



Alarm Manager Help Sheet

Frequently Asked Questions

What is the Admin username and password?

Username admin
Password administrator

How do I access the Call History for a Customer?

In the Service screen, select the Customer and click on the Call History button. The Call History for the customer will be displayed. Calls are displayed in reverse order of date i.e. with the most recent call at the top of the list.



How do I delete a Service Call?

To delete a Service Call, you must be logged in as the Admin user.

In the Service screen, select the Customer and click on the Call History button. The Call History for the customer will be displayed. Select the Call you would like to delete and click on the Delete button.



How can I edit a Service Call?

In the Service screen, select the Customer and click on the Call History button. The Call History for the customer will be displayed. Select the Call you would like to edit and click on the Select button.



The Call will then be opened, the Call No. will be displayed and you may click on the "Log Call" or "Complete Call" buttons to access and edit the information in the relevant section.

How do I print a Letter for one Customer?

To print a Letter for one particular Customer, in the Customer screen, select the required Customer and select the Systems option.



Select the System for which the Letter should be printed and click on the Letters button.



You can then select the required Letter. To select a Letter - double-click on the Letter or select the Letter and click on the "Select" button.

Once you have selected a Letter, the Letter will be generated for the selected Customer/System and displayed on the screen.

When the Letter is displayed, you can then choose to print, copy or save the letter.

How do I find out what Maintenance Contracts are due for renewal in a given month?

On the Reports menu, select Maintenance Contracts and then select Maintenance Renewals.

This report lists Contracts due to expire during a specified range of dates.

The dates will default from the beginning to the end of the current month. You may change these dates to any dates of your choice.

Note re. Option to Exclude Blocked Customers from the Maintenance Renewals Report

In Utilities – Options, there is an option which allows you to decide to Exclude Blocked Customers from the Maintenance Renewals report.

How do I renew all the Maintenance Contracts that are due for renewal in a given month?

Go to Utilities, Maintenance Renewals, Auto-Renew Contract Dates.

Click on Edit.

The dates will default to the current month; select the dates for the required month if different.

Click on Save

All Contracts due for renewal within the specified dates will be listed on screen.

You may select individual customers to be invoiced or you may select "All Customers". Double-click on the check box beside each customer to select.

When you are finished selecting the required customers, click on **Go**. The Contracts for selected Customers will then be renewed based on the Contract Duration defined in their System record (e.g. “Annually” will be renewed for 12 months).

How do I renew the Maintenance Contract for one particular Customer?

In the Customer screen, open the required Customer and then open the Systems section. Select the required System and click on the Renew Contract button.



The Contract for selected Customer/System will then be renewed based on the Contract Duration defined in their System record (e.g. “Annually” will be renewed for 12 months).

How do I find out what Routine Maintenance Calls are due in a given month?

On the Reports menu, select Maintenance Contracts and then select Maintenance Renewals.

This report will list Maintenance Calls due within a specified range of dates.

The dates will default from the beginning to the end of the current month. You may change these dates to any dates of your choice although you cannot use any dates prior to the beginning of the current month. To list Maintenance Calls that are outstanding for dates prior to the current month, please use the “Maintenance Calls Not Done” report, see below.

Note the check box options as follows:

Include address and phone?

Selecting this option will include the address and phone numbers for each Customer on the report allowing you to pass the report to an engineer with the full details available for each customer.

Include expired/expiring contracts?

By default, customers whose contracts have expired or are due to expire before the date of the next Maintenance Call will be excluded from the report. Selecting this option will include such Customers on the report but details of their expiry dates will be printed.

There is a Customer missing from the Maintenance Calls due report. Why?

More than likely the Customers Contract is due to expire before the Next Service date. By default, such Customers will be excluded from the Maintenance Calls Due report, unless you select the option to ***Include expired/expiring contracts?***

How do I delete a Customer?

It is not possible to permanently delete a Customer in Alarm Manager. 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, you must first be logged in as the Admin user. Open the Customer in the Customer screen and click on the “De/Activate” button.



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. 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).

How do I add a new System Type?

Go to Data Maintenance – System Types and click on the “Add” button. For the new System Type, enter a Code and a Description.

Ignore the fields that refer to “Invoice” and “VAT” unless you are integrating your Alarm Manager software with Mercury Sales Ledger in which case, please contact us for advice.

Why is it necessary to Re-Index the files and how often should I do it?

The Re-Index procedure will re-create the systems Index files. These are files which are used to store key data items from the main database files (Customers, Service Calls etc.) in a structured sequence and are used to provide fast access to data in reports, drop down lists, etc.



It is sometimes possible that the Index files can become corrupt and this often leads to problems such as lists being out of sequence or data missing from a screen or report. If you notice a problem like these you should immediately run the Re-Index Files procedure and then check the item again.

To prevent such problems occurring and to keep the system operating at maximum speed and efficiency it is advised that the Re-Index Files procedure be run every day.

When running the Re-Index Files procedure no other user must be logged onto the Alarm Manager.

To run the Re-Index procedure click on the Re-Index button on the toolbar.

If the Re-Index procedure has not been run for two days, you will be asked to run it the next time you run Alarm Manager.