BoldU

SIMPLE DATA ENTRY

Quick Steps for Adding a New Customer

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Introduction

When creating a new customer there are four core forms that require completion in order to get signals into the account, know where to send the authorities and contact the premises. Below is a brief flow of what to enter on what form to successfully create a new Customer in Manitou. This document is assuming no linking to an accounting package.

Vocabulary

NAME	DEFINITION
Navigator	Left-hand portion of the Manitou Operator Workstation.
Status Bar	Bottom portion of the Manitou Operator Workstation.
Application Frame	Workspace for handling alarms, updating customer data, and other data entry.
Customer Record	Accounts in which to monitor alarms and signals.
Jump To Menu	Right-hand side of the customer record containing all forms that comprise that customer record.
Site Contact Point	Phone number of the physical location.
Password	Word or phrase to validate the person called, in the event of an alarm.
Area Fill	The ability to automatically update customer data with an area, or partition, received within an event.
Transmitter	The signaling equipment housed at the customer location responsible for transmitting events to alarm automation. Often known as the “dialer.”
Receiver Line Prefix	Used to define the receiver, or line, difference between the same panel account number.
Transmitter Type	Default signaling translations that best meet the transmitter used at the customer location.
Customer Programming	Customer specific signal translations of signals for clarity and accuracy.

New vs. New Based on Previous

On the New Customer entry form there are two choices. New and New Based on Previous. New starts with a completely blank customer record and all fields will require attention. Based on Previous allows you to copy information from accounts with similar settings and setup to the new account.

Please note: When creating customers based on previous it is important to ensure that if choosing to NOT include specific forms that the Services too should NOT be included so there are no orphaned services created in the new account.

Basic Account Information

Enter the following on the Basic Account Information form:

- Customer ID - This may be auto-generated if the option is set to do so.
- Customer Name - Always type this from left to right such as: "John Smith" or "Smith's Silversmith."
- Customer Account Type - Most often Residential or Commercial. (Note: The way the name files inside the database is determined by the type. John Smith will file as Smith, John when the account type is residential.)
- Verify the Country, Language, and Time zone. If the Country is set incorrectly here, and the operator clicks next, it will be necessary to cancel and start again.
- Click Next

Address

Focus is on the House button on the Main Customer form. Press Enter do launch the Address entry dialog.

- Type in the zip/postal code and press Enter. If there is a matching zip/postal code in the database you will be presented with the possible city, state/province options. If so, select the applicable city and press enter. If not, tab to the City field and enter the City then tab to the State/Province and select the applicable entry.
- Type in the Street Address in the Address 1 field.
- Type in the Suite/Appt/Other further address details in the Address 2 field. Note: The Address 2 field is not included in searching at this time.
- Click OK or press Enter
- When applicable, enter in the Cross Street and Subdivision information.

When all the data for the form is properly entered select the Details form in the Jump To menu

Details

The Details form contains all site-specific details.

- Enter in any/all site specific telephone numbers.
- Enter any/all site specific email addresses. Note: PDF v. RTF is for report output. PDFs are "images" of documents and thereby are not editable while RTF is like a Word document that could be copied and edited.
- If available, enter any Web address for the customer record.
- If applicable, select the Dealer to which the customer is attributed.
- If applicable, select the Branch to which the customer is attributed.
- Select the Police Authority applicable to the account.
- Select the Fire Authority applicable to the account.
- Select the Medical Authority applicable to the account.

Upon completion of all applicable details, select the Options form in the Jump To menu

Options

The Options form allows for setting of some standards that can enable functions in Programming and other locations. All "global" passwords used on the account should be entered on this form as well. Manitou also offers the ability to have named duress passwords. Simply check the Duress checkbox to flag any passwords that should be used in a duress situation.

- Enter full account passwords. Individual passwords can be configured on the Contact List.
- Enter named Duress passwords. Named Duress passwords, when validated, display a message to operators that leave no room for doubt as to what they should do next. We encourage the use of named duress passwords as opposed to just a "bad" password.
- Select any applicable options.
- Select the Area Fill option if necessary. Add/Update Always can be used to reduce operator confusion and allow systems to automatically add any undefined areas (partitions) received through the signals.
- No need to add Default Script Messages as they can be configured globally.

Upon completion of all applicable details, select the Systems form in the Jump To menu

Systems

The Systems form is considered the “heart” of the account. This is where we configure how a signal will find this account when it arrives from the receiver.

Event Monitoring

Many strictly alarm monitoring sites will only employ the Event Monitoring systems. This is used for alarm/signal processing within Manitou. The other system types of Access Control, GPS and Other are utilized for add-on features.

- Select the Event Monitoring Node in the tree and click the Add button (or Alt +A)
- The System number is automatically applied. This is an “inventory” number such as #1 is the first Event Monitoring System on a customer record.
- Enter a Description – Some sites use the Name of the Service offered such as Burglary, Fire or the like. This is completely up to the individual monitoring company, see a supervisor for more information for naming schemes.
- Leave the System type as Event Monitoring. If it is not Event Monitoring, drop down the list and select Event Monitoring
- Select the Monitoring Type. This, in most cases, will be Alarms Only. Alarms Only means you are monitoring the alarm events and bringing them to an Operators attention. Note: Selecting Log Only (All Signals Logged) will create every event as a non-alarming event.
- Click OK

If your data contains Panel Types, it is possible to select that on the Systems node.

Transmitter

Transmitters identify the equipment signaling from the monitored site. It is possible to add one or many transmitters to a system.

- Select the Transmitters Node in the tree and click the Add button (or Alt +A)
- The Transmitter number is automatically applied. This is an “inventory” number such as #1 is the first transmitter on a customer record.
- Enter a Description – Some sites use the Name of the Service offered such as Burglary, Fire or the like. This is completely up to the individual monitoring company, see a supervisor for more information for naming schemes.
- Click OK

Transmitter Details

The Transmitter Details define the default behaviors and communication pathway to the customer record.

- Drop down and select the applicable Transmitter Type for this record. The Transmitter Type selected defines the default programming and event translations. If the signals do not have overrides and communicate clearly as alarm/signal events, it is possible to select the DFLT transmitter type.
- Select the appropriate Receiver Line Prefix for the account.
- Enter the panel transmitter ID (account number from the panel).
- Enter Caller ID information, if applicable.

Transmitter Options

Select any options that may apply to the transmitter such as if Any signaling activity constitutes a Test to satisfy the Transmitter Test interval.

When applicable enter in a Transmitter Test interval. The number is the increment and then interval, being: hours, minutes or days. Note: Manitou requires services to match the intervals. If you do not have any services that match the interval you will not be able to save the record until the interval is entered into the Supervisor workstation or you remove the interval.

After entering all Transmitters and details click Programming on the left-hand tree.

Programming

Programming is used to enter customer specific overrides as necessary. Please see the Non-intelligent Signal Programming document available on the BoldGenius Resource Library for instructions as to how to program non-intelligent signals.

When completed click the Areas form on the left-hand tree

Areas

Areas are Panel partitions. Many accounts may not have an area or one area. If monitoring Open/Close Schedules it will be necessary to enter the Areas to which they are monitored for opening and closing events.

- Enter the Area Number.
- Enter a Description for the Area. We encourage using accurate names for these areas for clarity.
- Repeat as necessary for all areas at the location.

When completed click the Zones form on the left-hand tree

Zones

The Zones form is for listing the physical locations within the location. Such as Zone 1 is the Front Door.

- Enter, or select, the Area Number. If the area is unknown or the description is not Area specific, enter an asterisk (*) in the Area column.
- Enter the Zone Number.
- Enter a Description for the Zone (50 character limit). We encourage using accurate names for these zones for clarity.
- Repeat as necessary for all physical locations at the site.

Finish and Save

Upon completion of the above data entry, Click Finish

This saves the basic information so that the account may receive signals, display to the operator the address where the event was tripped, dispatch the applicable authority and contact the location.

Most often after the Finish it is a good practice to View the customer to review the data entry and continue with the additional data entry including Contacts, Call Lists, Open/Close Schedules and Comments.