timecard is marked as completed when the technician has performed the work for the time that the timecard was scheduled for. Completed timecards can be used in the report facility to receive a report on hours worked by technician.

All timecards for a particular service job are marked as completed automatically if that service ticket (or service appointment) is marked closed by a completed date.

Time cards consist of the following information:

<b>Technician</b>	Enter the ID of the technician this timecard is for. If the technician ID is invalid, a technician validation list will appear (or select the [...] button to display the technician list). You may then select the correct technician from this list or enter a new technician to the list.
<b>Work Date</b>	Enter the date the work is scheduled for.
<b>Work Status</b>	Select if this timecard is for scheduled work or for completed work. When the timecard is first entered, it should be selected as scheduled. Service tickets that are completed will automatically update this status to completed.
<b>Warranty Service</b>	This field tracks whether this timecard is for warranty (non-billable) work.
<b>Category</b>	This field allows you to identify this timecard with a specific Category – which is searchable on the Technician Timesheet Report.
<b>Dispatch Status</b>	For detailed tracking of a technicians current work status (on-site, paged, in-route, callback, etc.) enter a valid dispatch status in this field. If an invalid dispatch status is entered (or the [...] button is selected), a dispatch validation list will appear. Select a valid dispatch status from the list.

The following fields are available for Standard, Overtime and Travel Time. The hours entered in these fields will be used on the Technician Timesheet Report to reflect actual hours worked, as well as for calculating labor charges to be billed to the customer (based upon the Service Rate Table that was setup in the Setup Wizard section of the software).

<b>Billable</b>	Select whether the time being entered below this section is for billable or non-billable hours. If Billable (Yes), then the program will use these hours (plus any other timecard billable hours entered for this job) to calculate the labor charges billed to a customer on their invoice. If these hours are non-billable, then select No.
<b>Standard</b>	For the Standard/Overtime/Travel fields, enter the appropriate Service Rate Code from the Service Rate table you had previously setup in the Setup Wizard area. You may also access the Service Rate Table by clicking on the [...] lookup button and select, modify, or add a new service rate code at this time. This code will determine the labor calculation structure for these billable hours.
<b>Time In</b>	Enter the time the technician started this job (HH:MM 24 hour format). If there is a scheduling conflict, a warning message will be displayed.
<b>Time Out</b>	Enter the time the technician ended this job (HH:MM 24 hour format).
<b>Total Time</b>	This field is calculated automatically based upon the Time In/Time Out values.
<b>Dispatch Status</b>	For detailed tracking of a technicians current work status (on-site, paged, in-route, callback, etc.) enter a valid dispatch status in this field. If an invalid dispatch status is entered (or the [...] button is selected), a dispatch validation list will appear. Select a valid dispatch status from the list.
<b>Travel Time</b>	For the Travel Time field, enter the number of minutes this technician spent

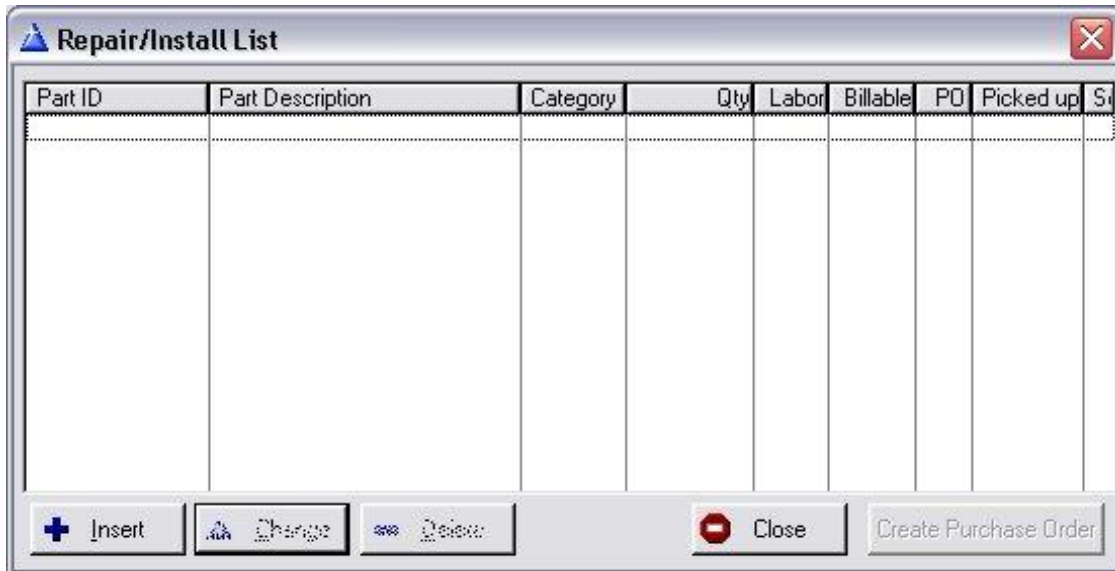
traveling to and from the job site. This will be reported on the Technician Timesheet Report, as well as used for labor charges billable to the customer if this is selected as Billable.

- Starting Mileage** Enter the starting odometer reading.
- Ending Mileage** Enter the ending odometer reading.
- Total Miles** This field will automatically calculate and display total travel distance for this timecard.

### Repair List (Service List) - Entering Part Repairs

Once a service is performed, you may identify what parts were repaired, replaced, inspected or installed by going back into that service ticket that was originally created and selecting the REPAIR button. You may only repair, inspect or replace equipment that is currently on the detailed equipment list for this customer, or choose INSERT to identify new equipment that was installed during the service. Installed items will also be automatically added to the customers equipment list.

### Repair/Install List (Service Install List)



If you are using the inventory tracking feature of this program, this section also allows you to track which parts were sent back for repair, if a replacement part was given to the customer, and where the part was sent for repair. In addition, you can enter the date when the part was received back from being repaired.



## Repaired/Installed Item

Record will be Added

Category: REPAIR

Part ID: YA-NP76 Qty: 1.00

Part Description: Yuasa NP76 6 Volt 7AH Battery

Repair/Install Time: (HH:MM Format)

Repair Status (For Repaired/Replaced Items Only)

Picked Up From Customer On: [ ]

Gave Customer Replacement: YES NO

Date Sent Out For Repair: [ ]

Sent Back For Repair To: [ ]

Received Repaired Part On: [ ]

OK Cancel

### Category

Specifies what type of service was performed on this part.

*NEW=Installed this part during service job  
REPAIR=Repaired this part during service  
REPLACE=Replaced part with an identical part  
INSPECT = Inspected Item*

If an item is marked as NEW, then the partid entered in the next field will automatically be added to that customer's equipment list as well.

If an item is marked as REPAIR or REPLACE, then the partid entered in the next field must already exist in the customer's equipment list. If INSPECT selected, you may then choose pass/fail.

The category field can be used in the Equipment Repair report to print a list of repaired, replaced, or installed parts during servicing.

### Part ID

The part id will be displayed in this field. If the Part Id does not exist in the customer's equipment list and this repair is marked as a repair or replace, then you will be asked to add the partid to the equipment list. If this repair detail is marked NEW, then the part id will be validated against the inventory file. If the part is not in inventory, you may add it to inventory at this time.

Pressing the [...] button pops-up the inventory list (for new installs) or

equipment list (for repair/replace items) for you to choose from.

**Part Description** Enter the name of the part that was repaired/replaced or installed.

**Time To Repair** Length of time to repair/replace this part (used in Equipment Repair report to show total repair time for a specific part).

**NOTE:** *The following fields are used mainly for inventory tracking only.*

**Picked Up On** If the part was picked from the customers' site to be taken back to your location, then enter the date this part was picked up.

**Gave Replacement** If you replaced the defective part with another one, then you would select 'YES'. By selecting 'YES', your inventory will automatically be adjusted to reduce your on-hand stock by 1.

**Date Sent For Repair** Enter the date that you sent this part out to be repaired.

**Sent Back For Repair To** Enter the name of the manufacturer the part was sent back to for repair.

**Received Part On** Date part came back from repair. Will add item back into inventory stock.

Any part repairs entered in this section can be printed out on the Equipment Repair report in the Report Facility section. You will have the option of printing a list of parts repaired/replaced/installed for any date range, based upon a particular part or for a specific customer.

**Create Purchase Order** If you would like to create a purchase order based upon the NEW items listed in the Serviced Items list, click on the Create Purchase Order button on the serviced items list screen. You will then be prompted for which vendor to cut the PO for (or let the software autoselect for each part) as well as select if the PO is to include items already in stock.

### **Generating An Invoice Directly From a Service Ticket**

Once a service job has been completed and the service ticket is brought back to the office, you should first bring up the service ticket and enter a completion date. You may then create an invoice for this service ticket directly from the ticket screen by selecting the INVOICE button found on the service ticket screen.

When you select the INVOICE button, you will be asked if you wish to create a product invoice or a service invoice (you may change the default setting for this question in the System Defaults area). Generally speaking, a product invoice is a better choice since the descriptions of work performed and any repaired items found on the repair list will fit more easily on a product invoice (product invoices are generally more flexible).

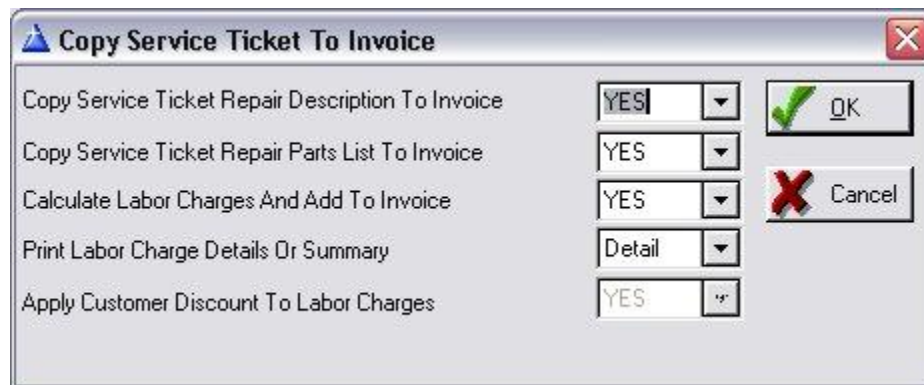


A service ticket is normally billed to the same account, however you may choose to bill this service ticket to a different account by selecting YES to the 'Post To Different Account' question. If you select YES, you may choose from a list of customers that will be displayed. The invoice will then be posted against that customer's account rather than the account associated with the service ticket.

If an invoice is already on file for this service ticket, then a screen will appear displaying the invoice number and asking if you wish to view or modify the invoice at this time. If you select 'YES', the invoice screen will be displayed.

Once you have selected the type of invoice to create from this ticket, the appropriate invoice screen will be displayed. The instructions for creating an invoice are the same as described under the 'Invoice Generation' chapter of this documentation.

When creating an invoice from a service ticket, the service ticket number will automatically be inserted into the 'Service Ticket#' field found on the invoice screen. A window will pop-up asking you several questions:



#### Copy Repair Description

If you select 'YES', the repair performed description that you previously entered on the service ticket will be copied into the invoice description box. Select 'NO' to leave description blank.

#### Copy Repair Parts List

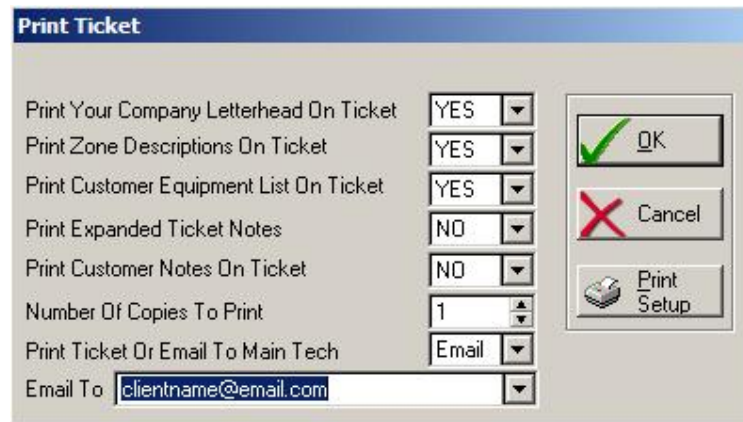
If you select 'YES', any items that you entered on the service ticket repair parts list (F2 key from the service ticket screen) will be listed individually in the invoice description area. If a part is identified as a 'repair' part, then the word REPAIRED will appear before the name of the part. If a part is identified as a 'REPLACE' part, then the word 'REPLACED' will appear before the name of the part. Example: REPAIRED Smoke Detector, REPLACED Panel, etc. You may then go over to the amount

fields and enter the appropriate charge for each item repaired.

If you wish to print out this invoice, select the PRINT button and the invoice will be printed as usual.

## Printing a Service Ticket

In order to print this service ticket, select the PRINT TICKET button. A service ticket will then print on a blank 8 x 11 paper showing all pertinent information about this customer including name, address, cross street, problem reported, zone descriptions (optional), and current equipment installed (optional). An area is also available to write what work was performed, labor hours and total cost for the job. You also have the option of emailing this service ticket (as an attached PDF).



When you select PRINT TICKET, you will be asked several questions about printing the service ticket (you may change the default value for these questions in the System Defaults area):

**Print Your Company Letterhead On Ticket** Answer YES to print your company name and address on the top of the service ticket. Answer NO if you are using your own letterhead paper.

**Print Zone Descriptions On Ticket** Answer YES if you want a complete customer zone description listing to print on the service ticket. Answer NO to eliminate the zone printing.

**Print Customer Equipment List On Ticket** Answer YES if you want to print a detailed list of equipment installed at this customers' site. If the equipment list can't fit on the page, a second page will be printed listing all detailed equipment.

**Print Expanded Service Notes On Ticket** If you have entered additional service notes for this ticket ( NOTEPAD button on the ticket screen), then you will be asked if you wish to print these expanded service notes on your ticket. If you select YES, a separate ticket page will print specifically for these notes. If you select NO then the expanded service notes will not print. This question is automatically bypassed if you do not have expanded service notes for this ticket.

**Print Customer Notes On Ticket** If you wish to print the notes that you have on file for this customer (NOTEPAD button on the

customer main screen), the select 'YES' otherwise select 'NO'.

**Print Ticket Or Email Ticket**

Select PRINT to print the service ticket. Select Email to have the service ticket emailed to the email address below. If you select Email, the software will automatically create an Adobe Acrobat PDF document of the service ticket and email it out to the technician listed in the Email Address field –as a PDF attachment to the email. The Email address that is defaulted comes from that technicians Employee Profile email address. You may override that email address is required.

If you wish to print out all service tickets (batch print) scheduled at the beginning of the day, then you may do this from the appointment calendar. Selecting the PRINT TICKET button from within the appointment calendar screen will allow you to enter a date range of when the service tickets are scheduled. You will be asked to enter the scheduled date range and the questions described above. You may also choose to print service tickets for just certain conditions:

*NOTE: If you wish to batch email service tickets rather than batch print, contact us about our optional eService add-on module. eService provides additional features so that service tickets can be emailed to all scheduled technicians for all tickets scheduled within a specific date range – all with the touch of a key.*

**Technician Name**

If you only want service tickets printed for services assigned to a specific technician, then enter the technicians' name here, otherwise leave blank.

**Town Name**

If you require service tickets to be printed just for jobs scheduled in a specific town, enter the town name in this field, otherwise leave blank.

**Service Code**

If you want to print service tickets for specific service categories, enter the service code in this field.

Once you have answered the above questions, all service tickets that meet those conditions will be printed. In addition, if you have any appointments or service reminders that you marked as 'Make Ticket=Yes', then a service ticket will automatically be generated and printed as well.

## Chapter 5: Invoice Generation

### Invoice Overview

All invoices, whether they are product invoices, or recurring invoices are generated from this section. In addition, statements may be printed separately from this section. You have the option of printing statements along with your monthly recurring billing, or printing recurring invoices separately from the statements. Select the INVOICE button on the top taskbar to bring up the invoice menu.



*Note: In former versions of our software package, we enabled Service Invoices to be used for service tickets and service projects completed. However, over time we have determined that the Product Invoices are more static and more stable for the system to access. Unless you have a specified reason for continue usage of the service invoices, we highly suggest that you use the Product Invoices for your invoicing need when dealing with Service Tickets.*

**Product invoices** are suitable for itemizing products and services onto one bill (there is no limitation to the number of items or text that can be listed on a product invoice). The product invoice allows you to select parts from your inventory file and the program will do a price lookup for the invoice. If you are using the inventory tracking feature, the product invoice will automatically adjust inventory based upon the quantity of each part sold. If you are also using the multiple location inventory feature, each product sold on the product invoice offers you the choice of selecting which location the product was sold from. Product invoices may include a combination of itemized product listings, as well as descriptions of work performed, although it is best suited for listing items sold.

**Recurring invoices** are to be used to send bills out to those customers that subscribe to a monitoring service or are billed for any type of recurring charge(s). You will generate the recurring invoices each month, and invoices will be generated only for those customers eligible to receive a bill at that time (based on the NEXT BILL field on the customer recurring charges screen). At the same time, a statement can be printed for any customer that is late in sending out a payment

(statements can also be generated separately). A customer is considered late if you have not received a payment within your net terms, which is determined on the 'SET COMPANY HEADER' section of the Utilities, along with the amount of the late fee.

Multi-account invoicing (dealer invoicing) is supported as well. A multi-account invoice (also referred to as DEALER invoicing) is designed to allow numerous accounts (work-sites) to be billed collectively to one master, or 'dealer' account. When the dealer invoice is processed, only the dealer account will have an invoice posted against it. Dealer invoices are created at the time of your recurring billing.

If you are using preprinted invoices and/or statements, you may order them directly through our Z-Micro Technologies forms and supplies division, or Deluxe or NEBS. Remember to select the type of invoice and statement you will be using from the Utilities/Set Company Header function. You may at any time change over to any other available invoices or statements that is selectable.

If you currently use a specific invoice form and would like to continue using it, please contact us.



## Product Invoices

If you selected INVOICES from the Invoice menu, a customer list will be displayed. See chapter 3 for a description of various methods that you can use to select a customer from the list.

If the customer you selected has already had product invoices generated, then a list will appear allowing you to either modify one of the existing product invoices, or press INS to create a new invoice.

The product invoice data entry form will then be displayed. The company name, as well as the invoice date will also appear.

**Product Invoice - ABC Corporation**

**Bill To**  
ABC Corporation  
150 Main Street  
Mesa, AZ 85201

**Work Site**

**Invoice Date** 3/15/08 **Number** P 1

Tax Code Phoenix

Remarks	AD	Category	SalesRep	P.O. Number	Ticket#	Description On Statement
1	2	INSTALL	MLN	534222		New Installation

Part ID	Part Description	Qty	Unit Price	Dsc%	Extended Tax
20P	Ademco Vista 20P Panel	1.00	219.00	0.00	219.00 Y
FB-5100	FBI Keypad	1.00	75.00	0.00	75.00 Y
BLANK				0.00	0.00 Y
YA-NP76	Yuasa NP76 6 Volt 7AH Battery	1.00	19.00	0.00	19.00 Y
NT-IM110	Nutone Wireless Intercom	3.00	175.00	0.00	525.00 Y
BLANK				0.00	0.00 Y

Sub Total 838.00  
Sales Tax 64.53  
Total Due 902.53

### Buttons Available On This Screen

- |                    |   |
|--------------------|---|
| <b>Insert Item</b> | Adds a new item to the product invoice  |
| <b>Change Item</b> | Allows you to change a detail item on the product invoice.  |
| <b>Delete Item</b> | Deletes a detail item from the product invoice  |
| <b>Add Text</b>    | Adds a text description to the product invoice and identifies the text description with the word TEXT in the part id field. The printed invoice will print the full text description in this location. This button may be used for each text box you want to add to the invoice. There is no limit to the number of text boxes per invoice. |

**Blank Line** Adds a blank line to the product invoice. The word BLANK will appear on the screen but only a blank line will print in its place on the printed invoice.

**Scan Item** Puts the invoice into a mode that inserts parts onto to the invoice by using a bar code reader to scan the UPC code of the part being sold. Does not require keyboard intervention during scanning – just click on this button to put into Scan mode, then using the bar code reader scan the UPC code of each item and click on the scanner trigger to accept. The program will automatically find that item in inventory based upon the UPC code, gather appropriate description and pricing information, and add as a line item onto the invoice. Repeat until all items are scanned then click on STOP SCANNING button to finish. UPC Code must be in the UPC Code field of item within Inventory.

**Up/Down** Moves the location of a detail line either up or down on the detail list.

You can fill in the following fields for a product invoice

**Worksite Location** If this invoice is to bill work that is being performed at another location, you can click on the lookup button in the Worksite Location box and select the work site from your current list of customers.

**Tax (County) Code** This field will default to your customer tax code (county code) for calculating sales tax. If you need to bill this invoice based upon a different tax code, select the tax code here.

**INVOICE #** Each product invoice is assigned the next available product invoice number. You may enter your own invoice number or use the one that is assigned by the system. All product invoices as identified with a 'P'.

**INVOICE DATE** Today's date automatically appears in this field but may be changed if necessary to whatever date is required.

**REMARK ID 1&2** Enter the number of the remark(s) which will appear on the invoice. If you do not want a remark to be printed on the invoice, then leave this field blank (0). You may select the [...] button to display a list of valid remarks.

**AD** You can include an ad within the main section of invoices (just below the detail section of an invoice). Ads can be graphical or textual. See Setup Wizard chapter for details on creating ads.

**CATEGORY** The category code is used in conjunction with several reports such as the Cash Receipts Report. You may identify the type of work that is being performed (INSTALL, REPAIR, WARRANTY, etc.), and then get a cash receipts report later showing how much revenue you have generated doing that type of work. This field is validated against a category validation table. Therefore, any new category you wish to use must first be added to the category table (select the [...] button to display list of categories).

**SALESREP** You may enter the name or initials of a salesrep responsible for this

sale. The cash receipts report allows you to list invoices by specific salesrep.

**P.O. NUMBER**

If you need to reference a purchase order number from the customer, enter that number here. Only those invoices that have a purchase order field will print this number (Invoice form #301 and form #301L).

**STATEMENT DESCRIPT**

This field will allow you to control what description you want to appear on a statement if this invoice is past due. If nothing is entered in this field, then the standard 'Invoice' description will be printed. If you enter a description in this field then this description will replace the 'Invoice' description. For example, you might enter 'INSTALLATION' if this is for an installation. This field will scroll beyond the original 20 characters displayed on the screen (up to 40 characters long).

**SERVICE TICKET#**

If this product invoice is for a job that you issued a service ticket for previously, then enter the number of the service ticket here. This number must match a valid service ticket number for this customer. If a valid number is entered, you will be asked if you want to copy the service ticket repair description into the description area on this invoice.

Once you have passed the above fields, you will in the 'detail' area of the product invoice. This is where you enter a list of all parts that you are billing for, as well as any descriptions. If this is a new invoice, the first thing you will need to do is press the Insert Item button. A data entry screen will appear for you to enter the item to include on the invoice. If this invoice already has one or more detail lines, then you will be on the detail list screen and may scroll up and down throughout the invoice by pressing the up and down cursor keys or the page up/page down keys. If you wish to add another item to the invoice, press the Insert Item button and you will be brought back to the 'data entry' form for that item. To edit an existing detail line, just scroll down to that line and press the ENTER key. You will then be able to edit that detail item.

The following fields are entered from this 'data entry' form

**Part ID (SKU #)**

Enter the part number of the item being sold. This part number must exist on the main inventory file. The software will look up the part from the inventory file and place the part description and price in those fields. You may, of course, override these fields if necessary once you get to those fields. You may also enter a 'service' code in this field that you have previously set up in the inventory file. In this situation, the part description would be the description of service performed instead. This is completely acceptable and can be helpful for certain common services.

If the part number entered is not on the inventory file (or if you select the [...] button), the master inventory file list will pop-up, where you may select the appropriate part being sold or press Insert to add a part which does not yet exist on the inventory file. The inventory list is displayed in part number order, but you can display this list in part description order by selecting the Part Description sort tab on the top of the inventory list.

If your products are bar coded and you wish to use your bar code reader when creating an invoice, make sure you have the UPC in the UPC field of the inventory item. Then, when creating an invoice click on the SCAN ITEM button found on the invoice to lookup parts based upon the UPC code.

If you leave the PART ID field blank and press TAB, you will be brought over to the PART DESCRIPTION field. This is useful if you do not use part numbers or wish to enter a description of an item that you normally do not carry or have listed in your inventory file. This is also useful if you wish to enter a brief description (30 characters) of a service performed or a charge that is not related to a specific part (freight, shipping and handling, etc.).

If you wish to just have a blank line printed on the product invoice, you may select the BLANK button found on the product invoice screen. You may also type the word 'BLANK' in this field and when the invoice is printed, a blank line will be printed in this place. You may use as many 'blank' lines as necessary to format the look of the invoice to your preference.

**Description** The description field is automatically filled in if you have previously entered a part id in the prior field. However, if the part id field was left blank, you may enter anything you wish in this field including part descriptions, service descriptions, or special charges.

**Qty** Enter the quantity of this item being sold (you can also click on the up or down arrow button with the mouse to increment or decrement the quantity). The quantity field will automatically default to 1 if a part number was entered in the part id field. This is to help speed the process of entering parts with a bar code reader.

If you are using the inventory tracking feature, inventory will be checked at this time to see if you have enough of this stock on-hand. Please refer to the following section on 'Inventory Tracking' for a description of this feature.

**Unit Price** Enter the unit pricing of the part being sold. The price is automatically entered if a lookup was performed on the inventory file, however you may override this price or enter a new price on this field.

**Extended** This field is a calculation based upon the quantity times the unit price. This field can not be overridden.

**Tax** If this item is taxable, enter 'Y', otherwise you may leave this field blank or enter 'N' for NO. The tax rate charged is determined by the county tax table that is associated with this customers account (found on the customers' main screen)

Once you have entered the above fields and select OK, the item will be posted to the product invoice and will now appear as a line item in the 'scrollable' section of the invoice.

You may enter as many line items as necessary for this invoice. If an invoice has more lines than can be printed on an invoice page, additional invoice pages will be printed with the total sales tax and total due lines being printed only on the last page.

To save this invoice, select the OK button. If you wish to cancel the invoice, select the Cancel button.

## Inventory Tracking

The program has a comprehensive inventory control feature that allows you to track the on-hand stock status of your inventory, including inventory in multiple locations (trucks, warehouse, additional office locations, etc.). For a full explanation on the inventory feature, refer to the Inventory Maintenance chapter in this documentation.

The inventory tracking feature is a selectable option found on the Set Company Header section of the System Utilities Menu. If you do not wish to keep track of your on-hand stock, then select 'NO' for inventory tracking. If you wish to utilize the inventory tracking option, then select 'YES'.

If you have chosen to use inventory tracking, you then have the additional option of keep track of your inventory for multiple locations. This option is selected as well in the Set Company Header screen under the question 'Multiple Locations'. Selecting 'YES' will allow you to enter stock counts for multiple locations on each part and ALARM will then prompt you to select the inventory location to adjust.

Inventory tracking works in conjunction with product invoices. Whenever an item is posted onto a product invoice, it checks the current stock status of that item and deducts the quantity sold from the current stock level. If the quantity being sold is greater than the current stock level, a warning message will appear notifying you that there is not enough inventory on-hand for the sale. This is only a warning message and you may continue with the sale if you wish.

If you are using the multiple location option and the item you are posting on the invoice is maintained in more than 1 location, a field list appears on the Product Item form for the invoice allowing you to choose the location this item is being sold from. This selection list contains the names of all locations where that item may be found. Select the location where inventory should be affected and select OK. The on-hand stock count for that item will be deducted from that location only.

If an item is deleted from a product invoice, then the quantity of that item is put back into inventory. If multiple location inventory is used, then the quantity of that item is put back into inventory for that location. If an entire product invoice is deleted, then stock levels for all items on the product invoice are re-adjusted to their original stock levels before the product invoice was created.

The program also keeps track of reorder levels. This is a 'trigger' level that is designed to warn you of low inventory situations. Whenever an item is posted onto a product invoice, the reorder level is checked to make sure that the sale of this item does not drop below your predefined reorder level (refer to the Inventory Maintenance chapter for further details on reorder levels). If the quantity sold of an item will reduce your inventory stock level below the reorder level, a warning message will appear notifying you that it is time to reorder that item when you have a chance. You may just select OK to continue with the posting of that item to the product invoice.

## **Entering Service Descriptions**

The product invoice also allows you to enter descriptions of work performed. To enter service descriptions onto a product invoice, select the **ADD TEXT** button to add a service text box to the invoice (you may have as many service text boxes as needed).

A screen will appear that will allow you to enter a large area of text. The amount of lines you can enter is dependent on the amount of characters entered (a total of 1000 characters may be entered in this box). This text screen allows word-wrapping so that you can continue to type and the text will automatically wrap around to the next line. Once you have finished entering the text, you may also enter a tax status (Y=Yes, N=No, or leave blank) as well as an amount for that charge in the amount field. The amount field may also be left blank if the text in this box is not for a billable item but rather just a description to appear on the invoice (warranty explanation, etc.). Once you select **OK**, the text box will disappear and the text, tax status (if any) and amount (if any) will be posted to the product invoice screen.

If you need to edit the text of a posted description, highlight any line that belongs to that service description and select the **CHANGE ITEM** button (or double-click on the service text item listed). This will pop-up the service description box and you may freely move around the text and make any changes necessary. When you are finished with the changes, select the **OK** button to save.

## **Posting Payments**

In addition to the normal method of posting payments from the **ALARM Main Menu** section, you may post payments directly from within the invoice screen by selecting the **PAYMENT** button at anytime. When you select this function, a payment screen will appear. You may enter the check date, check amount, check number, and posted date for this payment. Selecting the **OK** button will save the payment and the invoice. You will then be returned to the invoice list.

Posting payments by this method follow the same requirements and rules as posting a payment from the **Main Menu**.

For a detailed explanation of the payment posting process, please refer to the 'Post Payments' chapter found in this documentation.

## **Monitoring or Service Contract Inclusion**

The **Contract** button brings up the contract section of the invoice so that a monitoring contract, service contract, or any other type of contract/document, may be included with the printing of your invoice. Please see the **Contract** section of this document for details on creating contracts.

## **Printing Or Emailing Product Invoices**

To print or email a product invoice, select the **PRINT** button from within the product invoice screen. A screen will pop-up asking to confirm that the printer is turned on and allowing you to perform an alignment test. You may also select the **PRINT SETUP** button if you need to select another printer to print invoices on.

In addition, you may print any existing payments already posted. If you select **YES** to the 'Print Payments On The Invoice' question, then payments will be included on the invoice and the total due on the bottom of the invoice will reflect these payments.

If you wish to email the product invoice, select EMAIL in the Print Invoice Or Email Invoice selection. The email address on file for that customer account will default into the email address field. You may override that email address or click on the drop-down field for a list of other email addresses that are already on file for that account. An Adobe PDF document will be emailed.

If printing, after you have responded to these questions, the product invoice will print.

If you are using a Blank invoice form (blank paper) or a few multi-purpose preprinted invoices where the invoice headings are printed by the computer, the heading will print in accordance with the product invoice requirements (Qty, Part ID, Description, Amount).

If you wish to print product invoices in a batch mode rather than individually, you may do so from within the customer list in the product invoice section. Once the customer list is displayed, select the BATCH PRINT button. A screen will pop-up asking you for the date range of product invoices to print, or the invoice number range of product invoices to print. Enter the appropriate selection and all product invoices within the range entered will print. Batch mode is not supported for emailing.

### **Applying Open Credits To Product Invoice**

When creating a product invoice, any open credits on file for that customer can be applied to that invoice, assuming that the open credit has been marked to allow applying to a product invoice (the Product Invoice checkbox must be checked on with an X in the Credit Post screen when the credit was originally posted to the customer account).

The software will automatically notify you if there are any valid open credits that can be applied to this invoice. This notification will pop-up when you either save the invoice by selecting the OK button, or when you go to print the invoice by selecting the PRINT button.

If there are open credits available to be applied, the credit apply screen will pop-up asking you if you wish to continue to apply a credit. Specify YES to continue, or NO to exit without applying any credit.

If you selected YES, the credit apply screen displays the amount of total discount and prepaid credit that is available to be applied to this invoice. These totals may reflect multiple open credits that have been posted to the customer's account. Once a credit has been applied, it will adjust any multiple open credits according to the oldest open credit first.

There are two types of credits that may be available for applying to this invoice - Prepaid and Discount. These types of credits are described in detail in the Post Credits chapter of this manual. Briefly, a prepaid credit is a credit that was posted because of a deposit or overpayment. A discount credit is a credit that was posted because of a referral fee, item discount, etc. A Prepaid credit when applied to an invoice becomes a payment posted against that invoice. A Discount credit when applied to an invoice becomes a discount line that is displayed on the invoice (with the Desc to Print field text that was entered on the original Credit Post screen), along with the amount of the discount represented with a negative number in the amount column.

To apply open credit to this invoice, enter the amount of each type of credit that is to be applied. You may apply either type of credit, or both types of credits at the same time if applicable (if one of the credits is not available, you will not be able to enter an amount in that field). You may not exceed the amount of available credit displayed on this screen.

Once you have entered the amount of credit(s) to be applied, select the OK button and the credits will be applied.

***NOTE: If you delete this invoice after a credit has been applied, the amount of applied credit will be automatically re-posted to the customer's open credit history (based upon whether it was a discount or prepaid credit), and therefore will be available for applying to future invoices.***



## Issuing Credit Memos

Discounts or credits may be given in a service invoice by entering the - sign after the amount has been entered into an amount field. When the sales tax rate comes up in that detail line, enter 0 as the sales tax and the total due will be adjusted accordingly. The invoice will print with the credit being shown. When a credit memo is created in this manner, an open credit will be posted to the customers account for the amount of this credit memo, and may be applied towards any future invoice. Please refer to the chapter on Posting Customer Credits for further information.

## Using the Phrase List

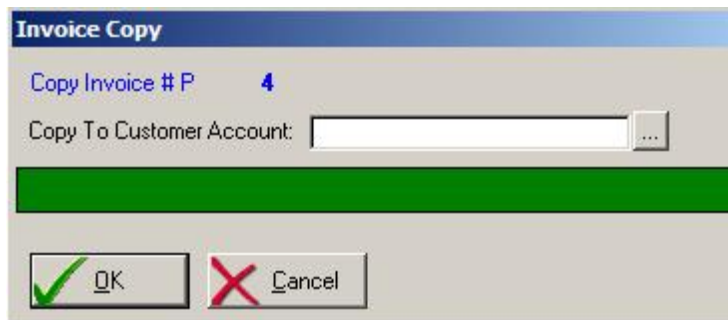
The product invoice has a feature called 'Phrase List' which allows you to store your most commonly used descriptions (phrases) and then place them on an invoice without re-typing them each time. To store or call up a phrase, press the PHRASE button when in the ADD TEXT section of the invoice. This will bring up a list of phrases (only the first line of each phrase is displayed). To add a new phrase, press the insert key. Each phrase must be identified with a unique code of your choice.

To select a phrase to use on your invoice, highlight the appropriate phrase and select OK. The full phrase will be placed onto your invoice in the next available blank line. You may choose several phrases and each phrase will be placed below the previous one.

## Copy Invoice

A copy feature has been included so that you can take an existing invoice and copy the details of that invoice to another account, or as a new invoice for the same account. This provides you with the ability to use any existing invoice as a 'template' for often billed items, and just select it and copy to another account.

To copy an invoice, click on the 'Invoice' button on the top toolbar, and then select the account with the existing invoice to be copied. On the right-hand side just click once on the invoice to copy (so that it is highlighted), and then click on the Copy button on the bottom. The following screen is then displayed:



When an invoice is copied, only the details and prices of the invoice are copied. The 'Bill-To' is replaced with the new account, a new invoice number is generated, and today's date is placed in the invoice date. In addition, any payment information related to the original invoice is cleared on the new invoice.

## Recurring Invoices

If you selected Recurring Invoices from the Invoice menu, the Recurring Invoice screen will appear. Invoices will be generated for all customers that are due to receive an invoice based on the 'NEXT BILL' dates currently on their customer record. If the date range you are billing for matches any of the 'NEXT BILL' dates on a customer record (recurring charges screen), then the system will generate an invoice for upcoming charges, as well as optionally check their history for any unpaid invoices. If there are unpaid invoices on file, they will be added to the invoice and a late fee will be applied if applicable (unpaid invoices will be checked if you specified you want to print statements along with your recurring invoices in the Company Header screen).

If you have specified to print statements with your recurring invoices, the system will also check the history of all customers to see if anyone is past due. If a customer is past due but not scheduled to receive an invoice, the system will automatically generate a statement showing a list of invoices that have not been paid and late charges will be applied.

Be aware that recurring invoices are affected in a large part by the settings that you initially entered on the SET COMPANY HEADER section of System Utilities menu. You may change these settings at any time in order to change the way your invoices are generated. The amount of any late fees, as well as how many days past due a customer must be before an invoice is considered 'past due' is determined in the Set Company Header section. The following is a summary of how certain fields on the Company Header screen affect recurring invoice generation (a detailed explanation of settings in the Company Header screen can be found in Chapter 1 – Overview).

<b>Late Fee / Late Rate</b>	If either one of these fields has a value, then late charges will be applied accordingly to any account that is past due. A Late Fee is a set dollar amount applied to an invoice. A Late Rate is a percentage of the current past due balance.
<b>Net Terms</b>	The number in this field determines how many days past due an invoice must be before it is considered 'late' by the system and therefore gets printed on invoices as past due.
<b>Late Period</b>	Enter the number of days open until a late charge is applied.
<b>Invoice Form</b>	The form selected in this field determines the invoice 'layout' that will be printed. There are numerous invoice formats to choose from, including blank paper and a laser form for laser printers.
<b>Using Preprinted Forms</b>	Select NO if you are using blank paper, otherwise select YES.
<b>Print Statements with Recurring Invoices</b>	Select YES if you want statements to be printed along with your recurring invoices.
<b>Print Only Balance</b>	Normally set to NO. If you select YES, then ONLY a 'Balance Forward' Forward on Statements: line will be printed on statements. Selecting NO will print a detailed list of any invoices that are past due, thereby giving the customer clearer information on which invoices are past due. Selecting NO is recommended.
<b>Sort Invoices By</b>	This selection allows you to choose what order your recurring invoices (and statements) will be printed. Normal selection is by Account.

However, you may print in name order, or zip code order if you are using Bulk Mail.

These fields are also described in the Overview chapter in the beginning of this manual.

To generate recurring invoices, select RECURRING INVOICES from the Invoice Generation Menu. It may take a few seconds for the recurring invoice screen to appear. Once the recurring invoice screen is displayed, you must answer the following questions:

**Print Recurring Invoices**

It is strongly recommended that a backup be performed before running ALL recurring billing

Click on the OK Button When Ready To Start Billing

Print Bills Scheduled From: 12/01/2001

Until: 12/31/2001

Do A Printer Alignment Test: NO

1st Remark To Print On Invoice: 1

2nd Remark To Print On Invoice: 1

Number Of Copies To Print: 1

Starting Customer Account#: ALL (Enter # or ALL)

Ending Customer Account#: (Enter # or END)

Specific Billing Method: ALL

Press CANCEL To Quit

**Print Bills Scheduled From**

The date range entered here determines which customers are getting billed. This date range is compared against every customers' NEXT BILL dates in the recurring charges screen. Only those customers' that are due to be billed during this date range will receive a recurring invoice. Once you enter the FROM date in this section, the UNTIL date will automatically be calculated by the system and displayed. If you wish to bill for a partial month only, then you can override the UNTIL date, otherwise leave the default value as is.

**NOTE:** The Billing date range should be in the NEXT MONTH from the time you are generating the invoices. For example, if you are physically generating invoices on December 15<sup>th</sup>, 2001 then the Billing date range should normally be 12/01/01 Until 12/31/02 (or any dates within the month of December). If this is not the case, then a warning message will appear. If you still wish to continue processing with a month other than the next month, then respond Yes, otherwise respond NO and you will be returned to the Invoice Menu.

**Is the Printer on and Ready?** Make sure the printer is turned on and the invoices are loaded

into the printer. Select 'YES' when ready. If you select 'NO', then you will be returned to the Invoice menu.

**Do a printer alignment test?** Before you print up the recurring invoices, it is **HIGHLY ADVISABLE** that you perform an alignment test first. If you don't, then it is very possible that all invoices will be printed out of alignment and you will need to reprint them again. To perform an alignment, select 'YES'. The printer will print a series of X's in the areas where text will normally appear. Check all areas of the invoice to be sure that is properly aligned. If it is not, then adjust the tractor feeds on the printer, or make adjustments up and down, then do an alignment test again. You may perform the alignment test as many times as needed to continuing to respond 'YES'. Once you are ready to print the invoices, select 'NO'.

**Enter the REMARKS** Enter the remark number that corresponds with the remark(s) which are to be printed. If you do not want any remarks to be printed, then leave this field blank. Select the [...] button to display a list of valid remarks.

**Number Of Copies To Print** Normally defaults to 1. If your printer supports multiple copies (such as laser and inkjet printers) you may select the number of copies to print.

**STARTING CUST ACCT #** Normally keep as 'ALL' to print all invoices due this month. You may select an account number or range of account numbers to print if you do not wish to print or reprint all invoices for the month. Just enter the starting account number in this field and then the ending account number in the next field described below. If you selected to sort the invoices by ZIPCODE in the set company header screen, then you may enter the beginning zip code number in this field. If you selected to sort the invoices by NAME in the company header screen then enter the letter(s) to start from.

If you wish to perform **ONLY** Dealer billing for those accounts setup as dealer accounts, enter the word DEALER in this field and the regular recurring invoiced accounts will be bypassed.

**ENDING CUST ACCT #** If you entered an account number to start printing from, then you will be asked to enter an ending account number. If you only want one invoice to be printed, then the ending account number should be the same as the starting account number. If you would like a range of invoices to be printed, then enter the last customer account number that you want to reprint. If you want all remaining recurring invoices to be reprinted, then enter 'END' into this field. If you selected to sort the invoices by ZIPCODE or NAME then enter the ending values.

**SPECIFIC BILLING METHOD** Usually set to ALL, this selection allows you to select recurring billing for a specific billing method only (ie: Printer, Visa, MasterCard, Email, etc.).

The Recurring invoices will now be generated. Depending on the selections you made above and the number of customers you have on file, it may take several minutes to several hours to generate the invoices. Obviously the more invoices to be printed, the longer it will take.

It is suggested that you monitor the printer while the invoices are being printed, since it is possible that the printer may jam. If this occurs, then you need to regenerate the invoices by selecting the last good account number that printed for 'starting customer account #' and the word 'END' for ending customer account # (if you are sorting the invoices by ZIPCODE or NAME then you must enter the zipcode or name of the last good invoice that printed for the starting value and then enter END for the ending value.

**IMPORTANT: DO NOT STOP THE RECURRING INVOICE PROCESS ONCE YOU HAVE CLICKED ON OK UNLESS ABSOLUTELY NECESSARY!**

### Credit Card Processing Of Invoices

Once the recurring invoice process has been completed for all accounts that have a billing method of 'Print' (printed invoices), and once multi-account (dealer) invoicing has been printed (see below), then accounts that are set up for billing method by credit card or EFT debiting (Visa, MasterCard, AmEx, Checking, Savings billing method selection in customer recurring charge screen) will be processed. A file is created containing each recurring transaction for the month. This file contains all pertinent information regarding each customer's transaction (credit card #, expiration date, charge amount, etc.). Payments will be posted automatically against these customers invoices for you. If a charge is denied, the credit card processing software (ICVerify) will notify you and you may then go into the payment screen for that invoice and 0.00 out the payment amount so the invoice remains open.

- q If you need to rerun the recurring invoice screen, you may do so without worrying about duplicate credit card transactions occurring. The system knows when a reprint is occurring and will only send credit card transactions to the processing file if the customer had not already been billed for that month.

## Multi-Account (Dealer) Invoicing

In addition to the regular recurring invoices that are generated, this program supports multi-account (dealer) invoicing. To set up an account for dealer invoicing, follow these steps:

In the customer maintenance section, make sure to create an account for the master dealer. You only need to create an account with an account number, name and address.

Once that is done, go into the first 'subaccount' that you want to bill to the master account. Click on the Recurring Charge button and Insert a new recurring charge:

The screenshot shows a 'Recurring Charge Profile' dialog box. The title bar indicates 'Record will be Changed' and the frequency is 'Monthly' with a value of '6.67'. The dialog is split into two main columns. The left column, 'Recurring Charge', contains fields for Code (CENTRAL), Bill Cycle (Q), Next Date (11/01/04), Bill Amt (20.00), Taxable (Y), Stop Date, and Cycle Cost (7.00). The right column, 'Billing Options', contains fields for Pro Rate First Time (Y), Starting (7/22/04), Mail To Account Number (1012), Post Charges To Above (YES), Identity On Dealer Invoice (Name), Next Increase Due On, and Billing Method (Printer). Below these is a section for 'Credit Card/Checking Information' and a 'Description Override (Usually Left Blank)' field. At the bottom left are 'OK' and 'Cancel' buttons.

Fill in the normal billing date, cycle, code, charge information found on the left side. The NEXT BILL fields in the recurring charges screen for each work-site account should normally be the same as the NEXT BILL field on the dealer account (typically monthly).

Then fill out the left-hand side of this screen as follows:

### Mail To Account Number

Enter the account number of the Master Dealer Account you setup earlier or select the account by clicking on the [...] lookup button.

### Post Charges To Above

Select YES so that this recurring charge is posted to the dealer account directly. If you select NO, then only the mailing address of the dealer account will be used – the invoice would still belong to this account.

### Identify On Dealer Invoice

Select Name to have this charge represented on the dealer invoice line item by the name of this subaccount. Select Address to have this charge represented on the dealer invoice line item by the street address (helpful if you have many stores with the same name posting to one master account).

When the recurring invoicing is generated each month, dealer invoices will be processed automatically after the regular recurring invoicing is finished. If dealer invoices are set up, a screen will pop-up asking if you wish to print the dealer invoices. At this point, you will need to replace your existing invoice forms in the printer with 8 x 11 blank paper (unless a custom dealer invoice was designed for you). Select BLANK for type of dealer invoice. You may then select if you are using preprinted forms, which remarks you wish to print on dealer invoices, and if you want to print an alignment test. Once you have answered these questions, the dealer invoices will print. Additional pages will be printed if there are over 40 accounts listed per page.

### **Printing An Audit Report**

The system has an auditing function that will be performed after a monthly billing. You may choose not to run this audit, however it is highly recommended that you perform this function. The Audit report double checks all customers that were supposed to be billed for the month and prints an exception report for any of these customers that were not billed, along with the possible reason they were not billed. You may print this report to your printer or display the report to the screen. The audit report is performed only when you choose ALL customers for monthly billing, not individual accounts or account ranges.

### **Applying Open Credits To Recurring Invoices**

If there are any open credits on file for a customer who is receiving a recurring invoice, those credits will be applied automatically against their recurring invoice for up to the amount of any new charges being billed on the recurring invoice.

As an example, if a customer is receiving a recurring invoice for a new \$50 charge, and they currently have \$80 of available credit, then \$50 of this open credit will be applied to the recurring invoice. The remaining \$30 of open credit will remain on file for this customer until it is applied to a future invoice.

Only open credits that have been marked as available to recurring invoices will be applied (the Recurring Invoice checkbox in the Credit Post screen must be checked on with an X). In addition, the Only Apply After date must be valid in order for that open credit to be applied.

Prepaid credits will be applied as a payment against the recurring invoice (the amount of the invoice reflects the actual charges, however a payment will be posted against the invoice).

Discount credits will be applied as a discount against the recurring invoice (the amount of the invoice will reflect the actual charges minus the amount of discount).

If a recurring invoice is deleted by the user, any applied credits will be re-posted to the open credit history for that customer and will become available to future invoices.

## Statements

Statements can be generated as part of the recurring invoice generation (see Recurring Invoices description above) or on a separate basis. If you do not wish to have statements printed as part of the recurring invoices, make sure to select NO to the 'Print Statements With Recurring Invoices' question in the Company Header screen (System Utilities).

To print statements, select STATEMENTS from the Invoice Generation Menu. It may take a few seconds for the statement screen to appear.

**Print Statements**

Do A Printer Alignment Test

Use Which Net Terms

Remark To Appear On All  ...

Remark If Account Current  ...

Remark If Over 30 Days  ...

Remark If Over 60 Days  ...

Remark If Over 90 Days  ...

Number of Copies To Print

Starting Customer Account#  (Enter # or ALL)

Ending Customer Account#  (Enter # or END)

The Statement screen will ask you several questions before generating statements:

**Do a Printer Alignment Test** For Dot matrix printers, it is recommended you perform an alignment test to make sure the forms are set correctly in your printer. Press Y for each time you wish to print an alignment test. When you are finished with the alignment test and wish to continue, press N. For Laser printers, select N.

**Use Which Net Terms** This field will default to your current Net Terms setting in the Company Header screen. However, you may change it to represent the individual net terms in the customer main account record. The net terms selected here will determine at which point an open invoice will print on a statement.

**Remark To Appear On All** Select a remark from the remark list that is to appear on all



statements that are about to be generated.

<b>Remark If Account Current</b>	Select a remark from the remark list that is to appear on only those statements where invoices are less than 30 days past due.
<b>Remark If Over 30 Days</b>	Select a remark from the remark list that is to appear on only those statements where invoices are between 30 and 60 days past due.
<b>Remark If Over 60 Days</b>	Select a remark from the remark list that is to appear on only those statements where invoices are between 60 and 90 days past due.
<b>Remark If Over 90 Days</b>	Select a remark from the remark list that is to appear on only those statements where invoices are over 90 days past due.
<b>Starting Cust Account #</b>	The default value is 'ALL' so that all accounts past due will receive a statement. You may enter an account number in this field if you wish a statement to be printed for an individual account, or for a range of accounts. If you are sorting your statements by name or zip code, then enter the beginning name or zip code in this field.
<b>Ending Cust Account #</b>	If you entered a value other than 'ALL' in the starting account # field, then enter a value in this field. If you wish to print a statement for an individual account, then enter the same account number as in the starting account # field. You may also enter the word 'END' to print all statements for accounts starting with the starting account # value and processing to the end of your accounts.

*Note: If you have selected Recurring Customer Sort: Name or ZIP in your Company Header Settings, starting and ending cust will be Name or ZIP code respectively.*

Once you have answered the above questions, the statements will be processed and printed. Late fees will be applied where applicable.

If you wish to use a different form for statements that you are using for invoices, be sure to go into the Company Header screen and select the type of statement form you will be using.

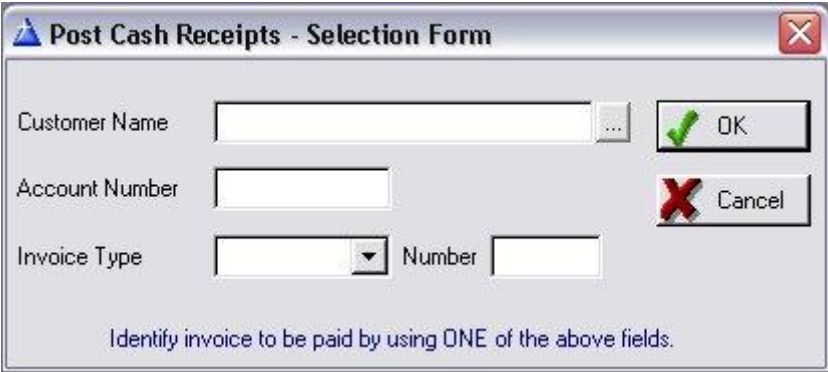
## Chapter 6: Posting Payments

The Post Payments function allows you to enter payments against invoices that were generated by the system. To confirm that the payment is being made for the correct invoice, summary information about the invoice will also be displayed such as customer name, invoice date, amount charged, sales tax charged and tax rate. An invoice must have been generated by the system in order for a payment to be posted.



### Selecting an Open Invoice

Once you have selected PAYMENTS button from the top taskbar, select the Post Payment menu selection. A screen will appear offering you several ways to locate the invoice being paid:



**Customer Name** If you know the name of the customer making a payment, enter the name here. This field supports a partial name search, so you can enter just the first few letters of the customers' name and any open invoices for customers whose name starts with those letters will appear on the open invoice list. Selecting the [...] button will display a list of customers for you to choose from.

**Customer Acct** If you know the customer account number, enter the number in this field. This is a more direct way of identifying a customer than by name above, since each customer has its own unique account number.

**Invoice Type** Select the invoice type to be paid.

**Invoice Number** If you know the invoice number that is being paid with this payment, then select whether it is a (R)ecurring or (P)roduct invoice, then enter the invoice number.

You may enter any one of these values, but do not enter more than one field. A list of all open invoices for the customer chosen will be displayed (unless you are going in by Invoice Number directly, in which case the payment screen will be displayed instead). Once you have identified the invoice to be paid, select the POST PAYMENT button while that invoice is highlighted on the list. This will bring you into the payment screen.

### Posting a Payment

Once you have selected the open invoice which you are posting a payment against, the cash receipts screen will appear. Make sure that the payment you are posting is actually for this invoice. If it is not, then press the ESC to return to the open invoice list. If it is the correct invoice, then you may proceed to post the payment using the following fields (up to 4 payments may be entered on the main payment posting screen, therefore each of the following fields is repeated 4 times):

#	Check Date	Check Amt	Check No	Post Date	Income Type	Invoice	
1	11/05/01					Charges	69.00
2						Tax Amount	5.69
3						Late Charge	0.00
4						Invoice Amt	74.69

**Invoice Description**

Invoice Number: P 118  
Account Number: 100  
Customer Name: Smith  
Invoice Date: 11/02/2001  
Recurring Cycle: Tax Rate: 8.25000

**Payment**

Paid To Date: 0.00  
Write-Offs: 0.00  
**BALANCE DUE = 74.69**

Overpayment

Payment Comments

OK Cancel Additional Payments

**CHECK DATE** Enter the check date, or date you received payment. (Date format = MM/DD/YY)

**AMOUNT PAID** Enter the amount of payment. If the payment is not equal to the invoice amount, then this invoice will remain an open invoice and

additional payments will be needed in order to satisfy the invoice (unless you write-off the remaining balance as described below).

If the amount of payment received is greater than the amount owed on the invoice, enter the amount of the full payment received. A pop-up window will appear asking you if you wish to credit this customer's account with the amount of overpayment. If you say yes, then the customer record will be automatically adjusted to reflect the amount of the credit, which will be applied to the next invoice created for that customer (see credits).

(Maximum \$99,999.99)

**CHECK NUMBER** Enter the number of the check. If the payment is in cash, then you can enter 'CASH'. If it is a money order or certified check, then enter 'MO' or 'CC'. (5 characters maximum)

**POST DATE** This field represents the date that you posted the payment into the system and defaults to the current system date when a payment is entered. This date is used when running the cash receipts report. You may enter a different date in this field if the payment is being posted for another date.

**INCOME TYPE** This is a validated field that allows you to 'categorize' the type of payment received (Deposit, Layaway, etc.). This category may be used by the Cash Receipts report to separate types of income into separate reports.

**WRITE-OFF** If a customer has not paid the invoice in full, a screen will automatically appear asking you if the customer is required to pay the remaining balance. If you select 'yes', then the invoice remains open. If you select 'no', then the remaining balance will be posted to the write-off field and the invoice will be closed. Write-off's will also appear on the cash receipts report for tax purposes.

To remove a write-off previously posted, enter a 0 in the amount paid field. This will zero out the write-off. You may then go back to the amount paid field and enter the correct amount paid.

**COMMENTS** If you need to make any comments about this payment, or if a partial payment was made and you wish to notate the amount and date of the last partial payment, then use this field.

Once the payment has been entered, select the OK button to post it. If you wish to abort any payment you have just posted on this screen, select the Cancel button. This will discard the payment and return you to the Open Invoice List.

If you have received more than 4 payments against an invoice, you may post additional payments in the 'Payment Overflow' area by selecting the ADDITIONAL PAYMENTS button from the payment posting screen. This button will only be active if there are already 4 payments on this screen, otherwise this button will not be available for use. This button will pop-up a list of additional (overflow) payments. This list allows you to enter an unlimited number of payments against this invoice. To post an additional payment, press the Insert key from the payment overflow list and enter the information as described in the fields above. If you need to modify a payment in this list, highlight the appropriate payment and press TAB, then make any changes necessary. If you wish to remove a payment from this overflow list, highlight the payment to be removed and press Delete key to confirm the payment, then select OK to perform the deletion. You will notice that the

current open balance on the invoice will change as you enter, modify, or delete a payment from this list.

**NOTE:** You can elect to have the software allow the use of the ENTER key to navigate through the fields of the payment screen rather than just the standard Windows TAB key. To activate this feature, go to Utilities/Set System Defaults/Invoice Tab and go to the 'Use Enter Key For Payment Postings' selection and select YES. This is helpful if you wish to use the numeric keypad on the right side of the keyboard for fast numerical data entry in these fields.

### **QuickPay Feature**

You can setup the software so that posting payments for invoices that are being paid in full can be done very quickly. This is especially helpful on recurring invoices where the majority of checks or payments being posted are the same as the amount owed on the invoice. With the Quickpay feature enabled, posting a payment is as easy as entering the invoice number being paid, typing in the check number, and hitting ENTER to record the payment. Then repeat for each additional payment. For those companies that post many payments in one day, this can be a very useful feature.

To activate Quickpay, Go to Utilities/Set System Defaults and click on the INVOICES Tab. Go down to the Post Payment Defaults section, and fill in the following fields as instructed:

Default Invoice Type:	R
Default Entry Field:	Invoice
Default Income Type:	Check
Default Payment To Invoice Amt:	YES

Now whenever you go to the PAYMENT button on the top toolbar of the software and click on Post Payments, the cursor will automatically be positioned at the Invoice Field (defaulted to Invoice Type R). Enter the invoice number, hit enter, enter the check number where the cursor is automatically positioned (amount is automatically filled in for you based upon the amount of the invoice, as are the posting dates), and press ENTER to save the payment. You are positioned now back at the same Invoice field – ready to enter a new invoice number to pay.

### **Automatic Apply Feature**

The automatic apply feature allows you to post a payment against several invoices at once. This is especially useful if a customer is paying off several invoices with one check.

To initiate the automatic apply feature, select Post Cash Receipts from the Main Menu. Once the post payment selection screen has appeared, enter the customers' account number or name. A list of all open invoices for this customer will now appear.

**Apply Payment To Remaining Open Invoices**

This section will automatically apply this payment towards ALL open invoices for the selected customer, starting with the oldest invoice first. Payments that exceed the customer's open balance will be applied as a credit towards the customer's account.

Account#	Check Date	Check Amount	Check Number	Date Posted	Income Type
105	11/21/2001			11/21/2001	

OK Cancel

From this open invoice list, select the APPLY CHECK TO ALL OPEN INVOICES button. A screen will pop-up confirming which account number the payment will be posted against:

You may choose another account number by entering the appropriate account number, or selecting the [...] button to display a customer list. If you wish to cancel this operation, select the Cancel button.

You will now need to enter information about the payment in the same manner as described above under normal payment posting procedures. Enter the check date, amount, number, posting date, and income type (optional) of the check you are posting. Once you have done this, the system will post the payment against all outstanding invoices, starting with the oldest invoice first.

If the payment is for more than all open invoices, you will be asked if you wish to credit the account.

### Changing / Reversing a Payment

To make a change to an existing payment, or reverse a payment that was previously posted due to a bounced check, enter the exact invoice type (R for Recurring, P for Product) and the exact invoice number from the post cash receipts selection window. The payment screen for that invoice will appear. You may now change any information entered about the payment on this screen. To reverse out a payment, simply change the check amount to 0, and remove the check number. This will re-open the invoice as unpaid and will appear on any future statements until it is paid again.

### Posting Payments From Within Invoices

To save time, it is possible to post a payment against an invoice while creating the invoice. This is especially helpful when you have received a deposit for a job and are now creating the invoice for this job. Once you have entered the information on the invoice, select the PAYMENT button that appears on the service and product invoice screens. The 'Cash Receipts Posting' screen will pop-up over the invoice. Post a payment as described in the beginning of this chapter. All rules and descriptions for posting a payment apply in this case as well. When you have finished posting the payment, select OK to save.



## Chapter 7: Posting Credits

You can process many types of credits, such as credit memos, discounts, and prepaid open credits (deposits and overpayments). All credits maintain an internal audit trail that may be viewed so that you can review how all credits have been applied. There are differences between the types of credits that can be posted to a customer's account and it is important that these differences are understood.



The system is designed to be flexible in its handling of credits. When posting a credit to a customer's account, you may choose to allow that credit to be applied to all types of invoices (service, recurring, and product), or just to a certain type of invoice(s). You may also specify an 'Only Apply After' date so that the credit can only be applied after a certain date has passed.

Every customer may have multiple open credits on file and the program will keep track of the total of these credits. Credits can be applied automatically against recurring invoices, and/or applied manually against a service or product invoice. You will be reminded automatically of any open credits when saving a service or product invoice. A complete audit trail of how each credit is applied is maintained.

Credits are posted by several methods. Some are automatic and some are posted specifically by the user. This section describes the different types of credits and the means in which they are posted to an account.



## Posting A Discount Credit

A discount credit provides a means of reducing the amount of an invoice. This results in lowering the revenue generated from that invoice. Examples of discount credits are a free month of monitoring, discount for a referral, promotional discounts, etc.

The screenshot shows a dialog box titled "Post Open Credit" with a close button (X) in the top right corner. Below the title bar, it says "Record will be Added" and "Credits Posted Will Be Applied To Future Invoices." The dialog contains the following fields and options:

- Credit Number: 1
- Credit Posted On: 11/21/01
- Only Apply After: (empty)
- Post To Account#: 105
- Original Credit: 50.00
- Available Credit: 50.00
- Type Of Credit: DISCOUNT
- Overpayment: NO (with a note: \* Normally Default To NO)
- Check Number: 1786
- Desc Of Credit: Discount
- Desc To Print: (empty)
- GL Code: 2000-0001-0000

On the right side, there is a section titled "Credit Can Be Applied To These Invoices Styles" with three checkboxes:

- Recurring Invoices
- Service Invoices
- Product Invoices

At the bottom, there are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Credit Activity" (with a folder icon).

Discount credits are applied to an invoice BEFORE sales tax is calculated since you are actually reducing the amount of the invoice that will be paid by the customer. A \$100 invoice with a \$25 discount credit is actually \$75. Sales tax (if applicable) will be calculated on the \$75 total amount, not the \$100.

Discount credits may be posted to a customers account by one of two methods:

q A credit memo may be generated in the service invoice area. A credit memo is a service invoice with a negative total due (refer to 'Issuing Credit Memos'). Once a credit memo is saved, a discount credit is posted against that customers account. You may modify the specifics of the discount credit if necessary by going into the customers account and select the CREDIT HISTORY button for a list of customer credit history (open & applied).

q A discount credit may be posted through the 'Post Payments/Credits' Menu (PAYMENT button on top taskbar). This is the normal method for posting credits and allows the greatest flexibility in determining how this credit will eventually be applied. Please see below for a detailed description of the Credit Posting screen.

## Posting A Prepaid Credit

A prepaid credit can be a deposit that has not yet been applied to an invoice, or an overpayment that was posted against an invoice in which there was extra money left over that could not be applied to any open invoices. In either case, a prepaid credit consists of money that has been received by you for a customer, but there are no open invoices to post these monies against.

The screenshot shows a dialog box titled "Post Open Credit" with a close button (X) in the top right corner. The text "Record will be Added" is displayed at the top, followed by "Credits Posted Will Be Applied To Future Invoices." in blue. The form contains the following fields and options:

- Credit Number: 1
- Credit Posted On: 11/21/01
- Only Apply After: (empty)
- Post To Account#: 105
- Original Credit: 50.00
- Available Credit: 50.00
- Type Of Credit: PREPAID (dropdown)
- Overpayment: NO (dropdown) \* Normally Default To NO
- Check Number: 1786
- Desc Of Credit: Prepaid Credit
- Desc To Print: (empty)
- GL Code: 2000-0001-0001

On the right side, there is a section titled "Credit Can Be Applied To These Invoices Styles" with three checked checkboxes:

- Recurring Invoices
- Service Invoices
- Product Invoices

At the bottom, there are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Credit Activity" (with a folder icon).

The main difference in how a prepaid credit is handled as opposed to discount credits is in the calculation of sales tax. Since a prepaid credit does not affect the actual amount of the invoice generated, prepaid credits are applied AFTER sales tax is calculated on the invoice. A prepaid credit does not affect the actual 'revenue' generated from the invoice. A \$100 invoice with a \$25 prepaid credit is still a \$100 invoice, with sales tax calculated against the \$100. The \$25 prepaid credit is then applied as an actual payment against this invoice so that the total due by the customer is less the \$25 (since the \$25 was already paid). In this scenario, the customer would now owe \$75 after the \$25 credit has been applied to the invoice.

A prepaid credit may be posted by one of two methods:

q Any overpayments that are posted in the Post Payment section can be applied as a prepaid credit to a customer's account. When a payment is entered in this fashion for more than the amount of the invoice owed by the customer, and there are no additional invoices to post the remaining payment to, then the amount of the overpayment will be posted to the open credit section for this customer.

q Prepaid credits may also be posted in the Post Payment/Credit selection on the Main Menu.

Select Post Credits and a Credit Posting screen will appear. This screen is described below.

### Credit Posting Screen

Record will be Added  
Credits Posted Will Be Applied To Future Invoices.

Credit Number: 1  
Credit Posted On: 11/21/01  
Only Apply After:   
Post To Account#: 105  
Original Credit: 50.00  
Available Credit: 50.00  
Type Of Credit: PREPAID  
Overpayment: NO \* Normally Default To NO  
Check Number: 1786  
Desc Of Credit: Prepaid Credit  
Desc To Print:   
GL Code: 2000-0001-0001

Credit Can Be Applied To These Invoices Styles  
 Recurring Invoices  
 Service Invoices  
 Product Invoices

OK Cancel Credit Activity

The credit posting screen is accessed by selecting PAYMENT button on the top taskbar, then selecting Post Credits on the payment menu.

The credit posting screen allows discount and prepaid credits to be posted as open credit against a customer's account. You may have multiple open credits for a customer. Open credits will then be applied when you create an invoice for that customer (you will be asked how much of the open credit is to be applied to that invoice - all open discount and prepaid credits will be totaled for you and you may apply as much or as little of either type of credit to an invoice).

The credit posting screen has the following fields that may be filled in:

- |                         |  |
|-------------------------|--|
| <b>Credit Number</b>    | This number is automatically assigned by the system.   |
| <b>Credit Posted On</b> | This date will default to the current system date. You may override this date if necessary.  |
| <b>Only Apply After</b> | If you want this credit to only be applied after a certain future date, then enter that date in this field. If you wish to have this open credit applied to the next invoice that is created, then leave this field blank. |
| <b>Post To Account#</b> | Enter the customer's account number that this credit is to be posted to. If  |

you leave this field blank, or enter an incorrect account number, a customer list will automatically pop-up. You can also select the [...] button to display the customer list.

<b>Original Credit</b>	Enter the amount of the credit currently being posted. This amount will always remain on file, even after the credit has been applied to future invoices.
<b>Available Credit</b>	This is the amount of credit that is currently available (open) from this particular credit. Initially, the available credit will be the same as the original credit. However, as this credit is applied to future invoices, the available credit amount will reflect the amount of credit still remaining to be applied.
<b>Type Of Credit</b>	There are two types of credits that can be posted to an account, PREPAID or DISCOUNT credits. A prepaid credit is the result of an overpayment received from a customer, or a deposit that is not yet being applied to an invoice. A Discount credit is a discount such as referral discount, product discount, etc. that is to be applied to a future invoice in order to reduce the amount of that invoice. Select the appropriate type of credit. Please refer to the beginning of this chapter for a more detailed explanation of prepaid and discount credits.
<b>Overpayment</b>	If this prepaid credit is being posted because of an overpayment (a customer pays more than is currently owed), then select YES, however if this prepaid credit is being posted because of a deposit for future invoices, then select NO. This selection is only valid for Prepaid credits.
<b>Check Number</b>	If this is a prepaid credit, enter the check number for the check being used for this credit (overpayments or deposits). This selection only valid on prepaid credits.
<b>Desc Of Credit</b>	Enter a description of what this credit is for in this field. This is used for documentation purposes only.
<b>Desc To Print</b>	Enter a description of how this credit is to be represented on an invoice. Any text entered in this field will be printed on any invoice where this credit is applied to.
<b>Invoice Styles</b>	You have the option of selecting what type of invoices this credit may be applied to. All invoice styles (recurring, service, and product) are automatically selected with an X in each checkbox. If you do not wish this credit to be applied to a certain type or types of invoices, then press the space bar or use the mouse to click on the appropriate box to turn off the X.

When you have finished entering the above credit information, select OK to post the credit to the customer's account.

## Reviewing Or Modifying A Posted Credit

If a credit that has been posted needs to be modified, you may do so by following these steps:

Bring up the customer's main account screen from the Customer Maintenance area.

Select the CREDIT HISTORY button from the main account screen.

Highlight the credit you wish to review or modify and select CHANGE. This will bring up the credit posting screen for that credit. You may review the history of how this credit has been applied by selecting the CREDIT ACTIVITY button. The Credit Activity list shows every time this credit has been applied, as well as which invoice the credit was applied to and the amount of credit applied to each invoice.

Press the Cancel button when you are finished reviewing the credit activity to return to the credit screen.

If you wish to modify the posted credit, press the TAB key on the credit posting screen to the field you wish to change. Any field on this screen may be modified (except the Available Credit field which is calculated by the system). However if you modify the Original Credit amount, be aware that you may have already applied this credit to existing invoices. Although the system will allow you to modify the Original Credit (and thereby the system will recalculate the Available Credit for you), you may need to go into those invoices that have had this credit applied and make adjustments there as well. If this posted credit has not yet been applied to anything yet, then you may simply make a change to the Original Credit Amount without any further adjustments.

For example, if this is a prepaid credit that you are now reducing from an Original Credit amount of \$100 down to \$25 and the \$100 has already been applied to invoice # S 7, after you have changed the Original Credit amount on this screen and saved it, you will need to go into the Post Payment area and bring up the payment screen for invoice # S 7. You will see where this prepaid credit has been applied as a payment. Now change the amount of this payment to correctly reflect the modification you made to the original credit.

If this is a discount credit that you changing and this discount credit has already been applied to an invoice, then you will need to go into the actual invoice where the discount has been applied and change the amount of discount in the invoice screen. For example, if the Original Credit amount was \$100 and you changed it to \$25, then you will also need to go into that invoice from the Invoice Generation Menu area, and change the discount amount that was originally applied to the invoice.

## **Deleting A Posted Credit**

If a credit that has been posted needs to be deleted, you may do so by following these steps:

Bring up the customer's main account screen from the Customer Maintenance area.

Select the CREDIT HISTORY button from the main account screen. This will display the customer's credit history list.

Highlight the credit you wish to delete and press the DELETE key. This will bring up the credit posting screen for that credit. To confirm the delete, select the OK button to delete this credit. If you wish to exit without deleting this credit, then select the Cancel button.

If the credit being deleted has not yet been applied to any invoices, then there are no further adjustments to be made.

If the credit has already been applied to one or more invoices, then you will need to make adjustments on those invoices as well to reflect the deleted credit. Please follow these steps to adjust those invoices:

If this was a prepaid credit that was deleted, then go into the Post Payment section and bring up the payment screen for each affected invoice by invoice number. When the payment screen appears you will see a payment that reflects this applied credit. Change or remove the check amount that reflects the credit and then select OK to save.

If this was a discount credit that was deleted, then go into the Invoice Menu and proceed to bring up the invoice that had the credit applied. Once in the invoice screen, go to the discount line that is displayed and change or remove the amount of the discount.

## **Chapter 8: Service Appointments**

The Service Appointment Calendar feature allows the user to maintain and view a schedule of service appointments in a multitude of viewpoints.

The appointment calendar is the master list of appointments that are setup from throughout the software. Appointments show on the calendar as a result of being created from within any of these areas of the software:

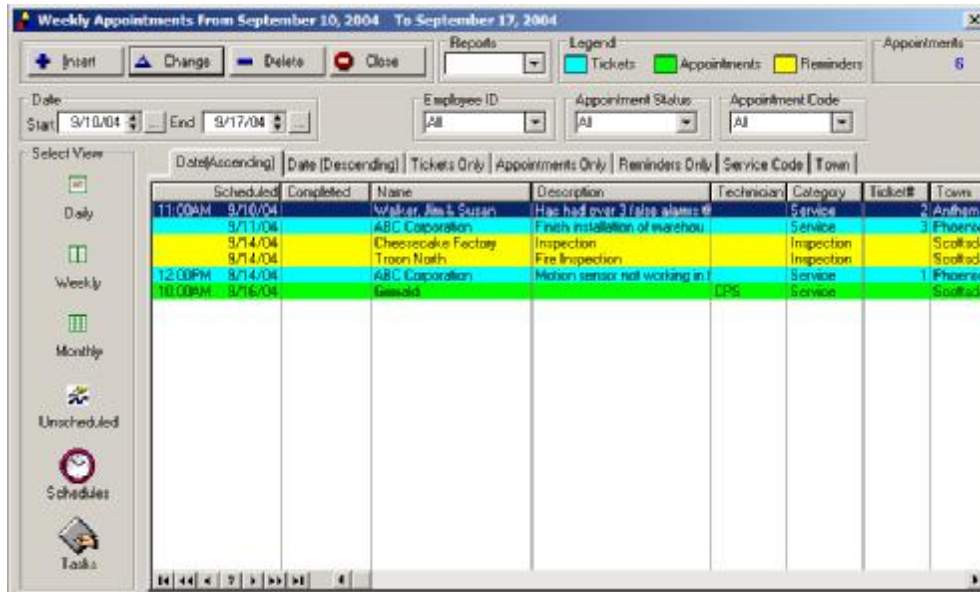
- Service Tickets
- Service Reminders
- Support Call Follow-Up Reminders
- Manually Entered Appointments On The Calendar Directly

As you will discover, the appointment calendar plays a vital role in the daily use of the software.

### **Viewing Appointment Calendar**

Once you select 'Appointments' button from the top taskbar, the main appointment screen will be

displayed. It is similar in style to the popular Microsoft Outlook calendar.



The top row of the calendar includes Insert/Change/Delete button as well as a Report Selection drop-down to print a Schedule Report or Batch Ticket Print.

All appointments listed on the calendar are color-coded for easy identification as to their source. The Legend shows the color-coding assigned to these appointments.

The appointment list displayed may be sorted by Date (Ascending), Date (Descending), Tickets Only, Appointments Only (manually entered or follow-ups from Support log), Reminders Only, By Service Code, or by Town. Click on the appropriate sort tab to immediately display that sort.



## Adding an Appointment

To add an appointment click on the INSERT button on the appointment calendar. This will display the Appointment Detail screen:

**Change Appointment**

OK Cancel View Customer View Ticket

Appointment Appointment Additional Notes User Defined

Multi-Day Appointment

**Service Information**

Scheduled From 11/10/08 Until  
Scheduled Time 1:00PM  
Arrive Until Time 2:30PM  
Date Completed  
Technician PWB  
Service Code Service  
Service Fee

**Customer Information**

Account# 1001 Ticket# 6  
Name ABC Corporation  
Street 150 Main Street  
Town Mesa  
Phone 602-555-1232

Description Repair Job

**Multi-Day Appointment** If this appointment is to span several days, check this box to display the 'Until' date field for a date range.

**Additional Notes Tab** If you need to write detailed notes about a particular appointment, click on the Appointment Additional Notes tab. This section may also be printed on the Appointment Calendar Printout.

**User Defined Tab** Allows the setup of up to 5 user-defined fields for tracking specific data about an appointment that your organization requires.

**Scheduled Date** Enter the date of the appointment in this field.

**Scheduled Until** If the Multi-Day Appointment checkbox is checked, this field will be displayed. Enter an ending date for this appointment, and the appointment calendar will reflect the date range of this appointment for each day within that range.

**Scheduled Time** You can enter the scheduled time of appointment. If a time is entered, you may also select AM or PM.

**Arrive Until** If your appointment must be scheduled within a specific time of the day, enter the latest time this appointment is scheduled for, including

AM or PM designation.

**Date Completed**

Once a scheduled appointment has been completed, you may enter the date of completion in this field. This allows you to keep track of which appointments were done, and which ones are still open. The scheduled appointment list can print out schedules based upon open or closed status.

**Technician**

Select the technician this appointment is assigned to.

<b>Service Code</b>	Enter a service code correctly categorizes the type of appointment being scheduled. This service code can be used by the Mail Merge section for reminders and notices to be sent out for those customers whose appointments are coming due. Selecting the [...] button will display a list of valid service codes.
<b>Service Fee</b>	Relays the service fee assigned to a service reminder. Does not get used in any billing calculations. It is displayed as a reminder to the service department if there is a fee associated with this appointment.
<b>Description</b>	You can enter a brief description of the type of appointment being scheduled. A more detailed description of this appointment may be entered in the Additional Notes Tab section of this appointment.
<b>Customer Acct #</b>	If the appointment is for a customer, enter the customers' account number in this field. If the account number is entered, the customer name and town fields will automatically be filled in. You may leave this field blank if you do not know the customers' account number, or if the appointment is for someone other than an existing customer. Selecting the [...] button will display a list of customers.
<b>Customer Name</b>	Normally filled in if you entered a customer account number in the previous field. You may enter a name if the appointment is not for a customer.
<b>Customer Street</b>	Normally filled in if you entered a customer account number in the account number field, otherwise you may manually enter a street.
<b>Customer Town</b>	Normally filled in if you entered a customer account number previously, otherwise you can enter the town manually.
<b>Customer Phone</b>	Normally filled in if you entered a customer account number.
<b>Create Ticket</b>	This field is only displayed if the appointment is NOT Service Ticket related. Select YES if you would like a service ticket created from this appointment when you batch print service tickets (which is performed by clicking on the REPORT selector on the top of the appointment calendar and selecting TICKET). Select NO (or leave blank) so that a service ticket is not created when performing batch ticket printing.
<b>Create Now</b>	This button is only displayed next to the Create Ticket field, if an appointment is NOT service ticket related AND the Create Ticket field is selected as YES. By clicking on the Create Now button, a service ticket will automatically be generated from this appointment, and you will be prompted as well if you wish to print the ticket at this time.

Select OK to save the appointment. You will be returned to the calendar view, and the appointment just entered will be notated in the # appointments displayed for that day.

**View Customer Button**

Click on the customer info button to display the full customer maintenance screen for this customer.

**View Ticket Button**

Only valid for appointments associated with a service ticket. Click on the View Ticket button to bring up the Service Ticket screen for the ticket associated with this appointment.

## Appointment Selectors

The Appointments Counter in the upper-right corner shows the total number of appointments currently displayed for the date or date range – based upon the parameters selected below:

NOTE: You can setup security for a user so that these selectors are set to defaults when they log in and view the appointment calendar. See Security Administration Chapter for detailed information.

**Employee ID**            The Employee ID drop-down selection displays a list of all employees that are currently on file within the Employee Profile section. To view the appointment schedule of all employees, select ALL as Employee ID. If you wish to view appointments for a specific employee only, click on the drop-down field and select the appropriate Employee ID from the list. The appointment list will immediately reflect the Employee ID selection.

**Appt Status**            The Appointment Status drop-down selection allows the selection of appointments based upon the following Status:

All	Displays ALL appointments regardless of status
Open	Displays only appointments that do not have a completed date
Closed	Displays only appointments that have a completed date
Unscheduled	Displays only appointments that have no scheduled date

Select an appropriate status from this drop-down list. The appointment list will immediately reflect the Appointment Code selected.

**Appt Code**            The Appointment Code drop-down selection displays a list of all appointment codes that has been previously setup. These are user-defined values that are used to assign a code to each appointment / ticket created (ie: Meeting, Service, Inspection, Repair, etc.). Select ALL to show all appointments regardless of their code, or click on the drop-down field and select an appropriate Appointment Code from the list. The appointment list will immediately reflect the Appointment Code selected.

**Company ID  
(OPTIONAL)**

If you have purchased the Multicom module for Alarm/Service Express, you have the additional capability of viewing the appointment calendar for only those accounts assigned to a specific Company/Branch/Division code. This selection will appear just to the right of the Appt Code selector.

You may also setup Security Administration so that the user logged in can only view appointments for a specific Multicom ID accounts. Call Z-Micro Technologies for further information on the capabilities of the Multicom add-on module.

## Appointment Views

The main panel on the left side is the Select View Panel:

NOTE: Some selectors are not valid on specific views and therefore will not be displayed in that view.

### Daily

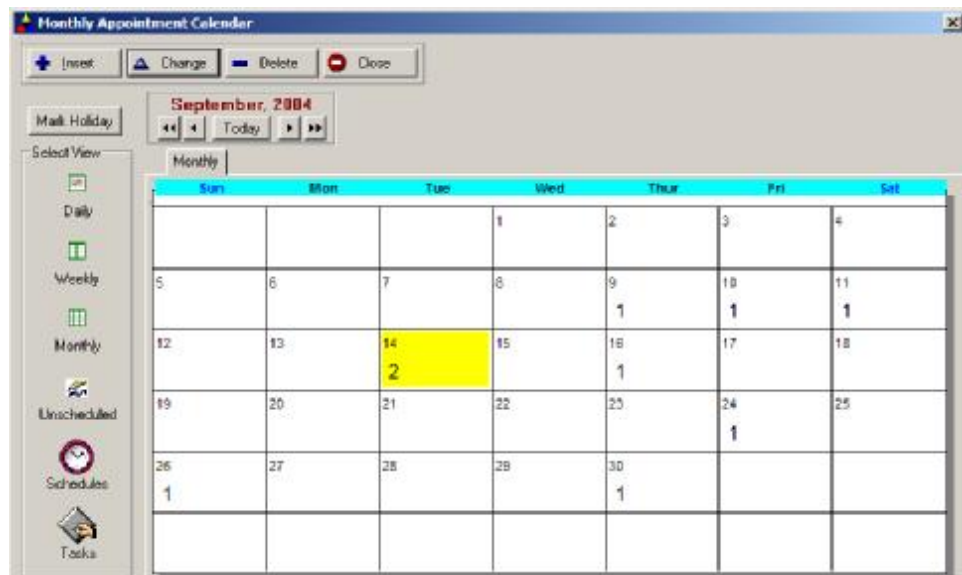
Clicking on the Daily button displays appointments for a specific date (defaults to current date). Click on the [...] lookup button to change date. Double-click on a listed appointment to bring up the Appointment Detail screen for details of that appointment. Click on INSERT to add a new appointment, or click on DELETE to delete an existing appointment.

### Weekly

Clicking on the Weekly button displays appointments for a one week (7 days) time period initially, defaulting with the current date as the starting date. To change the starting date, click on the up/down arrow next to the date or click on the [...] lookup button to change the date from a popup calendar. As you change the starting date, the end date automatically retains a 7 day span. If you wish to display a different date span than 7 days, first select the Start Date, and then click on the up/down arrow or [...] popup calendar on the End date field to select a different ending date. Double-click on the Appointment Detail screen for details of that appointment. Click on INSERT to add a new appointment, or click on DELETE to delete an existing appointment.

### Monthly

To view a monthly calendar, click on the Monthly button. This will display a typical monthly view of a calendar, with the inclusion of the number of appointments listed in each day box. Double-click on a specific date within this Monthly view to go to the Daily View showing a list of appointments for that specific date.



To navigate to other months or years on the monthly calendar, click on the left or right arrows displayed next to the date field above the monthly calendar. Single arrows change by month, double-arrows change by year.

### MARK HOLIDAY

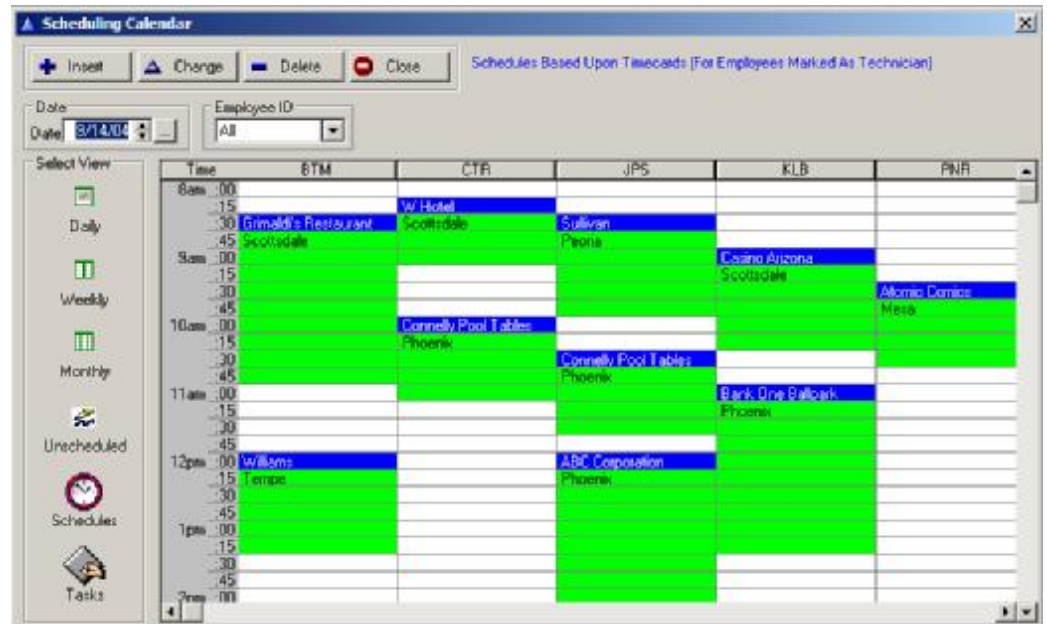
Click on this button to enter an event (holiday name, other event) to show on a specific date.

## Unscheduled

To display a list of all appointments that are not scheduled, click on the Unscheduled Button. This include all service tickets that do not have a scheduled date filled in, or an appointment that does not have an actual date associated with it. Examples of possible reasons for unscheduled appointments include service jobs that are awaiting repaired items from the manufacturer before reinstalling at customer site.

## Schedules

The Schedules button displays a graphic representation of your technicians schedule.



These schedules are based upon Timecards that are created from within each service ticket. Timecards are created either manually when the service department creates service tickets (by clicking on the Timecard button on the service ticket screen), or when creating a service ticket with at least one technician ID (in which case the program automatically creates a basic timecard for that service ticket for scheduling purposes).

Each technician in your organization will be listed on this screen under their own column. You may scroll the schedule screen to the right for up to 50 technicians. For higher resolution monitors, you can widen this list.

For each technician, schedules will be displayed within their column by showing the name of the account they are scheduled to service, along with the town where the account is located. A green bar will display the length of the scheduled appointment – as determined on the Timecard.

### Changing Schedules:

To change the Date, Starting Time, or Duration of a scheduled event, double-click on the scheduled event. This will bring up the Timecard with those parameters. Changing any of the parameters will automatically reschedule that technician schedule.

<b>Employee ID</b>	Technician ID scheduled
<b>Work Date</b>	Date of schedule
<b>Ticket#</b>	Scheduled service ticket
<b>Account#</b>	Account# of scheduled service
<b>Start Time</b>	Starting time of schedule
<b>Duration</b>	Duration (Minutes) of schedule

You may also view the customer account directly from here by clicking on View Customer button.

### Inserting Schedule

You can create new schedules for a technician directly from the Scheduled screen. Click on the INSERT button on the top of this screen to bring up the Schedule Employee (Timecard) screen as described above. Although it is not mandatory to schedule a technician to any particular service ticket# or account#, the typical usage of this area would be to schedule a technician to a specific account and ticket number.

### Deleting Schedule

You may delete a schedule by highlighting that technician schedule and clicking on the DELETE button.

The Schedule Screen may be setup with specific user parameters in the Security Administration section of the program (See Security Administration chapter for detail explanation). This includes viewing the grid from a specific starting time, and locking out a user (tech) so that they can ONLY view their own schedule.

Remember that the schedules displayed here are based upon Timecards. Therefore, any change you make to a timecard – whether it is directly from this Schedule screen or from within a service ticket – will immediately be reflected on this screen.



## Tasks

The Task screen shows a list of all tasks that have been entered.

Priority	Entered	Due Date	Completed	Subject	Status	%
1	11/05/04	11/25/04		Installation plans drawn up before installation	Project	
2	11/05/04	11/17/04		Prepare conference room for meeting with ABC Corporation	Meeting	
2	11/05/04	12/08/04		Apply for permit for Wilson project	Permit	

The tasks may be sorted by Priority, Due Date, Status (user-definable), Employee ID, Completed Indicator, and Percent Completed.

To insert a new task, click on the INSERT button. The Task screen will appear:

**Task**

OK Cancel

Priority: 2 (1=High 10=Low)  
 Employee ID: ACS  
 Status: Meeting  
 % Completed: 50

Task Entered: 11/05/04  
 Task Due: 11/17/04  
 Task Completed:

Subject: Prepare conference room for meeting with ABC Corporation

**Task Notes**

Setup projection system  
 Load Autocad plans onto server for walkthrough  
 Order catering by 11AM

**Priority** Prioritizes this task (1=Highest Priority / 4= Lowest Priority). Task list can be sorted based upon Priority

**Employee ID** ID of employee this task is assigned to. Authorized users may assign tasks to any employee listed in the Employee Profile section of the software. Non-Authorized users (as determined in the Security Administration Profile for this user) may only assign tasks to themselves. Task list may be sorted by Employee ID.

**Status** A validated field (user-defined values) that determines the type of task. Task list may be sorted by Status.

**% Completed** A percentage from 0 to 100 determining the completion stage of this task as of this moment. Task list may be sorted by Completed %

<b>Task Entered</b>	Date Task was entered into system
<b>Task Due</b>	Date task is due for completion. Task list may be sorted by due date
<b>Completed</b>	Date task was completed (task is considered completed when a date is entered into this field and will no longer show on open task list unless a checkmark is placed in the 'Include Completed Task' checkbox of the task list screen or clicking on the Completed Sort Tab on the task list screen.
<b>Subject</b>	Enter a summary description of this task
<b>Task Notes</b>	Description of task

## REPORTS Selector

### Printing Appointment Schedules (SCHEDULE Selection)

Selecting the SCHEDULE selection from the Report Selector activates this function. You can display or print out a listing of appointments scheduled for any date range by pressing the F10 key from the appointment calendar. After selecting this button, you will be asked the following questions:

<b>Start Date</b>	Enter the beginning scheduled date of appointments that are to be printed on the list.
<b>End Date</b>	Enter the last scheduled date of appointments that are to be printed on the list.
<b>Appt Status</b>	Since appointments can be marked as completed, you have the option of printing out just appointments that are still open, appointments that have been completed, or all appointments, regardless of status.
<b>Technician</b>	If you wish to print out a list of appointments assigned to a specific technician, enter the technicians' name in this field, otherwise leave blank.
<b>Town</b>	If you wish to print out a list of appointments for customers located in a specific town (for routing purposes), enter the name of the town in this field, otherwise leave blank.
<b>Service Code</b>	To print out a listing of appointments that have the same service code, enter the service code in this field, otherwise leave blank.
<b>Account No</b>	To print out a list of appointments that pertain to an individual account, enter the account number in this field, otherwise leave blank.
<b>Area MapCode</b>	If you wish to route your appointments for service efficiency, enter the Area Mapcode number in this field. This number corresponds to the Area Mapcode field that is on each customers record. If you do not route your service jobs, then leave this field blank.

**Send Report To** You may send this report to the screen for immediate viewing or to your printer.

Once you have answered the above prompts, the appointment schedule list will print out.

### **Printing Service Tickets In Groups**

Selecting the TICKETS selection activates this function. You can use this section to print in groups any service tickets that have been previously created. Known as 'batch' printing, you can select to print service tickets that are scheduled within a specific date range.

For further instructions on performing this feature, refer to the 'Printing Service Tickets' section of the Service tickets chapter earlier in this document.

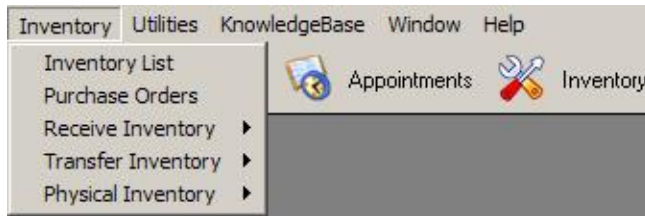


## Chapter 9: Inventory Maintenance

An extensive Inventory Management system is maintained throughout the software. At the basic level, inventory is used to maintain a list of parts you sell along with a description of each part and the selling price. Numerous areas of the software utilize the inventory list to ensure accurate entry of items being sold (Invoicing, Service Tickets Item List, Customer Equipment List, etc.).

Advanced inventory management features are also included for those requiring stock tracking, multiple warehousing, truck inventory, multiple price levels, purchase orders, kit assemblies, physical stock count, etc. This chapter details the various functions available from the Inventory section.

To access the main inventory list, click on the INVENTORY button on the top toolbar. You may also access the inventory list, along with all other inventory-related functions, by clicking on the Inventory menu selection on the top of the software. These additional inventory functions are described later in this chapter.



### Inventory Master List

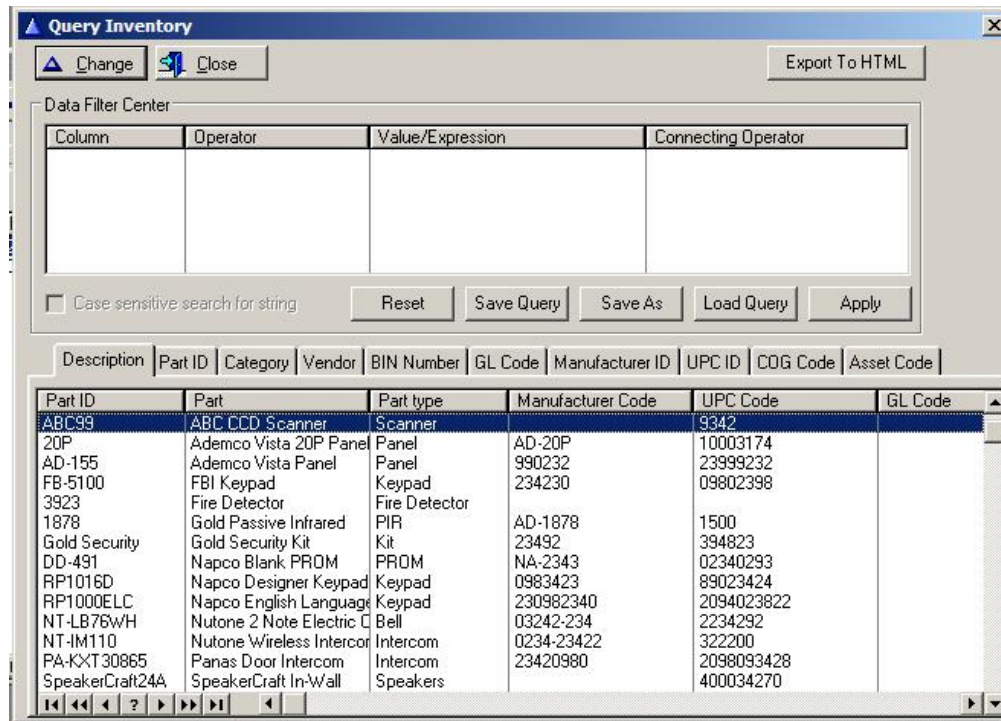
To display the inventory master list, click on the Inventory button on the top toolbar, or click on Inventory/Inventory List from the top menu selection. The inventory list will then be displayed:

Part ID	Description	Unit Cost	Price	Reorder	On Hand	Vendor
1878	Gold Passive Infrared	25.00	1.00	2.00	10.00	Ademco
20P	Ademco Vista 20P Panel	129.00	219.00	4.00	17.00	Ademco
3923	Fire Detector	45.00	95.00			ADI
450	Ultrasonic Motion Detector	45.00	75.00		52.00	ADI
ABC99	ABC CCD Scanner		99.00		431.00	
AD-155	Ademco Vista Panel	99.00	199.00	5.00	11.00	ADI
DD-491	Napco Blank PROM	100.00	150.00		75.00	ADI
FB-5100	FBI Keypad	50.00	75.00		3.00	Test
Gold Security	Gold Security Kit	1,200.00	2,100.00	3.00	21.00	Test
NT-IM110	Nutone Wireless Intercom	37.25	175.00			XYZ
NT-LB76WH	Nutone 2 Note Electric Chime	57.50	86.25		1.00	XYZ
PA-KXT30865	Panas Door Intercom	21.95	55.00		5.00	Test
RP1000ELC	Napco English Language Keypad	99.00	135.00		9.00	ADI
RP1016D	Napco Designer Keypad	99.00	145.00		12.00	ADI
SpeakerCraft24A	SpeakerCraft In-Wall	99.00	199.00		15.00	
YA-NP76	Yuasa NP76 6 Volt 7AH Battery	10.50	19.00	2.00	-1.00	Test

Inventory items may be searched in a multitude of ways by clicking on the appropriate sort tab and entering an appropriate value to start the search:

- Hide Unused Items** Click on this checkbox on the Inventory List to hide any parts that are marked as 'Hide Item On Inventory List' on the part maintenance screen. A part can be marked manually to hide, or to find all unused parts and have them marked for you, go to Inventory/Mark All Unused Items In Inventory.
- Sort By Part ID** Select this tab to sort items by Part ID. Enter a specific Part ID in the locator field below and press TAB to start the search.
- Sort by Description** Select this tab to sort items by their description. Enter a specific description in the locator field below and press TAB to start search.
- Sort By Category** Select this tab to sort items by the category of the item (ie: Panel, Contact, Phone, Video, Audio, Cables, etc.). Enter a specific category in the locator field below and press TAB to start search.
- Sort By Sub Category** Select this tab to sort items by their sub category (ie: Theater, Security, Fire, Automation, etc.). Enter a specific sub category in the locator field below and press TAB to start search.
- Sort by Vendor Name** Select this tab to sort items by the Vendor this item is normally purchased from. Enter a specific vendor name in the locator field below and press TAB to start search.
- Sort By Manufacturer Code** Select this tab to sort items by the Manufacturer Part Number (this part number may be different then the primary Part ID that often times represents a distributor part number for this item). Enter a specific manufacturer part id in the locator field and press TAB to start search.
- Sort By UPC Code** Select this tab to sort items by their UPC (bar code) code number. If you will be using bar code readers to scan parts for inventory control or invoicing, enter the part's UPC code in this field. You can either enter the UPC code manually into this field, or place the cursor in this field and use your bar code reader to scan the bar code number in, then press TAB to start search.
- Sort By GL Code** Select this tab to sort items based upon the GL Code they are assigned to in your chart of accounts table. Enter a specific GL Code in the locator field and then press the TAB key to start search.
- Sort By Bin Number** If you store stock in a warehouse, you may search for the location of items within the warehouse by using the Bin Number selection. Select the Bin Number tab and enter the Bin Number to find parts stored in that particular section of the warehouse.

In addition to the sort tabs listed above, there is a powerful Query section for Inventory that provides flexible searching within your inventory for parts based upon a combination of filters. To access the Query section, click on the QUERY button on the top of the Inventory List.



The Query section works the same as in the Customer List, Invoice List and Ticket List. Any column displayed on the bottom half of this list may be used as a filter by dragging the value of any column up to the Column section of the 'Data Filter Center' section on the top of the query screen. You will then have the option of choosing any Operator from the drop-down Operator column (ie: Equals, Contains, Begins With, Ends With, Greater Than, Less Than, etc.), as well as entering a value other than the one dragged to this section. You may then include additional columns to search on by dragging another column up to the next available line of the Data Filter Center. If you have multiple conditions, the 'Connecting Operator' column will allow you to choose various Boolean operators to set conditions of the search (ie: AND, OR, NAND, etc.).

To start the search of the query, click on the Apply button. You may then double-click on any item now displayed to bring up that item's record.

Click on SAVE QUERY to save this particular query if you intend to use it again in the future. A list of saved queries can then be selected by clicking on the Load Query button.

Reset the query by clicking on the Reset button.

If you wish to export the list of selected records from the query, click on the 'Export To HTML' button and a file will be created listing each Part displayed, along with the columns listed. You may then bring up the HTML file within programs such as Microsoft Excel.

## Adding a Part to Inventory

To add a part to the inventory file, press Insert from the Inventory maintenance list. The following information may be entered for each part:

**Part Will Be Changed**

Inventory Information | Costs Breakdown | General Ledger Codes | Image | Purchase History

Part ID (SKU#)  Hide Item On Inventory List

Part Description

Part Category  ...

Sub Category  ...

Warranty Period

Taxable

Add To Equipment List

Print On Service Tickets

Print Item On Invoice

Vendor/Cost List

Vendor Name	Unit Cost	Manufacturer Code	UPC Code
Ademco	129.00	AD-20P	10003174

Insert Change Delete Average Cost: 129.00

Price Levels

Price Level	Unit Price	List Order
Installation	219.00	1

Insert Change Delete

Stock Information - Main Location

On Hand Level

Reorder Level

Bin Number

**PART ID** Enter the part number for this part. The part number must be unique and a number must be entered into this field.

**PART DESCRIPTION** Enter a name and/or description for this part. You may enter any description you want up to 30 characters.

**PART CATEGORY** You can categorize this part by using the Category field. A category entered here must already exist on the Category validation table, otherwise you may enter a new category into the list. Select the [...] button to display the part category list. Uses categories allow you to sort parts by category.

**PART SUBCATEGORY** You can add an additional category to each part by using the Subcategory field. Like the Category field, the subcategory field is searchable on the Inventory List for helping to identify groups of parts. Click on the [...] button to display a list of valid subcategories you have entered into the subcategory validation list.



<b>WARRANTY PERIOD</b>	Enter the manufacturers warranty period such as '1 year', '90 days', etc.
<b>TAXABLE</b>	Select Y if this item is taxable, select N if this item is not taxable.
<b>Add To Equipment List</b>	If you would like this item to be added to the customers equipment list whenever it is sold on a product invoice, then select 'YES'. This allows the ALARM program to automatically update a customers' equipment list with items that were sold to that customer. If this item is not an item that should normally appear on a customers' equipment list, then select 'NO'.
<b>Print On Service Tickets</b>	If this item is to be printed in the equipment list portion of a service ticket, select Yes. If this item should not be included on a service ticket, select No.
<b>Print On Invoice</b>	To hide this item from printing on an invoice, select No otherwise select Yes. This can be used to include items on an invoice for stock tracking purposes – without the item actually appearing on the printed invoice.  <i>You may track an unlimited number of vendors that this part is purchased from (you will then have the opportunity on a purchase order to select which vendor to purchase this item from. To add a vendor and cost information to this part, click on the Insert button right below the Vendor/Cost List section. Then tab over to the next fields and enter the appropriate information as detailed below.</i>
<b>VENDOR NAME</b>	Enter the name of the vendor where this item is usually purchased. If a vendor name is entered, it will be validated against the vendor validation list. Select the [...] button to display a list of valid vendors.
<b>YOUR UNIT COST</b>	Enter the amount it costs you to purchase this part. If you purchase from several distributors at various prices, then enter the average cost.
<b>MANUFACTURER CODE</b>	If this part has a manufacturer part id that is different than the part id you have already entered for this part, enter the manufacturer part id here.
<b>UPC CODE</b>	Enter the UPC (bar code) number of the part. This is required if you will be using the bar code reader functions of the program.  <i>You may track an unlimited number of price levels for this part. When creating an invoice, you will have the option to select from any price level associated with this part. To add a price level (at least one is required), click on the Insert button below the Price Levels section. Then tab to each field described below and enter the appropriate information:</i>

**PRICE LEVEL** Select a price level category to represent the selling price being entered. The price level is validated against your price level list. Click on Insert in that validation list to add additional price level categories (you may also select the order in which price levels are to appear in this section). These price levels will also be used to select on an invoice which selling price you wish to select.

**UNIT PRICING** Enter the unit selling price for this item, based upon this price level.

**LIST ORDER** Enter the sequential number to determine the order this price level should appear in this price level list.

*The following fields are used for Inventory Tracking Only:*

**Quantity On-Hand** Current stock status of this item. When using inventory tracking, your on-hand stock count will automatically be adjusted by ALARM any time this item is sold using a product invoice. You may also make an adjustment on this field at any time if you do a physical inventory count and need to change the actual on-hand count.

If this item is listed on a product invoice, the on-hand stock count will be checked against the quantity being sold. If the quantity sold is greater than your current stock count, a warning message will appear notifying you of the discrepancy.

**Reorder Level** The reorder level is a 'flag' you can set so that you can be reminded when your stock for this particular item is running low. For example, if you normally should have at least 5 of these items in stock at all times, then you would enter the number 5 in this field. If this item is being listed on a product invoice and the quantity sold will bring you below your reorder level, then a warning message will be displayed telling you that it is time to reorder this item when you have a chance.

The reorder level is also used on the Inventory report (Reorder List selection in the Inventory report). You may use this report to print a list of all items in inventory where your current on-hand stock count is less than your stipulated reorder level.

**Bin Number** If your inventory is stored in a warehouse-style manner (in pre-numbered 'bins' for easy locating), then enter the bin number of where this item is stored. This number is strictly used to help you identify where this particular item is physically located in your inventory.

## Cost Information Tab

The cost information tab allows you to enter job costing information for this part. This information will be used by the Job Cost report to calculate your profits or losses on all invoiced jobs. This screen consists of the following fields:

The screenshot shows a window titled "Part Will Be Changed" with a close button (X). It has four tabs: "Inventory Information", "Cost Information" (selected), "General Ledger Codes", and "Image". Below the tabs, a blue message reads "Cost Information Is Used For Job Costing Report Calculations". Under a "Unit Cost Breakdown" section, there are four input fields: "Part Cost Breakdown" (59.00), "Part Price Breakdown" (99.00), "Labor Cost Breakdown" (70.00), and "Labor Price Breakdown" (120.00). Below these is a summary row: "Unit Cost Total" (129.00) and "Unit Price Total" (219.00). At the bottom is a "Contract Price" field.

### Part Cost Breakdown

Enter YOUR cost for this part.

### Part Price Breakdown

Enter the selling price of this part – materials price only (do not include labor being charged for this part – if any – in this field).

### Labor Cost Breakdown

If you wish to include labor charges as part of the price of this part, enter YOUR cost for providing labor on the installation/sale of this part.

### Labor Price Breakdown

If you would like to add labor charges to the total selling price of this part, then enter the labor price in this field. The Labor Price and Part Price fields should equal the total Unit Price Total field (the actual selling price – each – for this part).

### Contract Price

If you charge a set price for this item to be included on a service contract, enter the price here (for equipment list total)

## General Ledger Tab

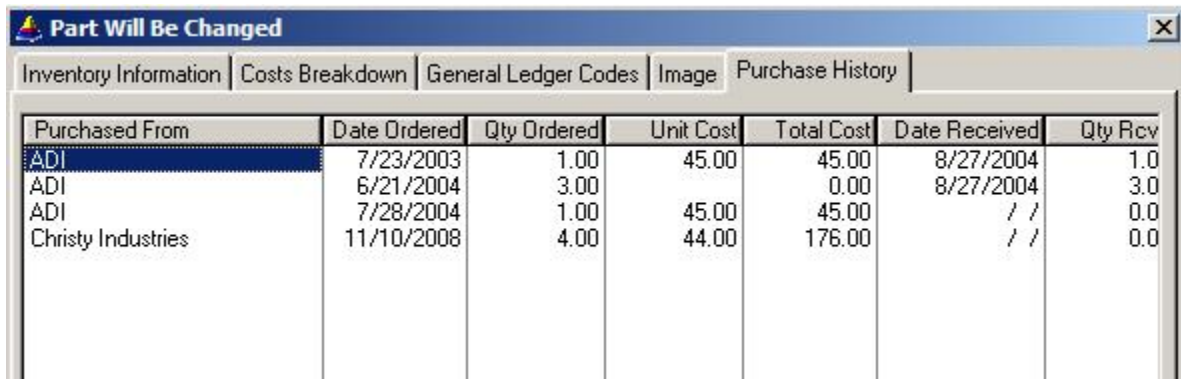
You can enter GL Codes associated with this item on this tab. The GL Codes are used on the General Ledger Report for financial transaction reporting at the GL level.

## Images Tab

You can attach a photo of the item for reference purposes. Click on the [...] button to bring up your directory tree and choose the image file for this part.

## Purchase History Tab

To view a history of purchases from your vendors on this part, click on the Purchase History Tab. The following screen will be displayed:



Purchased From	Date Ordered	Qty Ordered	Unit Cost	Total Cost	Date Received	Qty Rcv
ADI	7/23/2003	1.00	45.00	45.00	8/27/2004	1.0
ADI	6/21/2004	3.00		0.00	8/27/2004	3.0
ADI	7/28/2004	1.00	45.00	45.00	/ /	0.0
Christy Industries	11/10/2008	4.00	44.00	176.00	/ /	0.0

Your average cost for this item (based upon purchase history) will be displayed on the bottom of the list. If you have cost averaging option turned on (Set System Defaults/Invoice tab) then this average cost will be used for job costing purposes.

## Tracking Inventory In Multiple Locations

The system has the capability of keeping track of inventory that is located in additional locations (such as in your trucks, other office locations, warehouses etc.). Inventory that is located in other locations besides the Main location can be entered by selecting the ADDITIONAL STOCK LOCATIONS button from within the Masters Parts Data Entry screen.

If you are using the Multiple Location feature (must be selected in the Set Company Header section of the Utilities menu), then whenever an item is listed on a product invoice, the software will look to see if this item is located in more than 1 location. If it is, you are then asked on the product invoice if you wish to deduct this item from inventory from the main location or from one of the additional locations (a list will pop-up showing you all valid locations for this part).

When this button is selected from the master parts screen, a list of additional locations will appear if you have already entered locations for this part. If this is the first time you are adding a location for this item, the Additional Stock Location data entry screen will appear as follows:



Additional Stock Location

Record will be Added

Part ID (SKU#)

Location Name  ...

Stock On Hand  ▲ ▼

Reorder Level  ▲ ▼

Bin Number

<b>Part ID (SKU#)</b>	The part id field will already be filled in with the part id for this part.
<b>Location Name</b>	Enter the name of the location where this item is also stocked. Examples of location names include TRUCK1, TRUCK2 (you can also use the actual vehicles license plate number or the name of the technician that is assigned to that truck). The location name is not validated but you should be consistent when entering the name.
<b>Stock On-Hand</b>	Enter the current stock count at this location for this item. This should only have to be entered once. It will automatically update the stock levels any an item is listed on the product invoice (only if you have the inventory tracking feature turned on).
<b>Reorder Level</b>	This field determines the minimum level of stock you should keep on hand for this item at this location. If your inventory is reduced below this level a warning message will appear on the product invoice when this item is listed. In addition, you can print a list of items that need to be reordered using the Inventory Report.
<b>Bin Number</b>	If you label the shelves or 'bins' where your inventory is physically located at this location, then enter the bin number in this field.

Press the OK button to save this screen. You will then be returned to the Additional Stock Location list, with this location now listed. If you would like to add additional locations for this item, then press the Insert key from the Additional Stock Location list.

### **Kit Assemblies (Part Components)**

A very useful feature available in ALARM is the ability to assign a number of components that are to be sold when the 'master' component is sold. This is commonly referred to as kit assemblies or bill-of-materials. To illustrate the concept of kit assemblies, take the following example:

You typically sell a protection system consisting of:

- 1 alarm panel
- 2 keypads
- 1 smoke detector
- 1 battery
- 2 door contacts

You can make up a 'master' part in the inventory file called 'GOLD500'. This part would then have a list of the above components as its 'kit assembly'. Whenever you create a product invoice to sell part number GOLD500, the components listed above will automatically be entered onto the product invoice for you, along with their prices (optional). In addition, if you are using the inventory tracking feature, you may have the inventory stock levels for each of these components automatically deducted as well.

Using kit assemblies can reduce the amount of time it takes to create a product invoice, especially if you sell the same types of systems to your customers. You can use any part in your inventory file as a 'master' part, and any part can be a component of as many 'master' parts as necessary.

Setting up a list of components for a part is simple:

- 1) Select INVENTORY button from the Top Taskbar

- 2) Select Inventory List
- 3) Highlight the part which you wish to add components to and press ENTER.
- 4) Select the PART COMPONENTS button to bring up the component list.

You are now ready to add a list of components for this part (components are simply other parts that are already on your inventory file. A component must already exist in the inventory file).

Press the Insert key to start entering the first component to the list. Once the Insert key has been pressed, the assembly part screen appears as follows:

**Component**

**Quantity** Enter the qty of this component that is to be sold when the main part is sold.

**Component Part ID**

Enter the Part ID of this component. If you do not know the part number, type any character in this field and the inventory file will pop-up. You may then choose the part number from your list of items in inventory. If you need to add this component to your inventory, you may do so from the inventory list at this point.

**Component Part Desc**

The part description for this component will be entered automatically.

**Print Component Part Price On Invoice**

You have the option of having this components price printed on a product invoice, or bypass printing the price. The primary (Line Order #1) price level of a component will be used for calculations if the component price is printed on an invoice.

**Deduct Component Part From Inventory**

If you are using the inventory tracking feature of ALARM, select YES if you want this part to be deducted from the stock level within inventory. Select NO if you are not using inventory tracking or if you do not want this part to be deducted from inventory when it is sold on a product invoice (this only affects inventory levels if this part is sold as a component of another part - not if it is sold by itself).

To save this component, select OK. The component will be added to the kit assembly list and you will be returned to that list. Repeat this process until all components have been added to the list.

You may modify or delete any component from the kit assembly list at any time. To do this, go into the inventory maintenance list and select the master part. Then press the PART COMPONENT button to bring up the Part Components list. You may then press ENTER to modify a component, or press Delete to delete a component from this list.

### **Inquire / Edit a Part**

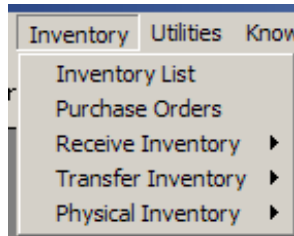
To review or modify a part already on the inventory maintenance file, select INVENTORY button on the top taskbar. Highlight the part to be viewed or modified and press ENTER. You may now make any changes to the file and select OK when finished to save the changes. Changes will not affect the information currently stored on the customers' detailed equipment lists.

### **Deleting a Part**

To delete a part, highlight the part on the inventory maintenance list and press Delete, then ENTER.

## INVENTORY CONTROL FEATURES

To access all of the inventory control features of the program, click on the Inventory menu on the top menu level:



The Inventory List menu selection was described above.

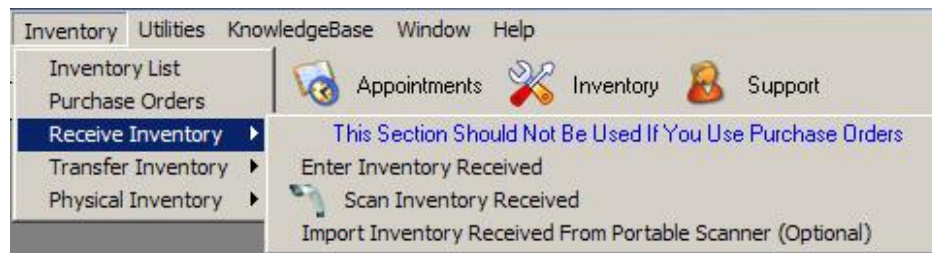
The Purchase Orders menu selection is described in the next chapter.

The remaining Inventory Control Features are described below.

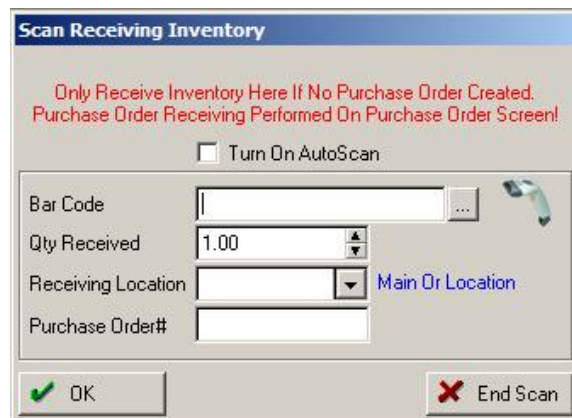
### Receive Inventory

**NOTE: If you are using Purchase Orders do not normally use this section since receiving inventory would be performed from within the Purchase Order section.**

There are several methods available for receiving inventory (adding inventory back into stock). Assuming you are NOT using purchase orders, you can receive inventory manually or through the use of a bar code reader. The main difference is just in the method used to enter the Part ID of the item being received into inventory. Select the appropriate menu below in the Receive Inventory section to accommodate the method you will be using (Enter Inventory Or Scan Inventory).



Once you have selected the menu, the Receiving Inventory screen will appear (Scan Inventory example below):

A screenshot of the 'Scan Receiving Inventory' dialog box. The title bar reads 'Scan Receiving Inventory'. A red warning message is displayed: 'Only Receive Inventory Here If No Purchase Order Created. Purchase Order Receiving Performed On Purchase Order Screen!'. Below the warning is a checkbox labeled 'Turn On AutoScan' which is unchecked. There are four input fields: 'Bar Code' with a text box and a scanner icon, 'Qty Received' with a spinner box set to '1.00', 'Receiving Location' with a dropdown menu and a 'Main Or Location' link, and 'Purchase Order#' with a text box. At the bottom are two buttons: 'OK' with a green checkmark icon and 'End Scan' with a red X icon.



The Receiving Stock feature is found on the Inventory Maintenance Menu. When you select this item, a screen will appear with the following fields:

**Turn On AutoScan**

*Scan Inventory Received Selection Only*

Click on this checkbox if your bar code reader has a trigger setup to scan the UPC code and send ENTER (default setting for most bar code readers). By turning on AutoScan, it is not necessary to hit the ENTER key on the keyboard after each scan. Simply scan the item with the bar code reader and press the reader trigger to enter the item into inventory and go on to scan the next item. No keyboard intervention is required. This is particularly useful when receiving large quantities of items into your warehouse. Just scan each item while you are away from the PC keyboard and go back to the PC to End Scan when finished scanning all items.

**Part ID (Manual)  
Bar Code (Scan)**

Enter the part number for this part being received into inventory. If you are using a bar code reader, you may scan the bar code label to enter the part number. Once the part number is entered, the Verification Information section of this screen will show the current stock status of this part. If the part number you enter is not on the inventory file, the inventory list will pop-up allowing you to choose a part.

**Qty Received**

Enter the quantity of this item being received into inventory (defaults to 1).

**Receiving Location**

If you are receiving this item into a location other than the MAIN warehouse (assuming you have Multi-Location Inventory turned on in the Utilities/Set Company Header section of this program), then click on the drop-down selector field to select the correct Location.

**Purchase Order#**

If the purchase of this item was from a purchase order, enter the P.O# number in this field. This number will remain on the screen for each part you receive into inventory during this session, until you change the P.O# number. If the Purchase Order is a number of an actual PO you created in this software, then this item being received will be identified with that Purchase Order.

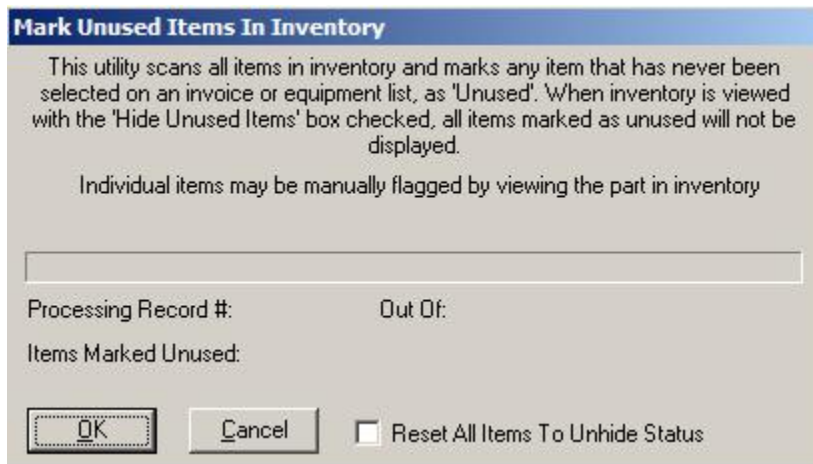
NOTE: If you have already created a purchase order in this program to order items from a vendor, it is highly recommended that all receiving of inventory for that purchase order be performed from within the purchase order section.

Once you have entered the above information and pressed enter on the last field, inventory will be updated for that part and a record of this transaction will be recorded (Received Inventory Report).

You may continue entering parts to be received into inventory, or select the Cancel button to cancel the inventory receive function and you will be returned to the Inventory Maintenance Menu.

## Mark Unused Items In Inventory

If you have a large list of items in your inventory system, you may find it difficult to add items to an invoice when browsing through the entire inventory list. If you have many items you never use, you may select this utility to scan through your entire inventory system, find which parts have never been used on an invoice or placed in a customer equipment list, and then have the utility automatically mark those items as 'Hide On Inventory List'. Then, when viewing your inventory list you may click on the 'Hide Unused Items' checkbox on the list and all of the items marked as Unused will not be displayed – making the selection of your normally used inventory much easier.

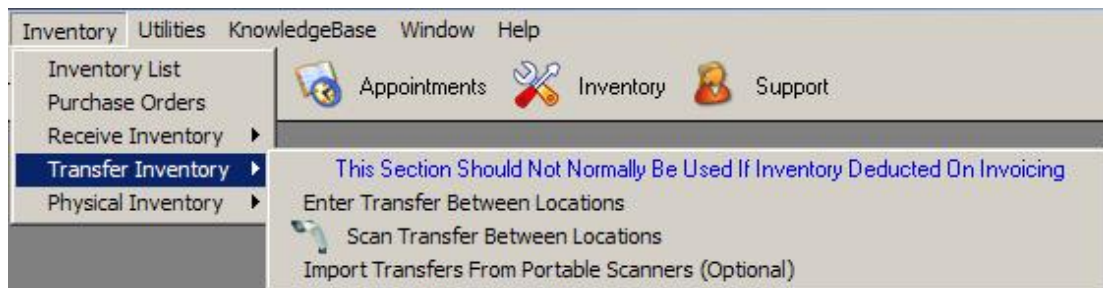


Click on OK to start the scanning process. If you wish to reset all items to the 'unhide' status, check the 'reset' box and then click on OK.

## Transfer Inventory

If you are using the Inventory Tracking feature as well as the Multiple Inventory Location feature (both selected from the Set Company Header section of the Utilities menu), then you may easily transfer stock between inventory locations. This is useful when items are being transferred from your main location to a truck, another warehouse or office or visa versa. Although you could adjust each items on-hand stock count manually, using this feature is much easier and more accurate, plus is recorded in the Transferred Inventory Report as an audit trail.

**NOTE:** *This section should normally NOT be used to deduct items from inventory for items sold to customers. The Invoicing section automatically deducts items from inventory as they are placed on the invoice. Only use this section for transferring stock BETWEEN locations. If you wish to use this section to deduct inventory when items are sold, you must first go to Utilities/Set Company Header and select NO to 'Deduct Inventory When Invoicing' and 'Deduct Inventory On Serviced Items'.*



There are several methods available for transferring between locations (deducting inventory from one location and adding it to another location. You can deduct inventory manually or through the use of a bar code reader. The main difference is just in the method used to enter the Part ID of the item being transferred. Select the appropriate menu below in the Transfer Inventory section to accommodate the method you will be using (Enter Transfer Or Scan Transfer).

Once you have selected the menu, the Transfer Inventory screen will appear (Scan Transfer example below):

The image shows a software dialog box titled "Scan Inventory Transfers". At the top, there is a checkbox labeled "Turn On AutoScan" which is currently unchecked. Below this is a section containing several input fields: a "Bar Code" field with a small scanner icon to its right; a "Description" field; a "Transfer Qty" field with a spinner control showing the value "1.00"; and two dropdown menus for "From Location" and "To Location", both with "(MAIN Or Location)" text to their right. At the bottom of the dialog, there are two buttons: "OK" with a green checkmark icon and "End Scan" with a red X icon.

**Turn On AutoScan*****Scan Inventory Transfers Selection Only***

Click on this checkbox if your bar code reader has a trigger setup to scan the UPC code and send ENTER (default setting for most bar code readers). By turning on AutoScan, it is not necessary to hit the ENTER key on the keyboard after each scan. Simply scan the item with the bar code reader and press the reader trigger to deduct the item from inventory and go on to scan the next item. No keyboard intervention is required. This is particularly useful when transferring many items from one location to another. Just scan each item while you are away from the PC keyboard and go back to the PC to End Scan when finished scanning all items.

**Part ID (Manual)  
Bar Code (Scan)**

Enter or scan part number of the part being transferred between locations. You may enter the number manually or scan the part number in using a bar code reader if the part has a bar code label on it. Selecting the [...] button will display the inventory list.

**Description**

The part description for the part number entered above will be displayed.

**Transfer Qty**

Enter the quantity of this item being transferred. For Scan Inventory selection, this quantity will remain at the set number for each scan until changed.

**From Location**

Enter the name of the location where the inventory is coming from. If the inventory is coming from the MAIN location then enter the word MAIN, otherwise enter the name of the location where the item is coming from. If this field is left blank, a pop-up list will display your available locations for this item. The Verification Information section on the bottom of this screen will display the current stock status for this location. Selecting the [...] button will display a list of valid stock locations. For Scan Inventory selection, the From Location will remain for each scan until changed.

**To Location**

Enter the name of the location where the inventory is to be transferred to. If the inventory is going to the MAIN location then enter the word MAIN, otherwise enter the name of the location where the item is to be transferred to. If this field is left blank, a pop-up list will display your available locations for this item. The Verification Information section on this screen will display the current stock status of this location. Selecting the [...] button will display a list of valid stock locations. For Scan Inventory selection, the To Location will remain for each scan until changed.

NOTE: If you wish to simply deduct this item from inventory and not transfer it between locations, leave the To Location field blank. The transaction will still be recorded in the Transfer Inventory Report.

You may continue entering other parts to be transferred, or select Cancel or End Scan to exit the transfer screen.

## Transferring All Stock Between Locations

If you need to transfer ALL stock from one location to another, including transferring stock to a new location, you may do so from the 'Enter Transfer Between Locations' section (not the Scan Transfer selection). When the Transfer Inventory screen appears, select the TRANSFER AN ENTIRE LOCATION button to activate the Transfer All screen.

**\*\* IMPORTANT \*\*** Perform a backup of your data files before performing the Transfer All process. This program will perform a mass update to your inventory file and you will need the backup to revert your inventory back to the original status if you make a mistake.

When the Transfer All screen appears, fill in the following information:

**Transfer All Stock Between 2 Locations**

This function will transfer ALL inventory from one location (the FROM Location) to another location (the TO Location)

**\* MAKE SURE YOU HAVE A RECENT BACKUP \***

Part ID

FROM Location  (MAIN Or Location)

TO Location  (MAIN Or Location)

Transfer Status

Searching:

Transferring:

**Part ID**

Leave this field blank to transfer all stock between locations.

**FROM Location**

Enter the name of the location that you are transferring stock out of. If it is the main location, then enter the word MAIN. If it is another location, then enter the name of that location in this field. Please make sure you have entered the location name correctly before pressing ENTER.

**TO Location**

Type in the name of the location where inventory from the above location is to be transferred to. If you are transferring to the main location, then enter the word MAIN. If it is another location that you are transferring to, then enter the name of that location in this field. Please make sure you have entered the location name correctly before pressing ENTER.

If you enter the name of a location that does not yet exist for any part in the inventory file, then ALARM will automatically create this location and move all stock from the 'From' location into this

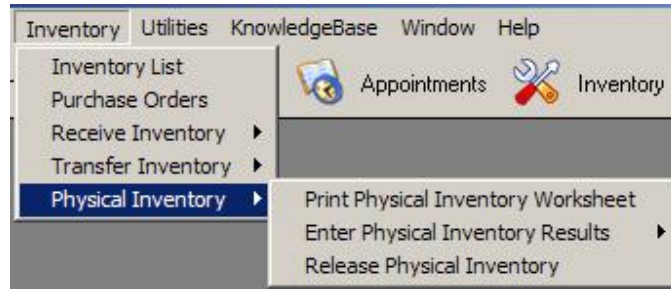
new location. This is useful if you are transferring stock from an old location to a brand new location or from a vehicle to a new vehicle. It is not necessary to already have that new location setup in inventory. This transfer will perform that for you automatically.

Once you have pressed TAB on the TO location field, your inventory will be searched for the appropriate stock locations and the transfer will be performed. You will be returned to the inventory menu when the transfer has been completed.

The Inventory Report in the report facility may be used to print a list of all stock in a particular location.

## Physical Inventory





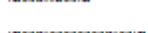
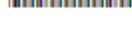

One important aspect of managing stock is the periodic physical count of inventory stored within your inventory location(s). This ensures that your physical stock and that which is recorded in the software match. Any discrepancies between physical stock counts and on-hand stock stored in this inventory section need to be reconciled, which this section will do for you. A complete audit trail of variations between different stock will be recorded and reported in the Physical Inventory report.



We recommend performing physical inventory in the order with which this menu is designed:

1. Print Physical Inventory Worksheet and perform physical inventory
2. Enter Physical Inventory Results and reconcile differences
3. Release Physical Inventory into software inventory

**Step 1:** To help assist in the labor-intensive physical inventory task, this program has a Physical Inventory Worksheet which we highly recommend using for this purpose. A description of this report follows:

<b>Physical Inventory Worksheet</b>					
Report Date 11/05/04				Page 1	
Selection					
Part ID	Part Description	Stock On-Hand	Physical Count	Bin Location	Physical Location Bar Code
1878	Gold Passive Infrared	9.00	<input type="text"/>	Main	
20P	Ademco Vista 20P Panel	17.00	<input type="text"/>	A-4	
450	Ultrasonic Motion Detector	50.00	<input type="text"/>	A-4	
ARC99	ARC CCD Scanner	431.00	<input type="text"/>	A-4	
AD-155	Ademco Vista Panel	11.00	<input type="text"/>	A-4	
ND-491	Nano Blank PROM	75.00	<input type="text"/>	A-4	
FR-5100	FR1 Keypad	3.00	<input type="text"/>	A-4	

As you can see, the physical inventory worksheet lists each item in inventory (you can choose to show only items currently stocked, or all items in inventory regardless of stock status), as well as a description of the part, current stock on-hand as recorded in the software, a box to enter physical inventory count, the bin location where the item is stored, the physical location of where the item is stored (this allows you to run this report to perform physical inventory based upon location such as for a specific truck, specific warehouse, specific office, etc). A bar code is also printed next to each item to help facilitate data entry of physical inventory counts into the software when you are ready for that step. Print this report and give to the persons doing the physical inventory counts.

**Step 2:** Enter the results of the physical inventory count worksheet into the physical inventory results screen:

Part ID	Description	Count	Release	On Hand	Bin Number	UPC Code
1878	Gold Passive Infrared	0.00		9.00		1500
20P	Ademco Vista 20P Panel	0.00		17.00	A-4	10003174
3923	Fire Detector	0.00				
450	Ultrasonic Motion Detector	0.00		52.00		35
ABC99	ABC CCD Scanner	0.00		431.00		9342
AD-155	Ademco Vista Panel	0.00		11.00		23999232
DD-491	Napco Blank PROM	0.00		75.00		02340293
FB-5100	FBI Keypad	0.00		3.00		09802398
Gold Security	Gold Security Kit	0.00		21.00	B-14	394823
NT-IM110	Nutone Wireless Intercom	0.00				322200
NT-LB76WH	Nutone 2 Note Electric Chime	0.00		1.00		2234292
PA-KXT30865	Panas Door Intercom	0.00		5.00		2098093428
RP1000ELC	Napco English Language Keypad	0.00		9.00		2094023822
RP1016D	Napco Designer Keypad	0.00		12.00		89023424
SpeakerCraft24A	SpeakerCraft In-Wall	0.00		15.00		400034270
YA-NP76	Yuasa NP76 6 Volt 7AH Battery	0.00		-1.00		882929323

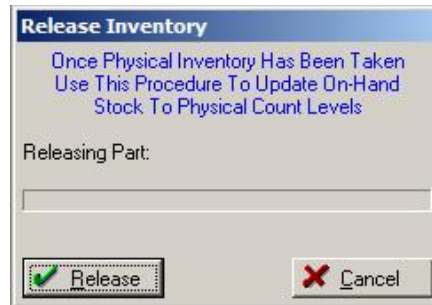
This screen works like a spreadsheet. Just double-click on the COUNT column (or any column) of the item you are entering the physical stock count into, and the COUNT column will be in edit mode so you may then enter the count number for that item. This screen also displays the current on-hand stock level that is recorded in inventory.

If you are using a bar code reader, you can facilitate the entering of your physical stock counts by clicking on the SCAN PHYSICAL COUNT button on top. This puts the list into a 'scan' mode so that all you have to do is scan the bar code next to the item on the Physical Inventory Worksheet, and then type in the quantity handwritten on that sheet. Then hit ENTER to record the count, and repeat by scanning the next item's bar code on that report, and so on. This speeds up data entry tremendously instead of having to enter the part number manually for each item that will have a physical stock count entered onto this list.

When you are finished entering all of the physical stock counts into this list, click on Close to exit.



**Step 3:** The final step in performing physical inventory is to release the physical inventory count into the recorded inventory 'on-hand' within the software. To do this, click on the Inventory/Release Physical Inventory menu selection. The Release screen appears as follows:



Click on the Release button to change on-hand stock to the new physical counts just entered above.

To run a report showing which inventory items have been adjusted, including their old and new stock counts and the net change, go to Reports/Management Reports/Released Inventory Report.

<b>Physical Inventory Released</b>							
Report Date	<b>11/05/04</b>					Page	1
Selection							
Released	<b>11/05/04 Thru 11/05/04</b>						
Part ID	Part Description	Stock On-Hand	Physical Count	Bin Location	Physical Location	Net Change	
1878	Gold Passive Infrared	9.00	8.00		MAIN	(1.00)	
20P	Ademco Vista 20P Panel	17.00	19.00	A-4	MAIN	2.00	
450	Ultrasonic Motion Detector	52.00	50.00		MAIN	(2.00)	
ABC99	ABC CCD Scanner	431.00	431.00		MAIN		
AD-155	Ademco Vista Panel	11.00	14.00		MAIN	3.00	
DD-491	Napco Blank PROM	75.00	73.00		MAIN	(2.00)	
FB-5100	FBI Keypad	3.00	3.00		MAIN		
Gold Security	Gold Security Kit	21.00	20.00	B-14	MAIN	(1.00)	
NT-LB76WH	Nutone 2 Note Electric Chime	1.00	3.00		MAIN	2.00	
PA-KXT30865	Panas Door Intercom	5.00	4.00		MAIN	(1.00)	
RP1000ELC	Napco English Language Keypad	9.00	5.00		MAIN	(4.00)	
RP1016D	Napco Designer Keypad	12.00	11.00		MAIN	(1.00)	
SpeakerCraft24A	SpeakerCraft In-Wall	15.00	14.00		MAIN	(1.00)	
SpeakerCraft24A	SpeakerCraft In-Wall	14.00	16.00		MAIN	2.00	



## Chapter 10: Purchase Orders

The Purchase Order section allows you to create comprehensive purchase orders that tracks part purchases and updates inventory automatically when items are received. Vendors are easily selectable from your vendor list and all pertinent information regarding the vendor (name, address, your account number with the vendor, attention, etc.) are placed on the purchase order for you. Your company name and address are also automatically placed in the 'ship to' section of the purchase and may be changed at any time. Parts are tracked by their order status (Ordered/Received/BackOrdered) and the purchase order item list is color coded for easy identification of each parts' status. Simple one-button receiving updates all parts on a purchase order as being received and inventory is updated automatically. In addition, you may select individual parts that are back ordered or use a bar code reader to receive purchased items.

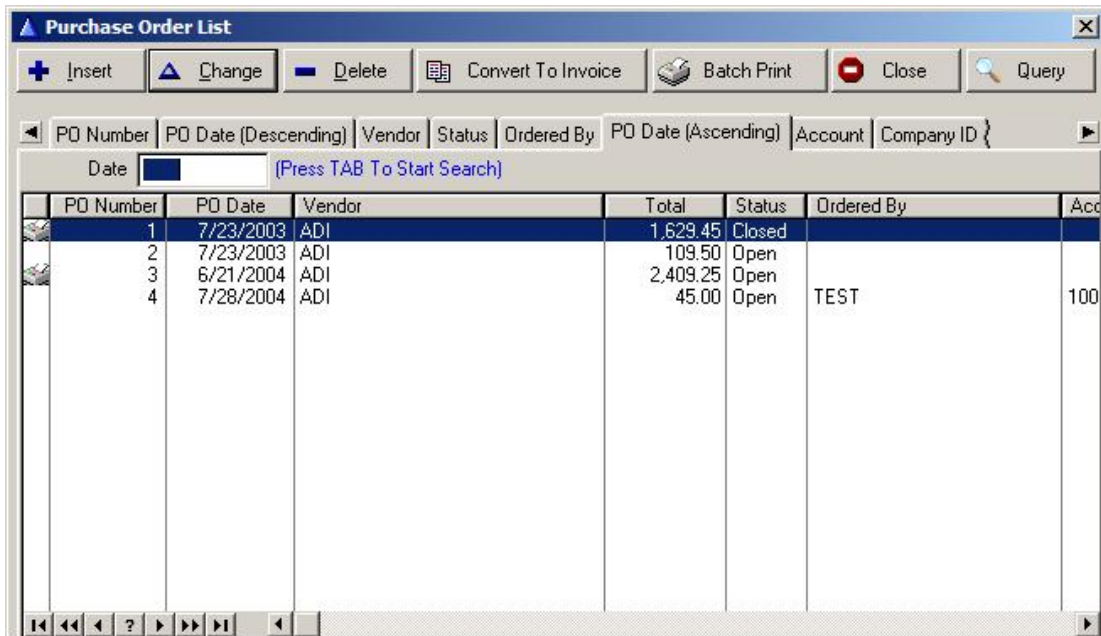
Full length text descriptions may be included in the body of the purchase order, and parts placed on the purchase order include their part number, part description, and your cost – all of which may be overridden at any time.

A Purchase Order report allows management to run various selections including parts ordered by vendor, date range, parts on back order, and parts ordered for specific service jobs.

Purchase Orders are printing in a format similar to an invoice and may be inserted in double-window envelopes or with a faxboard faxed directly to the vendor.

### Selecting A Purchase Order

To select a purchase order to add, view or delete, select the Inventory menu and then click on the Purchase Orders button. This will display a list of all purchase orders entered into the system:



PO Number	PO Date	Vendor	Total	Status	Ordered By	Acc
1	7/23/2003	ADI	1,629.45	Closed		
2	7/23/2003	ADI	109.50	Open		
3	6/21/2004	ADI	2,409.25	Open		
4	7/28/2004	ADI	45.00	Open	TEST	100

### Buttons Available On The Purchase Order List

**Insert** Add a new purchase order to the system

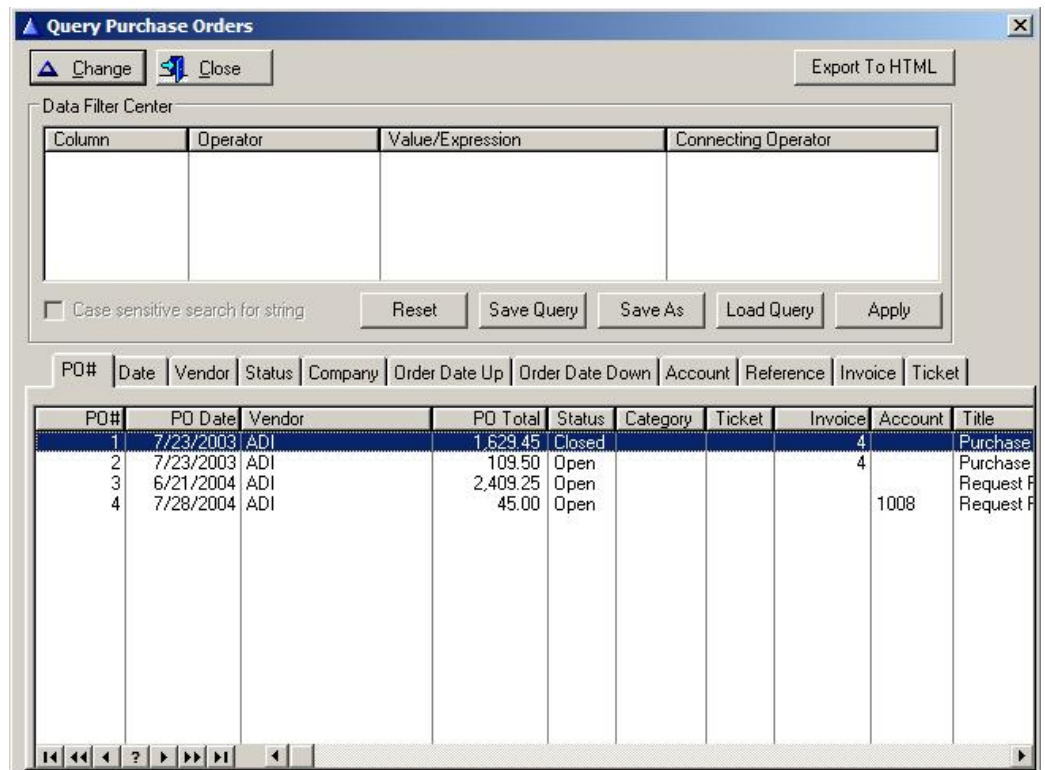
**Change** Modify or view the purchase order currently highlighted on the list.

**Delete** Delete a purchase order. All items received into inventory will be removed from inventory is a purchase order is deleted.

**Convert To Invoice** Convert a purchase order into an invoice.

**Batch Print** Print a batch of purchase orders. You can print purchase orders based on a data range or purchase order number range.

**Query** If the normal sort/search tabs on the Purchase Order List can not find a specific purchase order, click on the Query button to display the powerful Query engine (similar to that found in the Customer, Invoice, Ticket and Inventory list sections). Clicking on this button displays the Query as follows:



The Query screen consists of a Data Filter Center section on top, and a list of qualifying purchase orders on the bottom. To use the query, drag a value from any column in the bottom list, up to the COLUMN field in the Data Filter Center (or select a column by double-clicking on the COLUMN field). You may use any column from the bottom-half list to use as a filter. You may also double-click on the OPERATOR field to choose from a wide variety of operators including Equals, Contains, Begins With, Ends With, etc.

If you will be using more than one column as a filter, drag the next column up to the next available line in the Data Filter Center. The CONNECTOR column allows you to select various Boolean operators (AND, OR, NAND, NOR, etc.) for conditional searches.

To start the search, click on the APPLY button. You may also save this

particular search filter by clicking on the **SAVE AS** and entering a name to save this filter under, then use the **LOAD** button to reuse these saved filters.

The Purchase Order List consists of a number of sort/search tabs that can be used to easily identify existing purchase orders (the Utilities/Set System Defaults/Inventory PO tab allows a default sort selection tab in this section – either by ascending or descending date order):

- PO Number Tab** This is the default sort sequence. Purchase Orders are listed in order of their purchase order number (in ascending order). You may find a specific purchase order number by entering the number in the search field.
- PO Date Tab** This tab will sort the purchase order list in order of the purchase order date. Entering a date in the search field will display the purchase order list starting with the date entered.
- Vendor Tab** Selecting the vendor tab will sort all purchase orders in order of their vendor name. Entering a vendor name in the search field will present all purchase orders starting with that vendor.
- Status Tab** The status tab displays all purchase orders in order of their status (Open/Closed). Entering one of the statuses in the search field will list all purchase orders starting with that status.
- Ordered By** This tab sorts all purchase orders based upon the ordered by field
- Account** Sort purchase order list based upon the customer account number. You may also enter a customer account number in the search field to find all purchase orders for a specific customer.
- Company ID** If you are using the Multicom Option module for Alarm, this tab sorts purchase orders based upon your company code.
- Invoice Created** If invoices are created from a purchase order, click on this tab to sort all purchase orders in order of the invoice number that was created.
- Ticket** If the purchase order is related to items ordered for a specific service ticket, click on this tab to see a list of all purchase orders, based upon the service ticket they are assigned to.
- Title** Sort purchase order list based upon the Title given to each purchase order (ie: RFP, Purchase Order, Bid Request, etc.)

## Adding A Purchase Order

You may add a purchase order by clicking on the INSERT button or pressing the INS key.

A Purchase Order form will be displayed allowing you to enter components of the purchase order:

**Title** You may choose to use a different form title than the standard 'Purchase Order' at any time. For example, you may wish to send a 'Request For Bid' to a distributor in order to get quotes on parts before placing an order. To create new titles for the Purchase Order section, go to Utilities/Set System Defaults and click on the Inventory/PO Tab. Enter the additional titles you wish to have available in the Purchase Order Title drop-down field. (NOTE: You can not add new titles from within the Purchase Order screen itself since this should be a function performed only by management).

**Vendor Button** Click on the vendor box button to select a vendor from a list of valid vendors. You may add to the vendor list at any time. The vendor name, address and attention line, along with your account number at the dealer, will automatically be inserted into the 'Mail To' vendor box.

**Ship To** The Ship To field will automatically be filled in with your Company name and address (as it appears in your Company Header section of the program). You may at any time modify the Ship To information. Click on the Customers button to select a customer for drop-shipment of this order. If you are using Multicom, click on the Company button to select one of your companies to have the order shipped to.

The screenshot shows the 'Purchase Order' window with the following details:

- Title: Purchase Order
- Vendor: ADI (600 Syosset Way, Syosset, NY 11723, Attn: Shipping)
- Ship To: Customers (Z-Micro Technologies, Inc., 1509 Jericho Turnpike, Smithtown, NY 11728)
- Company: Company
- PO Date: 7/23/03
- PO Number: 1
- Ordered By: [Empty]
- Reference#: From Proposal

Part ID	Part Description	Ordered	Received	Unit Cost	Extended	BackOr
1878	Gold Passive Infrared	1.00	1.00	25.00	25.00	
Gold Security	Gold Security Kit	1.00	1.00	1,200.00	1,200.00	
116	Ademco Button Switch C.C.	3.00	3.00	2.15	6.45	
450	Ultrasonic Motion Detector	1.00	1.00	45.00	45.00	
RP1000ELC	Napco English Language Keyba	1.00	1.00	99.00	99.00	
1878	Gold Passive Infrared	5.00	5.00	25.00	125.00	
20P	Ademco Vista 20P Panel	1.00	1.00	129.00	129.00	

Buttons: + Insert Item, ▲ Change Item, - Delete Item, Add Text, ← Blank Line

Remark: [Empty] Terms: [Empty] Total: 1,629.45 Printed: [Checked]

Buttons: OK, Cancel, Print, Received All, Scan Receiving

Ticket: 4 Invoice: 4

Purchase Order Date Defaults to today's date. You may modified the date.

**Purchase Order Number** Purchase Order number automatically sequenced.

**PO Date** Date Purchase Order was created (defaults to current date).

**Remark** You may select a remark to be printed on the bottom of the purchase order. Remark list is same used by the invoicing sections.

**Ordered By** Enter the name of the person in your company placing the order.

**Reference Number** Enter a reference number (ie: distributor reference for this order)

### ***Buttons Available On Purchase Order Entry Form***

**OK** To save the purchase order, click on the OK button.

**Cancel** Clicking on Cancel button exits out of the purchase order without saving.

**Print** Click on the Print button to start printing the purchase order. You will asked how many copies of the purchase order is to be printed, as well as if you wish a signature line to be printed on the bottom of the purchase order. You may also select the windows printer driver to be used.

**Received All** If your entire order has been received from the vendor, clicking the Received All button will automatically update all items ordered as 'Received' and update inventory accordingly – without the need for you to select each part individually as received. You may go into individual items and change their order status (received, ordered, back ordered) at any time, even after they have been marked as received.

**Scan Receiving** If you are using a bar code reader, you can easily receive items into inventory once you have received this order using your bar code reader. Click on this button and start scanning the UPC code of each item being received into your warehouse (requires that the UPC Code is already on file for that item within the Inventory List). You do not need to use the keyboard while scanning, just scan each item and click on the scanner's trigger to accept that item. The Purchase Order will automatically record the item as being received. When you are finished scanning all received items, click on STOP SCANNING.

**Insert Item** The Insert Item button will bring up the item ordered screen as described below. Items inserted onto the purchase order do not update inventory UNTIL they are marked as received. Items inserted onto the purchase order are listed in the order they are inserted. If you wish to rearrange the order of any item(s) on the purchase order, you may use the Up/Down arrow buttons as described later.

**Change Item** The Change Item button allows you to modify any item placed on the

purchase order. Changes made to item status (ordered/received/back ordered) will automatically adjust inventory accordingly. Quantity changes will also reflect accordingly in inventory. See below for a detailed description of the purchase order item entry screen.

**Delete Item**

Clicking on the Delete Item will delete the highlighted item from the purchase order, and adjust inventory for that item if already received. You will be asked to confirm the deletion.

**Add Text**

You can add as many lines of free-form text as necessary on the purchase order by clicking on the Add Text button. If you run out of room on a text box, simply click on Add Text to add another text box. There is no limit to the number of text boxes that may be included on a purchase order, and you may print on multiple pages. The word TEXT will appear on the screen but will be blank when printed. If you wish to display the entire text box again, simply double-click on the text line, or click on the Change Item button. Only the first line of text will be displayed for each text box on the screen, but all lines of text will print.

**Blank Line**

If you wish to format the purchase order by placing some blank lines between detail items, click on the Blank Line button. The word 'BLANK' will appear on the screen but will be blank when printed.

**Up/Down Arrows**

If you wish to rearrange the order of the items listed on the purchase order, highlight an item to be rearranged and click on the appropriate button to move up or down that item throughout the list.



## Purchase Order Item Entry Screen

If an item is being added, viewed or modified on a purchase order, the following screen will be displayed:

**Purchase Order Item**  
Record will be Changed

Part ID (SKU #)	RP1000ELC
Part Description	Napco English Language Keypad
Manufacturer #	320232
UPC Code	3829328829
Quantity Ordered	1.00
Quantity Received	1.00
Back Ordered	0.00
Unit Cost (Each)	99.00
Extended Price	99.00
For Job Ticket#	22,543

Stock Status  
Stock On-Hand: 7.00  
Reorder Level

OK Cancel Received Back Order

### Part ID (SKU#)

Enter the Part ID of the item being ordered, or click on the [...] lookup button to see a list of all items in your inventory file.

### Part Description

The part description will automatically be filled-in after the Part ID field is selected. You may modify the description at this point if desired.

### Manufacturer #

Represents the Manufacturer ID of this part (if different than the Part ID used to represent this part in inventory).

### UPC Code

Represents the UPC Bar code number identifying this part (may in fact be any bar code symbology, not just UPC).

### Quantity Ordered

Enter the quantity of this item being ordered. You may also use the 'spin' control to increase or decrease the quantity.

### Quantity Received

Once an item is received, you may manually enter the quantity received. Usually, you would click on the Received button on the bottom of this screen (see below for a description of buttons available on this screen), of this field is automatically filled-in if the Received All button is clicked on the main purchase order screen. If you have received a partial order for this item, then enter the number of items received and enter the quantity still on back order in the following field.

### Back Ordered

If an item you have ordered has not been received yet, you may place the quantity still on back order in this field. Clicking on the Back Order

tab (as described below) will place the entire quantity ordered into this field.

<b>Unit Cost (Each)</b>	Enter your cost to purchase this item (each). This field is automatically filled-in based upon your cost field on the main inventory file.
<b>Extended Price</b>	This field is automatically calculated based upon Quantity Ordered * Unit Cost.
<b>For Job Ticket#</b>	If you wish to link this item being ordered with a particular service ticket, enter the ticket number in this field. This is used in the Purchase Order Report if you wish to find a list of all parts ordered for a particular service job.
<b>Stock Status Box</b>	This display-only section shows the current Stock On-Hand and Reorder Levels for the item being ordered.

#### ***Buttons Available On The Purchase Order Item Screen***

<b>OK</b>	Adds the item entered onto the Purchase Order Form.
<b>Cancel</b>	Cancels the current item ordered and returns back to the Purchase Order form.
<b>Received</b>	Click on this button to receive the entire quantity of this item ordered. For example, if the Quantity Ordered is 5 and the Received button is selected, the Quantity Received field will now also reflect a quantity of 5. You may adjust this number to a different quantity if necessary, even after you have selected the Received button. Inventory will be adjusted accordingly.
<b>Back Order</b>	If you have any quantity of this item still on back-order, clicking on this button will place the entire quantity ordered into Back Ordered status. You may run a report of back-ordered items in the Purchase Order report. You may adjust the back ordered quantity to a different quantity if necessary, even after you have selected the Back Order button.

#### **Inquire/Edit An Existing Purchase Order**

To view or modify an existing purchase order, display the purchase order list (Inventory section), and highlight the purchase order to view. Double-click on the purchase order (or press the Change button or enter key). You may make any changes you wish to the purchase order and reprint the purchase order at any time.

#### **Marking Items For Receiving / Back Order**

Each item ordered on a purchase order can have a status of Ordered (no quantities in the received or back ordered fields), Received, Back Ordered, or a combination of received and back ordered. The appropriate buttons used to mark items as received or back ordered are described above.

## **Printing or Emailing Purchase Orders**

A Purchase Order may be printed (or reprinted) or emailed at any time. Purchase orders are printed on plain 8 ½ x 11 paper. To print a purchase order, bring up the purchase order list and highlight the purchase order to be printed. Double click on the purchase order, or press the CHANGE button or press the enter key. The purchase order form will be displayed.

Click on the PRINT button. You will be asked how many copies of the purchase order you wish to print (supported by printers capable of printing multiple copies such as laser and inkjet printers). The default quantity is 1. You will also be asked if you wish a signature line to be added to the purchase order. This signature line is helpful if your vendor requires a personal signature from your company to accept the order. This signature line will print on the bottom of the purchase order.

Click on the Print Setup button if you wish to select the windows printer driver the purchase order will print to. The purchase order will print to your default windows printer driver unless selected otherwise. If you have a fax board installed, you may select your fax board as a printer driver and fax the purchase order directly to the vendor.

To email a purchase order, select EMAIL in the Print PO or Email PO selection field. When Email is selected, an email address field will be displayed with the Vendor's email address (as entered in the Vendor Profile screen in the software). You may override that default email address. An Adobe Acrobat PDF document will be created and attached to an email sent to the email recipient.

## **Deleting Purchase Orders**

If you find it necessary to delete a purchase order, you may do so by bringing up the purchase order list (Inventory section) and highlighting the purchase order to be deleted. Click on the DELETE button or press the DEL key. You will be asked to confirm the deletion. Once a purchase order has been deleted, all items that were marked as 'received' will automatically be removed from inventory – based upon the quantity received.



## Chapter 11: Support Log

The support log is designed to act as a central 'Call Center' by tracking all incoming and outgoing calls placed by your staff, including automatic timing of calls, call status tracking with status codes definable by you (talked/left message/busy/fax/etc.), priority assignments, automatic logging of employee ID handling call, contract status identification, and virtually unlimited note taking. You may leave calls open and prioritized for immediate attention. The Support Log performs auto-escalation based upon priority and open calls so important calls requiring attention are always identified at the top of the support log list. These important open calls are also color coded on the list to further identify calls that require priority attention.

The Support Log is integrated throughout the rest of the system, including the ability to schedule follow-up callbacks directly to the appointment calendar, sending a letter directly to a customer from within the support log area, reviewing a customer support history directly from within the customer main account, and a support log report to provide important management information on support calls.

The Support Log data entry screen may be setup with default values that you determine for various fields including incoming/outgoing, priority, call status, and priority fields. You may also turn on/off the automatic logging of Operator User ID. These default settings are definable in the Utilities/Set System Defaults area.

To review a support log for a particular customer, bring up the main customer account screen for that customer and click on the Support Log button. Only that customers' support history will be displayed, along with total number of hours spent on support. You may review any particular support call by double-clicking the support call entry you wish to view.

## Viewing Support Log List

To display the Support Log List, click on the SUPPORT button, or press the F8 key. The Support Log provides the following functions:

Call Date	Time	Company	Priority	Disp	Status	Phone	Spoke To
2/05/01	9:06AM	Fischer, Inc.	2	Closed	Sales	602-777-7777	Jim Fischer
2/10/99	1:12PM	ABC Corporation	2	Closed	Sales	516-887-2343	Larry Thomson

### *Color Codings Used On Support Call Log (Call Date Column Color Codes):*

RED	Open support calls more than 2 days old.
YELLOW	Open support calls from yesterday.
GREEN	Calls (Open or Closed) entered today.

### *Buttons Available On This Screen:*

Insert	Adds a new support call entry to the Support List
Change	View or modify support call highlighted on list
Delete	Deletes support call entry from list

*The following sort tabs may be selected:*

<b>Sort By Disposition</b>	This is the default sort setting for the Support Call Log list. Support entries are sorted in an 'auto-escalation' method starting with Open calls/Highest Priority (1-4)/Date. A selection list allows you to select Open/Closed/Other for the beginning of the sort.
<b>Sort By Company</b>	Selecting this sort tab sorts the support call list based upon company name. You may enter the full or partial name of the account to pull up all support entries starting with that customer name.
<b>Sort By Priority</b>	Selecting this sort tab sorts the support call list based upon highest to lowest priority (1-Highest , 4-Lowest). A selection list allows you to select Priority #.
<b>Sort By Date</b>	Select this sort tab to list all support calls in order of their date (current first). You may enter a specific date to start the support call list from that date.
<b>Incoming</b>	Display only support call entries marked as 'Incoming'
<b>Outgoing</b>	Display only support call entries marked as 'Outgoing'
<b>Tech</b>	Displays support call entries starting with a specific Technician ID.
<b>Status</b>	Displays support call entries starting with a specific Status. A drop-down list is available to select a valid Status.

## Adding A Support Call Entry

You may add a support call entry by clicking the INSERT button on the Support Call Log list.

**Support Entry Will Be Changed**

Client

Call Date: 7/29/2004    Call Time: 8:41AM    Call Length: 00:15:06    Priority: 2    Disposition: Closed

Contract Expiration Status

Service: 6/01/05    Monitor: 7/15/05

Company: Mancusso Restaurant    Support Technician: CPS

Spoke To: Larry Thomson    Telephone: 480-398-3902

Schedule Follow Up (Optional)

Follow Up Date: 7/30/04    Reason For Follow Up: Finalize Deal During Lunch

**Notes Of Conversation**

Larry has signed off on the expansion plans and will be signing contract with us on 7/30/04. Asked that we take care of town permit requirements and wants job completed in 30 days. I said not a problem. Will be meeting at their restaurant tomorrow at 12pm to sign contract.

OK    Cancel    Date/Time Stamp    Phrases    Send Letter    Customer Info    Print

The following fields are available on the Support Call Entry screen:

- |                       |   |
|-----------------------|---|
| <b>Account Status</b> | Appearing in the upper left corner, this indicates the Customer's current account status (Client/Prospect/Dealer/Other...)  |
| <b>Call Date</b>      | Automatically defaults to today's date but may be modified while still in Add mode.   |
| <b>Call Time</b>      | Automatically defaults to the current time when a support call is entered.  |
| <b>Call Length</b>    | Automatically turns on during new support call entries. Click on Watch icon to turn on/off timer. Call Length field may also be entered manually by double-clicking on field and entering the actual call length. |
| <b>Priority</b>       | Specifies level of importance for this call. Priority levels 1 (Highest Priority) to 4 (Lowest Priority). User-Definable default setting in System Defaults.  |
| <b>Disposition</b>    | Marks call as Open/Closed/Other. Open calls remain on top of Support Call Log for 'auto-escalation' of open calls.  |



<b>Incoming/Outgoing</b>	Indicates if call was incoming or outgoing (initiated by you).
<b>Credits Used</b>	One option for handling customer contracts is the ability to offer customer support on a 'prepaid' credit basis. This option is setup in the customer service contract area. If the customer has any prepaid credits still available for support, it will be displayed in the upper right box of the support call screen, and you may select the number of credits to deduct from this total from within this Credits Used field. For example, entering 1 for Credits Used will deduct 1 credit from the customers total prepaid credit field in their main customer account screen.
<b>Call Status</b>	This field is used to 'categorize' the type of call. This field is user-definable and has it's own validation list. Examples of possible call statuses include Talked/Left Message/Fax/Busy/Collect/Sale etc. This status is utilized on the Support Call Log list to easily identify similar calls, as well as on the Support Call Report. Click on the [...] button to enter your list of Call Status values.
<b>Company</b>	Identifies the customer this call is for. Click on the [...] button to lookup a list of customers and select the appropriate customer from the list. Selecting a customer also automatically preloads the following 'Spoke To' and 'Telephone' fields with all valid contact names and phone numbers associated with that customer.
<b>Support Technician</b>	This field identifies the person in your office handling this call. The technician name must be listed in the Technician validation list. Click on the [...] button to bring up a list of valid technicians. You may also add new names to the technician list directly.
Users that have the password protection feature turned on that requires each user to logon to the program may have the user's UserID automatically inserted in the Support Technician field. This option is selectable in the System Defaults area.	
<b>Spoke To</b>	Select from a list of valid contact names associated with the Company field entered. You may also enter any name in this field without it being required in the customer account already.
<b>Telephone</b>	Select from a list of valid phone numbers associated with the Company field entered. The contact name associated with each phone number will be displayed on the drop-down list. You may also enter any phone number in this field without it being required in the customer account.
<b>Notes Of Conversation</b>	This scrollable area offers a virtually unlimited amount of notes for this particular support call. These notes may be printed in the Support Log Report. See below for a list of buttons that can be used for this Notes field.
<b>Follow-Up Date</b>	If you wish to post a reminder on the appointment calendar for a follow-up call, enter the date of the follow-up in this field. The Call Status field described earlier will be used as the 'Service Code' in the appointment calendar detail record.

**Reason For Follow-Up** If entering a follow-up date above, enter a description as to the reason for the follow-up. This field will appear on the appointment calendar in the Service Description field.

**Contract Expiration Status** This display only box contains information on up to 3 various contracts available on the customer account. The first two contracts will display the type of contract and the expiration date of each. A Red LED will appear to the right of the expiration dates if the contract has expired, a Green LED will appear to the right of the expiration dates if the contract is current, and no LED will appear if no contract is on file. In addition, any prepaid support credits on file will be displayed in this box as well.

**Buttons Available On The Support Call Entry Screen:**

**OK** Saves support call entry and returns you to the Support Call Log.

**Cancel** Cancels the support call entry without saving and returns to the Support Call Log.

**Date/Time Stamp** Clicking on this button posts the current date and time on the next available line of the Conversation Notes field.

**Phrases** Click on this button to bring up a list of common 'phrases' that you may want to use in the Support Call area. The phrase selected will be copied to the next available area in the Conversation Notes field. This phrase list is the same phrase list used in the Invoicing area of the program so you may use those phrases, or add additional ones that are to be used in this area.

**Send Letter** If you would like to send a letter directly to this customer (perhaps as a follow-up to your conversation), then click on the Send Letter button. You will be asked what letter to send (letters are defined in the Customer Inquiry/Mail Merge area), if you wish to have your company letterhead printed, and a few other questions pertaining to the printout of the letter.

**Customer Info** This button gives you a direct link to the main customer account screen for that customer. From the main customer screen, you can review every aspect of the customers account very easily. When you are finished reviewing the customers account, you will be returned back to the Support Call entry screen so you may finish entering appropriate data and save the support call entry.

**Print** Print this specific support log entry.

### **Inquire/Edit An Existing Support Call**

To edit or view an existing support call entry, highlight the appropriate support call from the support call log and click on CHANGE or press enter. You may change any information in this screen, EXCEPT the Call Date and Call Time will be disabled. It is usually recommended to CLOSE a call out by selecting Close in the disposition field once a call has been completed.

### **Deleting A Support Call Entry**

To delete an existing support call entry, highlight the appropriate support call from the support call log and click on the DELETE button or press the DEL key. Confirm the deletion.


## Support Log Whiteboard System

This program ships with a separate program, which is a computerized Whiteboard that can be run from within your office. The Whiteboard software displays upon a dedicated computer, and shows all open calls that are currently being tracked from the Support Log section.

To active the Whiteboard, select Whiteboard Support Display from the Alarm for Windows menu group in Windows. You may also activate the Whiteboard by running WHITEBOARD.EXE from within the programs' directory.

Since the Whiteboard software constantly monitors the Support log for new and revised entries, it is recommended this software run upon a dedicated computer. If it is run on a workstation that is being used for other purposes it can slow down the processing time of that specific workstation each time it polls the support files.

One beneficial application for the Whiteboard is to connect the workstation it is running on to an external Scan converter so that it may be displayed on a larger TV monitor. The screen has been designed to run in full screen mode (in 640x480,) which is ideal for a 20" or larger TV screen. Scan converters can be purchased from most computer supply stores for approximately \$100 to \$200. This will allow the entire department responsible for handling customer calls to see the support whiteboard on the monitor.



The screenshot shows a window titled "Callboard" with a yellow header bar displaying "December 6, 2001" and "10:54:32AM". Below the header is a blue bar with statistics: "CALLS ON BOARD: 0", "OVERTIME: 0", "CALLS TODAY: 0", and "AVG CALLBACK: 0:00". Below the blue bar is a yellow header bar for a table with columns: "ACCT", "COMPANY", "PHONE", "TIME", and "WAIT". The table contains one row of data: "200", "ABC Alarm Corp.", "515-777-7777", "10:53AM", and "0:01".

ACCT	COMPANY	PHONE	TIME	WAIT
200	ABC Alarm Corp.	515-777-7777	10:53AM	0:01

*Note: The Whiteboard Support Display will display all support calls that are logged with a CALL STATUS of 'Log In'. Any other support calls that are logged in with a call status other than Log In, will not be displayed or calculated upon the Whiteboard. This allows you the flexibility of using the Support Log in Alarm 5.0, for a multitude of purposes. For any other calls that should be displayed upon the Whiteboard, simply use 'Log In' for the CALL STATUS field and leave the disposition OPEN.*

**The Whiteboard Support Display contains the following information:**

**Current Date**

**Current Time**

**Calls On Board** This field indicates the current number of OPEN support calls being displayed. These are all Support calls that use the 'Log In' value for the CALL STATUS field, and have an OPEN disposition.

**Calls Today** This field reflects the total number of support calls handled for today. These support calls are those that are marked with 'Log In' as the CALL STATUS, and have a disposition of either OPEN or CLOSED.

**Overtime** This field reflects the number of OPEN calls that are from a previous date, as well as any OPEN calls that are more than 3 hours OPEN.

**AVG Callback** This field calculates the average amount of time (HH:MM format) for OPEN calls to be closed since the beginning of the day.

**ACCT Column** This column indicates the customer account number for the open support call listed.

**COMPANY Column** This column represents the customer name for the open support call listed.

**PHONE Column** This column represents the return phone number for the open support call listed.

**TIME Column** This column indicates the time the original support call was logged into the system.

**WAIT Column** This column indicates the total amount of time (HH:MM format) that this call has been open.

The listed support calls are color-coded, based upon the amount of time the call has been open. If a call is more than 3 hours open, it will be listed in RED. In addition, all calls that are open, are listed starting with the oldest call first, except those calls from a previous day are which is listed at the end of today's listings.

To close the Whiteboard software, simply click on the X in the upper right corner.

## Chapter 12: Report Facility

This chapter explains the various reports which are available within the software. All reports will be accessed from this section.

### General Information About Reports

Almost all reports may be displayed to the screen or printed to your printer. If a report is displayed to the screen, you may scroll the report to the left and right, as well as up or down. If a report is displayed to the screen, you have the following functions to choose from (some functions may not be available depending upon the size of the report):

<b>Cancel</b>	Exits out of the report display screen.
<b>Print</b>	Selectable from the File menu, or by clicking on the Printer Icon, you may print out the report from the display screen – without having to rerun the report.
<b>Zoom</b>	Displays the report in a variety of zoom levels, both magnification modes, full page view, and zoom out modes. The zoom out view is usually difficult to read except for the purposes of seeing the format of the report and generally would not be used. You may also specify the number of pages to see at one time on the screen (either in Rows or Column format) by entering a number in the Row or Column field.
<b>Previous Page</b>	If the report is more than 1 page long, you may page forwards and backwards by selecting the Previous Page and Next Page menu items.
<b>Next Page</b>	If the report is more than 1 page long, you may page forwards or backwards by selecting the Previous Page and Next Page menu items.
<b>Jump</b>	If the report is more than 1 page long, you can enter an exact page number and immediately jump to that page. Useful for long reports.

There are a few other points to keep in mind when printing reports:

**1]** Most reports have additional specific selections that help define the type of information to be reported on. This offers you a great deal of flexibility in providing reports based upon your specific requirements. These selections are chosen by selecting the down-arrow button and choosing from the listed options.

Selecting a field to sort by will result in the report to be printed in ascending order based upon the field selected.

If a specific report criteria is selected, you will be asked to enter the value to search for in that field. Select OK to start generating the report. When the report is printed, it will only print for those records whose selected field equals the value you have just entered (Ex: Billing Cycle = Q, only those customers with a billing cycle of 'Q' will be printed).

2] Before you select a report to print, make sure you have paper in your printer and the printer is online. If you are not sure how to do this, consult your printer manual. Most reports print on blank paper.

3] Some reports take longer to process than others. This is due to calculations that some reports must perform. It is not unusual for certain reports to take 10 minutes or longer before printing out. It is recommended that where possible, these reports should be selected at the end of the day when access to ALARM is not critical.

4] If a report has been requested but you are returned to the Report Menu without any printout, this indicates that no information was found to report on.

5] If you wish to return to the report menu after you have entered any report screen, select the Cancel button. You may do this at any time up until the report is being printed. Once the report has started printing, if you need to cancel the printing it is best to first turn the printer off-line, then go into the Windows Print Manager and delete any print items still queued (press the DELETE button while highlighting the report being printed).

6] You may choose any valid printer to print a report to by choosing the PRINT SETUP button found on all print screens found throughout the software. The program will work with any printer installed in your Windows Control Panel (printer driver) section. In addition, any additional printer drivers such as a faxboard driver can be utilized.

## **Report Facility Menu**

To display the Report Facility menu, select REPORTS from the top Menu. The Report menu is divided into two sections - Management Reports and Financial Reports. Select one of these menu items and a list of reports available under that heading will be displayed. All reports can be restricted for use by the user from within their security profile section of Security Administration.

## **Management Reports**

### **Customer List**

This report will give you a 'birds-eye-view' of all of the customers in the system. Information displayed on this report include customer name and number, billing cycle, next increase date, charge, etc.

You may choose the types of information that are to appear on this report. You may select to print the conversation log, customer notes, and recurring charges information for each customer listed, or any combination. Just select YES or NO to each question according to your requirements

You may also choose to run this report with the 'Print One-Line Report' option. This option condense your customer printout so that each customer prints on just one line, allowing up to 55 customers per page to be printed. The basic information such as name, acct#, telephone and address will print with this option. If you want the full customer report to print, then select NO to this option.

The report may be sorted by one of the following fields:

Customer Name  
Account Number  
Billing Cycle  
Charge  
Next Increase Date  
Central Station Account Number  
Start Date

Using the cursor keys, select one of the above sorts and press ENTER. You will then have the choice of selecting what type of customers are to be printed:

- |                           |   |
|---------------------------|---|
| <b>All</b>                | All customers within the system will be printed.  |
| <b>Billing Cycle</b>      | You will be asked to enter a specific billing cycle (M,Q,S,A,N). Once you have entered the code, press ENTER. Only those customers whose billing cycle equals the one just entered will appear on the report.   |
| <b>By Bill Month</b>      | To print a list of customers due to get billed in any given month, select this item and enter the full name of the month that they are to be billed in.   |
| <b>Closed Accounts</b>    | Select this item to print out only closed accounts.   |
| <b>By Central Station</b> | Select this item to print out customers assigned to a specific central station.   |
| <b>By Bill-To Account</b> | Select this item if you want to print out what customers are billed to a specific account.  |
| <b>By Partial Account</b> | If you want to find only those customers whose account number starts with a certain number of letters or numbers, use this selection. Just enter the appropriate number of characters and the system will print out only those customers whose account number starts with those characters. |
| <b>By County</b>          | If you want to print a list of customers that reside in a specific county, select this item and then enter the name of the county.  |

In addition to this customer list, you can print a list of customers by over 25 searches from within the Mail Merge section. Please refer to that chapter in this manual for further details.

### Customer Detail Report

The customer detail report will print one page per customer of all pertinent information on file for those customers. You may select the type of information that is to be printed on the customer detail report. By selecting YES or NO, you may print the customers' notification list with or without passcodes, and alarm call history.

You may sort the report by Customer Name, Customer Account #, or Central Station Account #.



*The report may be selected for:*

- |                          |   |
|--------------------------|---|
| <b>All</b>               | All customers on file will be printed, one page per customer.       |
| <b>Specific Customer</b> | Print a detail report for one customer only                         |
| <b>Central Station</b>   | Print only those customers belonging to a specific central station. |

**Service Ticket Log**

This report will print a listing of all service tickets that have been entered into the system, based upon any given time period. You will be prompted for the following information:

- |                             |  |
|-----------------------------|--|
| <b>Starting From - To</b>   | Enter the date range based upon the service appointment date.  |
| <b>Job Status</b>           | You may select to print all tickets, unscheduled tickets only (no appointment schedule date on file), open tickets only (not linked to a service invoice), or completed tickets only (completed date filled in). |
| <b>Billing Status</b>       | If you selected Completed jobs above to print, you may also specify to print all, just unpaid, or just paid service tickets based upon the invoice paid status.  |
| <b>Print Repairs</b>        | Select YES if you want to print the Repair Performed descriptions from each service ticket appearing on this report, otherwise select NO.  |
| <b>Print Invoice Amount</b> | Select YES to print invoiced amount on report. Select NO to hide the invoiced amount (useful if report is for technicians).  |

*The report will be sorted by Ticket number, and may be selected by one of the following:*

- |                            |  |
|----------------------------|--|
| <b>All</b>                 | Print all service tickets within the above parameters.                                       |
| <b>Specific Customer</b>   | Print service ticket history for an individual customer.                                     |
| <b>Specific Technician</b> | Print service tickets assigned to a specific technician within the above parameters.         |
| <b>Specific Category</b>   | Print service tickets categorized with a specific service code, within the above parameters. |

**Support Log Report**

This report is based upon the Support Log section of the program. You have a variety of print options for this report, including support entries from a specific Technician and support calls within a specified date range, as well as the support log for a specific customer, disposition, status, and priority level. You may also retrieve a list of support calls that required the use of support credits, as well as a list of support calls that were not covered by any type of support agreement (no contracts or support credits on file).

## **Technician Time Sheet**

If you use the Time Card section of service tickets, you may print a technician time sheet for any time period by using this report. The time sheet can be helpful if you are using time cards to help determine the number of hours and the hourly wage to be paid to each technician.

This report may be selected for any time period, and may be printed for only scheduled time cards, completed time cards, or both. In addition, you may choose not to print the technicians wage information on this report (useful if this report will be given to persons who should not be privy to this information).

You may also select this report to list timecards for a specific technician, specific service ticket, or time cards that have a certain dispatch status (on-call, callback, paged, dispatched, etc.).

## **Inventory List**

This report will print a listing of all parts that are currently entered into the Inventory Maintenance file (parts file), sorted by part description. Information such as part description, cost, price, and warranty period will be printed.

## **Received Inventory List**

This report prints a history of all items received into inventory from the Receive Inventory section. You have the option of selecting a date range of when items were purchased, as well as selecting this report to print a purchase history for a specific part, specific vendor, or specific purchase order number.

## **Purchase Order List**

Print purchase order list. Select to print the report to 'screen' or 'printer'. You have the option of printing a date range of purchase orders. Select if you would like to print open, closed or all purchase orders. Select if 'yes' if you would like to print the item details on the purchase order. Make a selection for report order, PO Number, PO Date or Vendor. Then make a selection for report filter.

## **Equipment Installed List**

You can print a list of all equipment currently installed throughout your customers, or print a list of equipment installed at a particular customers' site. In addition, you can print a list of customers that have one particular part installed. This is especially useful if you need to track down which customers have a part that is being recalled by the manufacturer. You can also use this report to identify which customers may be due for an upgrade of a particular part (this can also be accomplished from within the Mail merge section).

## **Serviced Items List**

If you utilize the Repair history file within the service ticket area, you can print out a complete repair history of any part, or a repair history for a particular customer. Since you can identify a part as being repaired, replaced, or inspected, you may choose either one of those designations when printing this report. This report is especially useful in trying to identify parts with a high failure rate.

## **Received Inventory List**

Print a report of received inventory items. You can select a date range of received FROM and TILL. Then make a selection for filtering your report, Specific PO#, Specific Vendor, Specific Part ID.

## **Rolodex List Report**

The Rolodex List Report will print your Rolodex list (unlike the above Rolodex Cards which is designed specifically against the customer database). Your options on this report include specific a specific relationship to print. You may also select if you wish the comment notes to be included on the report. This report may be sorted by Last Name, Company Name, Main Telephone Number, or Relationship. You may also print a list of your rolodex contacts within a specific Town, State, or Zip Code.

## **Rolodex Cards**

You may purchase continuous Rolodex cards so that the system can neatly print up your Rolodex. Rolodex cards may be printed in order of customer name, account number or central station account number and may printed for all customers, just a specific customer, all customers with a certain billing cycle or customers that have come on-line since a certain date (start date on the customer record). Closed accounts will not print on the ALL selection. You may choose among two Rolodex card sizes: 2 1/6" x 4", or the 3" x 5" (index) size.

## **KnowledgeBase Report**

You may print out the contents of your KnowledgeBase database with this report.

## **Recurring Exception Report**

This report will audits your customers accounts that were just invoiced. If any accounts are found that are not billed or who's billing date was not updated, credit card has expired will show on this report.

## **Alarm Call Log (ALARM Only)**

The alarm call log report will print a history of all alarm calls, either for a specific customer or for all customers within a specific time period. You may also print a list of customers with high false alarms.

## Central Station Notices (Alarm Only)

You can print up pre-formatted disconnect, reconnect and update notices right from within ALARM. Central station notices that are printed will automatically be logged in the correspondence log.

<b>Customer Account Number</b>	Enter the account number of the customer that you wish to have disconnected/reconnected/updated. The customer name will appear on the screen if correct, otherwise an error message will inform you to re-enter the account number. This account number is mandatory.
<b>Effective As Of</b>	The effective date entered here will be printed on the disconnect notice so that the central station knows on which date the action is to be taken.
<b>Purpose Of Notice</b>	The central station notice can be used for several reasons. The selections available are Disconnect, Reconnect, Update and Memo. Each selection results in different wording to appear on the notice.
<b>Print Passcode On Notice</b>	If the central station requires the customer passcode to appear on any disconnect notices, then select YES, otherwise you may select NO to keep the passcode confidential to any other parties who may see this notice.
<b>Using Letterhead Paper</b>	If you are using your own letterhead for the notice, select YES. If you are using blank paper, then select NO.
<b>Print Copy For Customer</b>	If you select YES, a copy will be printed of this notice, addressed to the customer (the central station copy will always be printed, addressed to the central station).
<b>Signature Required</b>	Since some central stations require a signed disconnect notice from the customer, selecting YES will print a signature line on the bottom of the notice where the customer and sign and then return a copy to you or to the central station (you can leave instructions for the customer in the special comments section described later).
<b>Print Copy For Office</b>	If you would like a copy of the disconnect notice for your own files, select YES.
<b>Special Comments</b>	You may type up to 10 lines of special comments that will appear on this notice. This comment will be printed on all copies.
<b>Email Or Print</b>	Select if the Central Station Notice report should be printed, or emailed to the Central Station's email address.

Press ENTER through all of the comment lines in order to start printing the notices.

## Financial Reports

### Cash Receipts Report

This report will print a cash receipts journal of all payments received for any time period you want. Information displayed on this report include invoice date, invoice amount, sales tax amount, amounts received, dates received, payment age, write-offs, etc.

You will be asked to define the date period for the report. By entering beginning and ending posting dates, you can define monthly, quarterly, yearly or any other period. Enter the dates in date format (MM/DD/YY) for the RECEIVED FROM and TO fields (the received from and to fields relate to the payment posting dates in the post cash receipts section).

*The report may be sorted by one of the following fields:*

**Customer Name**

**Date Paid**

Using the cursor keys, select one of the above sorts and press ENTER. You will then have the choice of selecting what type of invoices will be included in the report:

**All** All invoices paid within the specified dates will be printed.

**Service Invoices** Only service invoices paid within the specified dates will be printed.

**Recurring Invoices** Only recurring invoices paid within the specified dates will be printed.

**Specific Category** Print out only those service invoices with a specific category code

**Specific Customer** Print out only invoices paid for a specific customer.

**Specific County** Print list of paid invoices for a specific county (use for tax purposes)

**Specific Salesrep** Print out a list of paid invoices for only those invoices assigned to a specific salesrep.

### Credit Report

The credit report displays a list of credits that have been posted to customers accounts during the specified date period. This report allows you to select the type of credit to list (Prepaid, Discount, All), as well as a credit history for a specific customer. You may also print a list of only open credits, or credits that are now closed (have a zero available credit balance).

Optionally, you may print a detailed activity history for each credit that appears on this report. The activity history shows how each credit was applied, and to what invoice(s) it was applied to.

### Invoice History Report

This financial report will print a list of generated revenue for any given time period. Unlike the cash receipts report which strictly reports on payments received, this report will allow you to determine

how much revenue was generated for any period in the past. In addition, you can use this report as an 'account history' for any specific customer where it will show all invoices, both paid and unpaid for that customer.

You may specify to print only service invoices, recurring invoices, or both. The report will sort by Invoice date and you may choose the following specific selections:

- All** Print all invoices within the date range specified.
- Specific Category** Print only those invoices that were identified with a specific category (only service invoices may be marked by category, therefore only service invoices will print with this selection).
- Specific Customer** Print only invoices generated for a specific customer within the date range specified.
- Specific County** Print a list of invoices generated from customers living in a specific county within the date range specified. This selection is good for reviewing sales tax histories within specific counties (municipalities).
- Specific Salesrep** Print a list of invoices that were sales for a specific salesrep.

### Monthly Revenue Breakdown Report

This vital report shows you on one page the financial status of your recurring revenue. The report calculates the revenue that you will be generating for each month of the year, based upon the current recurring amounts entered for each of your accounts. The revenue breakdown is reported for each month, as well as what type of revenue is being billed (monthly, quarterly, semi-annual or annual) and the number of invoices being generated that month for each bill cycle.

### Sales Analysis Report

This summary report shows you a 'birds-eye view' of where your sales are coming from, the amount of sales in relationship to each other, and the percentage of sales. You may choose to print out just recurring invoices, just service invoices or both. If service invoices are printed (or both service and recurring), the report will print totals based upon each invoice category (from the category code on the service invoice). Each category will be printed along with total revenue, total receipts, and percent of total as compared to other invoices in the same time period. An excellent management report to see where your money is coming from.

You may also select specific types of invoices to be printed, including:

- All** Include all invoices in this report
- Specific Category** Only total invoices that belong to a specific category
- Specific Customer** Only total invoices that were generated from a specific customer
- Specific County** Print a sales analysis of invoices generated within a specific county

**Specific Salesrep** Print a sales analysis by sales rep

### **Sales Tax Report**

This report will print a sales tax journal of all sales tax received for any time period you want. Information displayed on this report include county, tax rate, tax received, taxable and non-taxable gross sales for each county during the specified time period.

You will be asked to define the date period for the report. By entering beginning and ending dates, you can define monthly, quarterly, yearly or any other period. Enter the dates in date format (MM/DD/YY) for the RECEIVED FROM and TO fields.

Select the accounting method for sales tax reporting: RECEIPTS (Cash Basis) or REVENUE (Accrual).

Using the cursor keys, select one of the above sorts and press ENTER. The sales tax report may be selected by the following conditions:

- |                           |  |
|---------------------------|--|
| <b>All</b>                | All counties will appear on the sales tax report.                                      |
| <b>Recurring Invoices</b> | Print sales tax totals for only recurring invoices                                     |
| <b>Service Invoices</b>   | Print sales tax totals for only service invoices.                                      |
| <b>Specific Category</b>  | Print sales tax totals for service invoices categorized with a specific category code. |
| <b>Specific County</b>    | Print sales tax journal for a specific county only.                                    |

### **Recurring Credit Card Charges Report**

This report will print a list of all credit card or EFT (electronic funds transfer) charges.

- |                             |  |
|-----------------------------|--|
| <b>Send Report To</b>       | Send report to screen or print.          |
| <b>Next Billing</b>         | Enter the billing date range.            |
| <b>Select Sort Field</b>    | Select Customer Name or Customer Account |
| <b>Select Report Filter</b> | Select report filter.                    |

*By cycle*  
*By method*  
*By code*

## Aging Report

The aging report will print a list of each customer with the amounts still due in each aging category (current, 30-60, 60-90, over 90 days). You may print the report for all ages, or just those customers who owe over a specific age category. You may also print the report for just a specific customer.

You will also have the option of printing the customer conversation log under each customer that appears on the report. This is especially useful if you have used the conversation log to report calls in regards to collection efforts. If each of those conversations were marked as Log Type 'COLLECT' or some other similar code, you may print out a list of collection calls you made to each customer so that it is printed under the customers name.

This report is an excellent tool for performing collections.

## Outstanding Balances Report

This report will print a list of all invoices not paid or partially paid. Information displayed on this report include customer name, customer telephone number, invoice date, invoice amount, amount received (if any), and age of account.

The report may be sorted by one of the following fields:

*Customer Name*

*Days Past Due*

Using the cursor keys, select one of the above sorts and press ENTER. The only selection available for this report is all unpaid invoices:

**All**                      All unpaid invoices will be printed, along with total amount due.

## Collection Letter/Mail Merge

*See Chapter 13 Inquiry/mail merge*

## Contract Analysis Report

The Contract Analysis report displays the current financial status of your service contracts (specifically your monitoring contracts). This report will help you determine the remaining value left on your contracts based upon the face value of the contract and the amount of time that is left until the contracts expire. You may run this report for an individual customer or for all customer. You will be asked to enter a date range. Any contracts that have started or will expire within that range will be analyzed. For example, a contract with a face value of \$1200 over 5 years and has 2 years remaining until expiration will have a remaining value of \$480 (\$20/month \* 24 months left). This value can be very helpful if you are applying for a bank loan or need to take a customer to court for terminating a contract early.



## **Job Costing Report**

This report can be helpful in determining your profits and loss on specific jobs you have invoiced. This report looks at invoices generated between a specific date range and lists all items sold on those invoices, including your cost and amount charged for each item. The report then calculates the profits or loss (both dollar amount and percentage) for each part, and then subtotals these figures for each invoice. A grand total is printed at the end of the report for an overview of profits and losses on all invoices listed on the report. You may also specify this report for a specific customer only, or for only one particular Part that was sold during the time period specified.

This report will also calculate and print the total labor and materials cost for each item – assuming these figures have already been entered into the Inventory section of the program (Cost Information Tab within the Inventory Maintenance Entry screen).

## **GL Report**

The GL Report summarizes all financial transactions that occur within the software during the date period you specify. You may send this report to the screen, printer or export to an ASCII file (GL.TXT). You have the option to print a detail or summary listing by individual GL code or ALL GL Codes. The GL Report is based upon the GL codes you have setup in the chart of account section (Utilities/Chart Of Accounts) and the proper assignment of these codes in the Setup Wizard section of the software (see the Setup Chapter earlier in this documentation for a detailed explanation of GL Codes).

## **Custom Reports**

Where available, Z-Micro Technologies can design custom reports for you for a nominal charge.



## Chapter 13: Customer Inquiry/Mail Merge

The Customer Inquiry/Mail Merge facility can help improve communications with your customers. You may create letters or postcards for various occasions (service contract about to expire, dunning letter, 'thank you' for new business, promotional marketing, product update announcement, etc.). The mail merge will automatically insert each customer's name and address into a predetermined location on the letters and postcards. You may create as many different letters or postcards as necessary and they will always be available through the letter or postcard list. If your needs go beyond these letters or postcards, you also have the option of exporting the mail merge list to a DBASEIV file format for merging into your existing word processing program, creating a fax list for broadcast faxing (compatible with the online faxing services such as [www.efax.com](http://www.efax.com) and [www.flatratefax.com](http://www.flatratefax.com) services), and an email list for email campaigns (a very good broadcast email program available by several companies on the internet is 'Prospect Mailer 2000'. Our Email file that is created (email.csv) from our mail merge is compatible with Prospect Mailer 2000 and any other email broadcasting program that accepts an ascii file of email addresses

The Customer Inquiry/Mail Merge is also used to search your customer database for groups of customers in almost unlimited selections. Over 50 fields are available for searching, and all fields may be combined to select on those customers that meet ALL the criteria entered.

To perform a mail merge, select 'MAIL MERGE' from the top menu. The Mail Merge menu allows you to create/modify letters, create/modify postcards, and process the mail merge with the Print Mail Merge.

### Create / Modify a Letter

Letters may be created under the 'Letter Format' menu selection. A list of letters already created by you will appear. You may add a new letter by pressing Insert from this list. If you want to review or modify an existing letter, highlight the letter and press ENTER.

Each letter must be given a unique name. You may also enter your own salutation to appear on the letters, or if left blank the salutation will default to DEAR ....the contact name is automatically inserted after the word DEAR).

You may then create the body of the letter. You may use any of the windows editing commands within this section (cut and paste using the EDIT Cut and Paste selections found in the EDIT menu). Word Processor formatting is supported (RTF) such as typeface, font size, attributes, font color, justification, etc.

When you are finished creating or modifying the letter, select OK to save the letter. This will return you back to the letter list. Select Cancel to return back to the Mail Merge Menu.

### Create / Modify a Post Card

Post cards may be created under the 'Post Card Format' menu selection. Press Insert to add a new post card, Delete to delete a post card, or highlight a post card that is listed and press ENTER to review or modify an existing post card. Each postcard requires a unique name to identify it.

In the post card screen, you will see the format of a postcard. Here you may enter the name of the

postcard and a 4 line message that will appear on the bottom of the post card. The customers' name and address will be automatically printed in the middle section, and you may optionally print your return name and address if desired. You may create as many post cards as you need for various reminders and notices.

### **Create / Modify a Mailing Label**

You can easily setup an unlimited number of mailing label and envelope formats that will be used by the Mail Merge utility to send correspondences to your customers. Each label can be defined with it's own name, and you can specify the left and top margins, as well as the size of the label on the sheet. All size dimensions are entered in inches (8.5, 2.75, etc.).

<b>Label Name/Description</b>	Enter a unique name and a description for this label (Ex: Avery 5160)
<b>Page Width/Height</b>	Enter the size of the label sheet (usually width=8.5, height=11.00)
<b>Label Width/Height</b>	Enter the size of width and height of one of the labels on the page.
<b>Top Margin/Left Margin</b>	Enter the measurement (inches) where the top label is offset from the top of page and from the left side of the page (usually .25).
<b>Print Contact Name</b>	Select YES to print the customer 'Contact' name field (prints above company name). Select NO to print only Company Name and address, no contact field.
<b>Font Size</b>	Usually set to 10, 11, or 12, this is the point size of the font. If you set too high a number on a small label, information may be cut-off at end.
<b>Print Mode</b>	Usually set to Portrait for labels, and Landscape for envelopes.

### **Print Mail Merge Documents**

The Customer Inquiry /Mail Merge selection allows you to choose the type of document to print (letters, postcards, labels, list, or export to DBASE or ASCII file formats). You will be prompted for the following:

<b>DOCUMENT TYPE</b>	Select what type of document you want to use for this mail merge. You may select postcard, letter, mailing labels (you may define your own label format very simply in the Create Labels menu selection described earlier in this chapter), list (a customer list used for your purposes to be displayed or printed), collect (for collection purposes - any letter that you have previously created, but with a slightly different format that will show the customers current outstanding balance), or export out to DBASEIV file format under the filename of CUSDBASE.DBF. If you select Export to DBASEIV the entire customer record for the customers selected will be exported. You may also create a faxlist of selected customers for broadcast faxing (compatible with efax.com or flatratefax.com). The faxlist selection will create a file named 'FAXLIST.'
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For Email campaigns, you may choose either the Email or Emailclip document type selection. Email selection creates as ASCII file named EMAIL.CSV that will contain the email addresses of the customers selected in the inquiry. If a customer has 2 email addresses on file, both addresses will be exported. If you select EMAILCLP, then the email addresses will be exported to your windows clipboard for easy pasting (CTRL-V) into your email program that you currently use (you may paste it in the TO:, CC: or BCC: fields). Please note, the number of email addresses stored in your clipboard will be limited by the size of your windows clipboard. Addresses in the clipboard will be separated with a semi-colon.

**DOCUMENT NAME**

If you selected labels, postcard, letter, or collect (collection notice), a list of the selected document type will appear. Select the appropriate document to be used. If you selected Collect, then a list of your regular letters will appear. You may create a collection notice in the letter section and then select which letter is the collection notice from this list. The only difference between a letter and a collection letter is that the current outstanding balance and account number is displayed on a collection letter.

**SORT BY**

You may sort the mail merge by either customer name or zip code. This sort relates to all document types, including mailing labels and file export selections.

**LOWER CASE**

Since most customer name and address information is entered on the customer screen in all upper case characters, it is incorrect to print this information in upper case characters when the body of the letter is in upper and lower case. If you would like only the first letter of each customer name and address to appear in upper case and all other characters converted to lower case then select 'YES', otherwise select 'NO' to keep all characters in upper case.

The Customer Inquiry/Mail Merge screen consists or 4 tabs: Customer Information Search, Billing Information Search, User-Field Search, and Equipment Search. Each tab is described below.

The SELECTION RANGES section allows you to enter a range of values to determine which customers are eligible to receive this mail merge. This section allows you to select customers in almost unlimited variations. Leave blank any fields which are not going to be used to determine which customers will be selected. You may mix and match as many conditions as needed in order to identify the correct group of customers. The following is a description of the various selection ranges that can be used:

## Customer Information Search Tab

### Acct Number Range

Allows you to select customers within the specified account number range. To select 1 customer, enter the same account number in the From and To fields.

### Customer Name Range

Enter the beginning and ending customer name (last name). You may enter up to the first 7 characters of the customer last name. You may also enter just beginning letters to search for an alphabetic range (Ex: From=A, To=AZ will search all customers whose name starts with the letter A.)

### Zip Code Range

Selects customers that live within the specified zip code range. Useful to do mailings to just certain geographic locations.

### Route Range (MapId)

Selects only those customers that live in a predefined Area MapId. This field is found on the main customer screen and can be utilized for routing service jobs. The most common identification for routing is to use the page number in your local Hangstrom map to identify the geographic location of a customer. You may however use any coding system which works well for you.

### Acct Start Date

Only selects customers whose installation dates (Active Since)

are between these dates.

**Acct Closed Date**

Only selects customers that have been closed between the specified dates. Normally the Customer Inquiry/Mail Merge search will IGNORE any closed accounts, unless specific selected in this field as a date range.

**Contracts Expired**

These two fields will be identified by your selection in the Set System Defaults area. Selects customers whose contracts have expired during the specified date range (based upon the contract expiration date). This selection can be used to send contract expiration notices to anyone whose service contract expired during the last month, or is about to expire in an upcoming month.

**# False Alarms**

Enter the minimum number of false alarms to use as a trigger for mail merge selection. If a number is entered, then also enter the FROM and TO dates of the false alarms. For example, for a list of customers that have had more than 10 false alarms in the last year, enter the number 10 in this field, then enter the date range (ie: 01/01/95 to 12/31/95) in the FROM and TO fields.

**Service**

Selects customers that have a service reminder of the same type and date range. This selection can be very powerful, since there are many ways to take advantage of it. Every customer can have a list of service reminders that are either one-time or recurring. As an example, you can enter recurring service reminders for customers that are due for annual inspections, fire inspections, battery replacements, etc. This reminders are kept on file and may used in this area to help send out notices or reminders to those customers who services are now coming due.

**Additional Acct#**

Enter an account number (or range) to scan through all of the 'additional account numbers' section of the customer records to find a match.

**Account # Category**

Enter a category that represents one of the additional account numbers (ie: Radio Backup, etc.) that was used to identify that account number if searching by category.

*Here is one example of how you would use this section:*

A customer has a service reminder on file for an annual inspection on the 1st of April for the next 5 years. It is now March and you want to send service notices to any customer that is due for an annual inspection in April. Each service reminder is categorized by the type of service to be performed, so lets assume this an annual inspection is categorized with the word 'INSPECT'. You would enter the word INSPECT in this Se36rv code field. Then enter the date range 04/01/92 To 04/31/92. When the mail merge searches through your customers, only those customers that are due for 'INSPECT' services during that date range will have notices mailed to them.

The SPECIFIC SELECTIONS section allows you to select customers based upon a match of values

entered into any of the displayed fields. In some situations, the screen displays a list of possible values that can be entered.

<b>Customer Town</b>	Enter the name of the town to search for customers in that town.
<b>Customer State</b>	Enter the 2-characters state code to search for customers in that state.
<b>County Name</b>	Selects customers that live in a specific county. Select from drop-down list.
<b>Account Type</b>	Select from the drop-down list (Client/Prospect/Dealer/Other/Dead).
<b>Property Type</b>	Select from the drop-down list (Res/Comm/Othr)
<b>Central Station</b>	Allows you to select only those customers that are assigned to a specific central station.
<b>Contract 1 &amp; 2 Type</b>	These two fields are definable in the Set System Defaults (Contracts) area. Each contract can be defined by a word (Ex: Gold/Silver/NoLabor/etc.). You may search for customers that have a specific type of contract in these fields.
<b>Prepaid Credits</b>	If you utilize the prepaid credits feature, you may search for customers that have a specific number of credits left on their contract screen (main customer account screen – Contracts Tab). Usually used to determine which customers are nearly depleted of credits – search for 1 credit left.
<b>Company ID (optional)</b>	This field will only appear if you have purchased and installed the MultiCom module option. The Multicom module allows you to run multiple companies within the program and segregate all financial reports, billing, and servicing based upon each company. If this module is installed, this field allows you to use the Company ID on each customers account as a selection in Customer Inquiry/Mail Merge area.

### **Email Address Export**

If you wish to E-mail to all of your existing customers who have an email address, you can create an ASCII text file, which will contain the e-mail addresses of your customers by selecting EMAIL as the Document Type. The ASCII file will include both the Primary and Secondary email addresses that are contained on the customer Email Address tab screen, as well as the name of the account.

The ASCII file will be then named EMAIL.CSV and will be in the standard ASCII format. Most email programs can import this type of file into their specific address book. From this point, simply follow the directions for your email program and perform a broadcast email, or individual emails.



## Email Address Search

**Customer Inquiry / Mail Merge**

Select which group of customers are to be searched for the Customer Inquiry.  
Only fill in fields that are pertinent to the selection of these customers.

Document Type: **EMAIL** | Document Name: \_\_\_\_\_  
Sort By: **CUSTOMER** | Lower Case: **NO** | Use Bill-To Address: **Yes**

OK | Cancel | Display Merge List

Customer Information Search | Billing Information Search | User-Field Search | Equipment Search

SELECTION RANGES		From	To	SPECIFIC SELECTIONS	
Acct Number Range				Customer Town	_____
Customer Name Range				Customer State	_____
Zip Code Range				County Name	_____
Route Range (MapId)				Account Type	_____
Acct Start Date				Property Type	_____
Acct Closed Date				Central Sta.	_____
Monitor Expires				Contract 1 Type	_____ *
ServiceExpires				Contract 2 Type	_____ *
# False Alarms:				Prepaid Credits	0 (Credits Left)
Service	_____			Email Address	_____ *

To find a customer based upon their email address, enter the email address in the 'Email Address' search field. If you wish to find all of your customers, who have an email address, enter just an \* in this field. If you wish to find all of those customers, who do not have an email address, then enter a # in this field.

### Use Bill-To Address

You may now select whether to have the Customer's Billing Address or the Site Address print, when creating Letters, Labels or exporting the names to a dbase file. Select Yes, in order to use the Bill-To-Address (if the customer does not have a Bill-To- Address, then the site address is used). Select No to always use the standard site address.

### Search For Customers With/Without Recurring Charges

If you need to find customers that have recurring charges (regardless of what recurring charge(s) they have), or you need to find customers that do not have any recurring charges, you may now do so within the Inquiry/Mail section.

To find all customers with a recurring charge, enter an \* in the Recurr Code field of the Billing Information Search tab.

To find all customers that do not have a recurring charge, enter a # in the Recurr Code field of the Billing Information Search tab.

## Search For Customers With/Without Contracts

To search for those customers with Contract Type codes entered, simply enter an \* in the Contract1 or Contract2 fields of the Customer Information Search tab (these fields may be described differently based upon your user definable settings for these fields).

To search for customers that do not have a Contract Type code, enter a # in the Contract1 or Contract2 fields of the Customer Information Search tab.

## Billing Information Search Tab

**Customer Inquiry / Mail Merge**

Select which group of customers are to be searched for the Customer Inquiry.  
Only fill in fields that are pertinent to the selection of these customers.

Document Type: LIST | Document Name: | Lower Case: NO | Use Bill-To Address: Yes

Sort By: CUSTOMER | OK | Cancel | Display Merge List

Customer Information Search | **Billing Information Search** | User-Field Search | Equipment Search

SELECTION RANGES		From	To	SPECIFIC SELECTIONS	
Next Billing Date Range				Recurr Code	*
Next Rate Increase				Billing Cycle	
Past Due (In Days)				Late Fees	
Post-To Account Range				Billing Method	
Credit Card Expiration				Recurr Amount	

\* = Used, # = Empty On Definable Fields

### Next Billing Range

Selects customers whose next recurring billing will occur within the specified date range (searches all 6 Next Billing fields in the recurring charge screen of each customer).

### Next Rate Increase

Selects customers who are due for a rate increase during the specified date range. This field is checked against the Next Increase date on the main customer screen.

### Past Due (In Days)

Selects only customers whose account is past due the length of time specified in this selection. For example, if you wish to send a collection

letter to just customers who are 60 to 90 days past due, then enter 60 and 90 as the Past Due range. (Note: in order for a collection letter to display the current outstanding balance, a Past Due range MUST be entered in this area).

<b>Post-To Acct Range</b>	Allows you to select customers that have a specific Post-To account number specified in their POST TO ACCT# field (on main customer screen). This can be helpful to identify all work-sites that are billed to a specific 'dealer' account.
<b>Credit Card Expiration</b>	Allows you to find customers whose credit cards have or will be expiring within the date range entered.
<b>Recurr Code</b>	Selects customers that are billed for a specific recurring charge only (Ex: CEN/LEA/PAY etc.). Select the drop-down list for a list of valid recurring charge codes that have been entered into your system. Searches all 6 recurring charge lines per customer.
<b>Billing Cycle</b>	Selects customers that are billed for a specific billing cycle only. Select the drop-down list for a valid list of billing cycles (M/Q/S/A). Searches all 6 recurring charge lines per customer.
<b>Late Fees</b>	Find customers that have either Y or N value in the Late Fee field.
<b>Billing Method</b>	Search for customers with a specific recurring invoicing billing method (Printer/Visa/MasterCard/AmEx/Checking/Savings/No Print). Select the drop-down list for a list of valid methods.

## User-Field Search Tab

The User-Field Search tab contains 20 user-definable fields that may all be searched. These fields are determined by the user and set in the Set User Definable Fields area in the Utilities menu.

**Customer Inquiry / Mail Merge**

Select which group of customers are to be searched for the Customer Inquiry.  
Only fill in fields that are pertinent to the selection of these customers.

Document Type: LIST | Document Name: | Lower Case: NO | Use Bill-To Address: Yes

Sort By: CUSTOMER | Display Merge List

Customer Information Search | Billing Information Search | **User-Field Search** | Equipment Search

	SELECTION RANGES From	To	SPECIFIC SELECTIONS
			Type of Acct
Equipment			
RecChg Stop			
Password			
Sales Rep			
Reference			
Security Co.			

\* = Used, # = Empty On Definable Fields

**Date Specific Fields** The first four fields on the User-Field Search tab are date-specific fields (these fields are found on the User-Defined tab of the main customer account screen). Enter a From and To date range to find customers with the appropriate dates in these fields.

**Text Fields** The next 12 fields on the screen are 'free-form' text fields. You may search for customers using these fields in the following manner:

Enter an exact match of the value being searched for Enter the word NOT and then a space in front of the value being search for. This will find all customers that DO NOT have that particular value in that user-definable field.

Enter a \* in the field to find all customers that have ANY value in that user-definable field.  
Enter a # in the field to find all customers that DO NOT have ANY value in that user-definable field.

**Validated Fields** The last 4 user-definable fields are 'validated' fields. This means that the values entered into those fields must match a list of valid values already entered into that fields validation list. To select a value to search on for one of these fields, click on the down arrow to display the drop-down list.

## Equipment Search Tab

Since the Equipment List section of the program can be user-defined (Set System Defaults), this tab may be named differently.

**Serial Number** A user-definable field. Allows you to select only those customers that have a specific range entered into this field. For example. If this field is used as a Serial Number field, you may find all customers that have a part with a serial number within a range of serial numbers.

**Installed In** (User-Definable). Enter a value in the From and To range to find customers with that value in this field. Often used to specify the location of a piece of equipment installed at the customer site.

**RMA Number** (User-Definable). Enter a From and To range to find customers that have that value, or enter the same value in the From and To fields to find a specific value.

**Date Sold** (User-Definable). Enter a date range in the From and To fields to find all customers that had equipment installed during that date range (or any date range defined for this field in the Set System Defaults – Equipment List area).

**Part Description** Selects customers that have a specific part installed by part

description (must be identified on the detailed equipment list), or customers that DON'T have a part. This selection is useful to identify which customers have a part, especially for product update notices. You can send a notice to customers using a certain part to let them know the benefits of upgrading to a newer version. In order to select customers that don't have a part already installed, enter the word NOT, then a space, and then the name of the part.

**Part ID** Select customers that have a specific Part ID listed in the Equipment List. Enter the word NOT in front of the Part ID to find customers that DO NOT have that part id in their equipment list.

**Part Category** (UserDefinable). Select customers with a specific part category in their equipment list by clicking on the down arrow and selecting a valid part category from the drop-down list.

Remember, you can mix conditions. If a selection is not being used, do not enter a value in that field.

Once you have entered your criteria, select OK to start. ALARM will automatically tally the number of customers that match your criteria and allow you to continue with the mail merge or return back to the mail merge menu. This allows you to play 'what-if' to see how many customers would be sent a letter based upon your selections. You may also use this section to simply print out a list of customers based upon your criteria (the customer list on the report facility also allows you to do this, however not as fully as the mail merge).

When printing the Mail Merge, you have the option of printing your return address on letters and post cards. In addition, you may perform a test print to make sure the paper is lined up correctly in your printer. If you are printing a letter, you may select an 'Offset' if you are using your own letterhead paper. This allows you to adjust how many lines down from the top of page before printing begins in order to accommodate the size of your letterhead.

If you are printing labels, you may select the number of copies to print. This allows you to print multiple labels for the same name and addresses (you may select up to 999 copies).

When printing letters or collection letters, you also have the option to select EMAIL as the printing method. When Email is selected, each letter will be created as an Adobe Acrobat PDF document and attached to an email (address to the email address on file for each recipient of the letter) and emailed to them.

### **Display Customer Merge List**

If you choose the LIST document type on the print mail merge screen and choose to display this list, a customer list will be displayed (similar to the list that appears in the Customer Maintenance section). This list may be scrolled up or down by pressing the cursor keys or pressing the Page Up or Page Down keys. You may also scroll immediately to the bottom of the list by pressing the CTRL-Page Down keys.

The Customer Merge list is very useful to call customers for collection purposes, scheduling services that are coming due, or any other use that you may using the mail merge section for.

You may review information about each customer by pressing the ENTER key while that customer is highlighted on the list. The Customer Review screen will then appear (this screen is similar to the Main Customer Maintenance Screen). You may only use this screen to review information, it is not intended to allow information to be changed. From the Customer Review screen, you may select any button displayed on the screen to review account status and histories.

Select the Cancel button to return back to the Customer Merge List. Again, this area is designed for review only so that you may have certain persons make phone calls to schedule appointments without them having access to changing vital customer information.

## **Scheduling Appointments From Merge List**

You can schedule service appointments from the customer merge list by pressing the APPOINTMENT button while on this list. The appointment calendar will pop-up. You may then go in and enter an appointment for any day. Please refer to the chapter on Service Appointments for further explanations about appointments.

## **Entering Customer Conversation Notes From Merge List**

If you would like to make notations on a customers' conversation log while using the customer merge list, you may do so by selecting the CONVERSATION button from the customer merge list screen.

## Ideas For Using Mail Merge

The mail merge section can be a very powerful tool in helping you increase your service revenue. By making up various letters or postcards, you can promote the benefits of each of these services to your customers. The following are just a few examples of what can be done with the mail merge:

- Print service notices for annual preventative maintenance inspections.
- Print service notices for fire alarm system inspections (whether mandatory or preventative).
- Print service reminders for battery replacements once every few years for each customer.
- Print a letter explaining the benefits and features of a new or improved product and send out to customers that would be interested in that product, based upon their existing equipment installation.
- Print a contract renewal reminder that explains their service contract is about to expire. Sent to all customers whose contracts are expiring (generated monthly for contracts expiring each month so your customers stay current with their contracts).
- Print notices to customers that are assigned to a specific central station explaining a policy change, or a rate increase will be taking effect as of a certain date.
- Print a letter to customers that had systems installed over 5 or so years ago to explain the benefits of upgrading their entire system. You can explain what products are now available to them and how they can benefit from them. This is especially true for customers that have panels restricted to a few zones and may need to upgrade their system for greater flexibility. To select these customers in the mail merge, simply enter the name of the panel they are currently using in the Part Installed field and only customers with that part installed will be mailed this letter.
- Print a letter to customers that do not have a particular protection device installed to explain such a device. A perfect example of this are customers that do not have fire detectors installed. By entering the word NOT before the name of the fire detector you normally install, you can send a letter out to only those customers that do not have a fire detector already installed on their premise.
- Generate a list or mail a letter to customers that have a high false alarm rate.
- Print collection letters to accounts seriously past due.
- Do an email campaign or fax broadcast of new products and services you offer.

These are just a few examples of how you can benefit by using the mail merge on an ongoing basis. If you use your imagination, you should be able to find additional sources of revenue waiting for you to tap by using the mail merge.



## Chapter 14: Utilities

The System Utilities selection of the Main Menu allows you to perform various functions which are not considered part of the normal day-to-day operation of the ALARM Database.

### Set Company Header

When you first install the system, you will enter your company's name, address and telephone number. In addition, the system needs to know the 'standard invoicing procedures' that your company follows. A complete detail of this section is in the 'OVERVIEW' chapter of this documentation.

**Company Name & Address Setup**  
Record will be Changed

Company Setup Options		Invoice Setup Options	
Company	All Security, Inc.	Late Fee	5.00
Street	500 Commercial Drive	Min Balance	300.00
Street 2	Suite 292	Late Rate	18.00
City	Phoenix	Net Term	30 Days (Default=30)
State	AZ	Late Period	28 Days (Default=28)
Zip Code	80232	Invoice Form	LASER2
Phone 1	602-778-3323	Color	Blue
Phone 2	602-778-3002	Statement Form	LASER2
License#	342292	Print CreditCard Box (Laser2 Invoice)	YES
Merchant#		Print Barcode On Invoice	YES
Country	United States	Using Preprinted Forms	N
Activate Password Protection	YES	Print Statements With Invoices	YES
Track Stock In Inventory	YES	Print Balance Forward Only	NO
Turn On Multi-Location Inventory	NO	Recurring Invoice Sort	ACCOUNT
Deduct Inventory When Invoicing	YES		
Deduct Inventory On Serviced Items	YES		

**Wallpaper Options**  
Optionally set your own corporate logo or graphic image to be used as wallpaper

Wallpaper Background: LOGO.BMF  
Wallpaper Position: Center

Buttons: OK, Cancel

## Security Administration

It is HIGHLY recommended that security be activated within the software in order to restrict access to only authorized personnel. In addition, each user should be setup so that they can only access those sections of the software that affect their daily job. As an example, very few users should have access to deleting invoices or adding GL Codes. The Security Administration offers a variety of security levels for each member of your staff.

### Important Notes Regarding Security Administration

It is HIGHLY recommended that access to tax tables and general ledger codes be restricted to ADD mode only. Once added and used, these items should never be modified or deleted unless there is a good reason. In addition, most users should not be allowed to delete customer records and invoices, so take that into account when setting up authority levels for each user.

There are two types of field responses throughout the Security Administration area. This user may be authorized or unauthorized to access all main sections of the software by responding either YES (authorized) or NO (unauthorized) to the various sections listed. In addition, a number of these sections have the additional security level of Add, Modify or Delete access. These additional security levels are represented by a checkbox  to the right of the Add, Modify or Delete selection. If you wish to RESTRICT the user from performing that particular type of access, put a checkmark (x) in the appropriate checkbox, otherwise leave the checkbox blank to allow that type of access. If you restrict access to all three methods (Add/Modify/Delete) then the user may only View that section.

If you selected 'YES' for password protection on the Set Company Header screen, then you will need to tell the software what Userids are valid and their passwords. This program is distributed with a master Userid of 'ALARM' and a password of 'MANAGER'. It is highly recommended that if you use the security feature that you create your own Userids. You can delete the master id from the system once you have entered your own passwords, but it is recommended that you try your new passwords out first before deleting the master password, otherwise you will not be able to gain entry to the program. The security administration screen consists of the following information:

<b>User ID Mandatory</b>	Enter a user id that needs to be entered to have program access.
<b>Password Mandatory</b>	Enter an accompanying password. Be careful of the case of the letters you are entering, since the password is case-sensitive and needs to be entered with the same combination upper-case and lower-case characters when signing on to the program.
<b>Employee ID</b>	Select the Employee ID associated with this User. Several areas of the program will identify the User entering a new record based upon the Employee ID of the User logged in. The Employee ID list is setup in the Employee Profile section of Utilities.
<b>Supervisor</b>	If this user is to have a supervisor status, then select YES. Only a supervisor may add, modify or delete security administration for other users. It is recommended that your new master id have supervisor access. Most users should NOT have Supervisor level control.
<b>Track Program Usage</b>	To maintain an audit trail consisting of the various main activities being performed by this user, select Yes otherwise select No. If this audit trail is turned on, all main sections of the software that is accessed by this user – including date, time, activity (add/modify/delete), and reference number of the account or record being accessed – is posted to an audit file that can be reviewed only by a supervisor. The audit report does add some overhead to the operation of the software, but is helpful if you need to keep an 'eye' on the activities of certain users within the program.
<b>Backup Reminder</b>	Only select if this User is the person responsible for performing backups on your system. By selecting 0, the user will NOT be reminded to perform a backup. However, for the user who should perform backups, select a number (in days) that represents how frequently the software will remind the user to perform a backup of the data. For example, setting this field to 1 will remind this user each day to backup data. As this user exits out of the software for the first time each day, the backup program that ships with this software will automatically pop-up in order to facilitate the backup. If this field is set to '2', then the user will be reminded every two days, etc.
<b>Restrict To One Login</b>	If set to YES, this user may only have one active login session for this program at a time. If set to NO, this user may log into the program more than once (ie: on multiple workstations at the same time).

## Customer Access Tab

This section of security controls the various security levels available in the customer maintenance section. Select YES for each section the user may have access to, or NO for sections that the user is unauthorized to enter.

The screenshot shows the 'Security Administration User Profile' dialog box with the 'Customer Access' tab selected. The 'Identification' section contains fields for 'User ID' (ALARM), 'Password' (MANAGER), and 'Employee ID'. The 'Options' section includes 'Supervisor Access Level \*' (YES), 'Track Program Usage' (NO), 'Backup Reminder (Days)' (0), and 'Restrict To One Log In' (NO). A red warning message states: '\* Only Supervisors May Add/Modify/Delete Security Profiles'. Below this, there are tabs for 'Customer Access', 'Service Access', 'Invoice Access', and 'Management Reports'. The 'Customer Access' section has two columns: 'Select YES for levels user can access' and 'Check Box To Restrict Access'. The first column lists various access levels with dropdown menus, all set to 'YES'. The second column has checkboxes for 'Add', 'Modify', and 'Delete' for each level. The 'Delete' checkbox for 'Tax Table' is checked. At the bottom, there are 'OK', 'Cancel', and 'Copy' buttons, along with a 'User Currently Logged In' checkbox which is checked.

Access Level	Selected	Add	Modify	Delete
Customer Maintenance	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add'l Customer Information	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Charges Screen	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support Calls	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Include # Prior Days On List		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Support Conversations	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax Table	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mail Merge	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Account # Change	NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Items of note on this tab

**View Support Conversations:** If NO selected, this user can not view the conversation notes of another user's support entries, but they can see the notes of their own support entries.

**Allow Account# Change:** Select NO so that this user can not change the account number already assigned to an existing account. Select YES to allow this user to change a customer account number.

**NOTE:** We recommend putting a checkmark in the DELETE restriction checkbox for Customer Maintenance and Tax Table access since these items should typically not be deleted once entered and used.

## Service Access Tab

Clicking on this tab displays a screen containing security levels for the various Security Management functions of the software.

The screenshot shows the 'Security Administration User Profile' dialog box with the 'Service Access' tab selected. The dialog has a title bar with a close button. Below the title bar, it says 'Record will be Added'. The 'Identification' section contains fields for 'User ID' (JOHN), 'Password' (STARWARS), and 'Employee ID' (JWA). The 'Options' section contains dropdowns for 'Supervisor Access Level \*' (YES), 'Track Program Usage' (YES), 'Backup Reminder (Days)' (0), and 'Restrict To One Log In' (NO). A red warning message states: '\* Only Supervisors May Add/Modify/Delete Security Profiles'. Below this is a tabbed interface with 'Customer Access', 'Service Access', 'Invoice Access', and 'Management Reports'. The 'Service Access' tab is active, showing two sections: 'Select YES for levels user can access' with dropdowns for 'Service Tickets', 'Technician Time Cards', 'Service Rate List', and 'Service Appointments' (all set to YES); and 'Check Box To Restrict Access' with checkboxes for 'Add', 'Modify', and 'Delete' for each of the four categories. The 'Delete' checkbox for 'Service Appointments' is checked. Below this is the 'Service History User Defaults' section with dropdowns for 'Service History Display Order' (Descending), 'Service History Display Status' (All), and 'Display From Specific Date' (Yes), and a spinner for 'Days Prior To Current Date' (5). At the bottom are 'OK' and 'Cancel' buttons, and a checkbox for 'User Currently Logged In'.

### Items of note on this tab

#### *Service Display Order*

Determines the default sort tab on the Service History List section of a customer account for this user.

#### *Service Display Status*

Determines the default status of service jobs to display on the Service History List section of a customer account for this user. Selections include ALL/OPEN/CLOSED/UNSCHEDULED.

#### *Display From Specific Date*

Select NO to show ALL past and future appointments on the Service History List within a customer account. Select YES to show appointments only dating back to a specific number of days from the current date.

#### *Days Prior To Current Date*

Only displays if above field is YES. Determines the number of days prior to the current date to start showing appointments on the customers' Service History List.

## Invoice Access Tab

Clicking on this tab displays a screen containing security levels for the various Invoicing functions of the software.

The screenshot shows the 'Security Administration User Profile' dialog box. The title bar indicates 'Record will be Changed'. The 'Identification' section contains fields for User ID (JOHN), Password (STARWARS), and Employee ID (JWA). The 'Options' section includes Supervisor Access Level (YES), Track Program Usage (YES), Backup Reminder (Days) (0), and Restrict To One Log In (NO). A red warning message states: '\* Only Supervisors May Add/Modify/Delete Security Profiles'. The 'Invoice Access' tab is selected, showing a table of access levels for various functions. The 'Check Box To Restrict Access' section has three unchecked checkboxes: Add, Modify, and Delete. The bottom of the dialog features an OK button, a 'User Currently Logged In' checkbox, and a Cancel button.

Select YES for levels user can access	
Invoice Generation Menu	YES
Post Payments And Credits	YES
Change Payments	YES
Inventory Maintenance	YES
Modify Inventory Stock	YES

Check Box To Restrict Access	
Add	<input type="checkbox"/>
Modify	<input type="checkbox"/>
Delete	<input type="checkbox"/>

## Management Reports

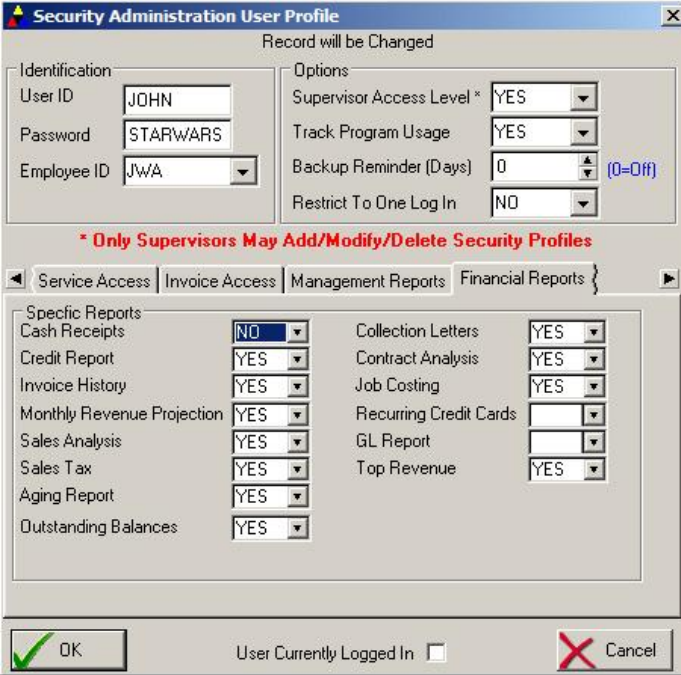
Every management report available in the system is selectable for authorized/unauthorized access.

The screenshot shows the 'Security Administration User Profile' dialog box with the 'Management Reports' tab selected. The 'Identification' and 'Options' sections are identical to the previous screenshot. The red warning message is also present. The 'Management Reports' tab is active, displaying a table of access levels for various reports. The 'Check Box To Restrict Access' section has three unchecked checkboxes: Add, Modify, and Delete. The bottom of the dialog features an OK button, a 'User Currently Logged In' checkbox, and a Cancel button.

Specific Reports	
Report Facility	YES
Customer List	YES
Customer Detail	YES
Service Log	YES
Technician Time	YES
Support Report	YES
Inventory List	YES
Purchase Order	YES
Equipment Install	YES
Equipment Repair	YES
Received Inventory	YES
Transferred Inventory	YES
Physical Inventory	YES
Rolodex List	YES
Rolodex Cards	YES
KnowledgeBase List	YES
Alarm History	YES
Central Station Notice	YES
Graphs	YES

## Financial Reports

Every financial report available in the system is selectable for authorized/unauthorized access.



Security Administration User Profile

Record will be Changed

Identification

User ID: JOHN

Password: STARWARS

Employee ID: JWA

Options

Supervisor Access Level \*: YES

Track Program Usage: YES

Backup Reminder (Days): 0 (0=0ff)

Restrict To One Log In: NO

**\* Only Supervisors May Add/Modify/Delete Security Profiles**

Service Access | Invoice Access | Management Reports | **Financial Reports**

Specific Reports

Cash Receipts	NO	Collection Letters	YES
Credit Report	YES	Contract Analysis	YES
Invoice History	YES	Job Costing	YES
Monthly Revenue Projection	YES	Recurring Credit Cards	
Sales Analysis	YES	GL Report	
Sales Tax	YES	Top Revenue	YES
Aging Report	YES		
Outstanding Balances	YES		

OK User Currently Logged In  Cancel

## Miscellaneous

A number of other sections within the software is protected by security within the Miscellaneous section. This includes access to the Rolodex section, GL Table access and GL Code assignments, Employee Data information (this contains sensitive data that only certain staff members should have access to), and a 'Startup Procedure' selection that allows you to choose what section of the software will automatically pop-up everytime this user brings up the program.

Security Administration User Profile

Record will be Changed

Identification

User ID: JOHN

Password: STARWARS

Employee ID: JWA

Options

Supervisor Access Level \*: YES

Track Program Usage: YES

Backup Reminder (Days): 0 (0=Off)

Restrict To One Log In: NO

\* Only Supervisors May Add/Modify/Delete Security Profiles

Invoice Access | Management Reports | Financial Reports | Miscellaneous

Select YES for levels user can access

System Utilities Menu: YES

Group Rolodex List: YES

Personal Rolodex List: YES

Employee Profiles: YES

Employee Employment Data: NO

General Ledger Table: YES

Assign GL Codes: YES

Setup Wizard: YES

Check Box To Restrict Access

Add  Modify  Delete

Add  Modify  Delete

Startup Procedure: Customer List

OK User Currently Logged In  Cancel

### Items of note on this tab

#### *System Utilities Menu*

Determines if this user has access to all the utilities under the System Utilities menu. This area should only be authorized for supervisors or those persons that have a need to access on these utilities.

#### *Employee Employment Data*

Only select YES for users that should have access to personal information entered about each employee. Normally most users should have this set to NO.

#### *Startup Procedure*

If desired, a user may have a specific section of the software automatically load when they launch the program. For example, if they select 'Customer List', then everytime they bring up the software, the Customer List will also automatically be displayed immediately. If left blank, the normal mode will be to launch the program without any specific task displayed in the main window.



## Password Timeout

This user may be setup to require password changes on a periodic basis. In addition, this user may be locked out from changing their password at that time unless a supervisor enters the changed password for them.

The screenshot shows the 'Security Administration User Profile' dialog box with the 'Password Timeout' tab selected. The 'Identification' section contains fields for User ID (JOHN), Password (STARWARS), and Employee ID (JWA). The 'Options' section includes Supervisor Access Level (YES), Track Program Usage (YES), Backup Reminder (Days) (0), and Restrict To One Log In (NO). A red warning message states: '\* Only Supervisors May Add/Modify/Delete Security Profiles'. Below this, a navigation bar shows 'Management Reports', 'Financial Reports', 'Miscellaneous', and 'Password Timeout'. The 'Password Timeout' section has 'Activate Password Timeout' set to YES, 'Timeout Password In' set to 90 Days From Last Changed Date, 'Last Changed' set to 11/10/04, and 'Require Supervisor Reset' set to NO. A note at the bottom reads: '\* If Supervisor Reset Required, User Can Not Log In After Timeout Without Supervisor Updating 'Last Changed' Date Field Above To Current Date.' The dialog has OK, Cancel, and 'User Currently Logged In' checkboxes.

### Items of note on this tab

#### *Activate Password Timeout*

If the password for this user should timeout on a periodic basis, select YES. If this user does not need to reset their password on a periodic basis, select NO or leave this field blank.

#### *Timeout Password In*

If Activate Password field above is set to YES, enter the number of days that should transpire until the user is required to change their password before being able to log in.

#### *Last Changed*

Shows last date User changed password when requested from the timeout.

#### *Require Supervisor Reset*

As an added security measure in the password timeout function, this user can be restricted from logging back into the software once their password has timed out until a supervisor resets their password for them. This would ensure an employee can't take the program and data and continue using it long after they leave the company.

## Multicom (Optional)

If you have purchased the Multicom Module for Multi-Company processing within the program, you can restrict this user so that they can ONLY look at customers assigned to a specific Multicom ID.

Security Administration User Profile

Record will be Changed

Identification

User ID: JOHN

Password: STARWARS

Employee ID: JWA

Options

Supervisor Access Level \*: YES

Track Program Usage: YES

Backup Reminder (Days): 0 (0=Off)

Restrict To One Log In: NO

**\* Only Supervisors May Add/Modify/Delete Security Profiles**

Financial Reports | Miscellaneous | Password Timeout | **Multicom** | Calendar

If you have the Multicom Module installed for Alarm, you may restrict this user so that they can only view and access customers that are assigned to a specific Company (or Branch) ID.

[For more information on Multicom please call our sales office or visit our website.](#)

Restrict Customer List To A Specific Multicom Company ID: No

Multicom Company ID Authorized To View: [ ]

NOTE: It is highly recommend that any user with a Multicom restriction NOT be set as a Supervisor and also be restricted from entering the following areas:

- Setup Wizard
- Utilities
- General Ledger
- Tax Table
- Employee Profiles

OK User Currently Logged In  Cancel

### Items of note on this tab

#### *Restrict Customer List*

If YES selected, this user may access only those customers assigned with a Multicom Company ID as specified in the next field. Since Multicom provides divisional processing within the software (tag customer accounts by company code, branch code, or division code), this feature enables your organization to assign various Users access to only a specific group of customers. When they display the Customer List, only those customers assigned to that ID will be displayed and accessible to this user.

#### *Multicom ID To View*

If Restrict field above is set to YES, enter the Multicom ID that belongs to customers this user is allowed to access.

## Calendar

Since the appointment calendar has numerous settings to view appointments, each User can be setup in this security section to customize their own initial view of the appointment calendar.

Security Administration User Profile  
Record will be Changed

Identification  
User ID: JOHN  
Password: STARWARS  
Employee ID: JWA

Options  
Supervisor Access Level \*: YES  
Track Program Usage: YES  
Backup Reminder (Days): 0 (0=Off)  
Restrict To One Log In: NO

\* Only Supervisors May Add/Modify/Delete Security Profiles

Financial Reports | Miscellaneous | Password Timeout | Multicom | Calendar

Appointments  
Default Calendar View: Daily  
Default Calendar Sort: Ascending  
Default To This User ID: No  
Default Calendar Status: All  
Default Service Code: All  
Default Multicom Code:   
06:00 HH:MM Start Time For Schedule  
 Disable Schedule  Disable Monthly  
 Restrict To This User Only  
 Restrict To This Company  
[For more information on Multicom please call our sales office or visit our website.](#)

Tasks  
Allow Tasks To Be Assigned To Other Users: Yes  View This User Only

OK User Currently Logged In  Cancel

### *Default Calendar View*

Initial view this user sees when bringing up the calendar. Select from Daily, Weekly, Monthly, Unscheduled, Schedules, Tasks

### *Disable Schedule*

Check this checkbox to disable this user from accessing the Tech Schedule section of the appointment calendar

### *Disable Monthly*

Check this checkbox to disable this user from accessing the monthly view section of the appointment calendar

### *Default Calendar Sort*

Initial sort of appointments on calendar. Select from Ascending, Descending, Tickets Only, Appointments Only, Reminders Only

### *HH:MM Start Time*

Each user may be setup so that the start time of the Technician Schedule section of the appointment calendar is geared towards their needs. If left blank, start time is 6:00AM.

### *Default To This User ID*

Default the appointment listing within the calendar to this User's appointments.

<i>Restrict To This User Only</i>	Check this checkbox so that this user can ONLY see their own appointments.
<i>Default Calendar Status</i>	If this user should start the appointment calendar by looking at a specific type of appointment (Open, Closed) then select the status from this drop-down selection.
<i>Default Service Code</i>	If this user should start the appointment calendar by looking at a specific service code, then select the service code from a list of codes displayed in this drop-down selection.
<i>Default Multicom Code</i>	OPTIONAL If the Multicom Module is purchased and installed, this appointment calendar can be setup so that this user can default to a view of appointments for customers with a specific Multicom ID. The User may then change the Multicom ID from the Multicom selection field on the calendar.
<i>Restrict To This Company</i>	If Multicom module is purchased and installed, this user can be restricted to viewing ONLY appointments for company's with a specific Multicom ID assigned in the above field by putting a check in this checkbox. The User will not be able to select another Multicom ID from the calendar Multicom ID drop-down field.
<i>Allow Tasks For Others</i>	Select YES if this user should be allowed to assign tasks in the TASK section of the appointment calendar to any other user. Select NO if this user can only create and assign tasks for themselves.
<i>View This User Only</i>	Enter a check in this checkbox if this user should only be allowed to view tasks that are assigned to themselves.

## Automatic Rate Increase

The program has been set up to allow an across-the-board rate increase for each customer easily. You may increase all customers, or select only groups of customers at a time. In addition, a list may be printed showing you all customers that have just been increased.

**IT IS EXTREMELY IMPORTANT THAT YOU PERFORM A BACKUP OF THE SYSTEM BEFORE PERFORMING THIS UTILITY. IF YOU ACCIDENTALLY SELECT THE WRONG GROUP OF CUSTOMERS TO RECEIVE A RATE INCREASE, IT WOULD BE VERY TIME CONSUMING TO GO BACK IN AND MANUALLY CHANGE BACK ALL RATES FOR THOSE CUSTOMERS. WITH A BACKUP YOU CAN RESTORE THE FILES IMMEDIATELY AFTER PERFORMING THE ADJUSTMENT IF YOU DISCOVER THAT YOU SELECTED THE WRONG CUSTOMERS FOR A RATE INCREASE.**

To perform this utility, select 'System Utilities' from the Main Menu and then 'Rate Increase Adjustments'. A screen will be displayed explaining what this function will do and you may select from the following options:

**Rate Increase Adjustment**

This utility allows you to give an across-the-board rate increase to all of your customers or just specific groups of customers.

**NOTE: IT IS RECOMMENDED THAT YOU PERFORM A BACKUP OF YOUR DATA JUST BEFORE USING THIS UTILITY**

Choose any one or combinations of conditions from below:

Adjust Customer Charges Or Your Costs: Charge

Adjustment Amount (Enter Percent OR Amount): % Or \$

Billing Cycle to be Adjusted: ALL

Specific Recurring Amount Or Cost To Adjust :\$:

Specific Service Type To Be Adjusted: ALL

Specific Central Station:

Specific Post To Account Number: (Dealer Adjustments)

Only Customers Due for Rate Increase: NO Dated:

Adjust Rate Increase Reminder Date: NO

If Yes, Increase Reminder Date By: Days

Printout of Customers Being Adjusted: YES

**Adjusting:** **Total Adjusted:**

Start Cancel

### Adjust Charges Or Costs

Select if this rate increase to affect the recurring charge amount billed to the customer or your cost.

### Adjustment Amount

You may increase your customers billing rate (or your cost) by a percentage or by a set dollar amount. Enter a negative sign to reduce the rate or cost by that amount or percent.

### Billing Cycle

You may increase by the above amount or percent for all customers, or you may increase by billing cycle. This is important if each billing cycle will be receiving a different rate increase.

<b>Specific Amount To Adjust</b>	To adjust <b>ONLY</b> charges (or costs) that are a specific dollar amount, enter the amount here.
<b>Service Type to be Adjusted</b>	If you wish to increase the rate for those customers being billed for a specific type of service only, (Central Station Monitoring, Leasing, etc.) then choose 'SELECT' and a list of your current service types will be displayed. You may then select any one of these service types.
<b>Specific Central Station</b>	To adjust the billing rate or your cost for recurring charges associated with a specific central station (based upon the central station assigned to a customer account) then enter that specific central station in this field.
<b>Post To Account Number</b>	To adjust rates only for those accounts that are billed to a specific master account (dealer billing), enter the master dealer account number in this field.
<b>Only customers due for increase</b>	If you want only those customers who are due for a rate increase to be increased, then select 'YES'. Rate increases will then be issued to only those customers whose RATE INCREASE REMINDER date is before today's date. To increase rates regardless of RATE INCREASE REMINDER date, select 'NO'.
<b>Dated</b>	If the Only Customers Due For Increase is set to YES, you can specify a specific Increase Due Date so that only those recurring charges that have an Increase Due Date prior to this specific date will be adjusted.
<b>Adjust Rate Increase Date</b>	You may opt for the system to automatically increase the RATE INCREASE date for each customer to identify when the next increase is due. If you select 'YES' you will be prompted for the number of days to increase the date by.
<b>Increase reminder date by</b>	If you selected 'YES' to the above question, the system will ask you the number of days you wish to increase the reminder date by. For instance if you wish to increase your customers again in one year, enter 365. This will increase everybody's rate increase date by one year automatically.
<b>Print customers being adjusted</b>	If you would like to get a printout of the names of all customers being adjusted by the utility, then select 'YES'. It is <b>HIGHLY</b> recommended that you use this printout. It will print not only the names of all customers being adjusted, but also the previous rate and new rate, new rate increase date and old increase date.

Once you have completed filling in all of the above questions, the adjustment process will start. The system will constantly monitor which accounts are to be adjusted and display both the current customer being adjusted and the total number of customers so far being adjusted. This will help give you some indication as to how long it will take to perform the adjustments.

## Change System Date

This selection allows you to change the current system date without exiting the software.

## Set System Defaults

See Chapter 2 – Setup Wizard for detailed information on setting up this section.

## Import/Export Transfers

This section provides you with a link to certain other programs or files that might be helpful to you. You may choose to perform one of these functions from this menu:

**QUICKLINK** This software can interface with the QUICKBOOKS Accounting program. QuickLink works by taking payments that you have already posted into this program and transferring them over to your chart of accounts in QUICKBOOKS. Please refer to the QUICKLINK instructions included at the end of this documentation for further information.

**LOGLINK** **ALARM Only.** Many central stations are now offering 'Dealer Access' packages that allow you to access the central stations' computer system so you may lookup the status of your accounts. Many of these dealer access software packages give you the ability to download an incident report directly to your computer for further review. If you have this capability, then the LOGLINK selection can take this incident file and import it into the Alarm Call History Log for each appropriate customer, thereby saving you the time of entering this information manually. Once in the ALARM program, these incidents stay on file and you may print an Alarm Call Log to display this information.

If you would like to use this feature, please give us a call so we can discuss with you the requirements of the incident file from your central station.

**DOWNLOADER XFER** **ALARM Only.** We have made arrangements with NAPCO to allow the import of information that is entered into their panel downloading software into our ALARM program. This saves you the trouble of entering the same information twice for each system. Data such as customer name, address, phone number, zone descriptions, etc. are imported into the ALARM program through the use of this facility. As arrangements with additional manufacturers are arranged, this section will be modified to include their software as well for import.

**IMPORT ADI CATALOG** **ALARM Only.** This selection allows to import the ADI price disk catalog into your inventory file within ALARM. You will have the option of importing all parts from the ADI disk (9,000 parts at last count), or you may select to import only certain manufacturers parts. The program will ask you to enter the path and file name of the ADI program. This field will default to C:\ADIPRICE\EXEC.DBF. If you have a standard price list from ADI, then you will need to change this filename to read STANDARD.DBF. This import works with the DOS version of the ADI catalog, not the Windows version.

**Import From RapidLink** **ALARM Only.** If you use Rapid Response Monitoring Corporation for your central station, they can provide you with a dealer access package called RapidLink. This database system allows you to view all information pertaining to your customers that are monitored at Rapid Response. Our Import From RapidLink selection will import individual accounts or new accounts directly into the ALARM program, thereby eliminating the need for you to re-enter the common customer data twice.

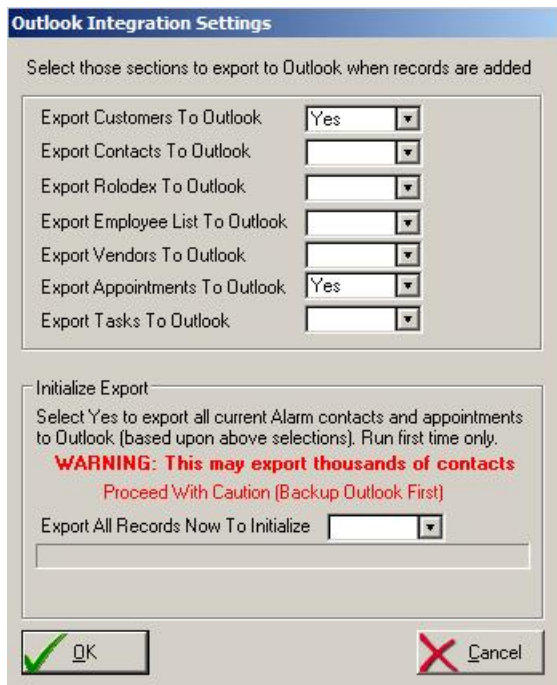
**Import Dbase Customer** If you wish to import basic customer data into the system, you may do so by creating a DbaseIV file with information from your existing program, then run this utility to load the CUSTOMER file with your customer data. The following is a definition your DbaseIV file should be in that contains your customer data to be imported (LEFT COLUMNS FIRST, THEN SECOND COLUMN). Save as CUSTOMER.DBF.

Field Name	Field Type	Field Length	Field Name	Field Type	Field Length
ACCOUNT	STRING	7	TITLE1	STRING	15
PHONE1	STRING	12	CONTACT2	STRING	25
LASTNAME	STRING	30	TITLE2	STRING	15
FIRSTNAME	STRING	20	PHONE2	STRING	12 Example: (9999999999)
ADDRESS1	STRING	30	FAX	STRING	12 Example: (9999999999)
ADDRESS2	STRING	30	CODEWD	STRING	24 (User Field)
TOWN	STRING	25	EQUPMNT	STRING	25 (User Field)
STATE	STRING	2 (Upper)	PERMIT	STRING	24 (User Field)
ZIP	STRING	10	RESCOM	STRING	4 (Res/Comm)
COUNTY	STRING	10	SERVNUM	STRING	10 (central#)
CONTACT	STRING	25	SERVCOM	STRING	25
			ACTSINCE	STRING	8MM/DD/YY



## Outlook Integration

If you use Microsoft Outlook, you can export contact and appointment information from this program to your Outlook software by setting up the appropriate parameters in the Outlook Integration section of Utilities. Outlook is a common application used in many offices, and has the added capability of synchronizing with many mobile devices in the market. When used in this fashion, you can export your contact information from this software to any mobile device supported by Outlook.



The screenshot shows the 'Outlook Integration Settings' dialog box. It has a title bar with the text 'Outlook Integration Settings'. Below the title bar, there is a section titled 'Select those sections to export to Outlook when records are added'. This section contains seven rows, each with a label and a dropdown menu:

- Export Customers To Outlook: Yes
- Export Contacts To Outlook: (empty)
- Export Rolodex To Outlook: (empty)
- Export Employee List To Outlook: (empty)
- Export Vendors To Outlook: (empty)
- Export Appointments To Outlook: Yes
- Export Tasks To Outlook: (empty)

Below this section is another section titled 'Initialize Export'. It contains the following text:

Select Yes to export all current Alarm contacts and appointments to Outlook (based upon above selections). Run first time only.

**WARNING: This may export thousands of contacts**  
Proceed With Caution (Backup Outlook First)

Export All Records Now To Initialize: (empty)

At the bottom of the dialog box, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

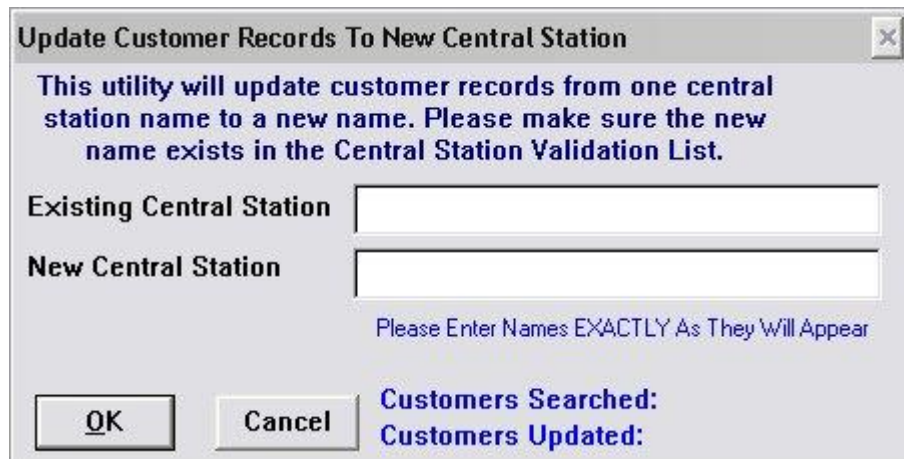
Select the various sections that you would like to have exported to Outlook. Once selected, the exporting is done automatically whenever a new record is saved. This takes place behind-the-scenes, and only requires that you have Microsoft Outlook installed on your workstation.

In addition to exporting anytime a new record is created, you also have the option to export your entire contacts and appointments records to Outlook. This should be performed only once, and it is highly recommended that you backup your Outlook database before doing so since you may well be exporting thousands of records to Outlook if your database contains that many contacts. To perform this initial export, select 'Yes' in the Initialize Export section.

## Additional Utilities

This selection is used for miscellaneous utilities that have been written over the years to benefit some of our customers. When you select this section, a list of utilities will be displayed. Select the utility you wish to use and select the SELECT button. Here are just a few of the utilities offered in this section.

### Central Station Change



The dialog box is titled "Update Customer Records To New Central Station" and contains the following text: "This utility will update customer records from one central station name to a new name. Please make sure the new name exists in the Central Station Validation List." Below this text are two input fields: "Existing Central Station" and "New Central Station". A note below the fields reads "Please Enter Names EXACTLY As They Will Appear". At the bottom left are "OK" and "Cancel" buttons. On the right side, there are two labels: "Customers Searched:" and "Customers Updated:", both followed by blank space for data entry.

If you need to update your customer records from one central station name to a new central station name, select CENTRAL from the Additional Utilities list. When using this feature, enter the existing and the new central station names EXACTLY as they appear and are to appear.

### Part ID Copy

You may copy the definitions of one specific part to a brand new Part ID by selecting COPYPART from within the Additional Utilities list.



The dialog box is titled "Copy Part In Inventory" and contains the following text: "This utility will copy an existing part in the Inventory List to a new part". Below this text are two input fields: "Existing Part ID" and "New Part ID". The "Existing Part ID" field has a small "..." button to its right. At the bottom left are two buttons: "Copy" (with a green checkmark icon) and "Cancel" (with a red X icon).

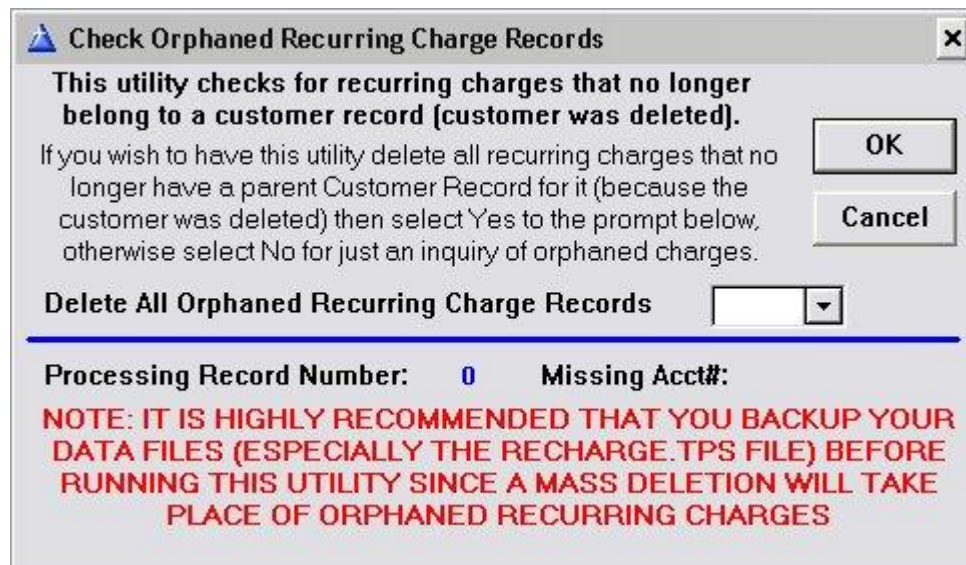
## Email Address Field Move

Since previous versions of Alarm did not have a dedicated email address field, most users the user-definable fields, to track email addresses. This utility will allow you to specify which user-defined field contains email addresses for your customers, and it will move the email address to the new designated email address field in Alarm 5.0



## Recurring Charges Orphan Check

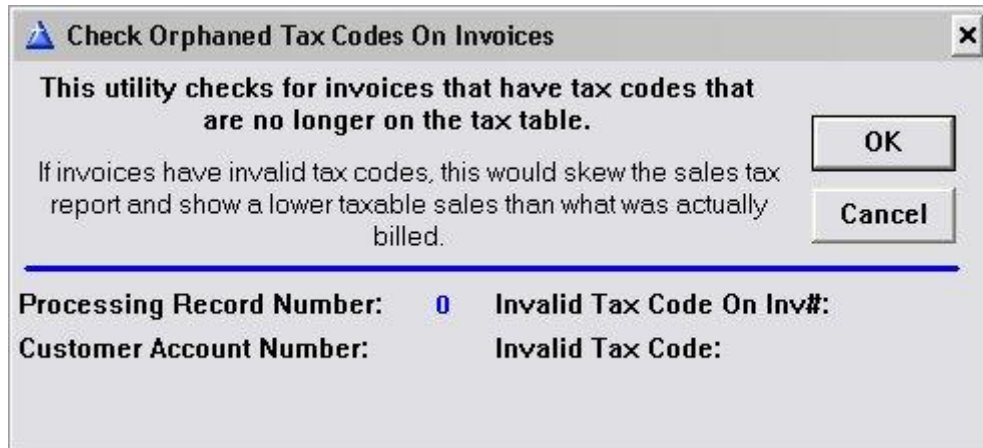
This utility has been added as a maintenance routine, in case you find recurring charges that do not belong to any customer. By running the utility, you will be notified of any recurring charges that are still on file, but do not have a particular customer to focus the charges upon.



## Invalid Tax Code On Invoices

If your sales tax report seems to show some discrepancies on the amount of sales tax you owe, use this utility. If a tax code that was once used for invoicing is no longer on your sales tax

validation table (or the tax code spelling has been changed, including changing the case of the letters), your sales tax report cannot report on those invoices. To verify those invoices, which have invalid tax codes, run this utility. If you find any invoices that do not have a valid tax code, you may simply enter that specific tax code back into the Tax Table, or change the tax code of that invoice by going to that invoice screen and clicking on the Tax Code lookup button.



- Invoice**                      Set starting number for recurring invoices (defaults to 1).
- Markup**                      Perform an across-the-board markup on the parts in inventory.
- Period**                      If you need to modify the NEXT BILL date of many of your accounts from one recurring NEXT BILL date to different date, then use this section to perform a mass update to those accounts.
- CopyZone**                      Copies an existing equipment list and/or zone list from one customer to another customer. This can greatly reduce the data entry time required to setup accounts if you sell the same type of alarm systems and setup the same zones for most of your accounts. If you select this utility, you will be asked which of the two lists you wish to copy (or both), and from what account do you wish to copy from, as well as which account will the list be copied to. Select QUIT when finished.
- AreaCode**                      If you need to change an area code to a new area code, use this utility. You may do a global change on all customers with a specific area code to a new area code, or define a zip code range and only those customers will have their area code changed to the new one.
- CustCount**                      If you do not wish to have the customer count number displayed on the customer maintenance list, then enter this word. You may toggle on/off this count display by using this command.
- Printmode**                      You may select this command to prevent your recurring invoicing from printing out to a printer. If you turn printmode to off, you can generate monthly invoices but they will not print. Turning printmode on will print all

recurring invoices to the printer.

- Wipestock** This command should be used with great caution if your company is using the inventory tracking feature. By selecting this command, you will be asked to confirm that you want to reset all inventory stock counts back to 0. It is highly recommended that you perform a backup of your data before proceeding with this function.
- Statoff** Although you have the option in the Set Company Header section of not including statements with your recurring invoices, this also means that customers who are due to receive a recurring invoice will not be notified of any past due items on their account. If you wish to print monthly bills for only those customers who are to be billed that month, but still show their outstanding balances as well then select this function. Customers who are not due to be billed that month will not receive statements.
- CopyCust** Allows an existing customer record to be copied to a new customer record. This utility will ask you to enter an existing customer account number, and then enter a new customer account number that the record is to be copied to. This copy routine will copy the customer main account screen and recurring charge screen. If you need to copy a customer equipment list and zone list as well, then use the COPYZONE command described earlier.
- Userlog** If you are using the password protection feature, you may run a report on user activity by using this command. This report can only be printed by persons with supervisor access levels. In addition, the password protection feature must be currently activated otherwise you will not be allowed to run this report. The Userlog report prints a history of all user activity within the program, including date, time, and area of program that is being accessed - by user. This report also prints any attempts to access unauthorized areas.

## **Multi-Company Processing**

- Multicom** This feature is a separate module that is purchased from Z-Micro Technologies. Using this module allows your company to track customers for multiple companies. All invoicing, service tickets, reports and customer tracking may be identified by the company a client belongs to.

Installing Multicom also provides a security feature within the software so that a user that logs in may only access customers assigned to a specific Multicom Company ID. For example, using Multicom you can assign customers to various branches within your organization. When a user logs in, they can be restricted to view ONLY those customers assigned to that particular branch the user is associated with. Since Multicom is useful to segregate customer accounts by any designation you require (Company, Division, Branch, etc.) this feature is a powerful tool in providing access only to those customers a user should be working with.

Please call Z-Micro Technologies if you would like further details on the Multicom module.

## Archive/Purge Utility

Once you have been using the software for a number of years, you may wish to remove the older historic records from the main database. Although you normally would want to maintain the most recent 1 to 2 years of complete financial records in the main database, any dated records prior to that can be archived to an archive database and then purged from the main database with this utility. It is not necessary to use the Archive utility since the program can maintain many years of data, however if you feel your system is starting to slow down (especially during recurring billing and report processing) you may use this utility to help speed up these processes.

Category	Setting	Archives ALL inactive customers	Archiving	out of	Status
Perform Archive	NO				
Inactive Customers	NO				
Invoices/Payments	NO	Dated			
Service Tickets	NO	Dated			
Appointments	NO	Dated			
Alarm Call Log	NO	Dated			
Support Call Log	NO	Dated			
Correspondence Log	NO	Dated			

To start the Archive/Purge utility, select 'Archive Data' from the Alarm menu group in Windows (Start/Programs/Alarm/Archive Data). The Archive/Purge screen will appear:

**BE SURE TO MAKE A BACKUP OF YOUR DATABASE BEFORE RUNNING THIS ARCHIVE UTILITY!**

Once the appropriate records have been archived, you will not be able to re-import them back into your main database. You will, however be able to review them as described later in this chapter.

*NOTE: The Archive Utility may take hours to complete, therefore it is highly recommended to perform the archive either overnight or during the weekend while the program is not being accessed. Always Run The Archive From The SERVER Computer or your main Workstation where your software data resides!*

## **Perform Archive**

Select YES to specify you wish to continue with the Archive. Select NO to prevent the archive from running.

### **What can you archive?**

#### **Inactive Customers**

Customers who have a CLOSED date upon their main customer record screen (and the closed date is prior to the current system date) are considered Inactive. You may archive these Inactive customers, along with all of their financial and historical records, by selecting YES. However, if an inactive customer still has open invoices, the customer will not be removed from the main database, nor will the open invoices be removed. However, any other records that are applicable (such as closed invoices, expired and past appointments, closed service tickets, etc.) will be copied to the Archive database. These remaining or closed financial records can then be archived and purged from the main database if necessary.

#### **Invoices/Payments**

You may select to archive/purge older invoices (along with their payment history). To activate this function, select Yes and then enter a date in the 'Dated Before' field. This represents any invoices or payments, which are to be archived when the Invoice date is dated BEFORE the specific date entered.

#### **Service Tickets**

To archive/purge older Service Tickets, select Yes. You may then enter a date in the 'Dated Before' field. This represents the dates of the specific Service Tickets, which are to be archived. Any of those Service Tickets that are dated BEFORE the date you have entered, will be archived.

#### **Appointments**

If you have an extensive appointment calendar history (since all past appointments remain on the calendar for retrieval purposes) you may archive old appointments by selecting Yes. Any of those appointments, which are older than the 'Dated Before' field, will be archived.

#### **Alarm Call Log**

If you enter or import alarm incidents into the customer's Alarm Call Log, you may archive past log entries by selecting Yes, and also entering a date in the 'Dated Before' field.

#### **Support Call Log**

To archive support records from the Support Log, select Yes. Then enter a date in the 'Dated Before' field.

#### **Correspondence Log**

If you have an extensive correspondence log (automatically created when statements or mail merge letters/postcards are sent out), you may archive those records by selecting Yes and then enter a date that represents those log entries dated BEFORE the date entered.

*Note: The Archive/Purge Utility should be used when you want to clear your database of older records. The Utility will remove any records dated BEFORE your inserted date. For example, if you wanted to archive any of your closed and inactive customers' information before January 1, 1998, you would simply insert that date into the Utility. This will remove any CLOSED customers and their specific information UNTIL this date. Any aspects of the software that you have generated after this date, will still reside with your Alarm For Windows program.*

Once you have selected the appropriate files(s) to archive/purge, click on Start Archive. The archive utility will begin to copy all relevant historical records to the ALARMWIN\ARCHIVES directory (or an ARCHIVES subfolder within the program directory you are using). During this copy session, customers that have historical records being archived will also be copied to the archive directory, however these customers WILL NOT be deleted unless they are also part of the Inactive Customer selection. The Archive will make a copy of the main customer record in the archive directory so that, these historical/financial records, which are being archived, may easily be retrieved by bringing up the customers account number in the archive directory.

Once the selected records have been copied, they will be purged from your main database.

### Reviewing Archived Records

If you wish to review your archived records, you may install your current program installation CD into the ALARMWIN\ARCHIVES directory (note that the Archives directory is a subdirectory under your ALARMWIN directory. If you installed Alarm initially into a different directory name, the ARCHIVES directory will be a subdirectory under your directory name).

Once the archive has been completed, you run the ALARMWIN.EXE program directly from your ALARMWIN\ARCHIVES directory. This will bring up the archive database instead of your main database. From there, you may perform any function against the archived database that you would against the main database (reports, lookups, etc.). You will not be able to generate any new invoices or create any new service tickets for these customers.

You may run the Archive utility more than once. Every time the Archive utility is run, it will add the new archived records to those existing archived records. At some point, if you wish, you may also simply backup all of the files from the Archive directory to a tape backup (or similar backup media). You then can delete the archive files and start a new archive.

We normally recommend doing an archive only once or twice a year at most, since it is unnecessary to perform archives more often than that.

### Important Notes

**Remember, the archive utility could take hours to complete depending upon the amount of records that need to be searched and archived. It is recommended that the archiving process be performed in the evening or over the weekend. Do not access this program during the archive process.**

Always run the Archive from either server (main) computer or the desktop where the data resides. This again, is the computer where your program data is actually stored. Running the Archive on any workstation other than the server will result in extremely long archive times and may possibly damage your database.



## Set Customer Reminder

The Customer Reminder is a pop-up screen that can appear in the main customer maintenance area and service ticket area. The purpose for this screen is to give a visual warning when a customer has an outstanding balance, as well as a reminder of any scheduled services that are coming due within a certain number of days. The actual reminder screen that will pop-up will look as follows:

Customer Reminder For ABC Alarm Corp.						
<b>PAST DUE WARNING</b>						
Customer Is Over <b>30</b> Days Past Due						
Current	0.00	Over 30	0.00	Over 60	0.00	Over 90 19.21
Services Scheduled Within <b>120</b> Days						
Appt Date	Completed	Code	Description	Assigned To		
11/01/01		Inspection	Fire Inspection	LARRYW		
<input type="button" value="OK"/>						

The top-half of the reminder screen will display only if an outstanding balance is found or a restriction is placed in the customers' Restriction field. The bottom half of the screen will only display if upcoming scheduled services are found. If services are found and you are in the service ticket area, you may click on the Add Scheduled Services To Ticket box to have the list of upcoming services included on the current service ticket you are generating. If you have the supervisor override feature turned on (see later in this chapter for explanation) then the User ID and Password fields must be entered by a userid with supervisor level control in order to continue with the service ticket (this will only occur on outstanding balance warnings, not on upcoming scheduled services).

There are number of options as to how and when this pop-up screen is to be displayed and the Set Customer Reminder utility is used to set these options as described on the following page.

## Set Customer Pop-Up Reminder Tab

### Set Customer Reminder / Daily Reminder Pop-Up Screens

The Customer Reminder screen can appear when accessing the customer profile and service ticket areas. It is meant as an immediate notification of past due balances or upcoming scheduled services which may affect how a customer is serviced.

Daily Reminder Pop-Up is displayed once a day (first time program is run) and displays important events such as credit card expirations, past due invoices, and expired service contracts for that day.

Set Customer Reminder Pop-Up | Set Daily Reminder Pop-Up

**Activate/Deactivate Reminder Screen**

Activate Reminder In Customer Section

Activate Reminder In Service Tickets  Display On

**Activate Customer Reminder On Following Conditions Only**

Activate If Outstanding Balance Found  Days Past Due  Days

Supervisor Override Required  (New Service Tickets Only)

Activate If Service Appointments Found  Service Status

Show Appointments Within  Days

### Activate Reminder In Customer Section

Select YES if you want the reminder screen to verify balance information when modifying existing customers. Select NO to turn off the reminder screen.

### Activate Reminder In Service Tickets

Select YES if you want the reminder screen to verify balance information and scheduled services while in the service ticket area. Select NO to turn off.

### Display On

If you choose YES to activate reminder in service tickets, you may choose if the reminder screen is to pop-up only when Adding service tickets, Modifying service tickets, or both Add/Modify.

### Activate If Outstanding Balance Found

There are two sections to the reminder screen: Outstanding Balance warning, and upcoming services scheduled. Select YES if you wish the reminder screen to check for outstanding balances.

### Days Past Due

Select the number of days past due a customer

has to be in order for the warning screen to pop-up.

**Supervisor Override Required**

If the password protection feature of the program is turned on, select YES if you require a supervisor to override to continue processing service tickets when an outstanding balance has been found.

**Activate If Service Appointments Found**

The second part of the reminder screen searches for upcoming scheduled services and displays it on the reminder screen. This is especially helpful when a service is being scheduled and you are not aware that other services are scheduled in the near future.

**Service Status**

If the above scheduled service appointment search is activated, which service jobs are to be searched for. Open services, Closed services, or ALL services.

**Show Appointments Within**

Enter the number of days with which the reminder screen is to search for services scheduled. For example, if 30 is entered, the reminder screen will search for any appointments scheduled within 30 days of the current date.

## Set Daily Reminder Pop-Up Tab

**Set Customer Reminder / Daily Reminder Pop-Up Screens**

The Customer Reminder screen can appear when accessing the customer profile and service ticket areas. It is meant as an immediate notification of past due balances or upcoming scheduled services which may affect how a customer is serviced.

Daily Reminder Pop-Up is displayed once a day (first time program is run) and displays important events such as credit card expirations, past due invoices, and expired service contracts for that day.

Set Customer Reminder Pop-Up | Set Daily Reminder Pop-Up

Activate Daily Reminder: Yes

Invoice Considered Late After: 10 Days

NOTE: Daily reminder may also be run separately within Windows by running POPUP.EXE

For Password Protection Users Only  
If you have password protection activated, you may specify up to 3 users that will see the daily reminder screen (once per day). Only these users will see the daily reminder

User ID 1: LARRYW  
User ID 2:   
User ID 3:

Appointment Codes To Search  
Select up to 4 appointment codes to search and display on daily reminder

Appointment Code 1: Service  
Appointment Code 2: Install  
Appointment Code 3: Repair  
Appointment Code 4: Inspection

OK Cancel Run Daily Reminder Now

The Set Daily Reminder utility is accessed from the Utilities menu (Set Customer Reminder/Daily Reminder). This utility controls the activation and options available for the Daily Reminder Pop-Up program that can be activated. The Daily Pop-Up program may also be activated from within Windows directly by running the program POPUP.EXE. Note this program is designed to run only once per day (so it does not delay subsequent entries into the software). Daily Events that are checked for in the Daily Reminder include contract expirations, credit card expirations, important service appointments, and customers with balances now coming past due, all occurring that day.

### Activate Daily Reminder

If YES selected, the daily pop-up reminder program will be activated for the FIRST time each day you bring up the system. After the first time it has been displayed for the day, it will no longer appear automatically whenever you re-enter the system. However, you may always review the day's reminders by clicking on the Run Daily Reminder Now button on the bottom of this screen.

### Invoice Considered Late After

In order to determine which invoices have now become past due on this day, select the number of days that a balance is considered past due. Any customers with an invoice that now becomes that number of days past due will be displayed in the daily pop-up reminder screen.

### For Password Protection Only

If you are using the password protection feature of the system,

you may specify up to 3 User ID's that will see the daily pop-up reminder each morning. Other users logging into the system will not activate the daily pop-up reminder. If one of the valid users bring up the system in the morning, but another of the valid users does not bring up the system until the next day, the second user will see both today's and the next day's reminders on their list.

**Appointment codes to Search** You may specify up to 4 service codes that will be searched on the appointment calendar and displayed on the daily pop-up reminder list. This is designed to remind you of very important events that you would like to automatically be reminded of in the daily pop-up, without having to remember an go to the appointment calendar to see those appointments as well.

**Run Daily Reminder Button** This button will run the Daily Reminder Pop-Up program IF there are any events scheduled to be displayed. If the daily reminder program does not see any events (contract expirations, credit card expirations, outstanding balances coming due that day, or important service appointments as defined in the Appointment Codes to Search section) then the Daily Reminder program will not be displayed.

## Master Contracts

You can store multiple contracts in the Master Contract area (for example for service contracts, monitoring contracts, or any other type of document) and then for each Invoice and/or Service Ticket you create you can select which master contract will be appended to that printout (or email).

Although most companies may have only one contract for their business, others have multiple contracts – depending upon the type of work being performed or the type of client the work will be done for. In either case, you first type your contract into the Master Contract area and then you easily select from this list the appropriate contract you want to use on the Invoice or Service Ticket 'Contract' section.

All of the RTF formatting controls are supported so that you may adjust the typeface, font size, color, and other attributes of the contract. In addition, spell check is supported.

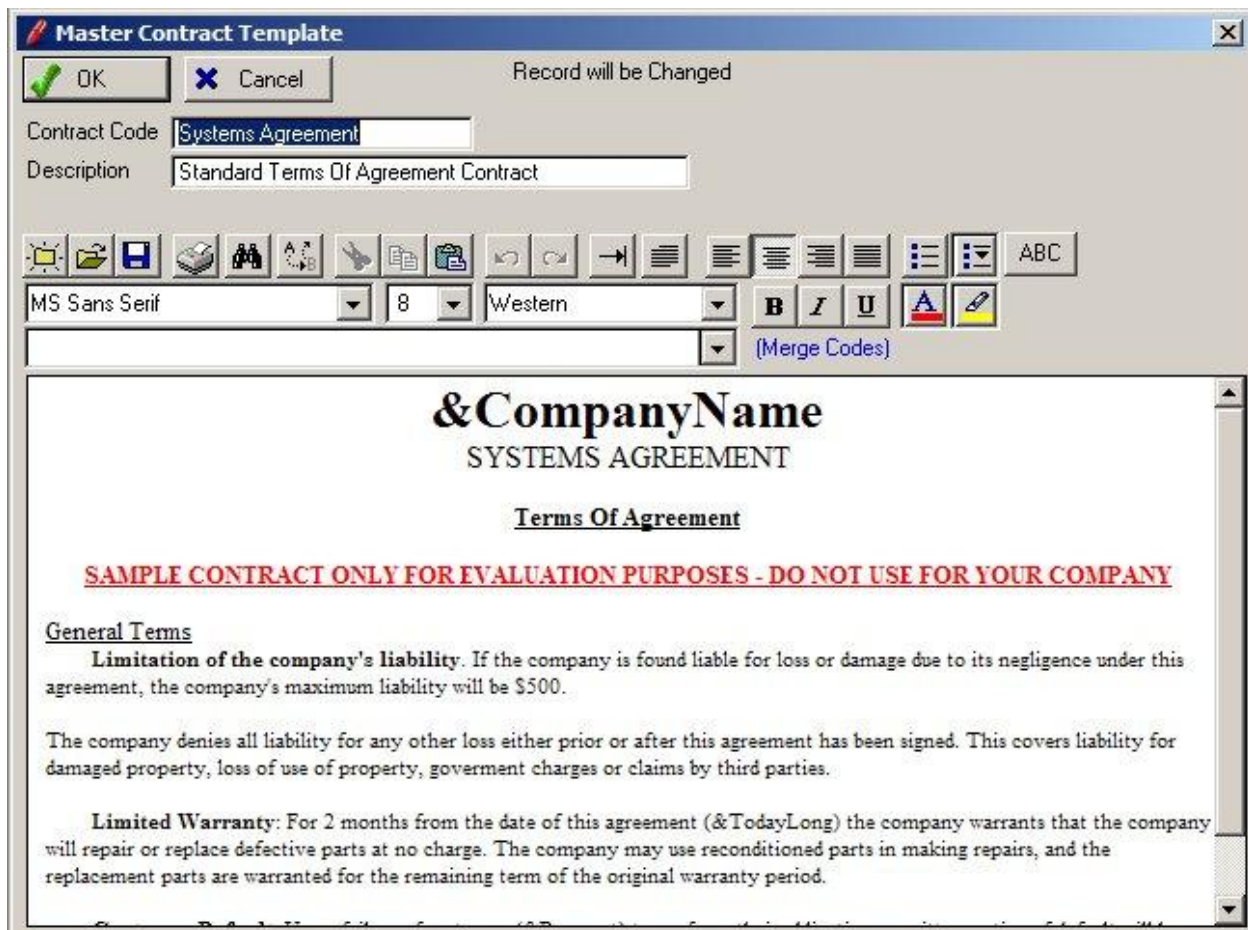
What makes the master contract template different than the standard word processor template you may be using (or just preprinted forms) is it's ability to merge related data for a personalized contract. With 30 different fields to select from – ranging from your company name/address to the customers name/address, site information, dates, invoice price, service category, etc. – you will be creating a customized contract to be included with your invoice/ticket printout.

To bring up the Master Contract list, click on the Master Contract selection in the System Utilities menu section.



Click on Insert to add a new Master Contract to your list, Click on Change to modify an existing master contract, or to delete a master contract click on Delete.

When adding or modifying an existing Master contract, you will see the following screen (the contract information in this example is only for illustration purposes and is not included in the Pursuit software – you will enter your own contract:



- Contract Code** This is the name you will assign to this Master Contract, as it will be identified in the Master Contract List.
- Description** A brief description identifying this Master Contract.
- RTF Controls** Provides selection of typeface, font size, colors, bullets, spell check and other attributes throughout your contract. See RTF Controls section in the beginning of this documentation for an explanation of each control.
- Merge Codes** The Merge Codes field is a drop-down selection field that consists of approximately 30 different merge codes. Each merge code represents a field in the software that can be placed anywhere within your Master Contract. When the Master Contract is selected for inclusion on an invoice or ticket, all merge codes in the master contract are automatically replaced with the value of those fields for that particular customer.

Merge codes include selections for:  
Your company name, address, telephone, license  
Customer name, address, telephone, main contact  
Invoice number, price, date  
Today's Date, Service Ticket

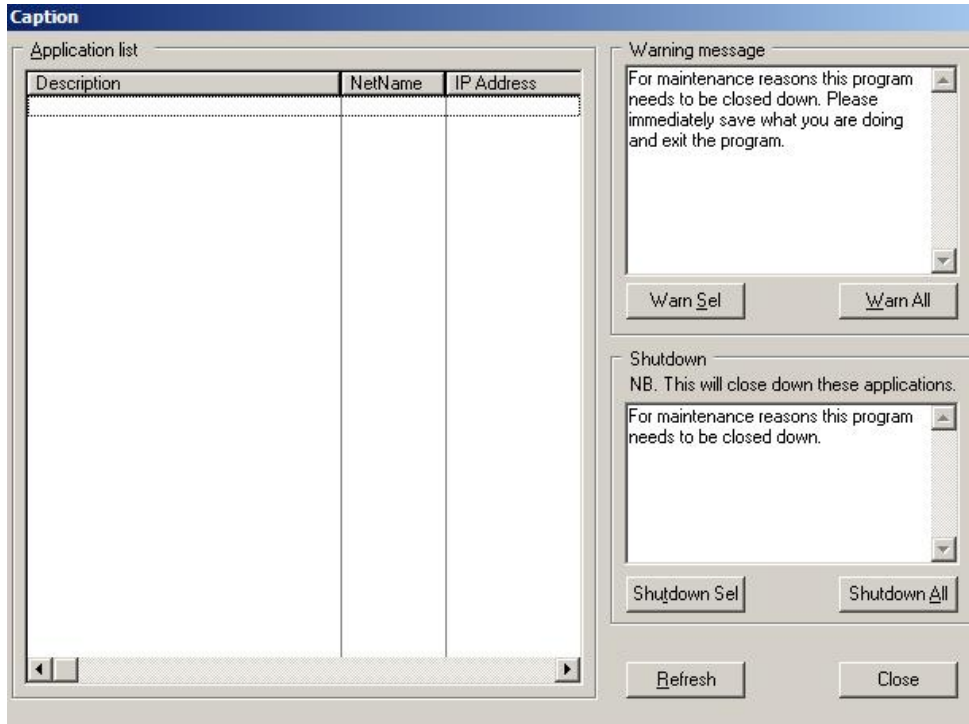
**Contract Section** This is the area where you enter the terms of your contract. Using the RTF controls above, enter your contract using any combination of typefaces and fonts that you require. Wherever you want to place a merge code that will be replaced by actual data, click on the Merge Codes drop-down field described above, and select the appropriate merge code. A merge code will be placed where your cursor is currently positioned in the contract text area. There is no limit to the number or frequency of merge codes that you place in your master contract. If your contract is more than one page long, then it will automatically print your contract on multiple pages (you will not see the page break on the screen, however it will automatically page when the contract prints).

**When you are finished entering your contract, click on OK to save.**



## Alarm Shutdown – System Administrators

A system administrator can request to shutdown all copies of this software running on workstations throughout the local network. This feature is selected by going to Utilities/Shutdown All Users.



A list of all users currently in this software will appear in the 'Application List' window. On the right-hand side, the administrator will have the option to send a warning message to one or all users. The default warning message may be changed by the administrator. Once the administrator clicks on either 'Warn' button, each user will immediately see a pop-up window with that message.

To shutdown each workstation remotely, the administrator and select one or all workstations from the left-hand list, and then click on one of the 'Shutdown' button. This will result in the shutdown of this software on all selected workstations.

## Automatic Maintenance Release Notification

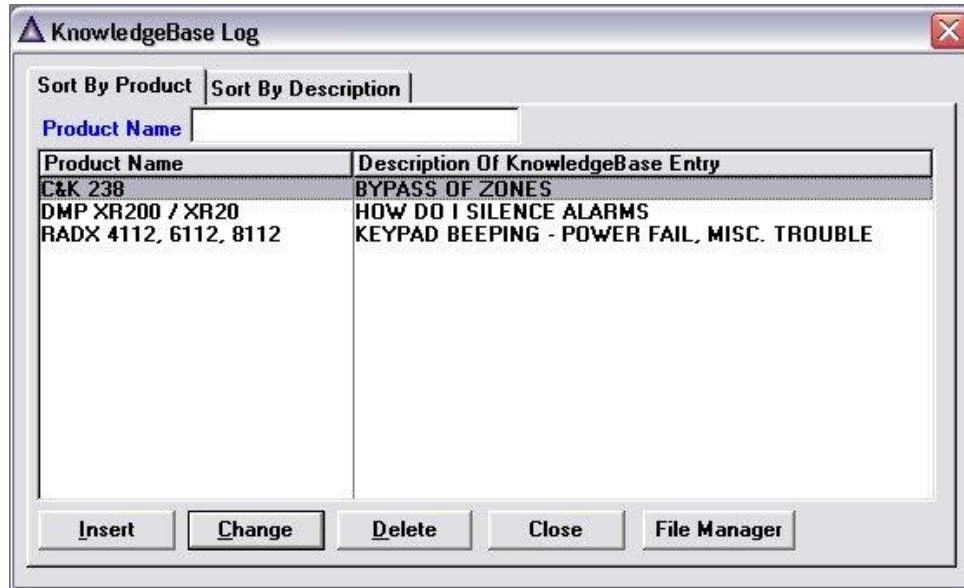
This software is designed to check Z-Micro Technologies servers to see if a new maintenance release is available for download. If it is, the user will have the option to start the download and apply the maintenance release to the current installed copy on this workstation. If there are no new maintenance releases available at the moment, the user will be notified as well.

To check for new maintenance releases manually, select Help/Check For Updates.



## Chapter 15: KnowledgeBase Log

The KnowledgeBase Log is designed to allow a customer service representative in your company to answer some types of technical questions that may be asked by your customers without having to refer that customer to one of your technicians. The KnowledgeBase Log contains information about common problems your customers may come across, and an explanation on how to correct the situation.



The KnowledgeBase Log consists of a list of common problems that you have previously entered into the system. To add a log entry, press the INS key from this list and the data entry screen will appear:

**Product Name** Each log entry is associated with a problem or question that could occur as a result of the use of a particular product. For example, if a customer calls and says they have a question about arming/disarming a their alarm, you could have an explanation on how to arm/disarm a keypad for the various keypads you normally install. Therefore this field will contain the part name of the keypad that this particular explanation refers to, then do the same for other keypads as well.

**Problem Desc** Enter a brief description of the problem or question that this explanation will answer.

**Explanation** This section allows you to enter text that describes in detail how to correct the problem. You customer service rep can read from this screen to help answer a question your customer has about the use of this particular product. This area can scroll beyond the initial 15 lines displayed by pressing the page up or page down keys.

To save a new entry into this log, select the OK button. To cancel this entry, select the Cancel button.



## Chapter 16: Rolodex Contact Manager

The Rolodex section is designed to store name, addresses, phone numbers, and notes for persons that you know. These names might include business associates, vendors, distributors, friends, etc. The Rolodex list has an unlimited capacity. You may also display a list of your contacts in order of their name, company name, or relationship to you.

### Selecting A Contact From The List

To select a contact from the Rolodex Contact manager section, select the Rolodex option from the Main Top Menu. When the list is displayed, you may choose from a variety of sort tabs:

**Sort By Contact Name** All of your contacts will be listed in order of their last name. This list is based upon a contacts personal name, not company name. You may find a contact by their last name by entering the last name on the top of this list (full or partial name supported).

If a contact does not have a personal name (such as a contact with a company name but no personal name), then that contact will not be displayed on this list.

**Sort By Company Name** Contacts will be listed in order of their company name. You may find a contact by a specific company name by entering the company name on the top of this list (full or partial company name supported).

If a contact does not have a company name, then that contact will not be displayed on this list.

**Sort By Phone Number** This list will display all of your contacts in order of their main phone number. This list is particularly helpful when you are trying to lookup a contact by their phone number. You may find a contact with a specific phone number by entering their phone number on the top of this list.

**Sort By Relationship** Each contact may be identified by the type of relationship you have with them. Some examples of relationships are VENDOR, DISTRIBUTOR, FRIEND, ASSOCIATE, etc. This list will display all of your contacts in the order of their relationship with you. Therefore, all VENDORS will appear together, all DISTRIBUTORS will appear together, etc. You may immediately go to a particular relationship section by typing in the relationship on the top of the list.

If a contact does not have a relationship entered they will not appear.

Once you have selected your list, press ENTER on that contact name to review or modify the contact.

## Add A Contact Name & Address

You may add a name to the Rolodex list by pressing the INSERT key from the Rolodex list.

A form will be displayed allowing you to enter a new contact. The Rolodex screen allows you to enter various information about the contact:

**Rolodex Name & Address Information** [X]

Record will be Added

Relation [ ] ...

Company [ ]

Title [ ]

Last Name [ ]

First Name [ ]

Address [ ]

Town [ ]

State [ ] Zip [ ]

Email 1 [ ] [Email]

Email 2 [ ] [Email]

Website [ ] [View]

Comments [ ]

Telephone Numbers

Main [ ] Xt [ ]

Fax [ ] Xt [ ]

Pager [ ] Xt [ ]

Mobile [ ] Xt [ ]

Other [ ] Xt [ ]

[OK] [Cancel] User ID [ ]

**Relation** You may 'categorize' each contact by the type of relationship they have with you. For example, you can enter utilities such as telephone, electric, cable, etc. as UTILITY. Companies you purchase your parts from can be entered with a relationship of DISTRIBUTOR.

The relationship field is validated against a relationship table. If a relationship you are entering in this field does not already exist on the relationship validation table, the table will pop-up and you may then add that relationship to the table.

**Company** If this contact is a company, enter the name of the company in this field. If this contact is a personal contact, you may leave this field blank.

**Last Name** Enter the last name of this contact. If this is a company contact and you know the name of a contact at that company, then enter their last name in this field.

**First Name** If you are entering a name of a contact, their first name is entered in this field.

**Address** There are two lines available for the contact street address. The first line is the normal street address. The second line can be used for suite numbers, etc.

**Town** Enter the contact's town.

<b>State</b>	Enter the contact's two-letter state abbreviation.
<b>Zip Code</b>	Enter the contact's zip code. 10 digit zip code supported.
<b>Email 1 and 2</b>	Email addresses for this contact. Click on Email button to automatically address an email for this contact, using your default email client program.
<b>Website</b>	If this contact has an associated website (ie: corporate contact), enter the URL of the Website in this field. Click on the View button to launch your browser to this website.

There are up to 5 Phone Numbers that may be stored for a contact:

<b>Main Number</b>	Enter the contact's main phone number. This number is automatically selected if you choose the AUTODIAL function, however you may edit the phone number in the autodial screen.
<b>Fax Number</b>	Enter the contact's fax number.
<b>Pager Number</b>	If the contact has a pager number, enter that number in this field.
<b>Mobile Number</b>	If the contact has a cellular phone number, enter the number in this field.
<b>Other Number</b>	This field may be used to store any additional phone number that does not fit into one of the above categories.

Each phone number has a 10 character extension field. The extension field may be used to enter the extension of that phone number, or a description for that phone number (after 5:00, 2nd line, etc.)

<b>Contact Notes</b>	Enter any notes of interest about this client in this area. There are up to 10 lines available for notes (this field scrolls after 5 lines).
----------------------	--

Once you have entered the applicable information into this screen, select OK to save the contact.

### Modify A Contact

You may modify or review a contact at any time. Select the Rolodex list, then highlight the contact to modify and press ENTER. Depending upon the sort tab you chose, you may select a contact by their personal last name, company name, phone number, or relationship.

Once the contact screen appears, you may modify any information and then select OK to save the changes.

If you do not want to save the changes, press the Cancel keys to exit without saving.

### Delete A Contact

To delete a contact, highlight the contact from the Rolodex list and press the DELETE key, then select OK to confirm the delete.

## Import Alarm History Log Utility (ALARM Only)

To select the incident log import utility, go into the Utilities menu and select Import / Export Transfers menu then select 'Import Alarm History Log'. This will bring up the Alarm Incident Log Import program.

Account No.	Date	Time	Code
Log Count			

The incident import screen will ask you a few questions, as follows:

- |                                       |   |
|---------------------------------------|---|
| <b>Continue With Import Procedure</b> | Answer as YES to continue, NO to abort import process.  |
| <b>Incident File Path &amp; Name</b>  | Enter the full path and file name of the file containing the incident log downloaded from your central station.   |
| <b>Enter Starting Date For Import</b> | Enter the first date from where the import should begin. Any log entries prior to this date will be ignored.  |
| <b>Enter Ending Date For Import</b>   | Enter the last date from where the import should end. Any log entries posted after this date will be ignored.   |
| <b>Alarm Codes To By Bypassed</b>     | You may enter up to 4 different alarm codes that will NOT be imported. This allows you to exclude normal notification codes such as low battery if you wish. If no code is entered, you will not be asked for a second code. The utility will immediately begin the import. |

Once the import begins, the Import Status lines will keep you informed of the status of the import. If any entries being imported already exist in the Call History Log of the ALARM program, they will not be imported in (this allows you to run the import for the same file multiple times without the system duplicating entries). Any entries that do not already have the account number of the incident already on file in the ALARM program (either as the account number, or the Central Station account number in the ALARM program), will also be ignored. A Status message and Log Count on the bottom of the import screen will identify the status of each entry.

When the import is completed, you will be returned to the ALARM Main Menu.



## Chapter 17: Common Questions and Answers

As always, the functionality of our software package is dependent upon the suggestions of our users. As many of our users may or may not know, we have enabled our Internet Website with a Discussion Board and Suggestion Box.

This is located at <http://www.z-microtech.com> (click on Discussion Board to access this area)

Our discussion board is the best and most current place to find common questions and answers to our software. Many of the improvements within our software products have come upon the suggestions of our users. If there are any suggestions or improvements you would like to see in future releases, please do not hesitate to insert your thoughts and ideas in the discussion board.

The following is a general list of the most common questions that have been asked over the years. Again, for a comprehensive listing of FAQ's please visit the discussion board area of our website.

### 1) The program is running extremely slow.

This software requires at least the minimum system requirements specified by the Windows operating system you are using. We recommend using the recommended system requirements rather than the minimum to ensure faster processing.

### 2) When first using this program, how do I enter past due balances?

There are two methods available for entering a customers past balance. The first method is to create a service invoice or product invoice to represent each invoice that is past due. Use the original invoice date on the new invoice so that the account is aged correctly and any late charges will be calculated correctly.

If you wish to recreate your invoicing for the last several months that you had done manually, and now wish to have those same invoices posted against the program, then you may use the recurring invoice section to 'fool' the system into creating invoices for each month for those customers due to receive an invoice. To do this, you need to set up each customer account so that their recurring invoices will start with the first billing cycle you want to go back to. Then, go into the System Utilities section and change the system date to the actual date you had generated those invoices. Run the recurring invoices for that first billing month. Now go back and change the system date to the next month and run the recurring invoice for that month, and so on. When you reach the current billing cycle, you will have a history or recurring invoices for all of your accounts. Be sure to change the system date back to today's date when you are finished. The last step in this process is to post payments against each of these invoices so that the accounts receivables are accurate and up to date. This is done through the Post Cash Receipts section.

### 3) I want to mail an invoice for one account to separate bill-to address.

In order for an invoice to be mailed to another address, you will need to select Yes in the OTHER BILL-TO field that appears on the main customer data entry screen. This will bring up a Bill-To Name and Address screen where you can enter the name and address of who is to receive any invoice that is printed for that account. Although the invoice is still posted against this account, the mailing address that is printed on the invoice will be that of the Bill-To information.

If you need to actually post this account's charges to another account already on file, then you will need to setup 'dealer billing' as specified in an earlier chapter in this documentation.

### 4) Once I start printing invoices, how do I stop the printer from printing?

Before you commit to printing the invoices, you may abort the recurring invoice process by selecting the Cancel button. However, once the recurring invoices start printing, the Cancel button no longer work. If you wish to stop printing, you must turn the printer off or turn the printer off-line, depending on the reason why you want to stop printing. If you just want to temporarily halt printing while you tend to the printer, and then pick up exactly where you left off, the press the off-line button on your printer (do not turn the printer power off). This will cause a screen to pop-up within a minute that will say 'Printer off-line, RETRY CANCEL'. Leave this screen as it is and when you are ready to continue printing, turn the printer on-line and then select Retry to start printing where you left off.

If you wish to abort the printing all together, then you may turn the printer power off. This will cause a screen to pop-up within a minute that says 'Printer off-line, Retry Cancel'. Select Cancel to abort the process. Since Windows uses a print spooler that stores printed information until the printer is available, you will need to go into the Windows Print Manager and delete any entries still waiting. You may then re-enter the program and turn your printer back on. NOTE: If you abort out of an invoicing in this manner, check the customer account of the last invoice that was printed. The LAST PERIOD/NEXT PERIOD fields may not have been updated do the abort. If this is the case, then just change the fields to reflect the correct LAST PERIOD/NEXT PERIOD.

#### **5) Can this program run in a network environment?**

YES. This program is designed to run without modification on Windows networks in either a Peer-to-Peer or Dedicated Server environments. You do not need to purchase any additional software licenses from us to run on a network. Your only consideration is making sure the network environment is set up to accommodate the program. As long as your workstations and server meet the minimum requirements stated in your Windows operating systems (recommended system requirements would be ideal) then you have all you need to run the software for multiple users.

#### **6) I am getting one of the following error messages:**

Invalid Record Declaration  
Invalid Key File  
Invalid Data File  
Can Not Open...  
General Protection Fault (GPF)  
Internal Error

Any of these error messages can probably be corrected by selecting the File Test/Rebuild icon in your program group. These messages can be caused by a corrupted file on your hard disk. To start this recovery process, double-click on the File Test/Rebuild icon (red cross icon).

The first step is to test the files to see which one needs to be recovered. Click on the top checkbox that says TEST ALL Files, then select OK. This will open all data files to see which one is corrupted. The bottom of the screen displays each file as it is being opened. If an error message does appear, look at the bottom of this screen to see which filename is displayed. This is the file that needs to be recovered.

The next step is to unselect the TEST ALL Files checkbox by clicking on it to remove the X, then click on the checkbox next to the file that needs to be recovered, then select OK. A message will appear asking to make a copy of the file - Click on Continue. The last message will probably say no errors detected - this is normal and click on Continue to finish the recovery process.

Once the file has been recovered, you may go back into the software to see if the error message has been corrected. If there are other files corrupted, repeat the above process one at a time for

each file that needs to be recovered.

Corrupted data files are usually the result of a hard disk crash which could occur because of power failures, rebooting the computer while using the program, shutting down the network prematurely, or aborting out of the program in any unusual methods rather than exiting out through the normal EXIT menu selection. Corrupted data files can also occur because of other types of hard disk crashes. If you find these errors occurring often, perform a SCANDISK on your computer to see if there are any errors on the hard disk, and then correct them if there are. If it still persists, you may want to have a technician check out the status of your hardware. Please call us if you need any additional assistance with these errors.

## How To Use The Quicklink Posting Program

QuickLink offers the capability of posting your payment histories from this program into your Quickbooks Chart Of Accounts Ledger. Any categories that are associated with your invoices will automatically be carried over to your Quickbooks program as a payment category. In addition, any recurring invoice payments will be also carried over to a category called 'RECURR'.

***NOTE:** You may post any time period you wish to Quickbooks, however it is recommended that the posting process be done on a monthly basis so that it is easy for you to remember the last posting period. If you try to post payments from this program into Quickbooks for a time period that was already posted, QuickLink will display a warning message to let you know that if you continue with the posting process, duplicate payment entries may be posted to Quickbooks. It is highly suggested that you do not proceed at this point otherwise you may need to go into Quickbooks and delete any duplicate payments that get posted.*

### Using Quicklink

To run QuickLink, select Utilities on the top menu bar, then select Import/Export Transfer, then select QuickLink.

**Post Payment Transactions To Quicken**

This section will create a QUICKEN posting file that will consist of all payments posted within the specified date range.

**The Last Posting Period To Quicken Was Thru**

Post All Payments Received From  Until

Print A Detailed Proof Sheet

Quicken Data Directory

**Post To Quicken**

**Cancel**

**Setup Categories**

Searching Transactions From

From the QuickLink screen, you have the following options available to you:

**Post To Quickbooks** This section posts the appropriate payment histories from this program into a posting file that will be used by Quickbooks.

**Setup Categories** This section allows you to associate each invoice category found in the program to its' appropriate category you wish to post to in Quickbooks. For example, if you have a payment that was made against an invoice that had a category of 'INSTALL', you may post any of these 'INSTALL' payments to a category that you have set up in

Quickbooks called 'SALES'. Since this program and Quickbooks both allow an almost unlimited number of categories, this conversion table allows you to associate each category with its corresponding Quickbooks category. Once set up, you normally do not need to go into this section again unless you have added new categories to this program.

Cancel

Exiting QuickLink will return you to the main software menu.

### Post To Quickbooks

The Post To Quickbooks section will create a file called ALARM.QIF that will be used in Quickbooks to import the payment histories. This screen will first display the last time period you used QuickLink. If you are entering a new time period that overlaps the last time period in any way, you will receive an error message saying that duplicate entries may be posted. Please heed this warning and do not continue unless you are absolutely certain that is what you want to do.

*To post the ALARM payment histories to Quicken, fill in these fields:*

#### Post All Payments Received From

This is the date range that you wish to post payments from. Any payments that have been entered by you within the specified date range will be transferred to the Quickbooks posting file. For Example, if you enter '01/01/04' as the from date and '01/31/04' as the To date, then any payments that you entered within that date range will be transferred to the Quickbooks posting file. If you enter a From or To date that overlaps the last posting date range, you will receive a warning message that you should not continue.

#### Print A Detailed Proof Sheet

You should always select 'YES' to this question so that QuickLink will print a report that shows you exactly what payments have been transferred to the Quickbooks posting file (ALARM.QIF). This allows you to proof the transactions listed before actually going into Quickbooks to complete the transfer.

Once the above fields have been entered and you select POST TO QUICKBOOKS, the posting process will begin. You will be kept informed of the process by the 'Posting Transactions From:' field on the bottom of the screen.

When the posting has finished, a screen will appear explaining to you what the next procedure is. What this section has done for you is create a file called 'ALARM.QIF' into your Quickbooks directory, that will be used once you get into Quickbooks to complete the posting (import) process.

At this point, you would exit out of the QuickLink program), and go into your Quickbooks program. Once in Quickbooks, you will select the 'IMPORT' selection from the file menu. You will then be

asked to enter the name of the import file, which is ALARM.QIF. Once the name is entered, the actual transfer of payment histories into Quickbooks will take place.

Each payment will be posted into its corresponding category field, so you may have a number of payment totals entered for the same date. This is normal and gives you a lot of flexibility when running reports within Quicken.

### Category Conversion Table

Before any payment histories can be posted to Quickbooks, you must make sure that all of your invoice categories are setup with the appropriate Quickbooks category that you want to post to. This section allows you to do this very easily. In addition, there are 2 additional categories that must be setup. These are the 'BLANK' category which is where any payments that do not have a corresponding invoice category will be posted. There is also a 'RECURR' category that is designed for all of your recurring invoice payments. These two categories must be setup with an appropriate Quickbooks category otherwise they will not transfer to Quickbooks

QuickLink automatically sets up your categories in the program. You will see the list of these categories if you select Category Conversion Table from the QuickLink main menu. To assign a Quickbooks category to each of these, press the ENTER key on each category one at a time. A screen will appear where you can enter the following:

<b>Invoice Category</b>	This is the Alarm / Service Express Invoice category, and should already be filled in.
<b>Quickbooks Category Code</b>	This is the category that the payment will be posted to in the Quickbooks program. You may decide to post all invoice categories to one Quickbooks category by simply entering that Quickbooks category code onto all of the category records in this section. Otherwise, enter the correct Quickbooks category name in this field. This Quickbooks category must already exist in Quickbooks Chart Of Accounts Table before any postings are done.
<b>Quickbooks Description</b>	In Quickbooks, you may have a description that relates to each Quickbooks category. If you wish to post a description onto Quickbooks, enter the description of that category here (please refer to your Quickbooks manual if you have any questions about this field).

Once you are finished with these fields, just press ENTER and the conversion table will update the record. Do the above process for each category in this table.

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The purchaser is licensed to run the software for one company name/address. Multiple company names and/or addresses (ex: branch locations) require the purchase of additional software licenses. This software is not transferrable to another company or corporation without the purchase of a license. This software is not transferrable to new ownership of the original corporation licensee

### **Support Contracts**

Annual support contracts are automatically renewed at a discount using last form of payment. Licensees that do not wish to have their contracts automatically renewed may contact Z-Micro Technologies to be removed from the discounted autorenew status.

### **Network License**

This product uses SQL technology and requires a purchase of the appropriate seat licenses. Purchaser may not exceed the number of purchased seat licenses for multi-user access.

### **IMPORTANT REGISTRATION NOTICE:**

The purchaser of this software product must call Z-Micro Technologies, Inc. to receive a registration number upon initially installing the software. This registration number qualifies the purchaser as an authorized user of this software. A final registration number will be required within approximately two months of the initial installation date. After that time, no additional registration numbers will be required by the authorized purchaser unless the purchaser re-installs this software or changes the address in the company setup area of this software.

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