



Alarm Manager Help Sheet

Customers

1. Introduction

The Customer screen allows you to add new customers and view or change details about an existing customer.

Click on the Customers button on the Toolbar or on the Menu select Data Maintenance - Customers.



The screen will open displaying the first customer sorted by Account No.

You can click on the Left and Right arrow buttons to move to the Next or Previous customer. You can click on the First and Last buttons to move to the First or Last customers.

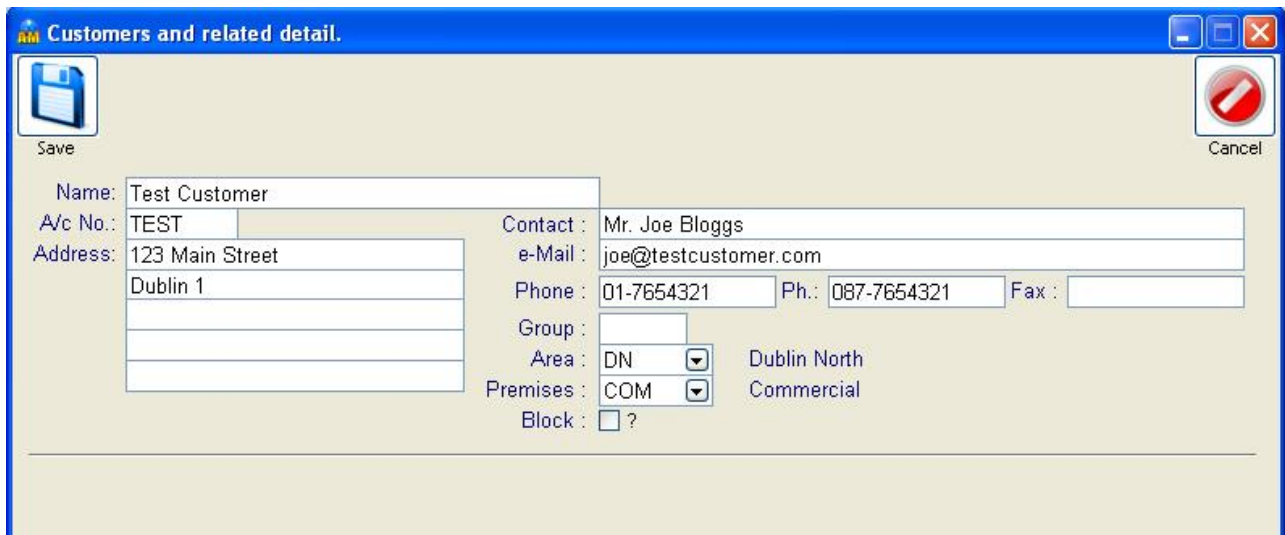


2. Adding a new Customer

To add a new customer, click the “Add” button.



Enter the name, account no., address, area, premises type, etc.



The screenshot shows a software window titled "Customers and related detail." with a blue title bar. Inside the window, there is a form with the following fields and values:

Name:	Test Customer		
A/c No.:	TEST	Contact:	Mr. Joe Bloggs
Address:	123 Main Street		
	Dublin 1	e-Mail:	joe@testcustomer.com
		Phone:	01-7654321
		Ph.:	087-7654321
		Fax:	
		Group:	
		Area:	DN (dropdown) Dublin North
		Premises:	COM (dropdown) Commercial
		Block:	<input type="checkbox"/> ?

Buttons: "Save" (floppy disk icon) and "Cancel" (red circle with slash icon) are visible in the top left and right corners of the form area.

A/c No.

Each customer must have a unique account number. The account number can be up to 6 characters long and can be alphabetic, numeric or a combination of both. It is recommended that you choose a numbering standard and use this consistently in the system.

Some examples of common account numbering standards are:

- Abbreviations of the customers name, for example, a customer called ABC Company Ltd. could be identified as ABC.
- Alpha-numeric using the first letter of the Customers name and a sequence number, for example ABC Company Ltd. could be A001, the next customer whose name begins with A would be A002 etc.
- Numeric sequence, beginning with 0001 and incrementing with each new customer added. Please note that it is advisable to always use the same length of numbers padded with the correct number of zeros, e.g. 0001, 0002 etc. not 0001, 002, 0003.

Do not use short Account numbers such as 1, 2, 3, etc. The minimum recommended length for an Account Number is three characters.

If you use a separate Accounts system, you should use the same A/c No. in both systems.

Before adding a new customer, check the next available Account No. in the sequence used. To do this click the “Acc. No’s” button, and in the search field enter the first few characters of the account number to be used. The list will then show all Customers with Account Numbers matching that entered and you may check the last used Account number in the sequence in order to identify the next available number.

Changing a Customers A/c No.

It is possible to change a Customers A/c No. To do so you must be logged in as the Admin user. Edit the Customer and go to the A/c No. field. Enter the new A/c No. You will be asked to confirm your intention to change the A/c No. Once you confirm your intention, the Customer screen will close and the A/c No. will be changed. As this change must be made in several files, it may take a number of seconds so please be patient. When complete, the Customer screen will re-open with the Customer displayed and the A/c No. changed.

“Block” option

Blocking a customer prevents access to Service Calls and removes the Customer from Maintenance Calls reports. This is designed to be a temporary action perhaps while a payment is outstanding.

There is a report available on the Reports menu to list Blocked Customers.

Group

The Group option allows you to assign several customers into one Customer Group. For example, a chain of shops under common ownership - you can setup an individual Customer for each location and setup one Group which can be assigned to each customer. This allows for reporting regarding all Service Calls within the Group, etc. To setup a Group go to *Data Maintenance – Groups*. Group is an optional field and only used when required.

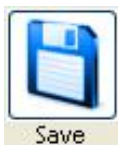
Area

Each customer must be assigned an Area. An Area can relate to a county or town or any other geographic location which you desire. There are reports which allow you to list Outstanding Calls for an Area and also Maintenance Calls Due for an Area. To setup an Area go to *Data Maintenance – Areas*. See the Basic Operations Help sheet for further details.

Premises

Each customer must be assigned a Premises Type. This defines the type of premises e.g. Retail, Industrial, Domestic, etc.

When complete, click on the Save button.



Additional Data

Following entry of the data described above, you may choose to enter further data for the customer by selecting one of the following options using the buttons displayed below the customer details.



3. Systems



This option allows you to Add or Edit the Systems associated with the Customer. Examples of Systems are an Intruder Alarm system, a CCTV system, an Access Control system, etc. Each System can have its own Maintenance Contract and List of Equipment. There can be any number of Systems for an individual Customer.

While viewing the list of Systems for the Customer, the following options are available to you:



To Add a new System click "Add".

To Edit or View the details for an existing System, select it and click "Edit" or double-click.

To Delete an existing System, select it and click "Delete" (you must be logged in as Admin user).

Customer Systems Update. [Save] [Cancel]

Adding System Details

System Type :
Install Date :

Maintenance Contract

Contract Type :
From Date :
To Date :
Maint. Amount :
Contract Duration :

Routine Maintenance Schedule

Service Interval : months
Last Service :
Next Service :
Hours per Call :

Monitoring

Monitor. Stn.:
Monitor Type :
Digi A/c No.:
Radio A/c No.:
Monitor Fee :
Commission :
Due Date : Only if commission receivable.

Enter the System Type.

For each system you can record the following:

System Type	Select from the drop-down list. This list can be updated in the Data Maintenance menu.
Installation Date	
Contract Type	Select from the drop-down list. This list can be updated in the Data Maintenance menu.
From Date	Start date of the current maintenance contract (if any).
To Date	End date of the current maintenance contract (if any).
Maint. Amount	The annual maintenance charge net of VAT.
Contract Duration	The length of the contract e.g. Annually
Service Interval	The frequency of routine maintenance calls e.g. 6 months or 12 months.
Last Service	When the system is being set-up for the first time, the last service date can be entered if there is one or use the installation date. Otherwise leave it blank and the system will automatically update it when a maintenance call is entered.
Next Service	<p>This identifies the Next Service Date for the System. If you click on the “<i>Set Next Service Date</i>” button, the Next Service Date will be calculated as the Last Service Date plus the Service Interval, e.g. if the Service Interval is 6 months, the Next Service Date will be set as 6 months after the Last Service Date.</p> <p>The system will automatically update the Last and Next Service Dates when a Routine Maintenance call is completed.</p> <p>At any time, you can manually enter or change the Next Service Date.</p>
Hours per call	Allows you to record an estimate of the average time to perform a routine maintenance call for this system. Allows calculation of estimated work times in the Maintenance Calls reports. This field is optional.
Monitoring Station	Select the monitoring station. Leave blank if the system is not monitored.
Monitoring Type	Select the type of monitoring provided.
Digi A/c No.	
Radio A/c No.	
Monitoring Fee	If you are collecting the monitoring fee enter the amount here. If the monitoring station collects the fee, leave this amount at zero.

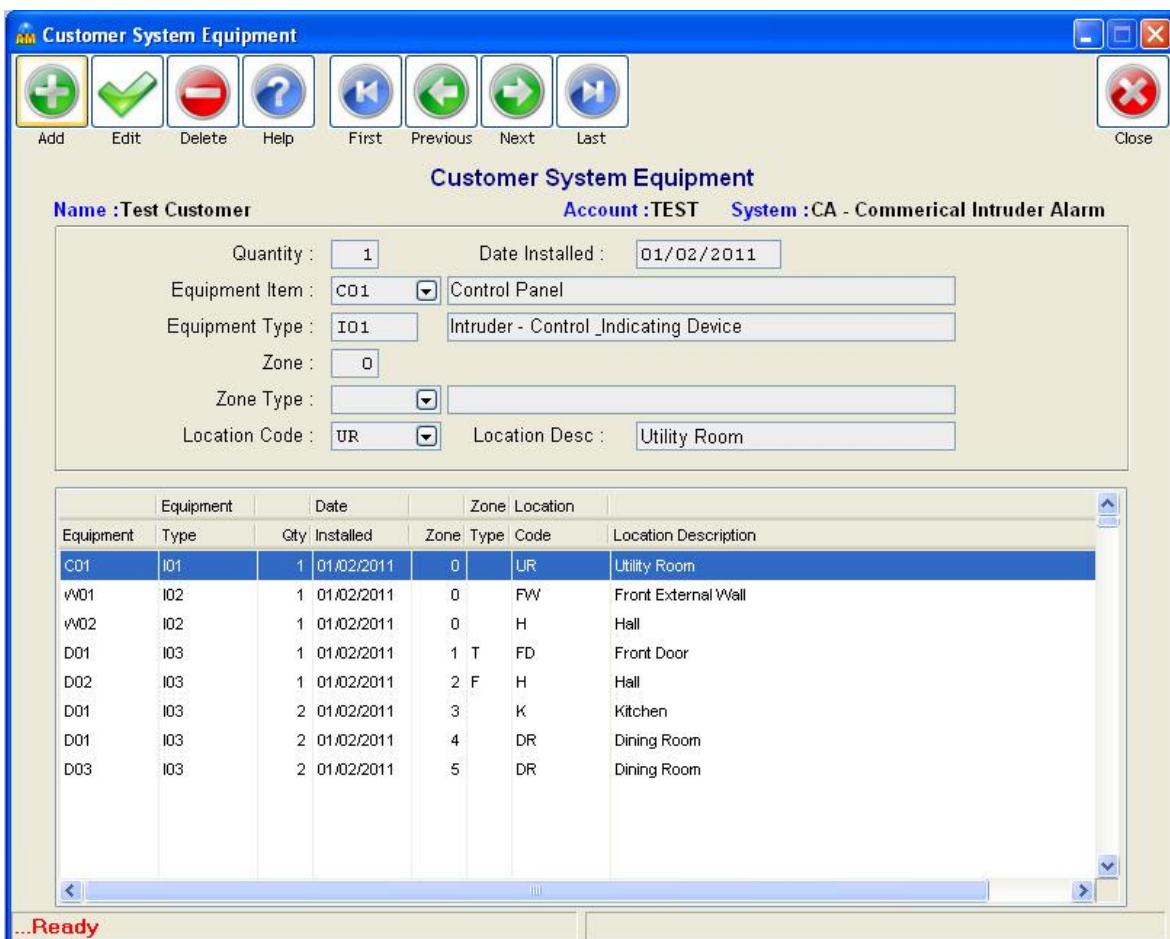
Commission Enter the amount of monitoring commission for this system. This is applicable whether or not you are collecting the monitoring fee (i.e. commission or profit).

Date Due This is the date on which the monitoring commission is due each year. The year is irrelevant and can be the first year that monitoring was established or any year. Do not enter a date here if you invoice for monitoring, only enter a date if you receive commission from the Monitoring Centre.

Equipment



Selecting a System and clicking on the “Equipment” button will allow you to enter, view or edit the list of Equipment setup for the particular System.



Equipment	Type	Qty	Date Installed	Zone	Type	Code	Location Description
C01	I01	1	01/02/2011	0		UR	Utility Room
W01	I02	1	01/02/2011	0		FW	Front External Wall
W02	I02	1	01/02/2011	0		H	Hall
D01	I03	1	01/02/2011	1	T	FD	Front Door
D02	I03	1	01/02/2011	2	F	H	Hall
D01	I03	2	01/02/2011	3		K	Kitchen
D01	I03	2	01/02/2011	4		DR	Dining Room
D03	I03	2	01/02/2011	5		DR	Dining Room

For each item of equipment, you can enter the following:

Quantity

Date Installed This is optional.

Equipment Item	Equipment Items relate to the individual components for the System e.g. “PIR Motion Sensor” or “CCTV Camera”, these must first be setup in Data Maintenance – Equipment Items. You should setup the items to identify the make/model etc.
Equipment Type	Once you select an Equipment Item, the corresponding Equipment Type will be automatically displayed. Each Equipment Item is assigned an Equipment Type when it is setup in Data Maintenance. Equipment Types are related to the section headings on the Specification i.e. “Control & Indicating Equipment”, “Warning Devices” & “Detection Devices”. The software comes with the above headings already setup plus some headings for CCTV Systems. You may add your own headings for other types of System.
Zone	For Equipment items that are of Type = “Detection Device”, you may enter the Zone number and this will print on the Specification.
Zone Type	For Equipment items that are of Type = “Detection Device”, you may enter the Zone Type and this will print on the Specification (this is optional).
Location Code	For Equipment items that are of Type = “Detection Device”, you may enter the Location and this will print on the Specification. When you select the Location Code, the Location Description is displayed and you may overwrite this, e.g. select “H” and the Description “Hall” is displayed, but if you wish you may change the word “Hall” to “Hallway at front of building”

Please refer to a separate Help Sheet which describes how to use the Equipment section in more detail.

Letters



This will allow you to select a Standard Letter to print for this Customer (for selected System). You can use this to print a Letter or other standard document which can contain Merge details from the Customer/System database allowing you to customise the Letter or document. To setup Standard Letters go to *Data Maintenance – Letter Templates*.

Please refer to a separate Help Sheet which describes how to use the Letters feature in more detail.



Print Equip. Spec.



This will print an Equipment List using the Items as setup in the "Equipment" screen as described above. The format is as defined by Intruder Alarm standards and also referred to as an "As Fitted Document".

Please refer to a separate Help Sheet which describes how to use the Equipment section in more detail.

Renew Contract

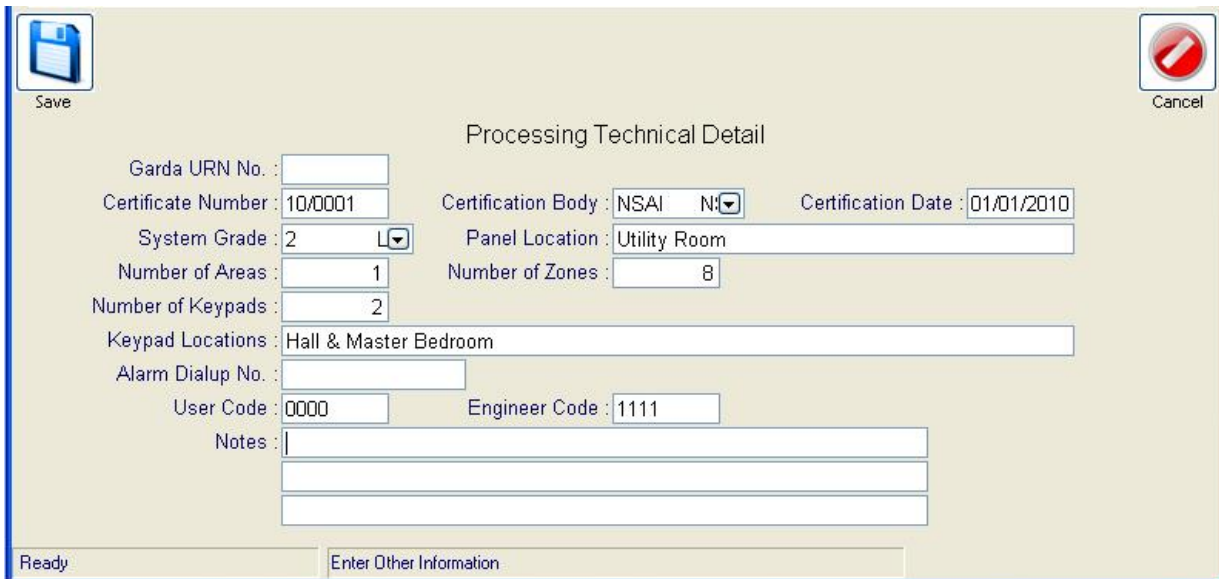


This button will allow you to renew the Maintenance Contract for the selected System.

4. Technical



This option allows you to add or edit the Technical Details associated with the Customer. This includes Certification details, System Grade, No. of Zones and other details.



Processing Technical Detail

Save Cancel

Garda URN No. :

Certificate Number : 10/0001 Certification Body : NSAI NSI Certification Date : 01/01/2010

System Grade : 2 Panel Location : Utility Room

Number of Areas : 1 Number of Zones : 8

Number of Keypads : 2

Keypad Locations : Hall & Master Bedroom

Alarm Dialup No. :

User Code : 0000 Engineer Code : 1111

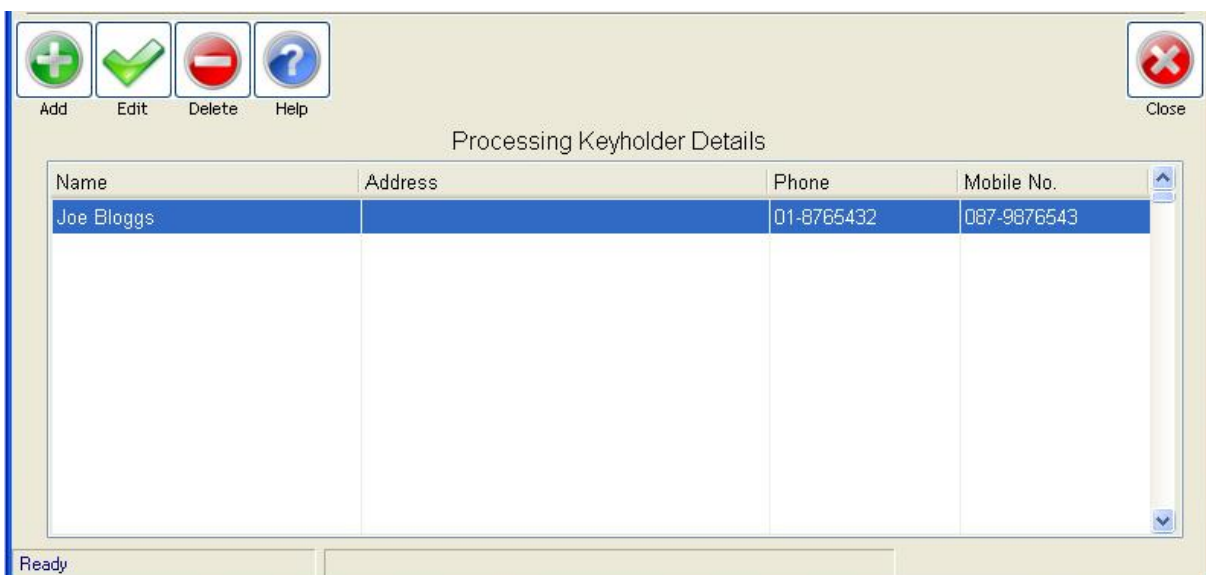
Notes :

Ready Enter Other Information

5. Keyholders



This option allows you to add to or edit the list of Keyholders for the Customer.



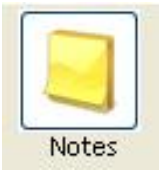
Processing Keyholder Details

Add Edit Delete Help Close

Name	Address	Phone	Mobile No.
Joe Bloggs		01-8765432	087-9876543

Ready

6. Notes



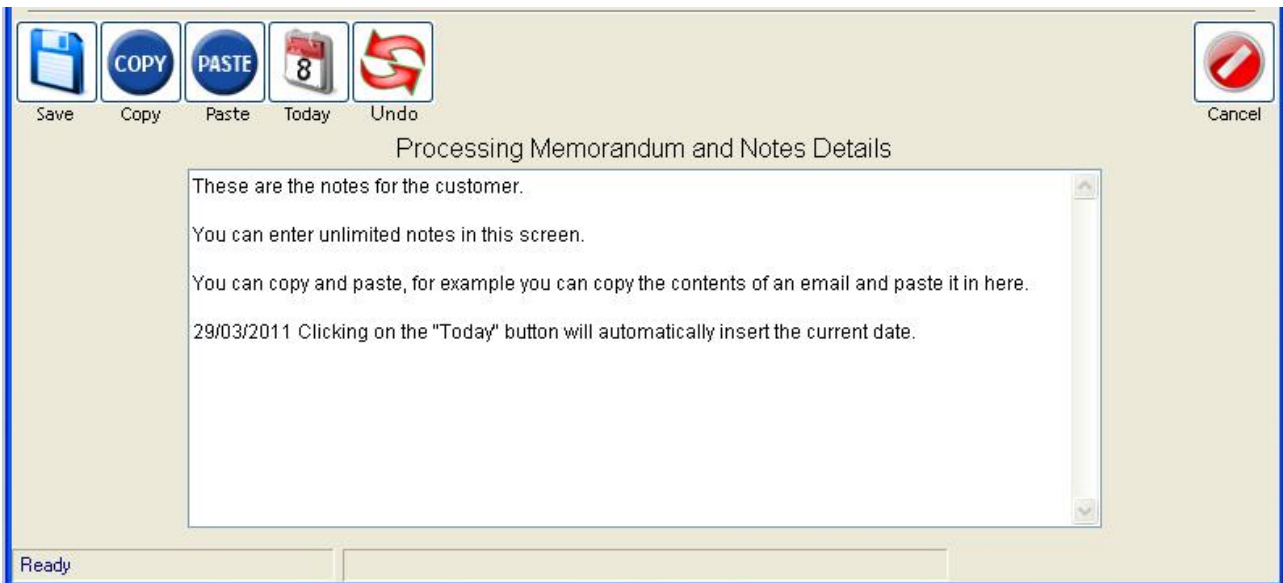
This option allows you to add or edit Notes for the Customer.
Notes are free type text, unlimited in length.

To copy part of the text, select the required text and press Ctrl-C on the keyboard

To copy the entire text, select the required text click on the "Copy" button

To paste text which you have copied from elsewhere, click below any existing text and click on the "Paste" button

To insert today's date into the text, click on the "Today" button



7. Direct Debit



This option allows you to identify that the customer pays their Maintenance/Monitoring fees by Direct Debit and record the customers Bank Sort Code and Bank Account number.

Bank authorisation is required to process Direct Debits and additional software is also required, please contact Mercury Software for further details.

8. Finding a Customer for Edit or View

Finding a Customer by Name

To search for a customer by Name where you know the exact name on file, click on the “Names” button.



A list of all customers will be displayed sorted alphabetically by Name.
Enter the first few characters of the customer’s name exactly as it is stored.
As you type, the list will move to the next match for the name entered.
To open a Customer, double-click on the required Customer or click “Select”.

Finding a Customer by Account No.

You can do the same by Account No. using the “Accounts” button.



Advanced Search

To search for a customer where you don’t know the exact name on file, click on the “Search” button.



Choose your search criteria, e.g. Name, Name and Address, etc.

A list will be displayed showing all customers sorted alphabetically by the search criteria.

Use the search box to enter the search criteria and click on “Find” e.g. enter “Harry”, click on “Find” and all customers with the text “Harry” in their name will be listed.

When you find the required customer on the list, double-click to open.

There are various advanced options which you can apply to your search using And, Or and Not, Match Case and Text Begins. Experimentation is the best way to see how this works.

<input type="checkbox"/> Text Begins	Enter text and press [Find]		
<input type="checkbox"/> Match Case	<input type="text"/>	<input type="button" value="Find"/>	<input type="button" value="Reset"/>
<input checked="" type="radio"/> And	<input type="text"/>	<input type="button" value="Enter=Select"/>	
<input type="radio"/> Or	<input type="text"/>		
<input type="checkbox"/> And Not	<input type="text"/>	<input type="button" value="Esc=Cancel"/>	

Once you have opened the required customer you can do the following:

Edit – allows you to edit the name, address, area or premises type.



9. Deleting a Customer

It is not possible to permanently delete a Customer in Alarm Manager. Customer data is important and even if you lose a customer, there is always the possibility that the customer may return to you in the future or a new occupier of the premises may make contact with you.

You can however, **Deactivate** a Customer and doing so hides that customer from the entire system until you ever decide to **Reactivate** that customer.

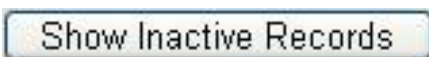
To Deactivate a customer click on the “De/Activate” button. To do this you must first be logged in as the Admin user.



Once you confirm your intention the Customer will be set as “Inactive”.

Inactive customers are not permanently deleted. They are hidden in the system and can be retrieved in the future if required. By default the system is set to Hide Inactive Customers and Inactive Customers will be ignored from all Searches and Reports.

In the Customer screen you can click on the “Show Inactive Records” button and all Inactive customers will then be available in the Search options and you may select and open an Inactive Customer.



You will only be able to view limited data for an Inactive customer until you choose to Reactivate the Customer. To Reactive a Customer, click on the “De/Activate” button (you must be logged in as Admin. user).

If you choose to “Show Inactive Records”, that setting remains selected until you close the Customer screen or click the “Hide Inactive Records” button. Next time you open the Customer Screen the Inactive Customers will again be hidden.

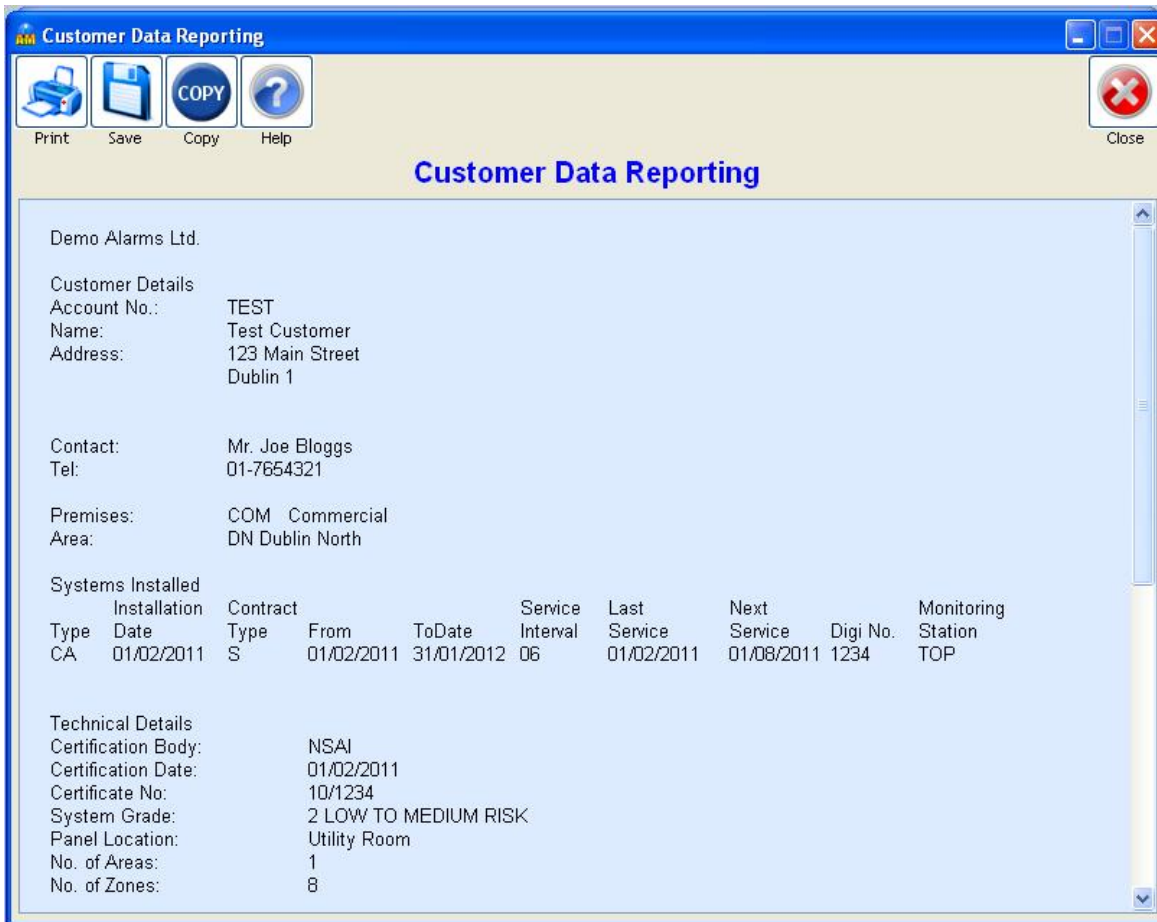
There is also a report available on the Reports menu to list Deleted Customers (Deleted Customers is the same as Deactivated Customers).

10. Print Customer Report



Print

This allows you to print a summary of the Customers details. Click on the Print button and the information will be displayed on the screen.

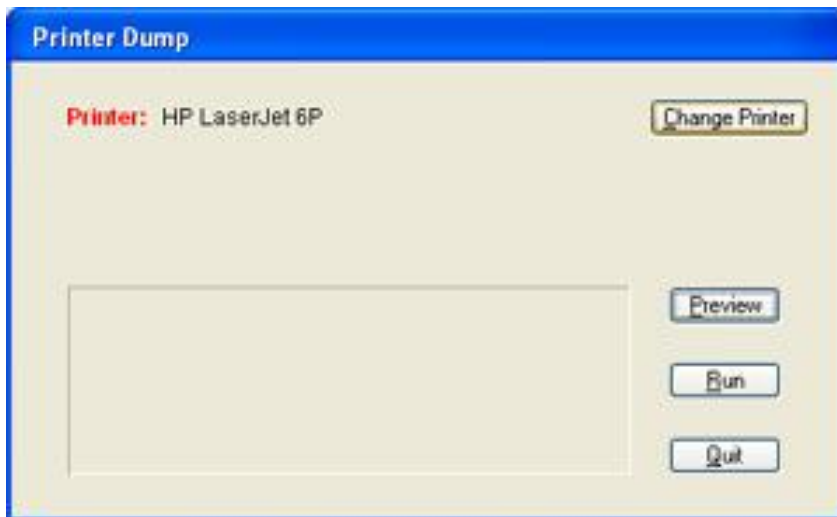


Once the Report is displayed on the screen you may select any of the following options:

Print

Prints the report to your default printer.

A Printer selection screen will open with the following options:



Change Printer - if you wish to print to a printer other than your default printer.

Preview – view the print layout of the report.

Run – to print the report.

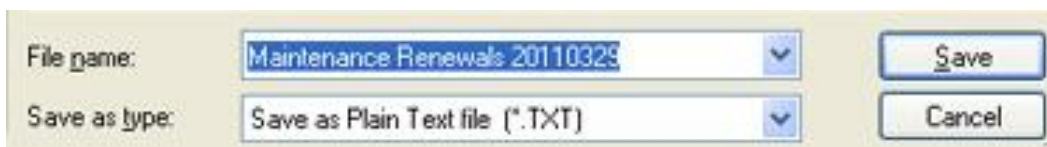
Quit – to close the printer selection box after you have printed the report or to cancel if you decide not to print the report.

Save

Allows you to Save the report to a file which you can then open in another application, e.g. Word or Excel.

You can save a report to one of the following file types:

- TXT Plain Text File
- CSV Comma Delimited File – each column separated with a comma
- DIF Tab Delimited File – each column separated with a tab



TXT files are designed for opening in Word Processing applications e.g. Word
CSV and DIF files are specifically for opening in Spreadsheet applications e.g. Excel

By default all report files are saved to the **C:\MSL\AMReports** folder, unless you choose a different folder.

The system will automatically assign a name to the file e.g. “Maintenance Renewals 20110329.CSV”. The first part of the name will relate to the name of the report, the second part identifies the date on which it was created where YYYY is the year, MM the month and DD the date. This means that you can immediately determine when a particular report file was created and it also means that a particular file will only be replaced if you re-save it on the same day.

Copy

Copies the entire report to the Windows Clipboard. You can then Paste it into any other application e.g. Word, Excel, Email application, etc. Tip: It is easier to transfer the report to Excel by Copying and Pasting it rather than Saving it to a file.

When you select the Copy option, you will be advised of the recommended Font and Point Size. Please take note of this and once you have pasted the report contents into the required application you must select the entire report text and set the Font and Point Size to those recommended in order for columns to be correctly lined up. The Font Used will always be Courier New which is a proportional font ensuring that all columns are correctly aligned.



Tip – when pasting the report into another application (e.g. Outlook, Word, Excel, etc.) if you do not know where to find the Paste option – you can usually right-click and select Paste from the menu or on the keyboard press Ctrl-V which is the Windows shortcut key for Paste.

11. Note for users of Mercury Accounts Software

If you are using the Mercury Sales Ledger, you should make all changes to customers in Alarm Manager and not in the Sales Ledger. Any additions or changes made in Alarm Manager will be automatically transferred to the Sales Ledger. The Sales Ledger will only change customers details in the Sales Ledger files, whereas Alarm Manager will make changes in its own files and in the Sales Ledger files.