Add a Customer

Preparing for New Customer Creation

Prior to creating a new customer in Manitou, it is vital to have all your information prepared and ready for entry. Every organization will have their standards regarding entering account data. Collect your data and prepare for the account creation.

What should you prepare?

- **Customer Name and Address.**
- If the account is in the Accounting system, **Accounting ID and Name.**
- **Customer site contact phone number.**
- Site-specific **Passwords** and **Duress passwords**.
- When applicable, the **Dealer** and/or **Branch** assigned to the account.
- **Authorities** who will respond.
- **Panel account numbers (a.k.a. Transmitter ID)** and which **receiver line prefix** it requires.
- If the panel requires a **test** and that **interval.**

New Customer Creation

New customer records need enough information to know where to dispatch, who to contact at the site, what authorities to send in the event of alarms, and how the alarm signals find the account. Therefore, when creating a new customer adding the four core forms that allow this, helps you enter accounts quickly, efficiently, and successfully. Here are the items to complete in a New Customer Record using the Manitou Web Client.

Creating a New Customer.mp4

How to launch New Customer Creation in Manitou Web Client

There are multiple ways to load the New Customer Creation in the Manitou Web Client.

1. **Quick Launch Icon** - The New Customer Quick Launch Icon is on the top left of your Manitou Web Client. If you don't see it, you may use the plus sign to add it to the quick launch bar.
2. **Menu - New - Customer** - The New Customer menu is found under the Hamburger (≡) icon then New, and Customer.
3. **Menu - Maintenance - Add New Customer** - You may also find the Add New Customer option under the Hamburger Icon (≡) then select Maintenance and then Add New Customer.

Step 1 - Initial Account Entry

Using your preferred method to access the New Customer Creation form, Add a New Customer then select the appropriate option:

- **Create a New Customer** — Starts with a blank customer record and all fields require attention.
- **Creating a New Customer based on an Existing Customer** — Allows an operator to copy information from existing accounts with similar settings.

Adding a Blank New Customer

Selecting the Create a new Customer radio button initiates the New Customer Information section fields requiring information.

Required fields are marked with an asterisk (*); upon entering data into those fields, the asterisks (*) change to black. Enter the following information:

1. **Click Add New Customer.**
2. **Enter the Customer ID** - Based on your company standards.
3. **Confirm the Country**, **Time zone, and Language** are correct.
4. **Choose the Dealer,** if required.
5. **Select the Accounting Company ID,** if required.
6. **Click Next.**

Verify your data is correctly entered then click **NEXT** to advance to the Address section of the new customer.

> Remember, if you enter the country incorrectly on this form and move to the next, you will have to cancel and start again.

Creating a new Customer based on an existing Customer

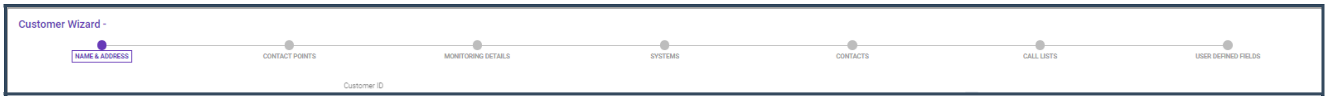
Choosing the Create a new Customer based on the existing Customer radio button allows you to create your new customer based on a selected customer record. When doing so, the system copies the forms you select and automatically removes the transmitter details for you to enter.

- Search for, or enter, the **Customer ID to load the existing record to copy**.
- The information copied is entered into the New Customer Information Items to update the customer creation form:
  - **Customer ID**
  - **Link to Accounting Record -** if required
  - **Customer Name** - The new name for the new account. Entered from left to right.
  - **Premises Type** - if different

    - **Country** - if different
    - **Language** - if different
    - **Time Zone -** if different
- Verify all information is correct then click **NEXT**.

Step 2 - Customer Information Stops

Within the Web Client, you will move through the Customer Creation Wizard. This wizard is designed to walk you through the most common data entry steps for a new customer. The steps along the Wizard are known as "**Stops**.".



The **only** required fields are the **Customer ID, Name, and Address**. You may finish this after entering the address update the record after creation, or completely step through the Wizard and enter all details you have.

Name and Address

1. **Choose the Customer Type** – Residential or Commercial
2. **Enter the Customer Name** – Always enter the name as you would read it from left to right.
3. **Enter the Zip Code for the Site** – If it doesn’t exist the wizard (magic wand icon) will not load any information.
    i. **If not there** – Enter the City and State for the Zip Code (This will add to the database)
4. **Enter the Street number and Name**
5. If available, enter the **Cross Street and Subdivision** information.
6. Verify the data is correct then click **Next**.

If Next is not enabled, a required field (highlighted in Red) is not completed.

We strongly recommend avoiding the use of punctuation or non-standard abbreviations within address fields as it may cause issues locating the data within the database, or validating with postal validation systems.

Contact Points

1. **Enter the Site Phone number.**
2. If available, enter the **SITE email address.**
3. When all is correctly entered, click **Next**.

Monitoring Details

1. **Enter the SITE password**.
2. If available, Enter the **Duress Code**.

> Note! If everyone has different passwords or access, do not put the password here, you will add that to individual contacts.

3. Within the Fill Section, under Area Fill, Drop it down and choose "**Add/Update Area Always.**"
   i. Click **"Auto Cancel Alarms on Restore"**.
   ii. If the account is UL, you will not select Auto Cancel, but you will select **"Ignore Aborts"**.
4. When all data is properly entered, click **Next**.

Step 3 - Systems Stops

Systems

1. **Click Add System**
   i. A new dialog, with its own stops, opens to create the new system.
   ii. Enter a **System Description**.
      1. Example descriptions are: "Burg Monitoring", "Fire Monitoring", "Video Monitoring", or a combination such as "Residential Burg and Fire". When in doubt, ask!
   iii. **Monitoring Type** defaults to Alarms Only, do not change this!
2. When all is entered correctly, click **Next**.

Add Transmitter

1. On the Transmitters stop, **click Add**.
2. **Enter the Transmitter Description**.
   i. Examples of the description would be: "Digital Dialer", "AlarmNet", "IMMIX", etc, or a company reference number.
3. **Select the Transmitter Type**:
   i. DFLT is the most commonly used Transmitter type when the type is unknown.
4. **Choose the Receiver Line Prefix**.
5. **Enter the Transmitter ID** – This is the panel account number assigned to the communicator at the monitored location. Usually the last four numbers on the account ID you have.
6. When set as expected, Click "**Done**" This returns you to the Add System stops.

Systems

1. Click **Next** to move to the **Areas and Zones Stop**.

Area and Zones

In order to properly dispatch and inform on the alarms received, you will need to enter the descriptions of the points into the record.

1. Within the **Areas** form:
    i. Enter **1** in the **Area** Column
    ii. Enter “**Area 1**” in the **Description** Column.
2. Navigate to the **Zones** form.
    i. Enter the **Area** you have or * for the Area where the zone resides.
    ii. Enter the **Zone** number.
    iii. Enter the **Zone description**. (Up to 50 Characters.)
    iv. **Repeat** for all zones for the record.
        a. (It is possible to import from a spreadsheet if you have it by using the handshake Icon (🤝) and pasting the information using the proper formatting.)
3. When all are entered, click **Next**.

🏁 If you would like to save the record, at any point after adding the required data, to be sure it is committed to the database, click Next until you get back to the main wizard stops, and then Click **Finish**. You may add all additional customer details after committing the account to the database. 🏁