



eService is an add-on module for the Alarm Office Management System. eService takes advantage of the speed and efficiency of the internet to deliver your service tickets directly to your technicians in the field, using any device that can receive standard (POP3) email messages.

With eService, the benefits to you and your technicians are clear: Virtually immediate delivery of service tickets to your technicians improves your dispatch capabilities. eService works with any email-capable device, including (but not limited to):

- PalmPilot and Handspring Devices
- Windows CE PDA's
- PalmPC PDA's
- Laptop/Notebook Computers
- Nextel web-enabled phones

With wireless email services available on the above devices, eService will send a wireless email to your technicians while they are out in the field. Similar to the printed service ticket, the eService Ticket will provide your technicians with all of the important information they require to service your customers, including:

- Customer Name, Address and Contact Info
- Appointment Date and Time
- Directions To Site
- Special Service Instructions
- Service Required Instructions
- Past 3 Service Calls
- Installed Equipment List
- Current Zone List

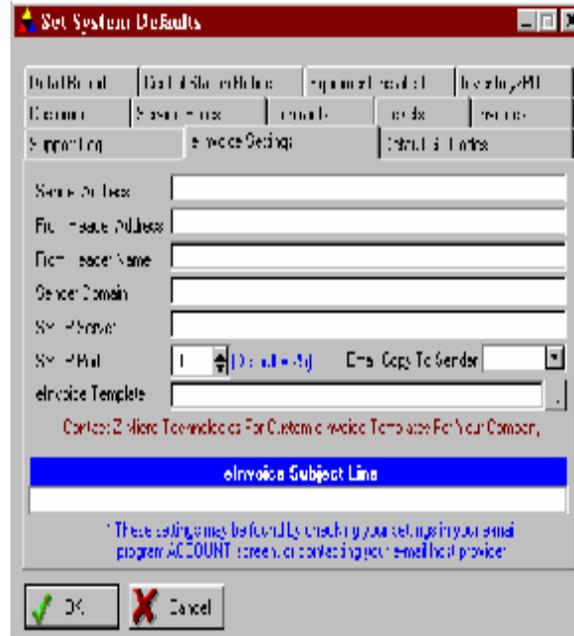
eService Tickets work in a similar fashion as the printed service ticket. You may email one particular service ticket, or batch email all tickets within a specified date period. You have the further option of selecting to email only tickets that have not yet been sent, only tickets that have already been sent, or all tickets regardless of their email status.

You may resend a particular eService at any time by going back into the service ticket and clicking on the eTicket button again.

The following pages describe the proper setup and use of eService Tickets.

System Defaults For eService Settings

Before you can use eService, you must setup the eService 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. The eInvoice tab contains your email default values for all email capabilities for Alarm, including the eService module, and the eService tab contains defaults that pertain to the eService directly. 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 active. The window contains the following fields and controls:

- Sender Address: [Text Input]
- From Header Address: [Text Input]
- From Header Name: [Text Input]
- Sender Domain: [Text Input]
- SMTP Server: [Text Input]
- SMTP Port: [Spin Box] (set to 25) [Dropdown: Copy To Sender]
- eInvoice Template: [Text Input]
- Buttons: OK, Cancel

Below the fields, there is a blue bar labeled "eInvoice Subject Line" with a text input field below it. A note at the bottom reads: "These settings may be verified by checking your settings in your email program ACCOUNT screen or contacting your email host provider."

Sender Address

Enter a valid email address that indicates who the sender is. Typically this would be an email address for your company
(ie: servicedepartment@yourcompany.com).

From Header Address

Enter a valid email address that will indicate where a reply should be sent to. This may be the same email address as your Sender Address, or it may be a different address
(ie: service@yourcompany.com).

From Header Name

Enter the actual name of the person or department that eService is coming from.
(ie: ABC Security Service Department)

Sender Domain

Enter your website address (ie: www.mycompany.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 eService Tickets. 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 can not 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

Not used for eService Tickets (the eService tab for System Defaults has it's own selection for this feature)

eInvoice Template

Not used for eService Tickets (the eService tab for System Defaults has it's own selection for this field).

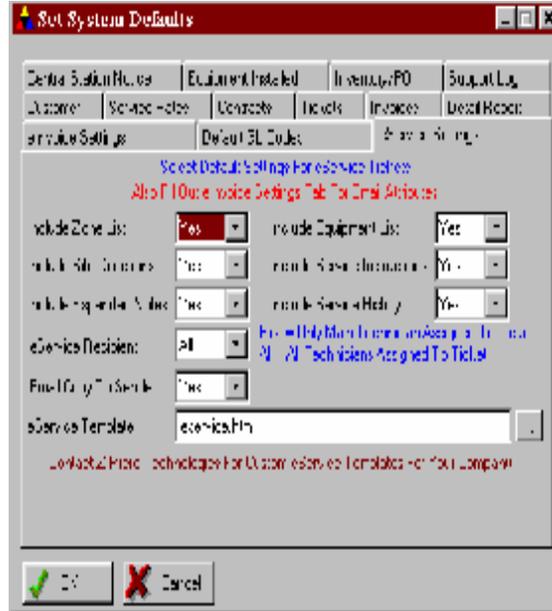
eInvoice Subject Line

Not used for eService Tickets.

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

Setting Up eService Tab

Next, you will need to setup the eService tab for features that pertain to the eService program:



Include Zone List

Select Yes to have the customer zone list appear on the eService Ticket. The Zone List includes the Zone ID and Zone Description for all zones specified in the customer Zone List area.

Include Equipment List

Select Yes to have the customer equipment list included on the eService Ticket. If the equipment list is included, the Part Description, Part ID, Qty and Date Installed fields will be included on the eService Ticket, specifying all items installed to that site.

Include Site Directions

If you would like the site directions to appear on the eService Ticket, select Yes. Site Directions are entered in the Site Directions tab of the customer main account screen.

Include Service Instructions

To include standing service instructions that have been entered into the customer account main screen 'service instructions' tab, select Yes.

Include Expanded Notes

Select Yes to include any 'Notepad' expanded notes that may have been entered onto the service ticket screen.

Include Service History

If you wish to include a list of the prior 3 service calls on the eService ticket, select Yes. This list will include the dates of the last 3 service calls to that client, as well as the main technician making the service call and the service code describing the service.

eService Recipient

You may choose to send an eService Ticket to All technicians assigned to the service ticket, or just to the main (first) technician assigned.

Email Copy To Sender

To keep a copy of all eService Tickets that you send, a copy of each may be sent to your own email inbox by selecting Yes.

EService Template

Select the eService template that you will be using. The standard template that ships with eService is 'eservice.htm'. These templates are HTML coded files that contain the necessary code to format the eService Ticket. You may create your own templates (if you are familiar with HTML coding) and Z-Micro Technologies provides custom services to create custom eService templates for your company.

Setting Up Technician Email Addresses

The last step you will need to perform before you can start sending out eService Tickets is to setup the email addresses for each technician that will be receiving email.

Technicians are setup in the Employee Profile section of Alarm, so go to Utilities/Employee Profile and double-click on the technician you wish to add an email address.

Once the technician profile appears, click on the Email Address button on the bottom of the profile screen. The following screen will appear:



The screenshot shows a dialog box titled "eService Technician Email Address" with a red header. It contains two input fields: "Tech ID" with the value "BillW" and "eService Email Address" with the value "billw@uswest.net". There are "OK" and "Cancel" buttons on the right side. Below the input fields, there is a blue link text: "(Email address for this technician to receive emailed service tickets)".

TechID

This is a display only field that verifies the technician id.

EService Email Address

This is the email address that this technician will receive eService Tickets.

Click on OK to save the email address for this technician. If you need to change the email address at anytime in the future, simply bring up the technician profile screen again, click on the Email Address button and change the email address to the new address, then click on OK to save the change.

NOTE: eService is purchased with a license based upon the number of technicians that will be using the eService feature. If you enter an email address for a technician and receive a license screen, that means you have reached your license limit and you will be instructed to call Z-Micro Technologies, Inc. to purchase additional eService licenses. eService licenses are sold in increments of 3 technicians.

Processing eService Tickets

Sending an eService Ticket is as easy as printing a service ticket. Once you have eService installed, an **eTicket** button will be displayed on all service tickets. In addition, a **Batch eTicket** button will appear on the Ticket list screen (Ticket button on the Alarm top taskbar). Both methods are described below:

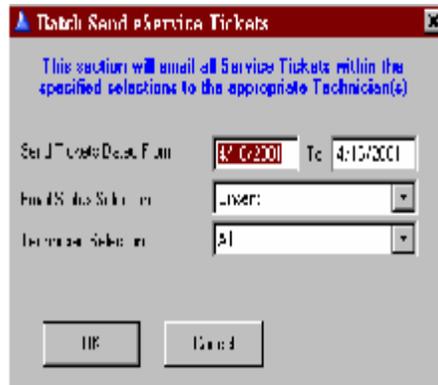
eTicket Button

To email a specific eService Ticket to your technician(s), bring up the service ticket to send and click on the **eTicket** button. If you had previously emailed this ticket, a green LED will appear to the left of this button. After the button is pressed the eService status screen appears indicating the ticket is about to be emailed. Click on SUBMIT NOW to email the ticket. All technicians that are scheduled on that ticket (and that has a valid email address in their employee profile) will receive the ticket in their email inbox. Scheduled technicians include any technician entered in the Service Rates tab or in the Timecard area.

Batch eTicket

To send eService Tickets in a batch, click on the Ticket button in the top taskbar in the Alarm software. When the Ticket list screen appears, click on the **Batch eTicket** button found on the bottom of the ticket list screen.

The batch eTicket screen has the following options:



Send Tickets Dated From/To

Enter the date range of scheduled service tickets which are to be emailed.

Email Status Selection

To send eService Tickets within the above date range that have not yet been sent, select Unsent. If you wish to resend eService Tickets that have already been sent within the above date range, select Sent. Select All to send all eService Tickets within the above specified date range regardless of their previous sent status.

Technician Selection

Select a specific technician to receive just their service tickets, or All.

Once one of the above methods have been used to send an eService Ticket, the eService status screen will appear:



The status screen indicates the number of eTickets to be sent. Once the Submit Now button is pressed, the remaining fields will display each eService Ticket as it is being sent, including the technician's email address, technician ID and the ticket number.

Based upon your processor speed and internet connection speed, eService Tickets take approximately 2 to 5 seconds per eTicket to send, therefore it is possible to process approximately 1000 eTickets per hour. Once the Submission of eTickets has begun, you can not stop the process unless you abort the task in windows.

Possible Error Causes

If your eService tickets 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 eService template (default is eservice.htm).
3. Verify the e-mail addresses you are sending to are valid. Do a test email from your email program to one of the email addresses you are having a problem with to ensure it is a valid email address.

Email addresses that are invalid during the sending of eService Tickets will be returned to you via your email provider as an 'undeliverable' mail in your inbox. You will want to change those email addresses in the employee profile screen.

Completing eService Tickets

Once the service work has been performed by the technician, you will probably want the technician to send the eService Ticket back to your office so you may enter the appropriate information into the service ticket and close it out. If the technician's handheld device can send emails, the following procedure will allow them to send a completed eService ticket back to you.

From the technicians handheld device:

- Highlight the eService Ticket on the inbox list of emails and click on the REPLY button to bring up a copy of the original eService Ticket (there may be an option setting in the email software that must be selected in order for the original text to appear on a Reply).
- On the bottom of the eService Ticket, have the technician enter the time worked, date completed (if necessary), equipment used on the job and description of work performed. This can be entered in any free-form manner that is acceptable to you and your technicians.
- Send this reply back to an office email address. It is advisable to setup either a unique email address with the sole purpose of receiving these completed eService Tickets, or setup a filter in your current email inbox to send eService Tickets to a particular folder in your email software (please refer to your email software Help section for information on setting up filters).
- At the end of the day, print out all completed eService Tickets that have been sent to the office inbox. You may then use those printed tickets to manually close out the service tickets within Alarm (just as a printed service ticket returned to the office would be used to enter information required to close the ticket out).
- Alternatively, rather than printing the eService Ticket out you may want to use the Windows Copy and Paste feature in order to copy text on the eService Ticket into the appropriate service ticket fields within Alarm (ie: Service Performed that is typed by the technician on the eService Ticket can be copied to the windows clipboard using the CTRL-C keys, and then go to the service ticket 'Service Performed' field and click on CTRL-V to paste that description into this field). This can be repeated for other fields within the service ticket.