SWS - Tools Menu - Options - Account Creation and Maintenance

The **Account Creation and Maintenance Options** relate to the management of the customer, and all other entity, records within Manitou. The following notes each option and how they function within Manitou.

Auto-generate contract number

When "Yes" is selected, this option automatically generates a contract number (Customer ID) for each new Customer Record entered. This number matches the serial number of the record in the database. The automatic number may be overridden when first entering the new Customer Record by manually typing a contract number into the Customer ID field.

For example, an alarm operation may not have specific number required for the customer records. Manitou Customer IDs do NOT need to match the equipment details at the location.

Contact (Person/Individual) user-defined fields

The Manitou System Administrator uses this option to create either text fields or checkbox fields. This option exists to add additional Central Station specific information into Customer Records. A Central Station may employ up to 200 user-defined fields.

These are person-specific fields that track things pertinent to individuals on a contact list but is repeated across multiple persons.

For example, there may be consistent values related to the persons tied to a customer record such as if the site monitors PERS units and the contacts at the monitored sites may have preferred hospital, or the like.

Customer user-defined fields

This option allows System Administrators to create additional fields or checkboxes that display on Report forms with an "Advanced" button. This option exists to add additional Central Station specific information into Customer Records. A Central Station may employ up to 200 user-defined fields.

*These are used to track any values that may be tracked across many accounts.   Manitou in the US, with UL certification(s), requires the checkbox value of "**CS Holds Keys**" to allow for the selection on UL monitored accounts, if the Central Station holds keys for UL Response.*

User Defined fields consist of two types: **Check box** and **Label + Text Box**

- **Check box** - This is a true/false value to track if the customer record has that value. For example, if the account has the central station holding keys the check box would be enabled. *If using these values within Enhanced Action Pattern logic, when the checkbox is enabled the value = "Yes" and unchecked the value = "No." These must be as noted including proper casing when referencing this value in an action pattern logic line.*
- **Label + Text Box** - May be used to track a specific value for the account. It is possible to force this informaiton to text, uppercase text, date, numeric, and phone number. Also the length defaults to 30 characters but may be expanded.   *When using these values for logic in Action Patterns,spelling **does** count.*

Some values tracked by existing monitoring companies are:

- ***Installed GPS** value, such as 2G, 3G, 4G, etc...*
- *Values of **licensing** for the customer such as if they receive AutoText, OpenVoice, or the like.*
- ***Opt In or Out** value.*

These values allow the monitoring company to set specific values that may not be natively in Manitou that the company neesds to be able to track in some way.

Customer Warning Threshold

Delivers a popup and/or watchdog message that lets the company know they are approaching their licensing threshold for customer records. This is to prevent disruption to the company's abilty to create new customer records.

Dealer User Defined Fields

Allows the creation of up to 200 Dealer specific items to track from dealer to dealer. Like the Customer User Defined fields, these allow tracking of monitoring company needs.

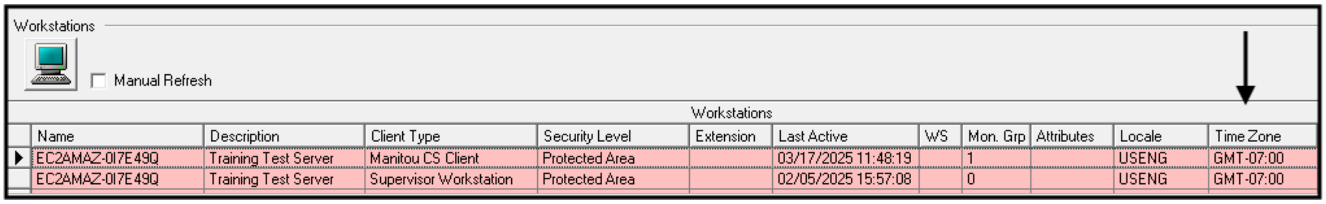
Display alarm resolution descriptions in the Activity Log

This option ensures that when selected to Yes, that the alarm activity log displays to the alarm operator, within the operations center, in the respective customer's time zone.

This ensures that when alarm operators are speaking the customer they are informing the customer based on their time zone without having to live recalcuate these values.

Display customer logs in their local time

When selected as "**Yes,**" this option defaults to the Customer's local time zone regardless of Workstation time zone settings.

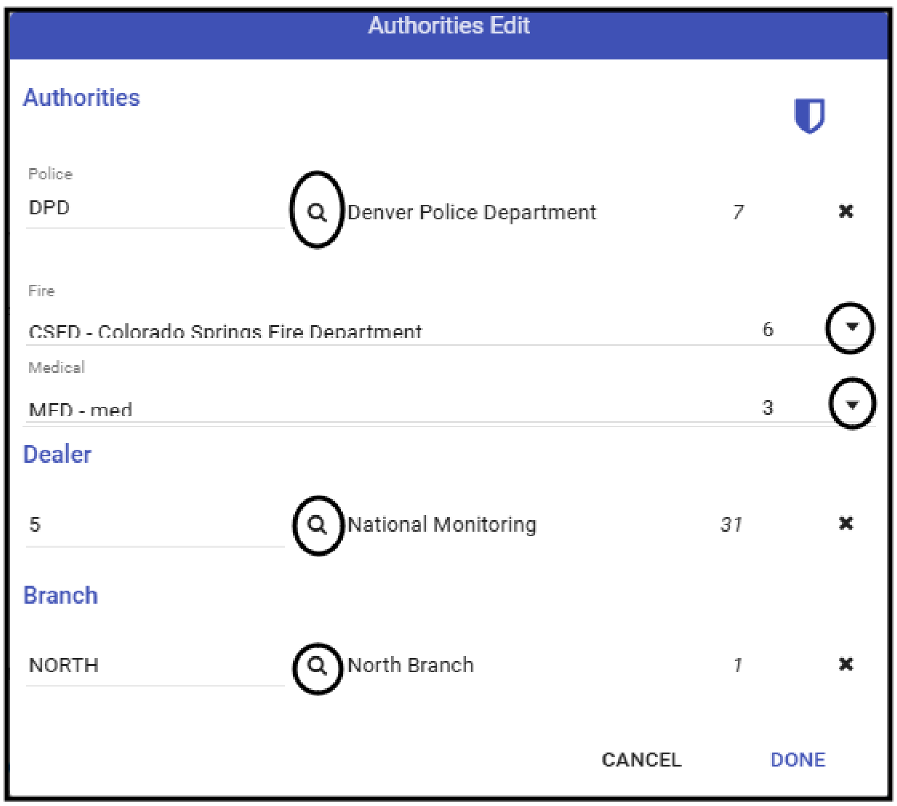


	Name	Description	Client Type	Security Level	Extension	Last Active	WS	Mon. Grp	Attributes	Locale	Time Zone
▶	EC2AMAZ-0I7E49Q	Training Test Server	Manitou CS Client	Protected Area		03/17/2025 11:48:19		1		USENG	GMT-07:00
	EC2AMAZ-0I7E49Q	Training Test Server	Supervisor Workstation	Protected Area		02/05/2025 15:57:08		0		USENG	GMT-07:00

Selecting "Yes" also affects which time zone information shows for Reports relating to Customer log information. The Customer's time zone displays on Reports rather than the Monitoring Company's time zone.

Drop down to combination search/data entry field threshold

This option determines when the dropdown fields change to search fields within any of the entity records. When the number of records of a specific type is less than the threshold number (default = 25), the system displays an arrow drop down for selcting from the list of available items. When the number of records exceeds the threshold number, Manitou then switches to provide a search icon that allows for entry of the id numbers or searching for the same.



Mask passwords on ManitouCS Web Client/BoldNet validation dialogs

This ensures that passwords used by users accessing the Web Client, or Manitou's BoldNet, are not displayed as plain text within the application.

Maximum number of days of log information to transfer from system account to new customer account

Sets the maximum number of days of Customer log information that transfers to a new Customer’s account when Transmitter information is not on file or when a new Transmitter is added to a Customer.

New Customer Monitoring Status

The option determines the default monitoring status when a new Customer is added. The options are: "Always Active", "Always Pending", "Default Active", and "Default Pending".

Require Customer edit comments

When "Yes" is selected, this option requires the Operator to enter comments into the Notes dialog whenever he edits and saves changes to a Customer Record.

Require Operator to type password before validation

When "Yes" is selected, this option displays a password verification dialog box whenever the Operator attempts to edit a Customer Record. When "No" is selected, the dialog box still displays, but is prepopulated.

Require password before viewing a Customer

When "Yes" is selected, the Operator must enter a password before viewing a Customer Record.