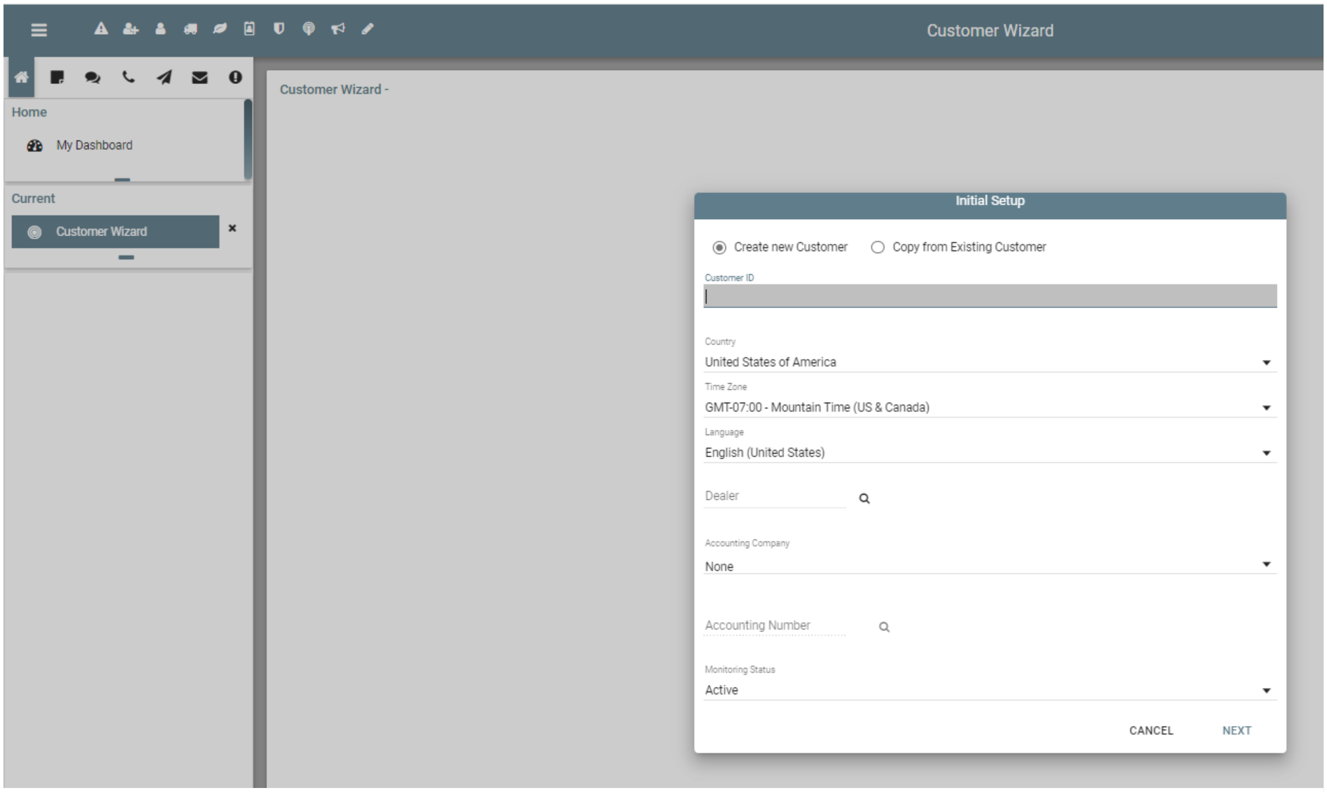
Customer Wizard - Inital Setup

Last Modified on 07/17/2024 4:07 pm EDT

This is the first screen you'll see.

- Customer ID: Manually fill with alphanumeric characters or leave blank if your organization is set to auto-generate Customer IDs
- Country: Pick the country that is appropriate for the customer (not the Monitoring Center)
- Time Zone: Select the appropriate time zone for the customer
- Language: Default language is English. Select the the language the customer speaks, if needed.
- Dealer: This is optional. If your Monitoring Center has third party Dealers whom you monitor for, you will select the Dealer this customer is associated with.
- Accounting Company: Choose the appropriate Accounting Company your Monitoring Center is linked to.
- Accounting Number: This field is unavailable if no Accounting Company is selected. If Accounting Company is selected, use the magnifying glass to search.
- Monitoring Status:
    - Pending: Use during the Data Entry process when one person enters the data, and another checks it and will change to Active
    - Active: Use to have an alarm sent in and have the operator react to it. Most commonly used.
    - Inactive: Use when necessary to 'turn off' monitoring for a customer
    - Deactive: Use when a customer stops service permanently


Customer Wizard
Home
My Dashboard
Current
Customer Wizard
Customer Wizard -
Initial Setup
Create new Customer
Copy from Existing Customer
Customer ID
Country
United States of America
Time Zone
GMT-07:00 - Mountain Time (US & Canada)
Language
English (United States)
Dealer
Accounting Company
None
Accounting Number
Monitoring Status
Active
CANCEL
NEXT