

Alarm for Windows 5

Office Management Software

Z-Micro Technologies, Inc.



Users Guide

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Chapter 1: Overview

Introduction

The ALARM For Windows 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 subscriber zone descriptions, customer notification list, alarm call history, conversation notes, detailed equipment list, and recurring service reminders make ALARM 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.

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.

If you have any questions or problems, you may contact technical support at (480) 767-5556 during the hours of 9:00AM to 5:30PM Monday through Friday. You may also fax us any questions you have to (480)767-5595. If you fax us a list of questions, we will reply by fax unless you request otherwise.

You may also contact us at our web site at <http://www.z-microtech.com> or through e-mail at support@z-microtech.com.

Features And Benefits Highlights

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

- ❑ Customer Billing (recurring, servicing, installation)
- ❑ Service Scheduling and Work Orders with a 50 year monthly appointment calendar
- ❑ Technician scheduling
- ❑ Purchase Orders
- ❑ Inventory Control (including multiple location warehousing)
- ❑ Customer Profile tracking including areas for zones, responsible parties, equipment installed, recurring services, central station information, alarm history log, and much more.
- ❑ Mail Merge for mailing letters or postcards for service reminders, collection notices, panel update notices, plus any other type of correspondence you require.
- ❑ Rolodex section for keeping track of names, addresses and phone numbers of all of your contacts (vendors, associates, friends, technicians,...).
- ❑ Numerous reports - both management and financial - with many options found within each report for flexible processing.
- ❑ Comprehensive payment and credit processing
- ❑ 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.
- ❑ 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 in the alarm directory, your invoices will automatically print your logo in the upper left-hand corner of the invoice.

Copy information from ALARM 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 existing software systems commonly found within the security industry. These include integrating with the Quicken accounting system (ALARM and Quicken/Quickbooks together make a comprehensive accounts receivable, accounts payable, and general ledger system. Quickpay adds payroll as well), the NAPCO downloader software, 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.

Integrate ALARM 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

- Processor:** Pentium Class Processor over 166Mhz in speed
- Memory:** A minimum of 32 Megs of Ram installed. (For a network server, a minimum of 64 Megs is necessary).
- Drives:** A minimum of 50 MB of disk space. (Please note, that depending upon the size of your database, this may expand extensively.)
- Video:** Windows supported graphic adapter and monitor. 800 x 600 resolution (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.
- Mouse:** Windows-supported Mouse (highly recommended but not mandatory)

Network Server Requirements

If you have decided to install Alarm for Windows upon your Windows-based network, your network server should fall into the following criteria:

- Processor:** Pentium Class Processor over 200Mhz in speed
- Memory:** A minimum of 64 Megs of Ram
- Drives:** A minimum of 100 MB of disk space.

Depending upon which Network Operating system you decide to install, Windows NT 4.0, Microsoft XP, (peer-to-peer) Microsoft 98 (peer-to-peer) or Windows 2000, note that these criteria are simply benchmarks. Also each workstation must be installed with a Network Card (NIC) to be able to access the network itself.

Once you have determined if your computer (or network) falls into of these categories, you are now ready to install the program:

NOTE: *If you are installing this machine on a networked system, you need to install the program locally on each machine as well as on the server. Even if you have decided that you want to "map" to the server, for data integrity purposes and to help increase the overall performance of the Alarm for Windows program, you must install the program locally on each machine in your network. Do not "MAP" directly to the alarmwin.exe file and run the program across your network. This also includes setting up "Virtual Drives." To achieve the highest amount of data integrity and database speed, use our Networking Directions to set up your network.*

Installing ALARM For Windows

The ALARM software is shipped on a CD-Rom. 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 ALARM For Windows is to be installed. If for some reason this procedure is interrupted, you may just start the process over again.

To start the installation procedure, please follow these steps:

1. Start up your Windows system if it is not currently open.
2. Insert the ALARM For Windows Program CD into your CDROM drive usually D: (this is the default drive letter. Check with your IT department if you are unsure).
3. 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 addition to the ALARM For Windows icon, a few additional icons were placed in the program group window. These include Backup Data Files, File Recovery (Rebuild), Uninstall, Archive Utility and a Read.Me file.

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 ALARM For Windows, double-click on the ALARM For Windows Icon in the program group. This will run the program and bring you to the ALARM For Windows logo screen.

Installing ALARM For Windows 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, 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, entitled Alarmwin 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.

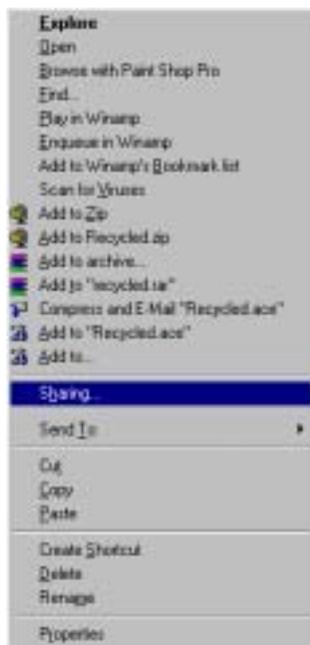


Figure 2.



Figure 3.



Setting up the Workstation (Client)

Install the Alarm for Windows application (program) on each workstation that you wish to have access to the Alarm for Windows data. This is important to help maximize the functionality and speed of how the Alarm for Windows 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), 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 Alarm for Windows 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.

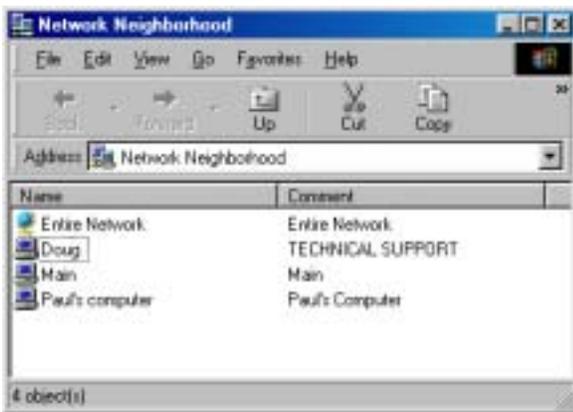
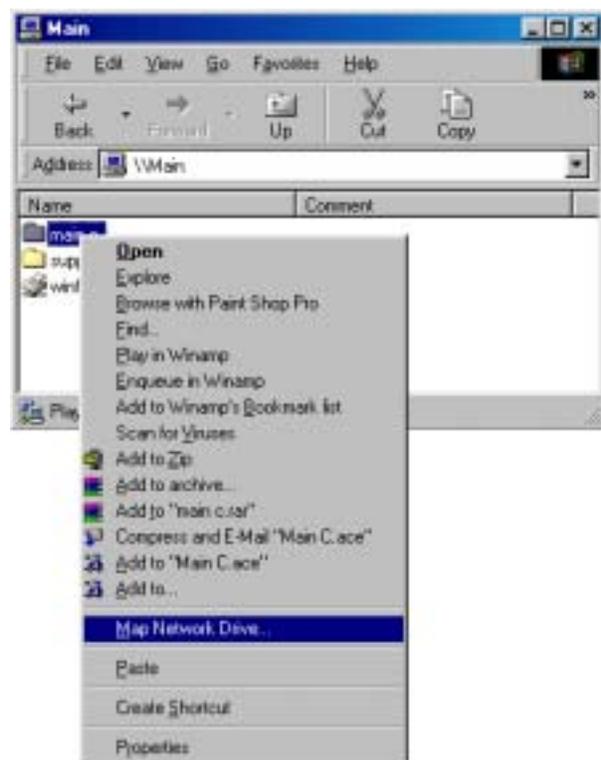
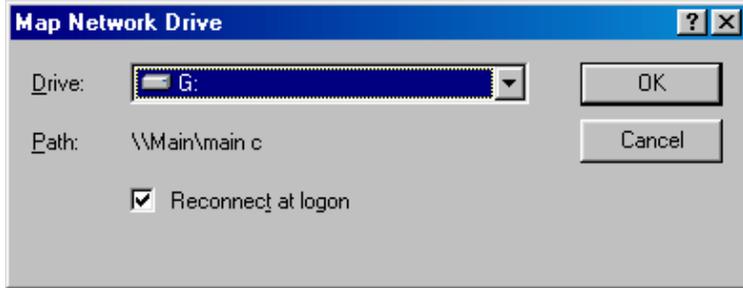


Figure 5.



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

Figure 6.

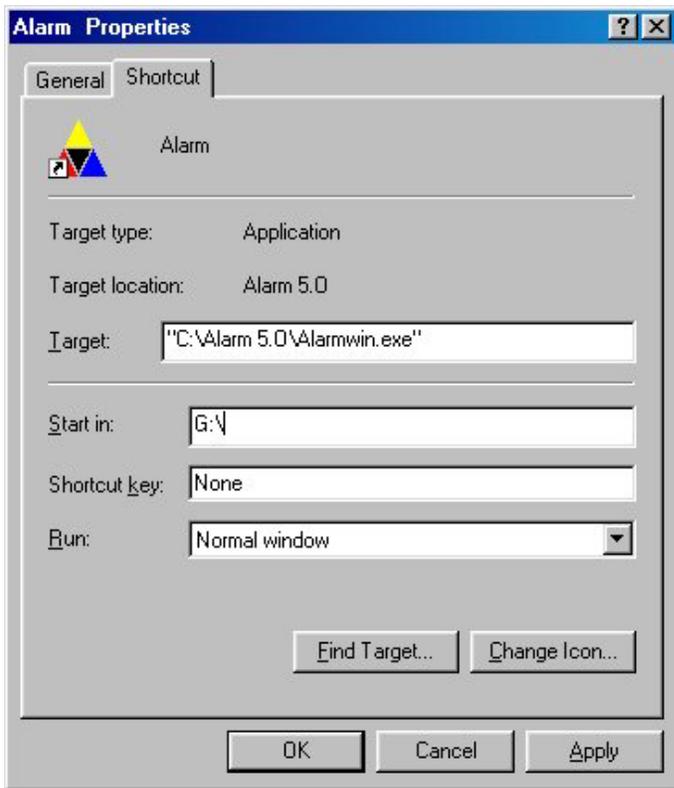


A window titled Alarmwin Properties will open. Check the TARGET box, this should point to the LOCAL drive usually C:\Alarmwin\alarmwin.exe. Change the START IN to point to your mapped (in our example G:\).

Once that has been completed, double left click on the Alarmwin icon, which now appears on your desktop and the Alarm for Windows 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, you will be presented with a Company Setup screen. This screen allows you to set defaults to various system options, such as:

Company Setup Options		Invoice Setup Options	
Company	All Security, Inc.	Late Fee	5.00 Balance Below Minimum
Street	3590 Commerical Drive	Min Balance	300.00
Street 2		Late Rate	18.00 Balance Above Minimum
City	Anytown	Net Term	30 Days (Default=30)
State	NY	Zip Code	11040
Phone 1	516-998-3453	Late Period	28 Days (Default=28)
Phone 2	516-998-3398	Invoice Form	LASER ...
License#	23432-A-13	Statement Form	LASER ...
Merchant#		Print Barcode On Invoice	YES
Country	United States	Using Preprinted Forms	N
Activate Password Protection	NO	Print Statements With Invoices	YES
Track Stock In Inventory	YES	Print Balance Forward Only	NO
Multi-Location Inventory	NO	Recurring Invoice Sort	ACCOUNT

Company

Enter your company name and address. Your company name will then appear on the top of each ALARM screen. The address will also printout on invoices if you do not use preprinted forms.

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 you company is outside of the United States of America, call Z-Micro Technologies Technical Support or e-mail: support@z-microtech.com.

Activate Password Protection

If you would like ALARM to provide password protection from unauthorized users, then select 'YES'. You will then be required upon future entries into the ALARM 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.

Track Stock In

There are two fields that determine if you want to use inventory

Inventory	control (keep track of on-hand stock counts). Select 'YES' for the Inventory Tracking question to have ALARM 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.).
Multi-Location Inventory	If you store inventory in more than one location i.e. Sales Office, Warehouse, Truck. Select YES here.
License#	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.
Merchant#	If you are authorized as a merchant for credit card processing through CheckFree Corporation, enter your merchant number in this field. This will be used for electronic credit card processing that is supported by the software (recurring charges – Visa/Master Card/Amex/Checking/Savings billing method options). For information on becoming a merchant with CheckFree Corporation, give us a call at 1-800-421-5960. Call Z-Micro Technologies, Inc. if you would like more information about electronic funds transfer programs. Call 480-767-5556.
Late Fee	<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>
Charge Fee	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.
Late Rate	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 ALARM 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)

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 ALARM For Windows 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 ALARM order for samples of forms. If you enter an incorrect statement form, a list of valid forms will be displayed. ALARM 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.

A help screen briefly describing each field on the Company Setup screen is available by pressing F1 within that screen.

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

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

All areas of ALARM For Windows 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 with ALARM 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 directly from within ALARM. 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 within ALARM). Once the fax software printer driver has been selected, any printing you perform within ALARM 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, and fax service reminder post cards/letters directly to customers, just to name a few possibilities.

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).

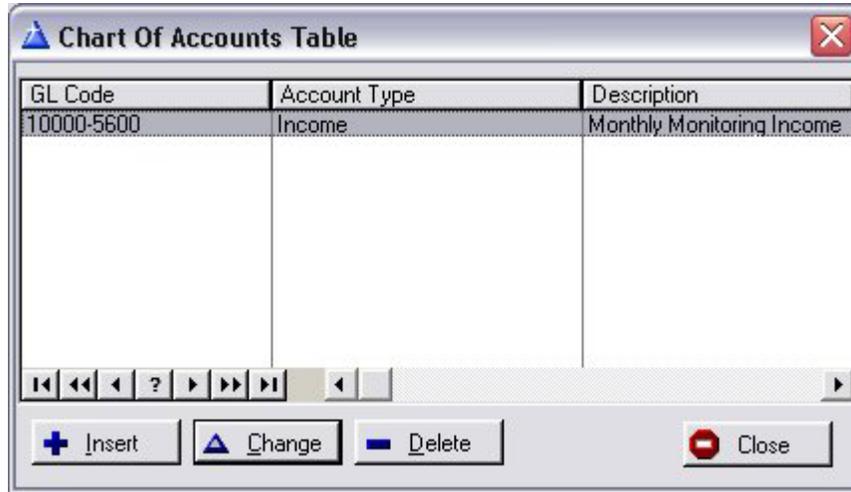


Company Header This section contains the initial setup information, including your company name and address, late charge settings, invoice and statement print forms, invoice options, and inventory tracking selections.

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.

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.



GL Code	Account Type	Description
10000-5600	Income	Monthly Monitoring Income

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.

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.

The screenshot shows the 'Set System Defaults' dialog box with the 'Customer' tab selected. The fields are as follows:

Account Status	Client	Property Type	RES
Late Fee	N	Dealer Access	MasLink
State	AZ	Tax Code Field Label	Tax
Tax Code	Maricopa	Recurring ProRating	N
Billing Method	Printer	Default Invoice Style	Product
Central Sta.	ABC Monitoring		

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).

Billing Method Select the standard way you bill your customers (Print Invoice, credit card charges, etc.).

Optional 4 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.

- Property Type** Select default for type of account (Residential/Commercial).
- Dealer Access** 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.
- Tax Code Label** If you wish to use a word other than 'County' to represent your tax table, enter the word here. Example: TaxCode
- Recurring Prorate** 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.
- Default Invoice** Select the type of invoice you usually produce (Product/Service). This setting determines the type of invoice you will normally create from within the customers account.

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.

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 window titled "Set System Defaults" with a tabbed interface. The "Service Rates" tab is selected. The window contains a grid of tabs at the top: Detail Report, Central Station Notice, Equipment Installed, Inventory/PO, Support Log, eInvoice Settings, Default GL Codes, Customer, Service Rates (selected), Contracts, Tickets, and Invoices. Below the tabs, the text reads: "Set The Service Rate Field Descriptions And Default Customer Rate Codes For Standard, Overtime And Travel Service Rates". There are three rows of input fields: "Standard Rate Label" with "Standard" in the field and "Default Standard Rate" with "Standard" in the field and a validation button (...); "Overtime Rate Label" with "Overtime" in the field and "Default Overtime Rate" with "Overtime" in the field and a validation button (...); and "Travel Rate Label" with "Travel" in the field and "Default Travel Rate" with "Travel" in the field and a validation button (...). At the bottom are "OK" and "Cancel" buttons.

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')

Overtime Rate Using the validation button, select the appropriate rate code you wish to use as a default for overtime service.

Travel Rate Label Enter the name that you wish to use to refer to any travel time charges you wish to charge the customer.

Travel Rate Using the validation button, select the appropriate rate code to use as a default for travel charges.

Service Rate Profile

Service Rate Profile [Close]

Record will be Added

Rate Code: Standard

Rate Description: Standard Labor Rate

Initial Service Rate: 50.00 For The First 60 Minutes

Service Rate: 25.00 Every 60 Minutes Thereafter

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

Taxable Service: Yes

Description To Print: Labor

GL Code: 10000-5800

[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.

Rounding Factor

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)

Taxable Service

Select the default setting of YES or NO if your service charges are taxable.

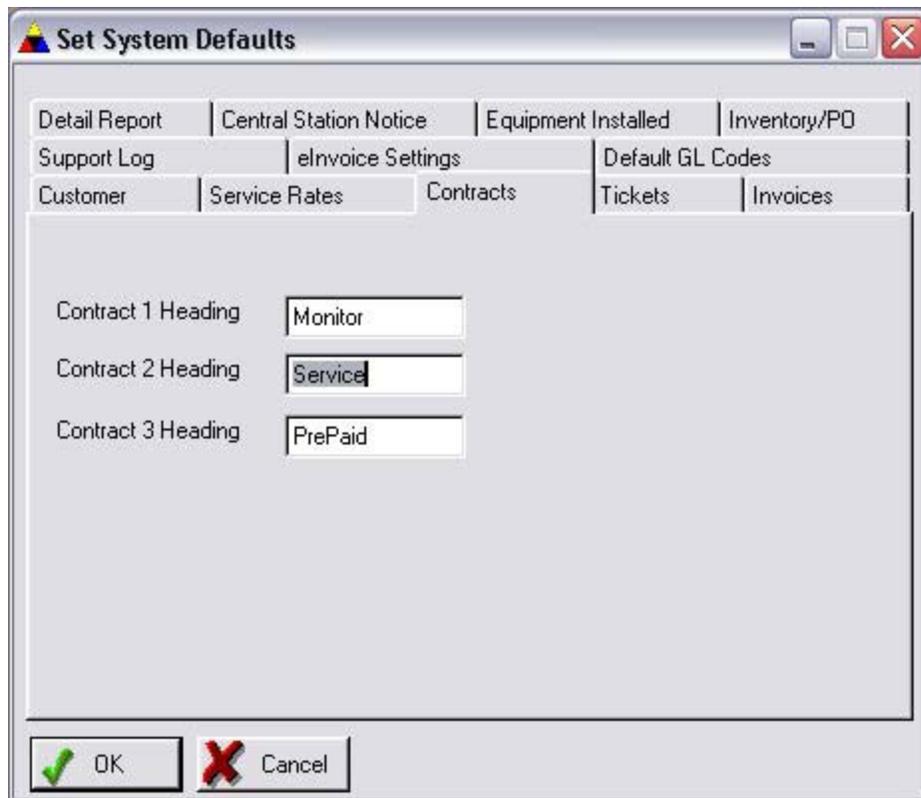
Description to print

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.

GL Code

If you are using general ledger codes for financial transaction tracking, enter the code used to track this service rate.

Contracts Default Tab



Contract 1 Enter the label of the first contract section found in the customer contract screen. If left blank, the label will default to Contract 1. For security professionals, this field is usually changed to say Monitor.

Contract 2 Enter the label of the second contract section found in the customer contract screen. If left blank, the label will default to Contract 2. For security professionals, this field is usually changed to say Service.

Contract 3 This label defaults to Prepaid, but may be changed by entering another label here.

Ticket Default Tab

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

Set System Defaults

Detail Report | Central Station Notice | Equipment Installed | Inventory/PO
Support Log | eInvoice Settings | Default GL Codes
Customer | Service Rates | Contracts | Tickets | Invoices

Print Ticket Defaults

Print Company Letterhead YES
Print Zone Descriptions NO
Print Equipment List NO
Print Customer Notes NO
Print Balance On Tickets Yes
Print C/S # On Ticket Yes

Invoice From Ticket Defaults

Invoice Style PRODUCT Default=Product
Copy Service Text NO Date No
Copy Repair List NO
Calculate Labor YES
Labor Description Detail
Apply Discounts YES

Default Service Rates On Timecards By Customer
Name Of Service Ticket Printer (Optional)

OK Cancel

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.

Print Balance On Tickets

If you wish to print the customer's open balance on the service ticket select YES.

Print C/S#

Print the Central Station account number (reference#) on ticket

Invoice Style

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.

Copy Service Text

If you wish the 'Service Performed' text of the service ticket to be copied onto the invoice, select YES.

Copy Repair List

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.

Calculate Labor

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.

Labor Description

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.

Apply Discounts

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).

Default Service Rate

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.

Name of Printer

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.

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 Settings' tab selected. The dialog has a title bar with a close button. Below the title bar is a grid of tabs: Detail Report, Central Station Notice, Equipment Installed, Inventory/PO, Support Log, Invoice Settings (selected), Default GL Codes, Customer, Service Rates, Contracts, Tickets, and Invoices. The 'Invoice Print Defaults' section contains: 'Number Of Copies To Print' (spinner set to 1), 'Print Payments On Invoice' (dropdown set to YES), and 'Name Of Invoice Printer (Optional)' (text field). The 'Invoice Display Order' section contains: 'Invoice Display Order' (dropdown set to Ascending) and 'EFT Service' (dropdown). The 'Post Payment Defaults' section contains: 'Default Invoice Type' (dropdown set to R), 'Unpaid Balance Default Response' (dropdown set to Yes), 'Default Entry Field' (dropdown set to Invoice), 'Credit Default Response' (dropdown set to Yes), 'Default Income Type' (text field set to Payment), and 'Default Payment To Invoice Amt' (dropdown set to NO). The 'Description Of Labor Charges In Summary Mode' section contains a text field set to 'Labor Charges' with a note '(When Creating Invoice From Tickets)'. At the bottom are 'OK' and 'Cancel' buttons.

Invoice Print Defaults

Number Of Copies Set the number of copies to print for each invoice. Typically set to 1 or 2.

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

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).

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), CheckFree services, or Electronic Funds Inc. For further details, please contact us for information on these services.

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.

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 **(NOT RECOMMENDED)**

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.

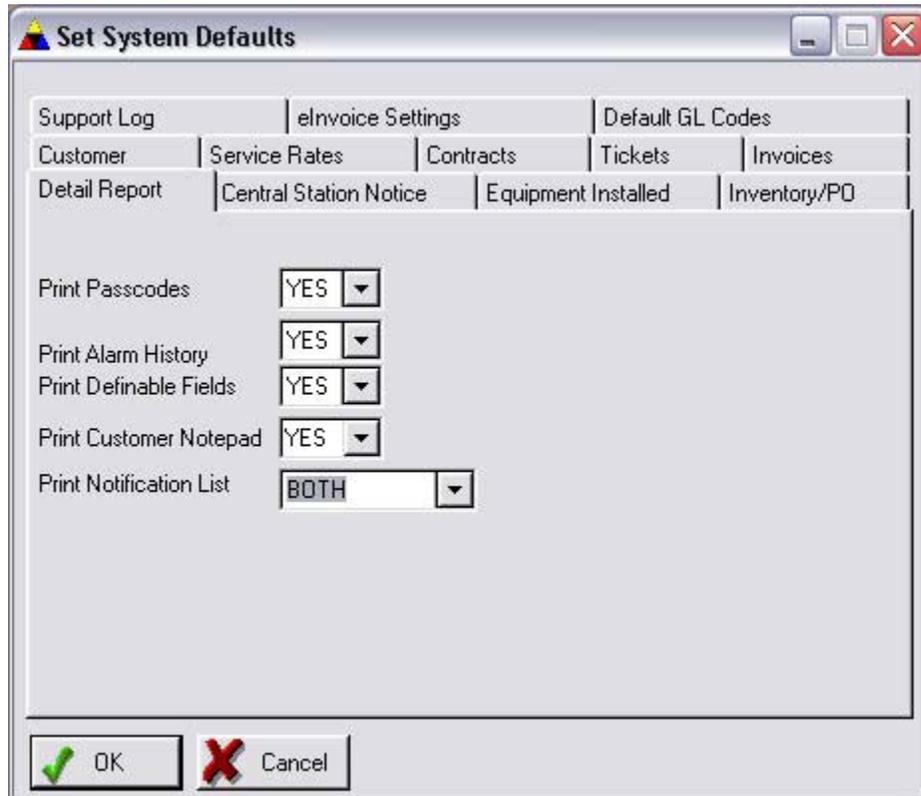
Unpaid Balance Default Response If, after payment a customer still has an unpaid balance. You are asked by the Alarm program if the customer is required to pay the balance. This will be the default response to the unpaid balance question. 'Yes' means the customer is required to pay the balance. 'No' 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.

Detail Report Default Tab

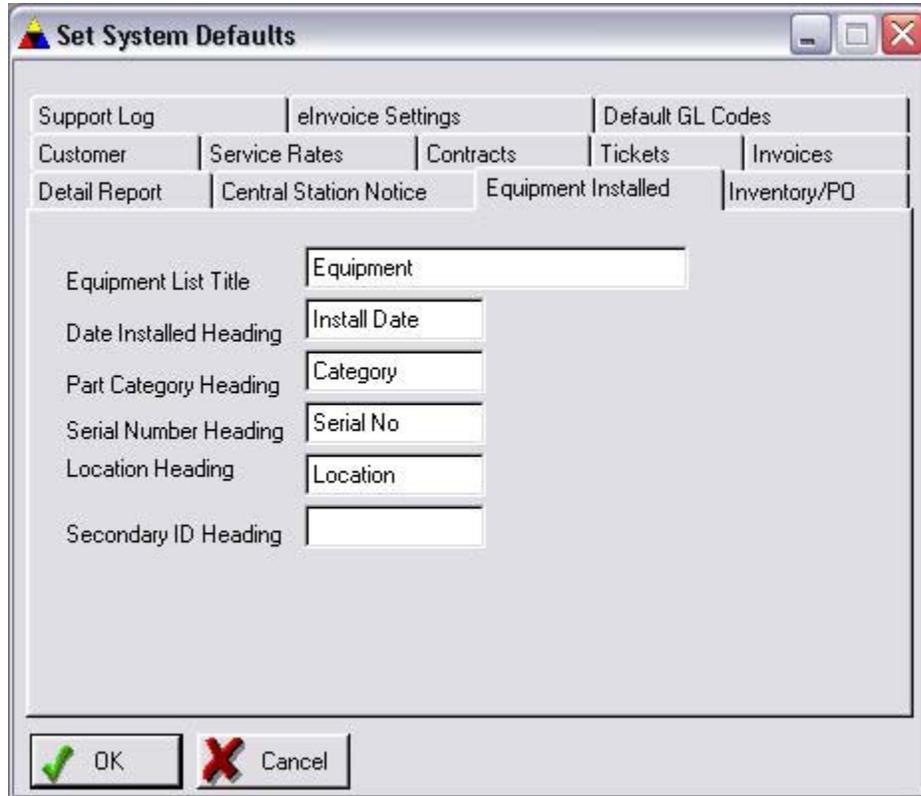
This section determines the default settings when printing a customer detail report.



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

Equipment Installed Default Tab

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



The screenshot shows a window titled "Set System Defaults" with a tabbed interface. The "Equipment Installed" tab is selected. The window contains several input fields for configuring the equipment list. The fields and their current values are:

Field Name	Current Value
Equipment List Title	Equipment
Date Installed Heading	Install Date
Part Category Heading	Category
Serial Number Heading	Serial No
Location Heading	Location
Secondary ID Heading	

At the bottom of the window are "OK" and "Cancel" buttons.

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.

Inventory/Purchase Order Default Tab

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

Set System Defaults

Support Log | Invoice Settings | Default GL Codes
Customer | Service Rates | Contracts | Tickets | Invoices
Detail Report | Central Station Notice | Equipment Installed | **Inventory/PO**

Inventory Defaults

Default GL Code: 1000-0001-0002
Default Cost Of Goods GL Code: 4000-0001-0001
Default Asset Account GL Code: 5000-0001-0001
Default Vendor Name: ADI
Post To Equipment List: YES
Taxable Default: Y

Purchase Order Defaults

PD Display Order: Ascending | Using Preprinted PO: NO
Include Repaired/Installed Item On PO If Not In Stock: No

OK Cancel

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.

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

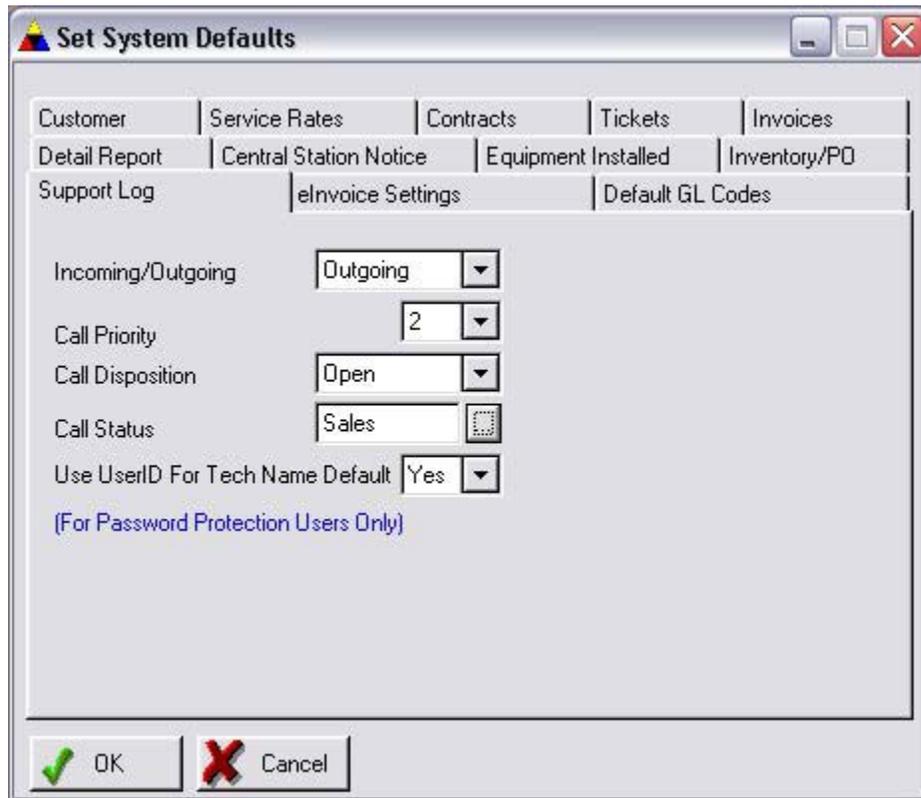
Select YES to have your company name and address printed on the purchase order form, otherwise select NO if you are using your own company letterhead paper.

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.

Support Log Default Tab

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



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.

Central Station Notice Defaults

This section determines the default settings for Central Stations Notices.

The screenshot shows a window titled "Set System Defaults" with several tabs. The "Central Station Notice" tab is active. The settings are as follows:

Setting	Value
Purpose Of Notice	DISCONNECT
Print Passcode	YES
Include Notification List	YES
Use Letterhead Paper	NO
Print Customer Copy	NO
Print Copy Office	NO
Signature Required Line	YES

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.

eInvoice Settings Defaults Tab

Alarm 5.0 features a revolutionary new method to have your recurring invoices sent to your customers. Called eInvoice, Alarm 5.0 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.

eInvoice Settings Defaults Tab - Settings

This section determines the default settings for eInvoice settings (electronic/e-mail invoices).

Before you can use eInvoice, you must setup the eInvoice 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.

The screenshot shows a window titled "Set System Defaults" with several tabs. The "eInvoice Settings" tab is selected. The fields are as follows:

Customer	Service Rates	Contracts	Tickets	Invoices	Detail Report
Central Station Notice	Equipment Installed	Inventory/PO	Support Log		
eInvoice Settings	Default GL Codes	eService Settings			

Fields and values:

- Sender Address: youremailaddress@yourISP.com
- From Header Address: youremailaddress@yourISP.com
- From Header Name: Your Name As It Should Appear In Outgoing Email
- Sender Domain: http://www.yourdomainname.com
- SMTP Server: your_pop3_smtp_accountname.com
- SMTP Port: 25 (Default = 25)
- Email Copy To Sender: Yes
- eInvoice Template: STANDARD.HTM

Below the fields is a section for "eInvoice Subject Line" with the text: "Here Is Your Invoice From All Security, Inc."

A note at the bottom states: "* These settings may be found by checking your settings in your e-mail program ACCOUNT screen, or contacting your e-mail host provider"

Buttons: OK, Cancel

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).

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).

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)
- 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)
- eInvoice Template** Select the eInvoice template file that contains the HTML code used for your particular style of eInvoice. Alarm 5.0 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)
- eInvoice Subject Line** 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)

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

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.

Recurring Charge Profile

Record will be Changed Monthly 6.67

Recurring Charge		Billing Options	
Code	MONITOR	Pro Rate First Time	N
Bill Cycle	Q	Mail To Account Number	200
Next Date	5/01/01	Post Charges To Above	YES
Bill Amt	20.00	Identity On Dealer Invoice	Name
Taxable	Y	Next Increase Due On	
Stop Date		Billing Method	Email
Cycle Cost	0.00	Email Address	johnsmith@aol.com

Description Override (Usually Left Blank)

OK Cancel

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 you 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.

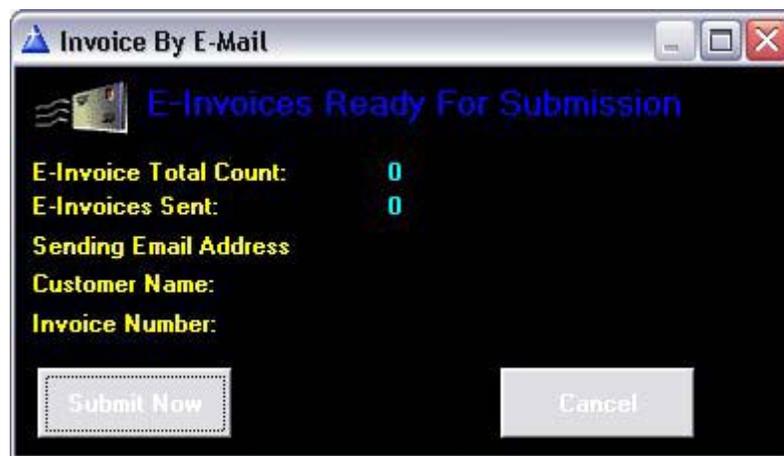
All other selections on this screen are standard to the recurring billing process and are described in the Alarm documentation manual.

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

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.

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 window titled "Set System Defaults" with a tabbed interface. The "Default GL Codes" tab is active. It contains five rows of input fields for GL codes and a "Taxable" dropdown menu. The values entered are: Late Charge GL Code: 10000-0001-2000; Write Off GL Code: 1000-0001-2001; Prepaid Credit GL Code: 2000-0001-0001; Discount Credit GL Code: 2000-0001-0000; Services GL Code*: 1000-0001-0003. The "Taxable" dropdown is set to "Y". A note at the bottom reads: "*GL Code And Taxable Status For Services Added As Text Items On Product Invoices".

Field	Value	Buttons
Late Charge GL Code	10000-0001-2000	[...]
Write Off GL Code	1000-0001-2001	[...]
Prepaid Credit GL Code	2000-0001-0001	[...]
Discount Credit GL Code	2000-0001-0000	[...]
Services GL Code*	1000-0001-0003	[...] Taxable [Y]

*GL Code And Taxable Status For Services Added As Text Items On Product Invoices

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.

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

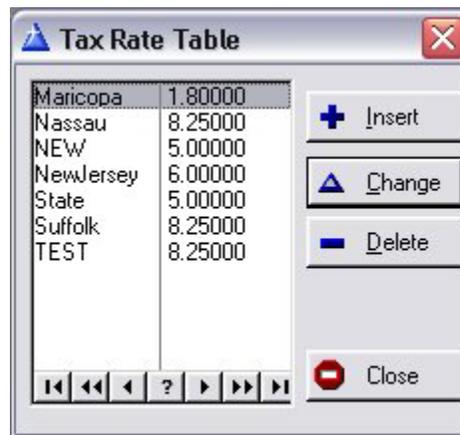
User Field Definition 1		Date Fields	
User Field Definition 2		User Field Definition 13	
User Field Definition 3		User Field Definition 14	
User Field Definition 4		User Field Definition 15	
User Field Definition 5		User Field Definition 16	
User Field Definition 6			
User Field Definition 7		Validated 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.

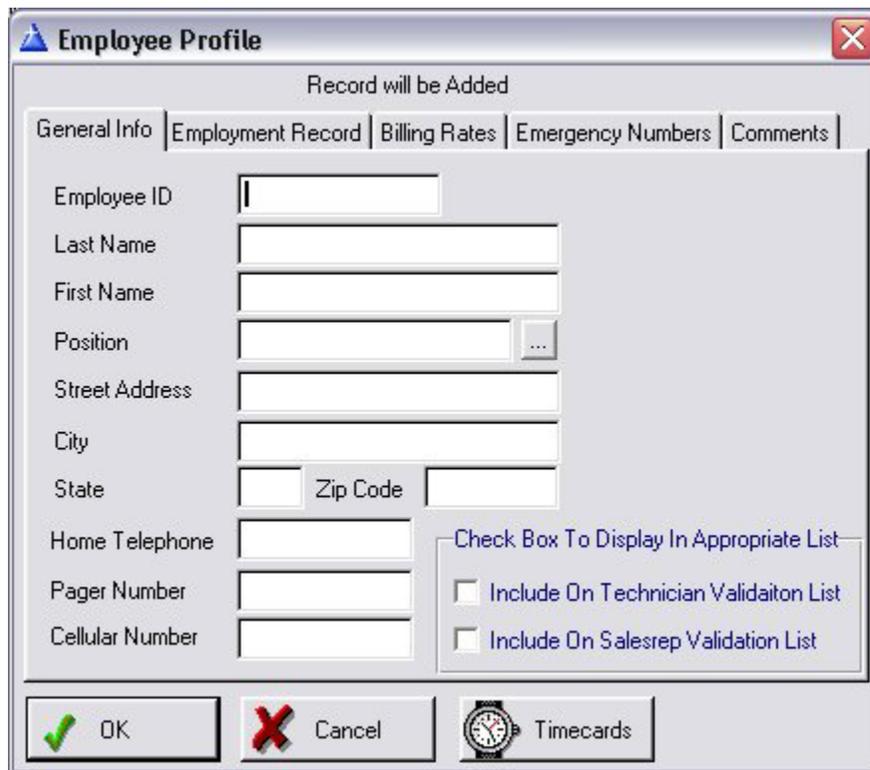
Municipal Name If you would like the sales tax report to breakdown the amount of sales tax charged/collected based upon each authority (ie: State/County/Local), then enter the different authorities that receive a percentage of the sales tax (up to 5 municipalities may be entered). This does not affect 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:

- 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.

At the bottom right of the form area, there is a section titled "Check Box To Display In Appropriate List" with two checkboxes:

- Include On Technician Validation List
- Include On Salesrep Validation List

At the bottom of the dialog, there 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.

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 currently selected), "Billing Rates", "Emergency Numbers", and "Comments". Under the "Employment Record" tab, there are several input fields: "Hire Date" with the value "2/15/94", "Social Security" with "873-23-9971", and "Date Of Birth" with "10/14/73". Below these is a section titled "Definable Fields" containing "Work Hours" (set to "8-4"), "Optional 2", "Optional 3", "Optional 4", and "Optional 5", each with its own input field. A "Setup Definable Fields" button is located to the right of the "Work Hours" field. 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 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 a tabbed interface with five tabs: "General Info", "Employment Record", "Billing Rates", "Emergency Numbers", and "Comments". The "Emergency Numbers" tab is currently selected and displays the following fields:

- First Emergency Contact Name:
- First Emergency Contact Phone:
- Relationship Of First Emergency Contact:
- Second Emergency Contact Name:
- Second Emergency Contact Phone:
- 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 clock 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.

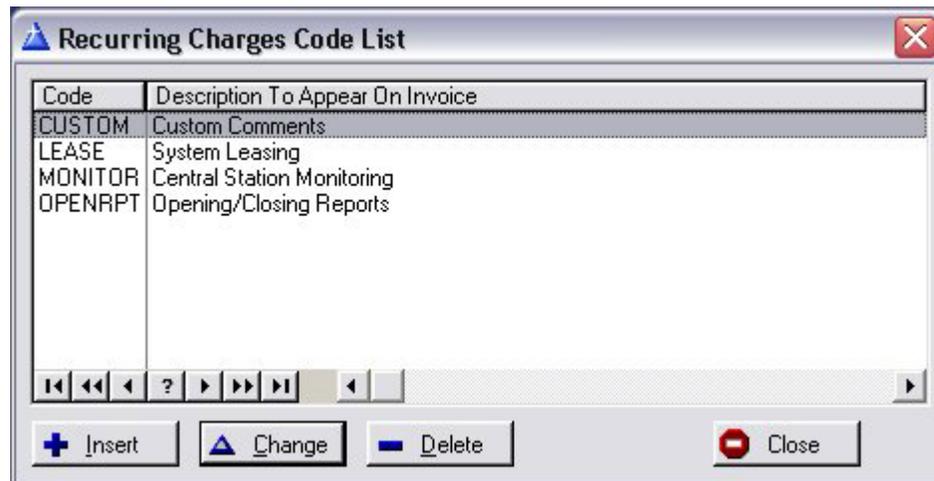
Invoice Categories

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.



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

KnowledgeBase Accesses the KnowledgeBase Log area. Used for storing common technical questions asked by your customers and the responses to those questions.

Window Select arrangement of open windows. Select active window from list of windows. Select About Program for current version information about program.

Keyboard shortcut - ALT + W

Help

On-line help system.

Keyboard shortcut - ALT + H

The following items are available on the taskbar:

Customers

Accesses the Customer Maintenance area (add/modify/delete customer records)

Keyboard shortcut - F2 Key

Tickets

Accesses the Service Ticket area (work orders)

Keyboard shortcut - F3 Key

Invoices

Accesses the Invoice Generation area to create new invoices:

Product Invoices - used for billing out service work and installations

Recurring Invoices - generates monthly billing

Statements

Generates past due notices (also included in Recurring Invoices)

Keyboard shortcut - F4 Key

Payments

Accesses the Post Payments and Post Credits areas.

Keyboard shortcut - F5 Key

Appointment

Accesses the Service Appointment Calendar (Monthly view of service appointments)

Keyboard shortcut - F6 Key

Inventory

Accesses the Inventory Maintenance area including receiving inventory and stock transfer.

Keyboard shortcut - F7 Key

Support Log

Accesses the Support Log area which tracks all customer calls and conversations, including detailed information on topics discussed, support problem and resolutions, etc.

Keyboard Shortcut – F8 Key

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

Some lists of information (inventory, equipment installed, rolodex, 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, click on the mouse button and move the cursor to change the width.

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 in the ALARM system can be copied to the clipboard. This allows you to

take any information and copy it to any other part of ALARM 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.

ALARM For Windows 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 ALARM For Windows 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 in ALARM, 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 ALARM 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 of ALARM.

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 move the screen while holding down the left mouse button. Release button when screen is in new position. 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 From ALARM

If you are using the password protection feature in ALARM, you will be asked to enter a USERID and PASSWORD in order to get into ALARM. The USERID and PASSWORD fields will not display the information being entered. Instead asterisk will be displayed instead. This is to prevent someone from seeing your login userid and 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 alarm. For example, the password ALARM is in all upper-case characters and therefore must be entered as such.

Entering Your First Customer - A Tutorial

The tutorial is placed before the chapters describing the ALARM 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 in ALARM, 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 ALARM.

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 later 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 to the ALARM system, 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

Certain 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.

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 steering wheel symbol for Recurring Charges
- 2) Click on the [...] button for charge number 1. 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.
- 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 date 01/01/96 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 End Date field.
- 8) Enter 7.00 in the Cost field.
- 9) We can now save this information by clicking on the OK button on the Recurring Charges screen. When we save the recurring charge screen, the customer account

screen is also automatically saved for us and 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. For information on those different areas, please refer to the appropriate chapter in this documentation.

All concepts of adding and modifying information throughout the ALARM system are consistent with the way you just entered a customer. Although the information being entered will vary from screen to screen, the ability to click on buttons with the mouse and the functions of those buttons 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 ALARM screen contain the major functions used in ALARM, 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.

Chapter 3: Customer Maintenance

Customer Maintenance

Account#	Customer Name	Telephone	Town	Street Address	Contact	Zip Code	Type	Status	Central Account
100	ABC Corporation	516-887-2343	New Hyde Park	993 Oak Lane	Larry Thomson	11040		Client	11-3939A
105	Koenig, Mr. And Mrs. John	516-887-2343	Hauppauge	832 Smithtown Blvd.		11789	COMM	Client	11-3422

Customer List Tabs The customer list screen now 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#

The Customer Maintenance function of ALARM 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, and contract expiration date, 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.

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.

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, as well as all future scheduled 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.

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 alarm. 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 ALARM 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

An unlimited listing of zones set up at the customers' site. Each zone record consists of the zone id, zone description, and alarm and restore codes.

ALARM LOG

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 ALARM Database System. These customers will appear in alphabetical order, and 13 customers will appear at a time. If there are more than 13 customers on file, 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. 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.

There are four additional methods which you may use to select a customer:

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)

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

Selecting the Central Acct# button will find a customer by the central station account number.

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)

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.

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

Customer File Maintenance - Smith Record will be Changed

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

Account: 100
Customer: Smith
First Name: John
Address: 777 North 1st Street
Address2:
City, State, Zip: Phoenix AZ 85024
TaxCode, MapID: Maricopa
Cross St.: 1st St. & Main
Contact1: John Smith Title: President Phone: 480-777-7777
Contact2: Title: Phone:
Active Since: 10/31/01 Closed Restrictions: None Fax: 480-444-4444

Other Bill-To: NO YES REVIEW
Late Fee: YES NO
Account Status: Client Type: COMM
Central Sta.: Rapid Response
Equipment:
Password:
Fire Prmt:

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

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.
(7 characters maximum)

CUSTOMER

Enter the customers' last name (if commercial account, enter the company name in this field).
(35 characters maximum)

FIRST NAME	Enter the Customer's first name (If a company, leave this field blank). (20 characters maximum)
ADDRESS 1	Enter the first line street address for this customer. (35 characters maximum)
ADDRESS 2	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)
TOWN	Enter the customer's city (25 characters maximum)
STATE	Enter the customer's State code (NY, CA, etc.) (2 characters maximum)
ZIP	Enter the customer's zip code (9 digit code allowed). (10 characters maximum including dash)
COUNTY	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)
CROSS STREET	Enter the nearest cross street to customers location.
CONTACT 1&2	Enter the name of the person(s) or department at this company. (maximum 25 characters)
TITLE 1&2	Enter the title of the above contacts (optional).
TELE #1&2	Enter the telephone number of the contacts above. Dashes are entered for you automatically.
MAP ID	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.
FAX NUMBER	Customer's fax phone number.
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.

C/S ACCT# 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.

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'.

ACTIVE SINCE Enter the date this customer was first serviced.

CLOSED 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.

RESTRICTIONS 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 blink on the upper left corner of this screen, as well as on the service ticket screen.

OTHER BILL-TO 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.

LATE FEE If this customer is to be charged a late fee for overdue payments, specify Y, otherwise select N.

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 of ALARM. The following fields are initially preset but can be changed if necessary:

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

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.

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, press CTRL-ENTER or press enter on the last field of the screen. If you wish to cancel this record without saving press CTRL-ESC.

Customer File Maintenance - Contacts/Rates Tab

This section allows you to keep track of up to 2 separate contracts for each customer, in addition to a 'prepaid' credit support policy. These service contracts are used by the Contract Analysis report, as well as for customer selection criteria within the Mail Merge section. You may define the names of each contract in the System Defaults area of the Utilities menu in the program.

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. This plan name will appear on the service ticket screen and also on the service ticket printout.

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.

An LED will 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 the contracts 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.

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 since deleting a customer and their related records will result in the removal of financial records and will cause inaccurate totals on your financial records.

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 (they will still appear on the customer list screen).

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.

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.

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.*

Alarm Call History Log

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.

Support Log

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.

Mailings (Correspondence Log)

Keyboard Shortcut: ALT + F12

The ALARM program will automatically keep a log of any correspondences that you generate to your customers from within the ALARM program. 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.

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:

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

Equipment X

Record will be Added

Part ID ...

Part Description

Install Date

Qty	Unit Cost	Price Each	Extended Price	Prob %
1.00	99.00	199.00	199.00	25.00

Category ...

Warranty Period

Serial No

Location

Secondary ID ▼

Print On Tickets ▼

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 ALARM. 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.

Press INS to add a part to this list, DEL to delete a part, or press ENTER to review or change a part. The equipment installed consists of the following fields:

PART ID Unique identification for this part. Part ID must already exist in inventory file.

PART DESCRIPTION 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.

DATE INSTALLED	Enter the date that this part was installed at the customer site. (Definable Field In System Defaults Area)
QTY	Enter the quantity installed for this part
UNIT COST	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.
PRICE EACH	This information will be displayed automatically. You may override this amount if desired.
EXTENDED	This information will be calculated automatically based upon the quantity and price each amounts.
SERVICE	This field represents the service contract cost for this part. This information will be displayed automatically. You may override the service cost if desired.
PART CATEGORY	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)
WARRANTY PERIOD	The warranty is displayed based upon the warranty on the inventory file for this part. You may override it if desired.
SERIAL NUMBER	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. (Definable Field In System Defaults Area)
LOCATION	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)
SECONDARY ID	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.

Contact List (Responsible Parties Notification)

Keyboard Shortcut: ALT + F9

Contact Notification

Record will be Added

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.

Service Reminders

Keyboard Shortcut: ALT + F6

Record will be Added

Reminder Number 2

Starting Date 11/01/2001

Schedule Time 10:00AM HH:MM

Service Code Inspection ...

Description Fire Alarm Inspection

Repeat Cycle Annual

Repeat Until 11/01/2010

Technician LARRYW ...

Create Ticket YES

OK Cancel

An integral part of ALARM 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, 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.
- SCHEDULE TIME** 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.
- SERVICE CODE** 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.
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.
- DESCRIPTION** 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.
- REPEAT CYCLE** 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.
- REPEAT UNTIL** 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.

TECHNICIAN

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.

CREATE TICKET

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 only when you press the PRINT TICKET button 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.).

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.

Zone Descriptions

Keyboard Shortcut: CTL + F2

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.

Customer Service History List (ALARM System Only)

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, as well as all future scheduled 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.

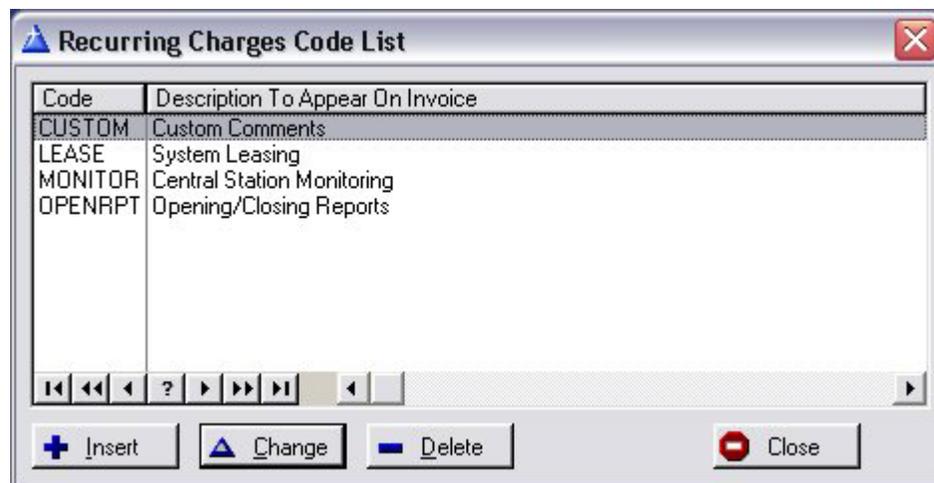
Adding/Viewing/Modifying Service Tickets

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 REVIEW SERVICE TICKET 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 'Create Service Ticket' button. The service ticket created will automatically be associated with this customer.

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).

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 customer's 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 or sent for credit card/debit transactions).

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), 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.

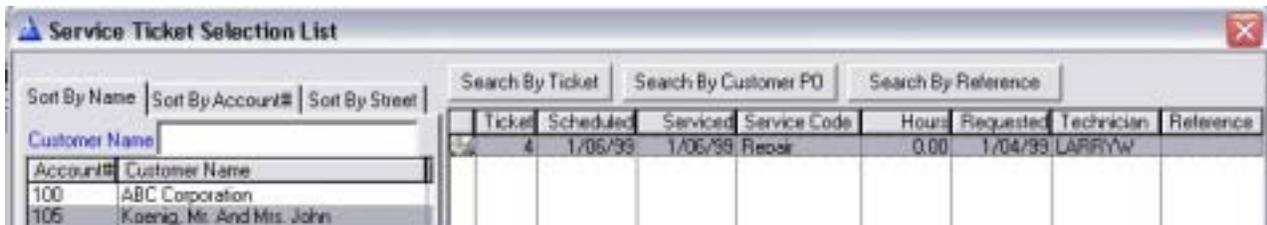
Depending upon the billing method selected, you may enter the credit card number and expiration date, checking/savings account number, email address or no further information may be required.

Chapter 4: Service Tickets

Service Tickets

One of the major features available in ALARM software 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 ticket area has undergone extensive changes to accommodate the capability for flexible service billing. You may now 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.



There are two new ways to search for a service ticket:

Search By PO

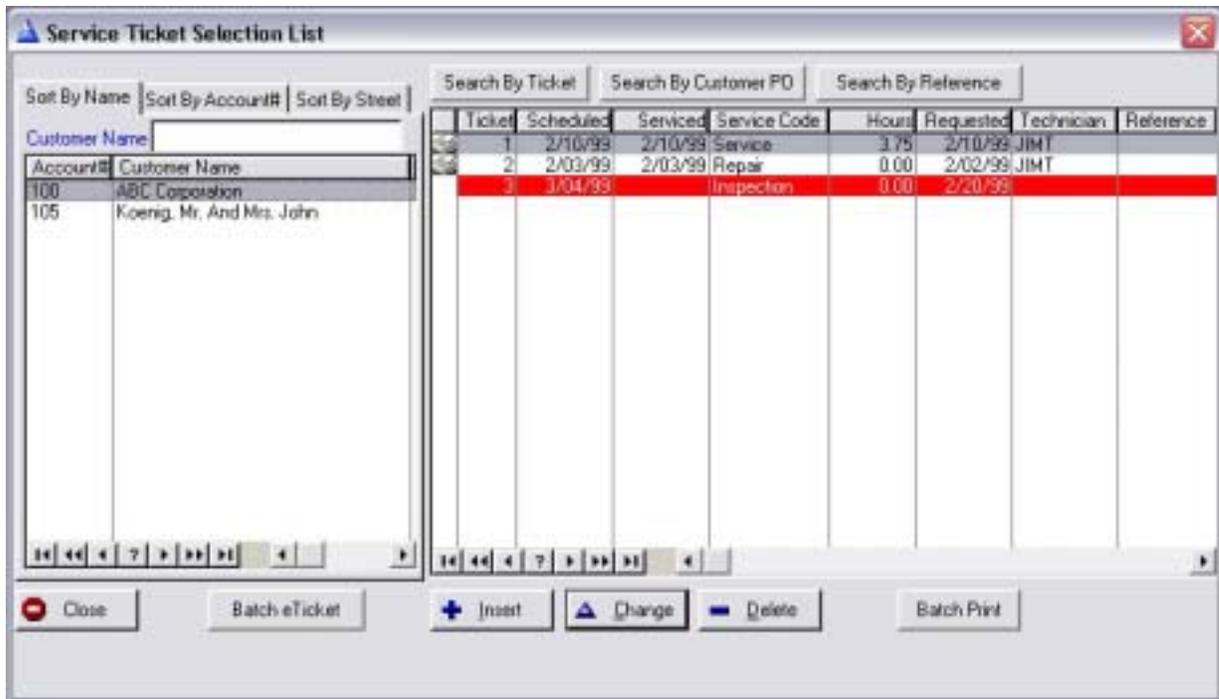
Click on this button to find a ticket based upon customer PO number

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.

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 Ticket - Koenig

Client: Since 2/10/99 Record will be Added OPEN

Contract Status: Monitor Service

Contract Started: Customer Information

Contract Expires: Customer: Koenig Account#: 105

Contract Type: Telephone: 516-887-2343 Map ID: I-15

Street: 892 Smithtown Blvd.

Town/State: Hauppauge NY 11788

Restrictions: **COD Only**

Service Schedule | Service Rates | Miscellaneous | User Defined

Ticket Number: 5 Appointment Time: [] (Enter As 12 Hr Or Military Format)

Date Received: 11/15/01 Time Range: []

Date Scheduled: 11/15/01 Service Code: []

Date Completed: [] Reference Number: [] eTicket

Service Requested: []

Service Performed: []

Buttons: OK, Cancel, Calendar, Time Cards, Notepad, Invoice, Repair List, Print Ticket, Printed

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:

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.

DATE SCHEDULED 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.

APPOINTMENT TIME Enter the time for the scheduled appointment.

TIME RANGE 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.

SERVICE CODE 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.

REFERENCE NUMBER

If you track preprinted service tickets with a different number than the number generated by the software, enter your ticket number in this field. Service tickets are searchable by reference number.

COMPLETED

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.

Service Ticket – Service Ticket Rates Tab

The screenshot shows a software window titled "Service Ticket - Koenig". At the top, it displays "Client Since 2/10/99" and "Record will be Added" with an "OPEN" button. The main area is divided into "Contract Status" (with "Monitor" and "Service" options) and "Customer Information" (including Customer: Koenig, Telephone: 516-887-2343, Street: 892 Smithtown Blvd., and Town/State: Hauppauge NY 11788). Below this are tabs for "Service Schedule", "Service Rates", "Miscellaneous", and "User Defined". The "Service Rates" tab is active, showing a table of rates with columns for category, name, and minutes. The categories include Standard, Overtime, Travel, and Under Warranty. A note states "This Area Not Available If Timecards Are Used". On the right side of the window, there is a vertical stack of buttons: OK, Cancel, Calendar, Time Cards, Notepad, Invoice, Repair List, Print Ticket, and a "Printed" checkbox.

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.

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.

OVERTIME RATE

Same as standard rate, however used to track overtime charges.

MINUTES

Enter number of overtime minutes for this service ticket.

TRAVEL RATE

Same as standard rate, however used to track for travel charges.

MINUTES

Enter number of minutes spent traveling for this service ticket.

UNDER WARRANTY

Indicate if this job is under warranty (will print on ticket and searchable on ticket report).

BILLABLE

Specify if this service ticket is billable.

Service Ticket – Service Ticket Miscellaneous Tab

Service Ticket - Koenig (Record will be Changed) OPEN

Client: Since 2/10/99

Contract Status: Monitor Service

Contract Started: _____

Contract Expires: _____

Contract Type: _____

Customer Information:

Customer: Koenig Account#: 105

Telephone: 516-887-2343 Map ID: I-15

Street: 892 Smithtown Blvd.

Town/State: Hauppauge NY 11788

Restrictions: **COD Only**

Service Schedule | Service Rates | **Miscellaneous** | User Defined

Requested By: [Text Box] Optional 1: [Text Box] Print On Ticket

Scheduled By: [Text Box] Optional 2: [Text Box] Print On Ticket

Customer PO: [Text Box] Optional 3: [Text Box] Print On Ticket

Hourly Rate: [Text Box] Hours: [Text Box] (Hourly Rate/Hours For Printing Only) Setup User-Defined

Service Requested: [Large Text Area]

Service Performed: [Large Text Area]

Calendar | Time Cards | Notepad | Invoice | Repair List | Print Ticket | Printed

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)**

HOUR 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 - Koenig". At the top, it indicates "Client Since 2/10/99" and "Record will be Changed". The "User Defined" tab is active, showing a grid of ten empty text input fields labeled "User Field 4" through "User Field 10". A "Setup User-Defined" button is located below the grid. To the right of the fields, there are buttons for "OK", "Cancel", "Calendar", "Time Cards", "Notepad", "Invoice", "Repair List", "Print Ticket", and a "Printed" checkbox. The background shows other tabs like "Service Schedule", "Service Rates", and "Miscellaneous", along with contract information for "Koenig" and a "Restrictions: COD Only" warning.

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.

Technician ID	Date	Standard				Overtime				Travel			
		Billable	In	Out	Total	Billable	In	Out	Total	Billable	Travel (Min)	Start M	
Total Labor Hours (Decimal Format):													
Billable Hours (Decimal Format):													

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.

Time Card Posting (Record will be Added)

Employee ID: JIMT Category: Repair
 Work Date: 2/03/99 Warranty Service: No
 Work Status: Completed Dispatch Status: Open

Standard Overtime Travel

Billable: Yes Billable: Billable: OK
 Standard: Standard1 Overtime: Overtime1 Travel: Travel1 Cancel
 Time In: 10:00AM Overtime In: Travel Time (Min):
 Time Out: 12:00PM Overtime Out: Starting Mileage: 0
 Total Time: 02:00 Overtime Total: Ending Mileage: 0
 Total Miles: 0

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:

- Technician** 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.
- Work Date** Enter the date the work is scheduled for.
- Work Status** 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.
- Warranty Service** This field tracks whether this timecard is for warranty (non-billable) work.
- Category** This field allows you to identify this timecard with a specific Category – which is searchable on the Technician Timesheet Report.
- Dispatch Status** 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).

- Billable** 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.
- Standard** 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.
- Time In** 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.
- Time Out** Enter the time the technician ended this job (HH:MM 24 hour format).
- Total Time** This field is calculated automatically based upon the Time In/Time Out values.
- Dispatch Status** 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.

Travel Time 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 customer's equipment list.

Repair/Install List (Service Install List)

Part ID	Part Description	Category	Qty	Labor	Billable	PO	Picked up	Status

Buttons: + Insert, Change, Delete, Close, Create Purchase Order

If you are using the inventory tracking feature of ALARM, 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.

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).

Create Invoice From Service Ticket

Select Invoice Type To Create:

Post Invoice To A Different Account:

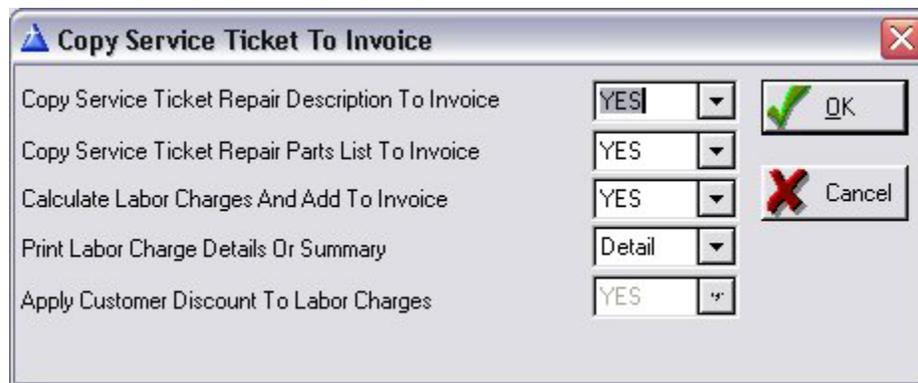
A service ticket is normally billed to the same account, however you may choose to bill this service

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:



Option	Dropdown	Button
Copy Service Ticket Repair Description To Invoice	YES	OK
Copy Service Ticket Repair Parts List To Invoice	YES	Cancel
Calculate Labor Charges And Add To Invoice	YES	Cancel
Print Labor Charge Details Or Summary	Detail	Cancel
Apply Customer Discount To Labor Charges	YES	Cancel

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.

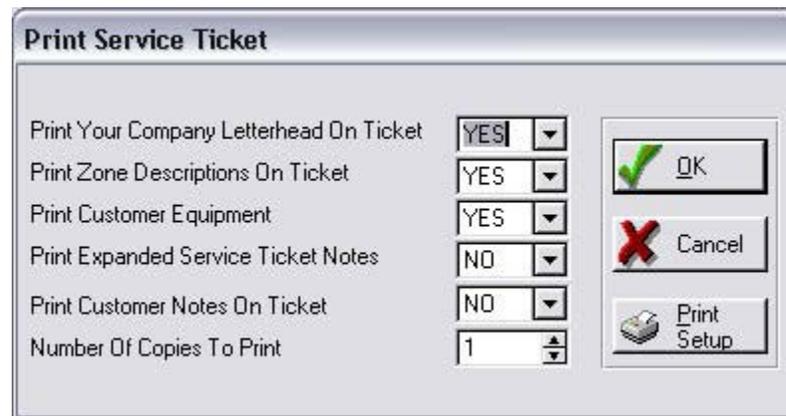
Copy Repair Parts List

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.



The image shows a dialog box titled "Print Service Ticket". It contains several options with dropdown menus and a "Number Of Copies To Print" spinner. On the right side, there are three buttons: "OK" (with a green checkmark), "Cancel" (with a red X), and "Print Setup" (with a printer icon).

Option	Value
Print Your Company Letterhead On Ticket	YES
Print Zone Descriptions On Ticket	YES
Print Customer Equipment	YES
Print Expanded Service Ticket Notes	NO
Print Customer Notes On Ticket	NO
Number Of Copies To Print	1

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'.

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:

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 that can be listed on a product invoice). The product invoice allows you to select parts from your inventory file and ALARM will do a price lookup for the invoice. If you are using the inventory tracking feature of ALARM, 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 by ALARM. 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 for ALARM.

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.

Part ID	Part Description	Qty	Unit Price	Dsc%	Extended Tax	
PA-KXT30865	Panas Door Intercom	1.00	55.00	20.00	44.00	Y
NT-IM110	Nutone Wireless Intercom	1.00	175.00	20.00	140.00	Y
1878	Gold Passive Infrared	1.00	35.00	20.00	28.00	Y

Sub Total	212.00
Sales Tax	3.82
Total Due	215.82

Buttons Available On This Screen

- Insert Item** Adds a new item to the product invoice
- Change Item** Allows you to change a detail item on the product invoice.
- Delete Item** Deletes a detail item from the product invoice
- Add Text** 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.

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 are 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.

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 be 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. ALARM 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, you may use a bar code scanner (wand or laser scanner) and the product id will automatically be inserted in this field when you scan the bar code. A price lookup will be performed and you may then click OK to post this item to the invoice. Using bar codes is a very fast and accurate way of posting items sold on an invoice.

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 of ALARM, 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 ALARM 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 ALARM 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, ALARM 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 appear 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 ALARM 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.

Printing Product Invoices

To print 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.

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.

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).

ALARM 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, ALARM 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 service invoices have 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 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.

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).

Late Fee / Late Rate	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.
Net Terms	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.
Late Period	Enter the number of days open until a late charge is applied.
Invoice Form	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.
Using Preprinted Forms	Select NO if you are using blank paper, otherwise select YES.
Print Statements with Recurring Invoices	Select YES if you want statements to be printed along with your recurring invoices.
Print Only Balance	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.
Sort Invoices By	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

Buttons: OK, Cancel, Print Setup

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 15th, 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.

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.

- 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, ALARM supports multi-account (dealer) invoicing. To set up an account for dealer invoicing, follow these steps:

In the customer maintenance section, enter the 'dealer' account number in the 'POST TO ACCT #' field for each customer account that is to be billed to the dealer. As you enter the dealer account number, a screen will pop-up to verify the dealer account. When asked in this window if the Bill-To account is a Dealer Account, answer 'YES'. Then save the customer record and do the same for any other 'work-site' accounts.

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. Only the first 2 recurring charges per work-site can be billed to a dealer account. You must make sure that a DEALER account is set up for recurring billing (amounts do not have to be entered, but the billing cycle and NEXT BILL date must be entered in the DEALER accounts' recurring charges screen). In addition, it is highly recommended that the DEALER account be set up for Monthly billing, even if the work-sites are being billed in various billing cycles. This insures that the dealer will be billed for all work-sites at various times.

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 ALARM 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 allow ALARM to 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.

- Remark If Account Current** Select a remark from the remark list that is to appear on only those statements where invoices are less than 30 days past due.
- Remark If Over 30 Days** 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.
- Remark If Over 60 Days** 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.
- Remark If Over 90 Days** Select a remark from the remark list that is to appear on only those statements where invoices are over 90 days past due.
- Starting Cust Account #** 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.
- Ending Cust Account #** 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.

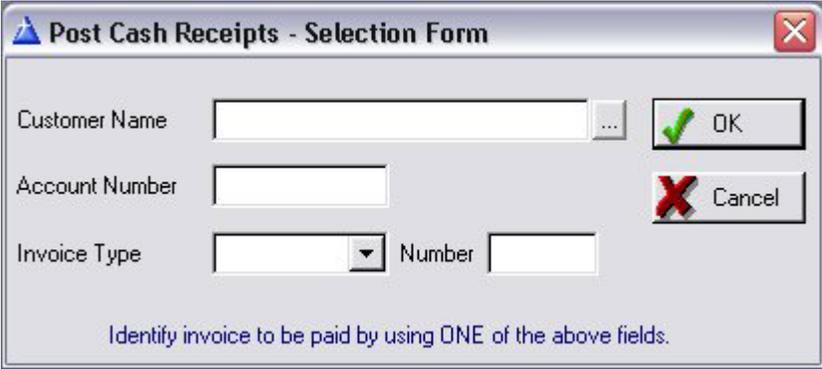
Chapter 6: Posting Payments

The Post Payments function of ALARM 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:

A screenshot of a Windows-style dialog box titled "Post Cash Receipts - Selection Form". The dialog box has a standard title bar with a blue triangle icon on the left and a red "X" close button on the right. Inside the dialog, there are four input fields: "Customer Name" (with a search button "..."), "Account Number", "Invoice Type" (a dropdown menu), and "Number". To the right of the input fields are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red "X" icon). At the bottom of the dialog, there is a blue instruction text: "Identify invoice to be paid by using ONE of the above fields."

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 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 customers 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.

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, S for Service) 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

ALARM 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.



ALARM 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 ALARM 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 ALARM 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 (with a selection button "...")
- Original Credit: 50.00
- Available Credit: 50.00
- Type Of Credit: DISCOUNT (dropdown menu)
- Overpayment: NO (dropdown menu) * Normally Default To NO
- Check Number: 1786
- Desc Of Credit: Discount
- Desc To Print: (empty)
- GL Code: 2000-0001-0000 (with a selection button "...")

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:

- 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).
- 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. Below this, a blue message states "Credits Posted Will Be Applied To Future Invoices." The dialog box contains the following fields and options:

- Credit Number: 1
- Credit Posted On: 11/21/01
- Only Apply After: (empty)
- Post To Account#: 105 (with a dropdown arrow)
- Original Credit: 50.00
- Available Credit: 50.00
- Type Of Credit: PREPAID (dropdown menu)
- Overpayment: NO (dropdown menu) with a note "* Normally Default To NO"
- Check Number: 1786
- Desc Of Credit: Prepaid Credit
- Desc To Print: (empty)
- GL Code: 2000-0001-0001 (with a dropdown arrow)

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:

- 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.
- 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

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:

- | | |
|-------------------------|--|
| Credit Number | This number is automatically assigned by the system. |
| Credit Posted On | This date will default to the current system date. You may override this date if necessary. |
| Only Apply After | 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. |
| Post To Account# | 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.

Original Credit	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.
Available Credit	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.
Type Of Credit	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.
Overpayment	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.
Check Number	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.
Desc Of Credit	Enter a description of what this credit is for in this field. This is used for documentation purposes only.
Desc To Print	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.
Invoice Styles	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 of ALARM allows the user to maintain a daily schedule of service appointments on the computer. In addition to being able to schedule service appointments from the customer service reminder list, you may also add any additional service reminders within the calendar itself. ALARM maintains an unlimited number of appointments per day.

The service appointment calendar is a monthly calendar that is displayed on your screen. From within this calendar, you can page forward and backwards in time to determine which appointments are scheduled, as well as histories of previous appointments.

Viewing Monthly Appointment Calendar

Once you select 'Appointments' button from the top taskbar, a monthly calendar for the current month will be displayed.



In addition, today's date (according to the computer's system date) will be selected automatically. Each day will show the total number of services schedules for that day, if any. To view your service schedules for this day, hit the enter key.

Buttons Available On The Appointment Calendar

The following buttons can be selected on the Appointment Calendar to perform specific functions:

Date Field Entering a date and press the TAB button displays the daily appointment list for that day.

Select Month

Left Arrow Scroll calendar back one month at a time
Right Arrow Scroll calendar forwards one month at a time

Select Year

Left Arrow Scroll calendar back one year at a time
Right Arrow Scroll calendar forward one year at a time

OK Brings up the daily appointment list for the day selected on the calendar

Cancel Exits from the Appointment Calendar

Today Brings up the daily appointment list for the current computer system date, regardless of which day is selected on the appointment calendar.

Holiday Allows special comment text (holiday names, special office situations, etc) to be placed under a particular day in the calendar.

Print Tickets Perform a batch print of service tickets for the date range specified by the user.

Print Schedule Print a list of appointments based upon a date range specified by the user.

The appointment calendar can be viewed for up to 50 years into the future or into the past and all appointments for those days are always available for viewing.

Printing Service Tickets In Groups

Selecting the PRINT TICKETS button 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.

Printing Appointment Schedules

Selecting the PRINT SCHEDULE button 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:

- Start Date** Enter the beginning scheduled date of appointments that are to be printed on the list.
- End Date** Enter the last scheduled date of appointments that are to be printed on the list.
- Appt Status** 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.
- Technician** 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.
- Town** 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.
- Service Code** To print out a listing of appointments that have the same service code, enter the service code in this field, otherwise leave blank.
- Account No** To print out a list of appointments that pertain to an individual account, enter the account number in this field, otherwise leave blank.
- Area MapCode** 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.

Adding an Appointment

To add an appointment to any day, select that day of the month with the cursor keys and then select OK. A list of appointments scheduled for that day will be displayed.



The daily appointment list may be sorted by the following methods by clicking on a sort tab:

Sort By Schedule Displays the list of daily appointments in chronological order (default)

Sort By Tech Displays the list of daily appointments in Technician ID order.

Sort By Category Displays the list of daily appointments in Service Code order

Buttons Available On The Daily Appointment List

Tech TimeLine Displays a graphic timeline indicating the hours each technician is scheduled to work on this particular day.

Tech Assignments Displays a list of timecards that represent the starting and ending time of each technician for all jobs on this day. Dispatch status for each technician may also be updated from within this function.

Pressing the Insert key will bring up the appointment data entry screen so that a new appointment can be entered. This screen consists of the following fields:

Service Appointment Record will be Added

Appointment | Appointment Additional Notes | User Defined

Customer Info

Service Information

Scheduled Date: 11/21/01
 Scheduled Time: 10:00AM
 Arrive Until: 11:00AM
 Date Completed:
 Technician: LARRYW
 Service Code: Install

Customer Information

Account#: 105
 Name: Koenig, Mr. And Mrs. John
 Street: 892 Smithtown Blvd.
 Town: Hauppauge
 Phone: 516-887-2343
 Make Ticket: YES

Description:
 OK Cancel

Appointment 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.

Scheduled Date Enter the date of the appointment in this field.

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.

Customer Acct # 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.

Customer Name 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.

Customer Town Normally filled in if you entered a customer account number previously, otherwise you can enter the town manually.

Customer Phone

Normally filled in if you entered a customer account number.

Service Code	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.
Description	You can enter a brief description of the type of appointment being scheduled.
Technician	You may assign a technician to respond to this appointment.
Create Ticket	If you would like a service ticket to be generated and printed for this appointment, then select YES. The service ticket will be generated when using the F9 key (Service Ticket Printing from within the calendar).

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.

Customer Info

Click on the customer info button to display the full customer maintenance screen for this customer.

View / Edit Appointments

To modify or view an existing appointment, select the appropriate day of the month and select OK. Highlight the appropriate appointment and click on the CHANGE button (or press ENTER). This will bring up the appointment data entry screen. You may changes to this information and select OK to save the changes, or select Cancel when you have finished reviewing if no information is to be saved.

View Technician Time Cards

You may view all scheduled time cards for a specific day by selecting the appropriate day of the month from the appointment calendar and selecting OK. When the list of appointments for that day is displayed, select the TECH ASSIGNMENTS button for time cards. You may update a time card from this section, as well as specify the current dispatch status of a technician. Time Cards displayed in this section are generally entered from within the service ticket section.

View Technician Schedule Time-Line Graph

If you need to determine which technicians are available during parts of the day, this Time-line graph is a birds-eye-view of which technicians are scheduled for work (based upon their time cards), and what blocks of time they are scheduled to work. To display the time line, select the appropriate day of the month from the appointment calendar and press enter. This will display all appointments for that day. Select the TECH TIMELINE button and within a few seconds a graph will be displayed showing the various work schedules for all technicians. Times of the day that are scheduled for work are blocked, and unscheduled times are open. If there are more technicians to

be displayed, press the up or down cursor key to scroll this list.

Deleting an Appointment

If you need to delete an appointment from the service appointment calendar, select the appropriate day of the month and press ENTER. A list of current appointments for that day will be displayed. Highlight the appointment to be deleted and press the Delete key to confirm the deletion. Select OK to delete the appointment, or select CANCEL to cancel the deletion.

Scheduling Holidays and Special Events

You may identify holidays and special events (CLOSED, VACATION, etc.) on the monthly appointment calendar by selecting the HOLIDAY button while on the appointment calendar monthly view. First highlight the day you wish to mark, then select the HOLIDAY button, enter the date and then type the name of the holiday or event which you want to have marked on that day then select OK. That day will now display the event/holiday that was posted. You may repeat this for any day(s) of the year you wish. This can be helpful when using the appointment calendar to schedule servicing so that your staff is aware of which days the office is closed so that appointments are not scheduled on those days.

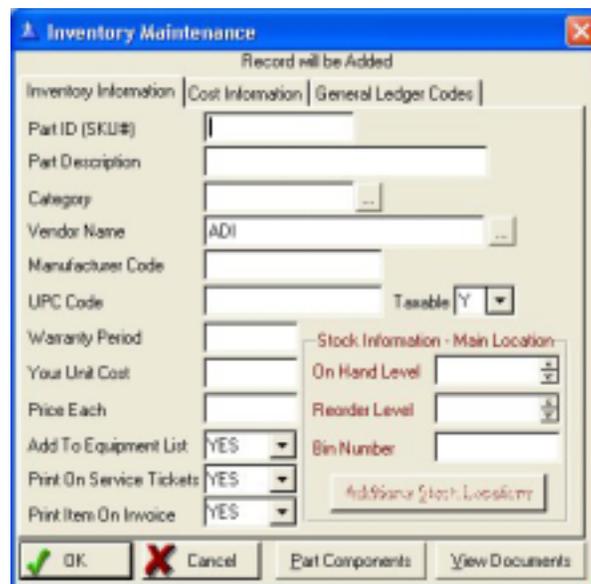
Chapter 9: Inventory Maintenance

So that it is easier to list equipment installed for each customer, an inventory file allows you to keep a list of all parts that you normally deal with. The inventory section also maintains a complete stock status for each item. It is recommended that the inventory file be set up before entering equipment lists for each customer.



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:

A dialog box titled "Inventory Maintenance" with a blue header and a close button. The title bar includes a small icon and the text "Inventory Maintenance". Below the title bar, it says "Record will be Added". The dialog is divided into three tabs: "Inventory Information", "Cost Information", and "General Ledger Codes". The "Inventory Information" tab is active. It contains several input fields and dropdown menus: "Part ID (SKU#)", "Part Description", "Category" (with a dropdown arrow), "Vendor Name" (with "ADI" entered and a dropdown arrow), "Manufacturer Code", "UPC Code", "Warranty Period", "Your Unit Cost", "Price Each", "Add To Equipment List" (dropdown menu with "YES" selected), "Print On Service Tickets" (dropdown menu with "YES" selected), and "Print Item On Invoice" (dropdown menu with "YES" selected). On the right side, there is a section for "Stock Information - Main Location" with "On Hand Level" and "Reorder Level" (both with numeric input fields and up/down arrows), and a "Bin Number" field. Below this is a button labeled "Add Stock Location". At the bottom, there are buttons for "OK", "Cancel", "Part Components", and "View Documents".

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.
VENDOR NAME	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.
WARRANTY PERIOD	Enter the manufacturers warranty period such as '1 year', '90 days', etc.
YOUR UNIT COST	Enter the amount it costs you to purchase this part. If you purchase from several distributors at various prices, then enter the average cost.
PRICE EACH	Enter the amount you normally charge your customers for this part. This amount can always be overridden on the customer's equipment list.
CONTRACT PRICE	If you determine your service contract prices based upon the value of equipment installed, then enter the price you charge on the service contract if this part is installed. The total contract price will appear on the customers' detailed equipment list, giving you an indication of what to charge for the service contract.
Add To Equipment List	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'.
Print On Service Tickets	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.
Print On Invoice	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.

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 dialog box titled "Inventory Maintenance" with a close button (X) in the top right corner. Below the title bar, it says "Record will be Changed". There are three tabs: "Inventory Information", "Cost Information" (which is selected), and "General Ledger Codes". A blue text label reads "Cost Information Is Used For Job Costing Report Calculations". Below this, there is a section titled "Unit Cost Breakdown" containing a table of input fields:

Part Cost Breakdown	<input type="text" value="38.00"/>	Part Price Breakdown	<input type="text" value="60.00"/>
Labor Cost Breakdown	<input type="text" value="7.00"/>	Labor Price Breakdown	<input type="text" value="15.00"/>
Unit Cost Total	45.00	Unit Price Total	75.00

Below the table is a "Contract Price" field with a value of "0.00". At the bottom of the dialog box are four buttons: "OK" (with a green checkmark), "Cancel" (with a red X), "Part Components", and "View Documents".

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).

Tracking Inventory In Multiple Locations

ALARM has the capability of keeping track of inventory that is located in additional locations (such as in your trucks, other office locations, 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 of ALARM (must be selected in the Set Company Header section of the Utilities menu), then whenever an item is listed on a product invoice, the ALARM system 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:



Part ID (SKU#)

The part id field will already be filled in with the part id for this part.

Location Name

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.

Stock On-Hand

Enter the current stock count at this location for this item. This should only have to be entered once. The ALARM system 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 for ALARM).

Reorder Level

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.

Bin Number

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
- 1 infrared detector
- 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.
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 an 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.

Transferring Stock Between Stock Locations

If you are using the Inventory Tracking feature of ALARM 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, or vica versa. Although you could adjust each items on-hand stock count manually, using this feature is much easier and more accurate.

If your parts are bar coded (or you have added your own bar code labels), then you may easily transfer stock between locations by scanning the bar code and then selecting what location to transfer the stock to, along with the quantity being transferred.

The Transfer Stock feature is selected from the Inventory button on the top taskbar. Once this is selected, data entry screen will appear asking you to enter the following information:

Part ID	Enter the 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.

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.

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.

Transfer Now If you wish to continue with this transfer, then select 'YES'. To abort this transfer process, select 'NO'.

You may continue entering other parts to be transferred, or select Cancel 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 Transfer Inventory section.

Select Transfer Inventory from the Inventory Menu. When the Transfer Inventory screen appears, select the TRANSFER ALL STOCK 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:

Do You Wish To Continue With Transfer Select YES to continue with transfer Select NO to exit without transferring.

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.

Receiving Stock Into Inventory

NOTE: If you are using Purchase Orders, DO NOT USE THIS FUNCTION.

If you are using the Inventory Tracking feature of ALARM, you should update your on-hand stock levels anytime items are purchased and put into your inventory. A history of purchased items are maintained by ALARM and an inventory purchase history report may be printed in the report facility.

The Receiving Stock feature is found on the Inventory Maintenance Menu. When you select this item, a screen will appear with the following fields:

Part ID 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.

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.

Vendor Name

Enter the name of the vendor this part was purchased from. The vendor name will remain on the screen for each part you receive into inventory during this session, until you change it.

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.

Once you have pressed TAB on the Qty Received field, your inventory on-hand stock level will be increased by the quantity entered.

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.

If you need to receive stock into an inventory location other than the MAIN location (which is where the inventory is received into), then you should go to the Transfer Inventory section once you have finished receiving the inventory and transfer stock between locations.

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.

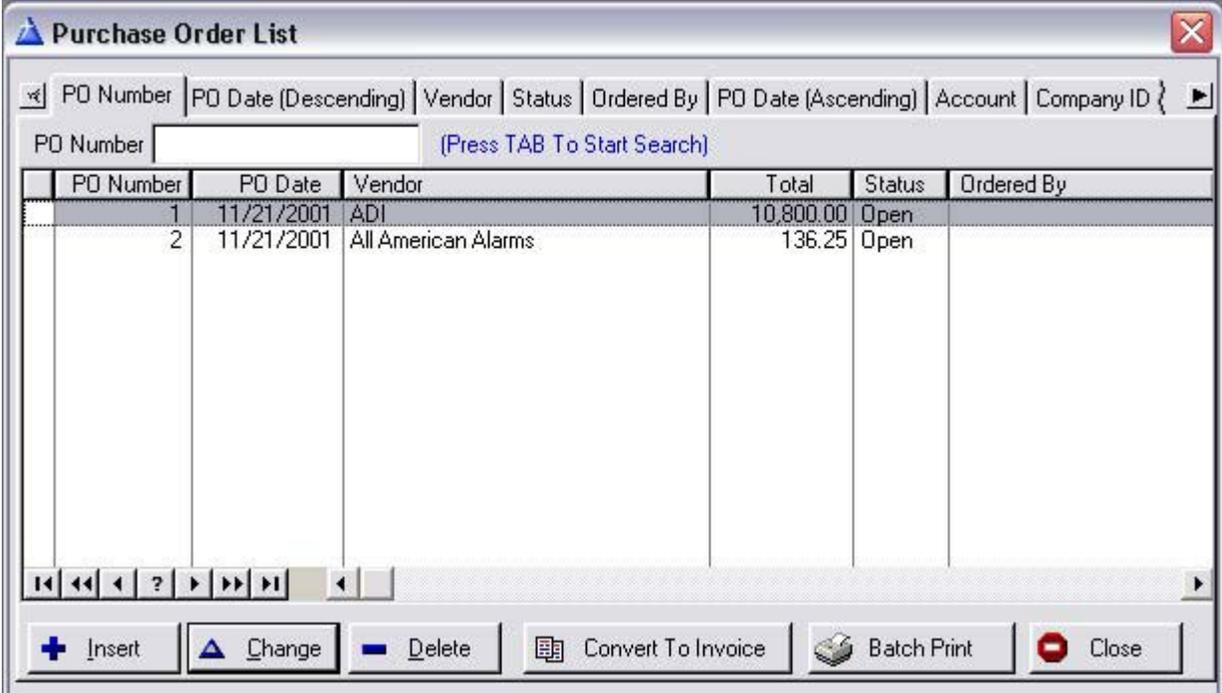
Full length text descriptions may be included in the body of the purchase order, and parts placed on the purchase order include their part number, part description, and your cost – all of which may be overridden at any time.

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:



The screenshot shows a software window titled "Purchase Order List". At the top, there is a search bar with a dropdown menu containing "PO Number", "PO Date (Descending)", "Vendor", "Status", "Ordered By", "PO Date (Ascending)", "Account", and "Company ID". Below the search bar is a text input field for "PO Number" with the instruction "(Press TAB To Start Search)". The main area contains a table with the following data:

PO Number	PO Date	Vendor	Total	Status	Ordered By
1	11/21/2001	ADI	10,800.00	Open	
2	11/21/2001	All American Alarms	136.25	Open	

At the bottom of the window, there is a toolbar with several buttons: "Insert" (with a plus sign), "Change" (with a triangle), "Delete" (with a minus sign), "Convert To Invoice" (with a document icon), "Batch Print" (with a printer icon), and "Close" (with a red X icon). There are also navigation arrows and a help icon (question mark) above the toolbar.

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 based on a data range or purchase order number range.
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.

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:

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.

The screenshot shows a 'Purchase Order' window with the following fields and data:

- Vendor: ADI
- Ship To: Customers
- Purchase Order Date: 11/07/01
- Purchase Order No.: 8001
- Remark: 2
- Terms: Net 30
- Ordered By: Rod
- Reference: 1526582525

Part ID	Part Description	Ordered	Rcvd	Unit Cost	Extended	BackO
450	Ultrasonic Motion Detector	1.00		45.00	45.00	
OP-SU200	Optex Solar Panel	1.00		116.50	116.50	
AD-155	Ademco Vista Panel	17.00		99.00	1,683.00	
RP1016D	Napco Designer Keypad	10.00		99.00	990.00	

Buttons on the right: + Insert Item, Change Item, Delete Item, Add Text, Blank Line.

Bottom bar: OK, Cancel, Print, Received All, Total 2,834.50, Printed , Ticket:

Purchase Order Date Defaults to today's date. You may modified the date.

Purchase Order Number Purchase Order number automatically sequenced.

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.

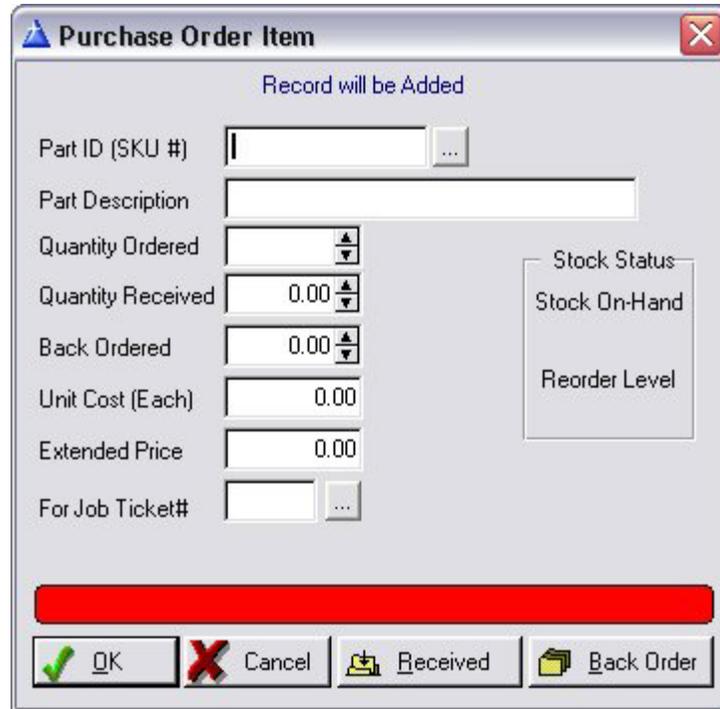
Buttons Available On Purchase Order Entry Form

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 be 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.
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:



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.

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.
Unit Cost (Each)	Enter your cost to purchase this item (each). This field is automatically filled-in based upon your cost field on the main inventory file.
Extended Price	This field is automatically calculated based upon Quantity Ordered * Unit Cost.
For Job Ticket#	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.
Stock Status Box	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

OK	Adds the item entered onto the Purchase Order Form.
Cancel	Cancels the current item ordered and returns back to the Purchase Order form.
Received	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.
Back Order	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 Purchase Orders

A Purchase Order may be printed (or reprinted) 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.

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
12/06/01	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:

Sort By Disposition	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.
Sort By Company	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.
Sort By Priority	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 #.
Sort By Date	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.
Incoming	Display only support call entries marked as 'Incoming'
Outgoing	Display only support call entries marked as 'Outgoing'
Tech	Displays support call entries starting with a specific Technician ID.
Status	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.

The screenshot shows a software window titled "ABC Alarm Corp. Support Call". The window contains several input fields and buttons. At the top left, the word "Client" is displayed in green. A red status message "Record will be Added" is visible. The form includes fields for Call Date (12/06/2001), Call Time (9:12AM), Call Length (00:00:36), Priority (2), and Disposition (Open). There are also fields for Credits Used, Call Status (Sales), and Contract Expiration Status (Monitor, Service, PrePaid). Below these are fields for Company (ABC Alarm Corp.), Support Technician (LARRYW), Spoke To (John Smith), and Telephone (515-777-7777). A "Schedule Follow Up (Optional)" section includes a Follow Up Date field and a Reason For Follow Up field. At the bottom of the window is a "Notes Of Conversation" text area and a toolbar with icons for OK, Cancel, Date/Time Stamp, Phrases, Send Letter, and Customer Info.

The following fields are available on the Support Call Entry screen:

- Account Status** Appearing in the upper left corner, this indicates the Customer's current account status (Client/Prospect/Dealer/Other...)
- Call Date** Automatically defaults to today's date but may be modified while still in Add mode.
- Call Time** Automatically defaults to the current time when a support call is entered.
- Call Length** 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.
- Priority** Specifies level of importance for this call. Priority levels 1 (Highest Priority) to 4 (Lowest Priority). User-Definable default setting in System Defaults.

Disposition	Marks call as Open/Closed/Other. Open calls remain on top of Support Call Log for 'auto-escalation' of open calls.
Incoming/Outgoing	Indicates if call was incoming or outgoing (initiated by you).
Credits Used	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.
Call Status	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.
Company	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.
Support Technician	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.
Spoke To	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.
Telephone	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.
Notes Of Conversation	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.
Follow-Up Date	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.

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.

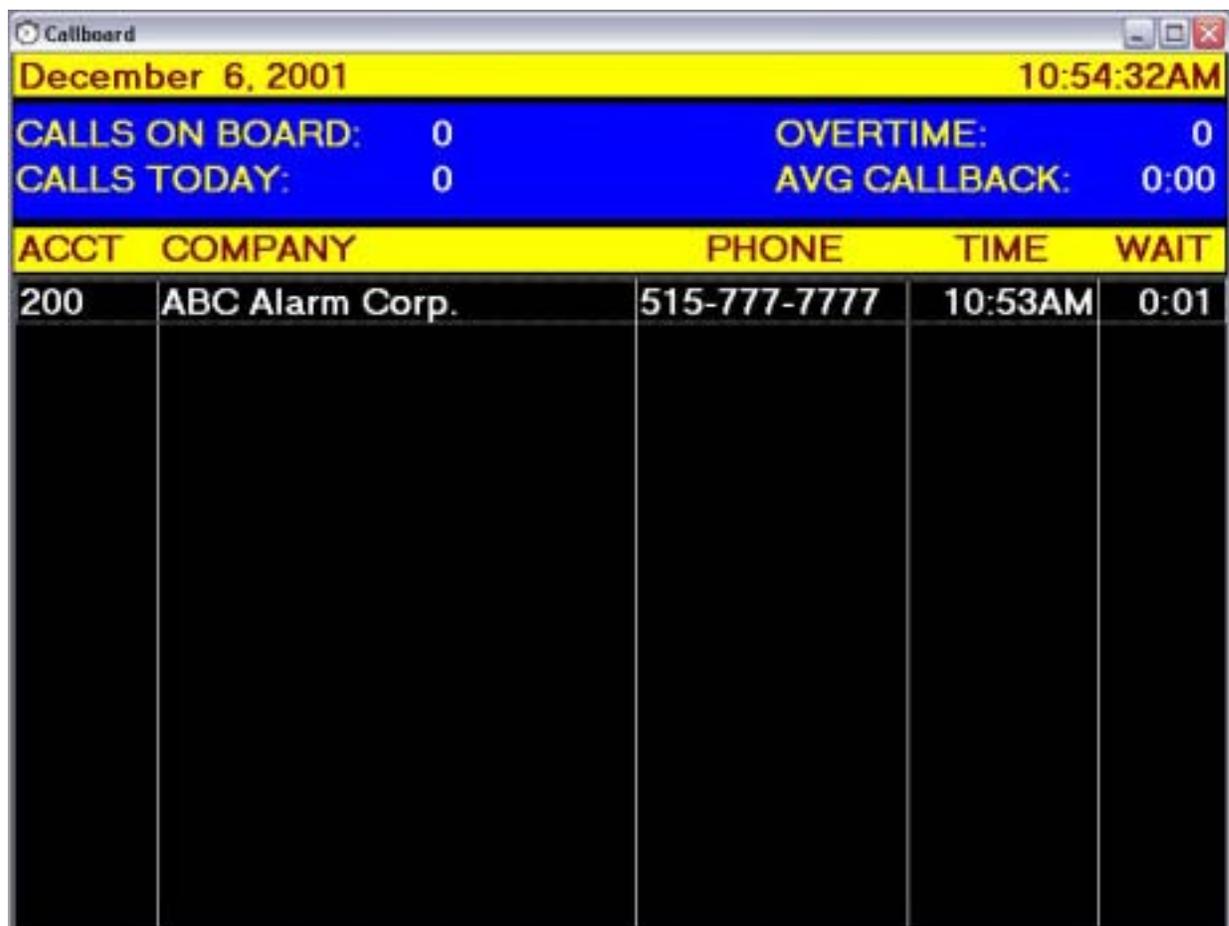
Support Log Whiteboard System

Alarm 5.0 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 of Alarm 5.0.

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 ALARMWIN 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 call statistics: "CALLS ON BOARD: 0", "CALLS TODAY: 0", "OVERTIME: 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 ALARM. 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):

Cancel	Exits out of the report display screen.
Print	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.
Zoom	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.
Previous Page	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.
Next Page	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.
Jump	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 ALARM. ALARM 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 (this allow reports, tickets, and invoices to be faxed directly from within the ALARM program).

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.

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:

- All** All customers within the system will be printed.
- Billing Cycle** 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.
- By Bill Month** 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.
- Closed Accounts** Select this item to print out only closed accounts.
- By Central Station** Select this item to print out customers assigned to a specific central station.
- By Bill-To Account** Select this item if you want to print out what customers are billed to a specific account.
- By Partial Account** 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.
- By County** 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:

- All** All customers on file will be printed, one page per customer.
- Specific Customer** Print a detail report for one customer only
- Central Station** 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:

- Starting From - To** Enter the date range based upon the service appointment date.
- Job Status** 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).
- Billing Status** 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.
- Print Repairs** Select YES if you want to print the Repair Performed descriptions from each service ticket appearing on this report, otherwise select NO.
- Print Invoice Amount** 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:

- All** Print all service tickets within the above parameters.
- Specific Customer** Print service ticket history for an individual customer.
- Specific Technician** Print service tickets assigned to a specific technician within the above parameters.
- Specific Category** 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

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

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.

- Customer Account Number** 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.
- Effective As Of** 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.
- Purpose Of Notice** 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.
- Print Passcode On Notice** 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.
- Using Letterhead Paper** If you are using your own letterhead for the notice, select YES. If you are using blank paper, then select NO.
- Print Copy For Customer** 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).
- Signature Required** 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).
- Print Copy For Office** If you would like a copy of the disconnect notice for your own files, select YES.
- Special Comments** You may type up to 10 lines of special comments that will appear on this notice. This comment will be printed on all copies.

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:

All	All counties will appear on the sales tax report.
Recurring Invoices	Print sales tax totals for only recurring invoices
Service Invoices	Print sales tax totals for only service invoices.
Specific Category	Print sales tax totals for service invoices categorized with a specific category code.
Specific County	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.

Send Report To	Send report to screen or print.
Next Billing	Enter the billing date range.
Select Sort Field	Select Customer Name or Customer Account
Select Report Filter	Select report filter. <i>By cycle</i> <i>By method</i> <i>By code</i>

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 ($\$20/\text{month} * 24 \text{ months left}$).

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 DBASEIII or ASCII file format for merging into your existing word processing program, creating a fax list for broadcast faxing (compatible with the www.efax.com service), 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.

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 DEARthe 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).

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.).

Label Name/Description	Enter a unique name and a description for this label (Ex: Avery 5160)
Page Width/Height	Enter the size of the label sheet (usually width=8.5, height=11.00)
Label Width/Height	Enter the size of width and height of one of the labels on the page.
Top Margin/Left Margin	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).
Print Contact Name	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.
Font Size	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.
Print Mode	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:

DOCUMENT TYPE	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 DBASEIII or ASCII file formats. If you select Export to DBASEIII or ASCII, 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).
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The faxlist selection will create a file named 'FAXLIST.'

For Email campaigns, you may choose either the Email or Emailclp 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 of 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.

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.

Customer Town

Enter the name of the town to search for customers in that town.

Customer State

Enter the 2-characters state code to search for customers in that state.

County Name	Selects customers that live in a specific county. Select from drop-down list.
Account Type	Select from the drop-down list (Client/Prospect/Dealer/Other/Dead).
Property Type	Select from the drop-down list (Res/Comm/Othr)
Central Station	Allows you to select only those customers that are assigned to a specific central station.
Contract 1 & 2 Type	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.
Prepaid Credits	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.
Company ID (optional)	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

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: |
Sort By: CUSTOMER | Lower Case: NO | Use Bill-To Address: Yes

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).

Post-To Acct Range	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.
Credit Card Expiration	Allows you to find customers whose credit cards have or will be expiring within the date range entered.
Recurr Code	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.
Billing Cycle	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.
Late Fees	Find customers that have either Y or N value in the Late Fee field.
Billing Method	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

Buttons: OK, Cancel, Display Merge List

Tabs: 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 searched 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 field's 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).

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 ALARM 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	ABC Alarm Company	Late Fee	5.00 Balance Below Minimum
Street	777 North 1st Street	Min Balance	300.00
Street 2		Late Rate	18.00 Balance Above Minimum
City	Phoenix	Net Term	30 Days (Default=30)
State	AZ	Zip Code	85024
Phone 1	777-777-7777	Late Period	28 Days (Default=28)
Phone 2	777-777-7777	Invoice Form	LASER
License#		Statement Form	LASER
Merchant#		Print Barcode On Invoice	NO
Country	United States	Using Preprinted Forms	N
Activate Password Protection	NO	Print Statements With Invoices	YES
Track Stock In Inventory	YES	Print Balance Forward Only	NO
Multi-Location Inventory	YES	Recurring Invoice Sort	ACCOUNT

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.

Record will be Added

User ID

Password

Supervisor Access Level * YES

Track Program Usage YES

Backup Reminder (Days) 0 (0=Off)

* Only Supervisors May Add/Modify/Delete Security Profiles

Customer Access | Service Access | Invoice Access | Management Reports

Select YES for levels user can access

Check Box To Restrict Access

Level	YES	Add	Modify	Delete
Customer Maintenance	YES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add'tl 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"/>
Tax Table	YES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

Important Notes Regarding Security Administration

It is HIGHLY recommended that access to tax tables, general ledger codes, and invoices be restricted to ADD mode only. Once added and used, these items should never be modified or deleted unless there is a good reason.

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 ALARM what userids are valid and their passwords. ALARM 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 ALARM program. The security administration screen consists of the following information:

User ID Mandatory	Enter a user id that needs to be entered to have access to ALARM.
Password Mandatory	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.
Supervisor	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.
Track Program Usage	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.
Backup Reminder	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.
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.
Service Access Tab	Clicking on this tab displays a screen containing security levels for the various Security Management functions of the software.
Invoice Access Tab	Clicking on this tab displays a screen containing security levels for the various Invoicing functions of the software.

Management Reports Every management report available in the system is selectable for authorized/unauthorized access.

Financial Reports Every financial report available in the system is selectable for authorized/unauthorized access.

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.

Automatic Rate Increase

The ALARM system 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:

Increase Percent OR Amount You may increase your customers billing rate by a percentage or by a set dollar amount.

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.

Service Type to be Adjusted 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.

If you do not want to differentiate by service types, then select ALL.

Only customers due for increase 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'.

Adjust Rate Increase Date 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.

Increase reminder date by 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.

Print customers being adjusted If you would like to get a printout of the names of all customers being adjusted by the utility, then select 'YES'. It is HIGHLY 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 to DOS.

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 The ALARM program can interface with the QUICKEN Accounting program. QuickLink works by taking payments that you have already posted into ALARM and transferring them over to your bank account in QUICKEN. Please refer to the QUICKLINK instructions included at the end of this documentation for further information.

LOGLINK

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.

EXPORT ALARM FILES

If you ever need to export any information that you have entered into the ALARM program to a file format that can be used by other programs, then select this option. You can export the major ALARM data files to an ASCII file format, which is a common format for most programs to recognize. This can also be accomplished in the Mail Merge section.

DOWNLOADER XFER

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.

DIRECT DEPOSIT

Z-Microsystems offers a unique service to our customers that allows you to accept payments from your customers through the use of 'Direct Deposit'. Direct Deposit is the process where payments are transferred from your customers' checking account into your bank account automatically the same day each month/quarter, etc. This can considerably reduce the time necessary to send out invoices and post payments. If you would like further information on this service, please give us a call.

IMPORT ADI CATALOG

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

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.

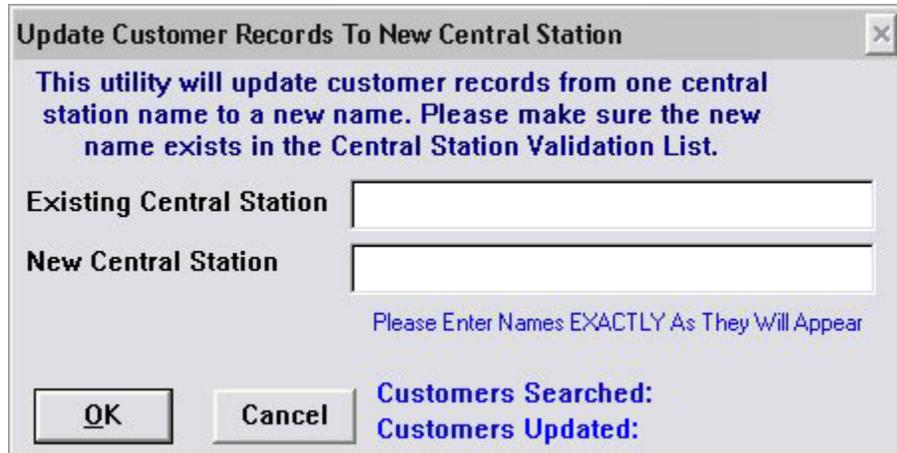
Import Dbase Customer If you wish to import basic customer data into the system, you may do so by creating a DbaseIII file with information from your existing program, then run this utility to load the CUSTOMER file with your customer data. The following is a definition your DbaseIII file should be in 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

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:

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 says "Please Enter Names EXACTLY As They Will Appear". At the bottom, there are "OK" and "Cancel" buttons, and two labels: "Customers Searched:" and "Customers Updated:".

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, there are two buttons: "Copy" (with a green checkmark icon) and "Cancel" (with a red X icon).

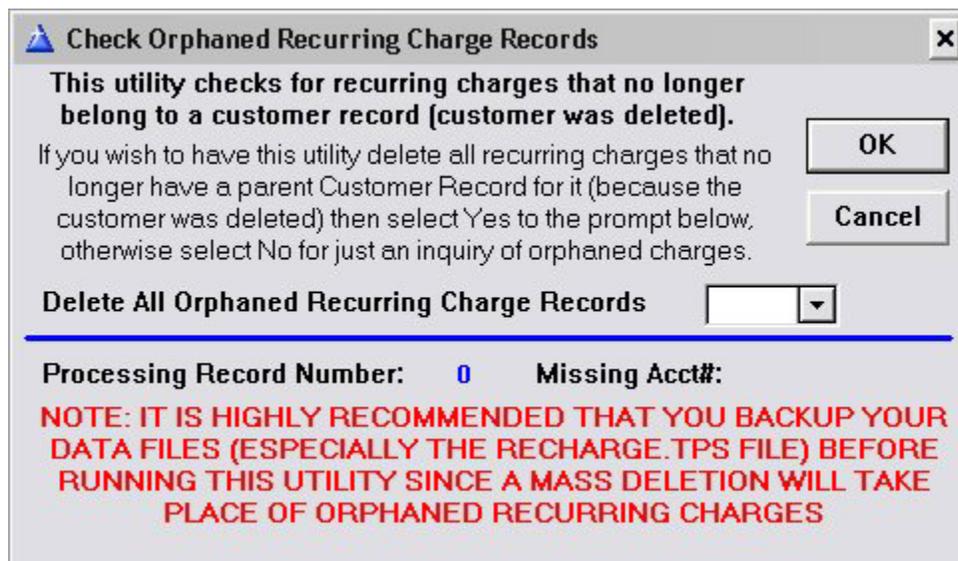
Email Address Field Move

Since previous versions of Alarm did not have a dedicated email address field, most users use 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

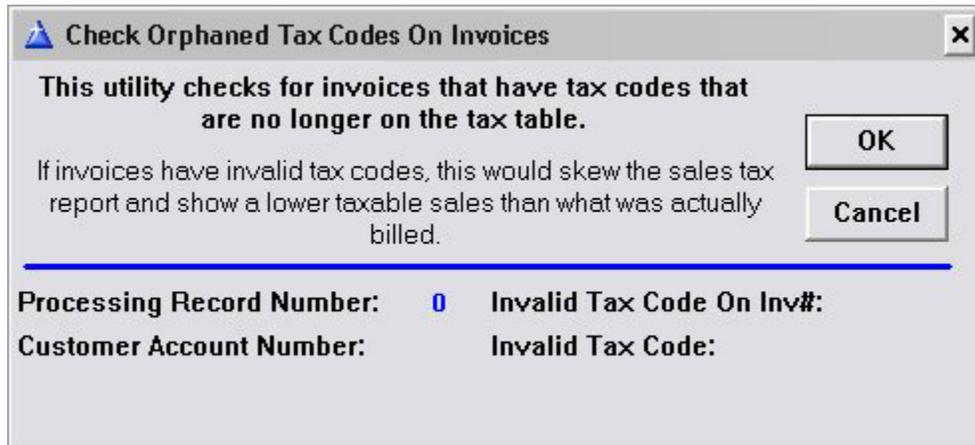
This utility has been added as a maintenance routine, in case you find recurring charges that do not belong to any customer. By running the utility, you will be notified of any recurring charges that are still on file, but do not have a particular customer to focus the charges upon.



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 of ALARM. 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 ALARM 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 of ALARM 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 ALARM 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. Please call Z-Micro Technologies if you would like further details on this feature.

Archive/Purge Utility

Once you have been using the Alarm for Windows software for many 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 Alarm 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.

Archive / Purge Utility

The Archive/Purge utility scans account histories and allows you to remove outdated records that you no longer need to have on the main database for day-to-day review. Archiving once a year will improve system performance. Normally keep 2 years history.

Only closed invoices and inactive customers without open balances will be archived
Archives may be reviewed by copying and running ALARMWIN.EXE in the Archive directory

ALL WORKSTATIONS MUST BE OUT OF PROGRAM BEFORE RUNNING

PERFORM A BACKUP OF YOUR DATA BEFORE ARCHIVING!

Perform Archive	NO			Archiving	out of	Status
Inactive Customers	NO	Archives ALL inactive customers		Archiving	out of	Status
Invoices/Payments	NO	Dated		Archiving	out of	Status
Service Tickets	NO	Dated		Archiving	out of	Status
Appointments	NO	Dated		Archiving	out of	Status
Alarm Call Log	NO	Dated		Archiving	out of	Status
Support Call Log	NO	Dated		Archiving	out of	Status
Correspondence Log	NO	Dated		Archiving	out of	Status

Start Archive Cancel

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 Alarm is not being accessed. Always Run The Archive From The SERVER Computer or your main Workstation where your Alarm for Windows 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. 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 Alarm 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 the Alarm program during the archive process.

Always run the Archive from either server (main) computer or the desktop where the Alarm for Windows data resides. This again, is the computer where your Alarm 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.						
PAST DUE WARNING						
Customer Is Over 30 Days Past Due						Last Paid Last Amt
Current	0.00	Over 30	0.00	Over 60	0.00	Over 90 19.21
Services Scheduled Within 120 Days						
Appt Date	Completed	Code	Description	Assigned To		
11/01/01		Inspection	Fire Inspection	LARRYW		
OK						

The top-half of the reminder screen will display only if an outstanding balance is found. 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 ALARM system). 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.

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.

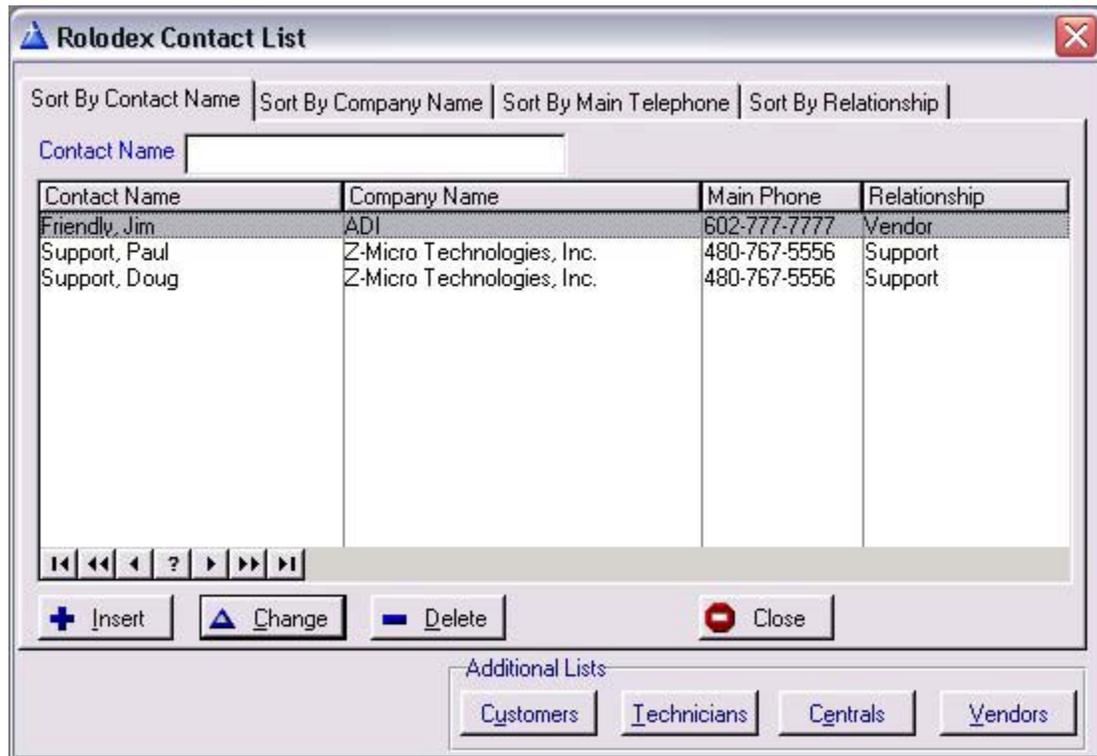
Explanation

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

Record will be Added

Relation: Vendor

Company: XYZ Vendor Corp

Last Name: Smith

First Name: John

Address: 111 North 1st Street

Town: Anytown

State: NY Zip: 11909

Comments: Purchase all kits from this vendor, great pricing.

Telephone Numbers:

Main	505-555-1212	Xt
Fax	505-555-1414	Xt
Pager		Xt
Mobile		Xt
Other		Xt

OK Cancel User ID: LARRYW

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.
State	Enter the contact's two-letter state abbreviation.
Zip Code	Enter the contact's zip code. 10 digit zip code supported.

There are up to 5 Phone Numbers that may be stored for a contact:

Main Number	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.
Fax Number	Enter the contact's fax number.
Pager Number	If the contact has a pager number, enter that number in this field.
Mobile Number	If the contact has a cellular phone number, enter the number in this field.
Other Number	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.)

Contact Notes 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

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:

- | | |
|---------------------------------------|---|
| Continue With Import Procedure | Answer as YES to continue, NO to abort import process. |
| Incident File Path & Name | Enter the full path and file name of the file containing the incident log downloaded from your central station. |
| Enter Starting Date For Import | Enter the first date from where the import should begin. Any log entries prior to this date will be ignored. |
| Enter Ending Date For Import | Enter the last date from where the import should end. Any log entries posted after this date will be ignored. |
| Alarm Codes To By Bypassed | 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 ALARM program is running extremely slow.

ALARM For Windows requires at least 32 MB of RAM in order to run properly (64 MB is recommended).

If you do not have at least 32 MB of RAM, or if you are using a couple of applications under Windows at the same time, either reduce the number of open applications, or increase your RAM to at least 64 MB.

2) When first using ALARM, how do I enter past due balances?

There are two methods available for entering a customer's past balance. The first method is to create a product invoice to represent each invoice that is past due. Use the original invoice date on the product 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 ALARM 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 accounts invoice to another account already on file, then you will need to enter the 'dealer' account number in the POST TO ACCT# field that appears as well on the main customer screen. See the Customer Maintenance chapter earlier in this manual for a full discussion of this field.

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 ALARM For Windows run in a network environment?

YES. ALARM For Windows is programmed to run without modification on networks such Windows Peer-to-peer, and other popular network systems. You do not need to purchase any additional software from us to run on a network. Your only consideration is making sure the network environment is set up to accommodate the ALARM program. You should have 32MB of RAM available on any workstation that will be running ALARM (64 MB recommended). See Setting Up Alarm for Windows On A Network (Chapter 1).

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 ALARM For Windows 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 ALARM For Windows 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 ALARM For Windows, shutting down the network prematurely, or aborting out of the ALARM For Windows 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.

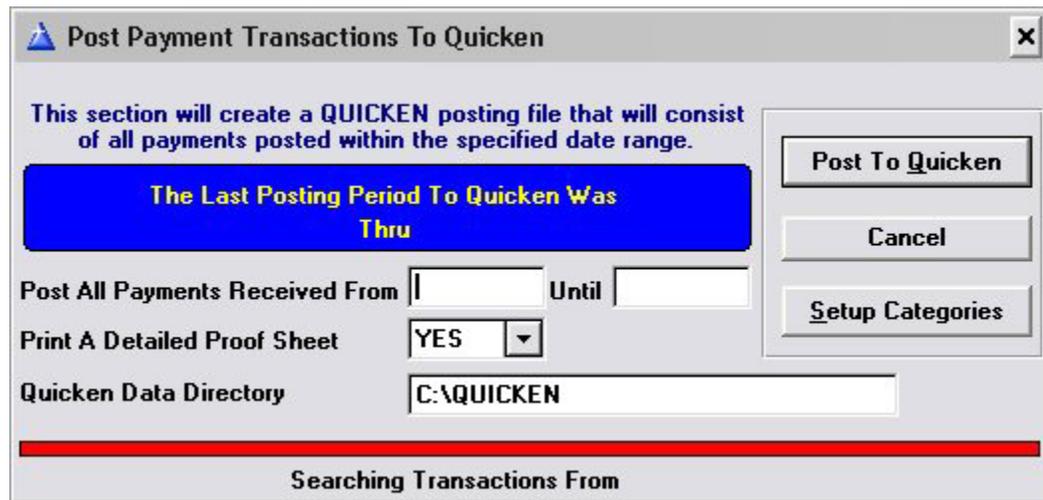
How To Use The Quicklink Posting Program

QuickLink for ALARM offers the capability of posting your payment histories from ALARM into your Quicken checkbook register. Any categories that are associated with your service invoices will automatically be carried over to your Quicken 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 Quicken, 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 ALARM into Quicken 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 Quicken. It is highly suggested that you do not proceed at this point otherwise you may need to go into Quicken 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.



From the QuickLink screen, you have the following options available to you:

Post To Quicken

This section posts the appropriate payment histories from ALARM into a posting file that will be used by Quicken.

Setup Categories

This section allows you to associate each invoice category found in the ALARM program to its' appropriate category you wish to post to in Quicken. For example, if you have a payment that was made against a service invoice in ALARM that had a category of 'INSTALL', you may post any of these 'INSTALL' payments to a category that you have set

up in Quicken called 'SALES'. Since ALARM and Quicken both allow an almost unlimited number of categories, this conversion table allows you to associate each alarm category with its corresponding Quicken category. Once set up, you normally do not need to go into this section again unless you have added new categories to ALARM.

Cancel

Exiting QuickLink will bring you back to ALARM For Windows

Post Alarm To Quicken

The Post Alarm To Quicken section will create a file called ALARM.QIF that will be used in Quicken to import the payment histories from ALARM. 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 ALARM Payments Received From

This is the date range that you wish to post payments from. Any payments that have been entered by you into the ALARM program within the specified date range will be transferred to the Quicken posting file. For Example, if you enter '01/01/93' as the from date and '01/31/93' as the To date, then any payments that you entered into the ALARM program within that date range will be transferred to the Quicken 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 from ALARM have been transferred to the Quicken posting file (ALARM.QIF). This allows you to proof the transactions listed before actually going into Quicken to complete the transfer.

Once the above fields have been entered and you select POST TO QUICKEN, 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 Quicken directory, that will be used once you get into Quicken to complete the posting (import) process.

At this point, you would exit out of the QuickLink program (and ALARM if that is how you entered QuickLink to begin with), and go into your Quicken program. Once in Quicken, 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 ALARM payment histories into Quicken 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 Quicken, you must make sure that all of your service invoice categories are setup with the appropriate Quicken 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 ALARM payments that do not have a corresponding service 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 Quicken category otherwise they will not transfer to Quicken.

QuickLink automatically sets up your ALARM categories. You will see the list of these categories if you select Category Conversion Table from the QuickLink main menu. To assign a Quicken 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:

Alarm Invoice Category

This is the ALARM category, and should already be filled in.

Quicken Category Code

This is the category that the payment will be posted to in the Quicken program. You may decide to post all alarm categories to one Quicken category by simply entering that Quicken category code onto all of the ALARM category records in this section. Otherwise, enter the correct Quicken category name in this field. This Quicken category must already exist in Quicken before any postings are done.

Quicken Description

In Quicken, you may have a description that relates to each Quicken category. If you wish to post a description onto Quicken, enter the description of that category here (please refer to your Quicken 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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