

Locate a Customer Record

Customer records are found in a number ways within Manitou.

Dashboard

The Default Dashboard upon arrival into Manitou displays the last 10 recent customers and alarm customers. When available, the Watch List Customers also show. A single click on any customer in these lists loads the customer record.

The screenshot displays a dashboard with three sections, each with a title and a list of customer records. Each record is preceded by a person icon. The sections are separated by horizontal lines. A blue vertical scrollbar is visible on the right side of the 'Recent Alarm Customers' section.

Recent Customers

- SSL002 - Summit Secure Learning Satellite Campus
- SUMMITSECURE - Summit Secure Learning
- SSL002W - Summit Secure Learning Satellite Campus Storage
- 99001234 - Josh Tafoya
- RYDFS009 - Customer 9

Recent Alarm Customers

- SSL002W - Summit Secure Learning Satellite Campus Storage
- 11008675 - Maria Rosales
- SUMMITSECURE - Summit Secure Learning
- 11007890 - Sarah Whitmire
- 1234567 - test building
- 78781100 - Bold Group
- 12345678 - Bold Group
- 99001235 - Michael Michaelson
- SARAH - Sarah Test
- ZZ5678 - Sam White

Customer Watch List

- SSL002W - Summit Secure Learning Satellite Campus Storage
- SUMMITSECURE - Summit Secure Learning

Search Icons

The Manitou Web client header has a spyglass (?) icon which loads the **Entity quick search**.

The screenshot shows the 'Customer Search' interface. At the top, there are radio buttons for selecting an entity type: Customer (selected), Dealer, Branch, Agency, Authority, and Global Keyholder. Below this is a 'Search Criteria' input field with a 'SEARCH' button and an 'ADVANCED' link. The 'Search Results' section shows a table with columns: ID, Name, Address, City, State, and Contacts / TX. The table is currently empty, displaying 'No Results'.

Users may select which entity type they want to find, then type in any values that may exist on the record to quickly load the records that match what the user types.

The spyglass with the plus sign launches the **Advanced Entity Search**.

The screenshot shows the 'Advanced Search' interface. It features the same entity type selection as the first screenshot. Below, there are five search criteria fields: Customer ID, Dealer ID, Customer Name, Transmitter ID, and Street 1. Each field has a dropdown arrow, an equals sign, and a trash icon. An 'ADD' button is located below these fields. At the bottom right, there is a 'Max. Rows Per Query' field set to 2000, an 'Include Cancelled Accounts' checkbox, and 'CLEAR' and 'SEARCH' buttons. The 'Search Results' section shows a table with columns: ID, Name, Address, City, and State. The table is empty, displaying 'No Results'.

CTRL + L

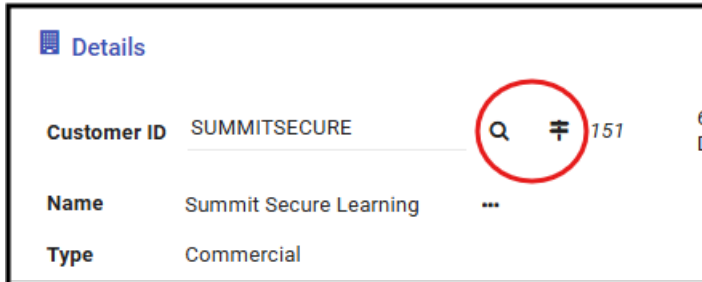
Allows users to type in Customer IDs or other information to find and load the customer record.



The screenshot shows a 'Customer' search dialog box. It has a blue header with the word 'Customer'. Below the header, there is a search input field with a 'Customer' label, a search icon, and a plus sign icon. To the right of the input field is a 'Go To' dropdown menu currently set to 'Customer'. At the bottom of the dialog, there are 'CANCEL' and 'DONE' buttons.

Once loaded, users may choose where to navigate to automatically.

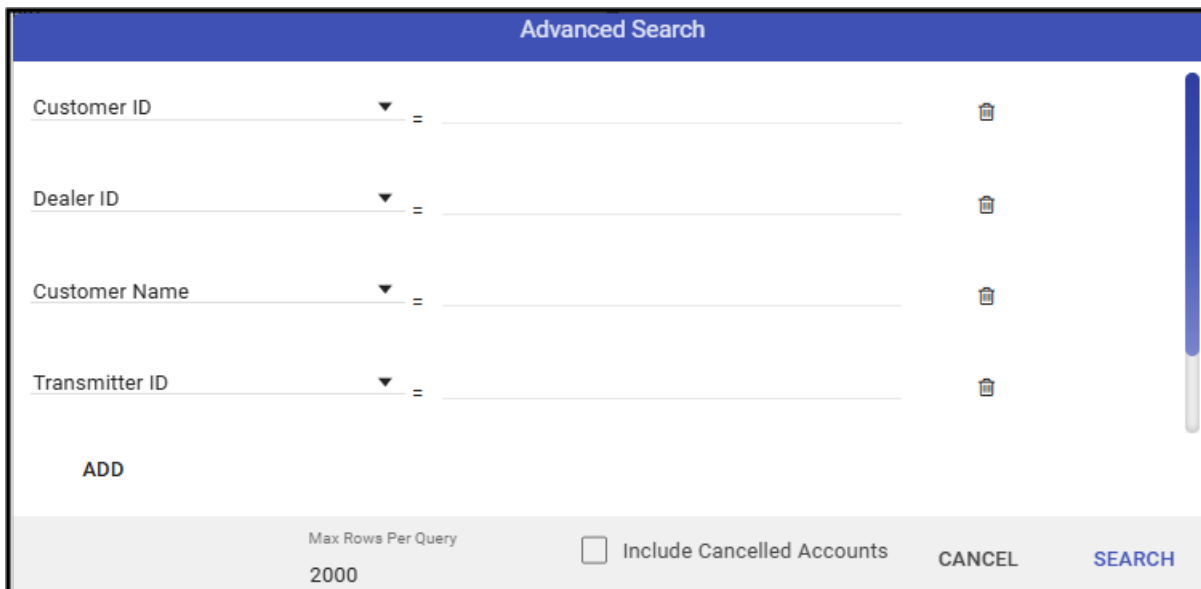
Within Customer Records

Once the user loads a customer record, the customer record contains the search icon and the ability to search by Receiver Line Prefix and Transmitter ID.







Details	
Customer ID	SUMMITSECURE   151
Name	Summit Secure Learning ...
Type	Commercial

The spyglass search launches the Customer Advanced Search.



Advanced Search

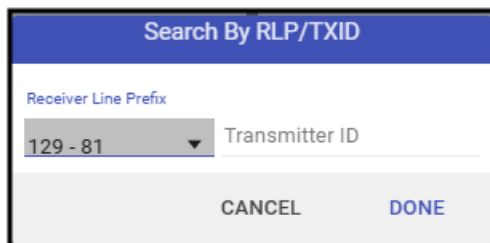
Customer ID	▼	=	_____	
Dealer ID	▼	=	_____	
Customer Name	▼	=	_____	
Transmitter ID	▼	=	_____	

ADD

Max Rows Per Query: 2000 Include Cancelled Accounts CANCEL SEARCH

Users may set their default search options by adding rows and selecting the common search items. These may be used individually or in combination.

The Tower icon opens the Transmitter ID search that requires both the Receiver Line Prefix and Transmitter ID.



Search By RLP/TXID

Receiver Line Prefix: 129 - 81 ▼ Transmitter ID: _____

CANCEL DONE

