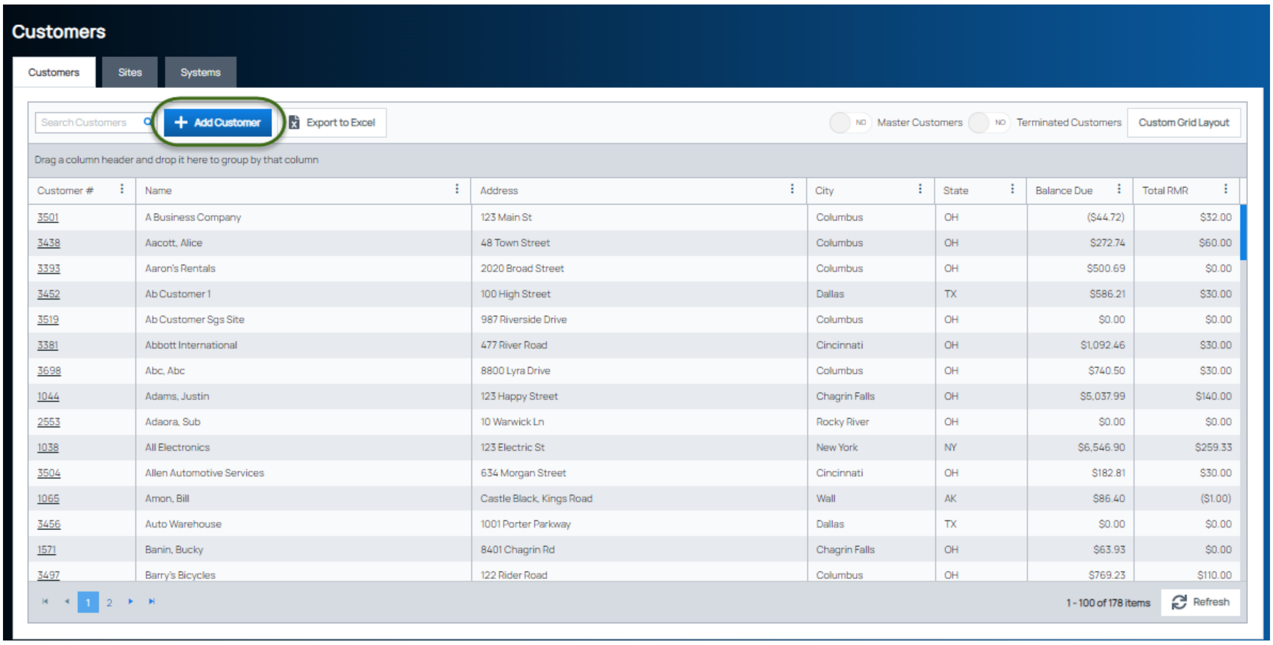
Add a Customer

Last Modified on 05/14/2025 4:24 pm EDT

If the customer you are doing business with has multiple sites, systems, and RMR, when using the Customer Wizard, you are able to create the customer, one site, one system, and one RMR. Once the Customer has been saved, you can add additional sites, systems, and RMR.

From the application menu, select CRM > Customers.

The Customer List opens. Click the **Add Customer** button located at the upper left of the list.



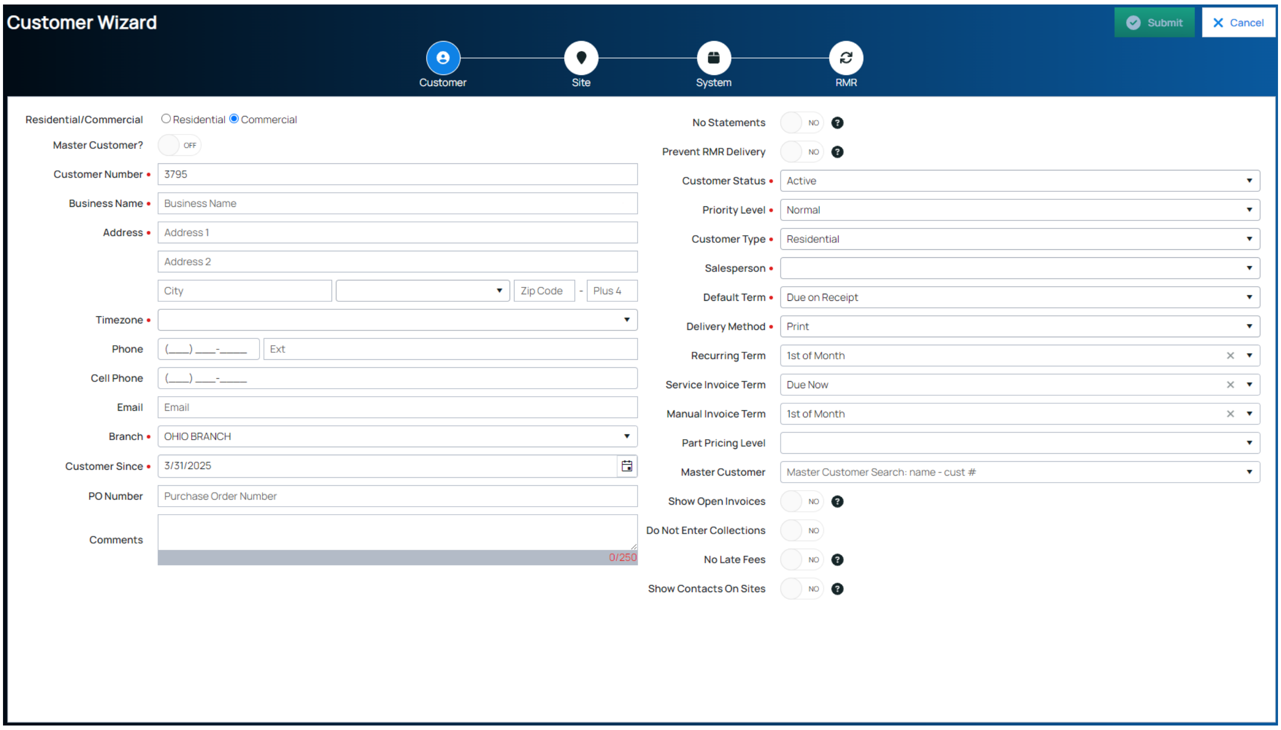
The Customer Wizard opens. There are four possible data entry forms within the wizard. Depending on the customer situation, you may be entering information on two or all four of the forms. At a minimum, you must fill in the Customer and Site forms.

Situation	Customer	Site	System	RMR
New customer for whom you are installing a new system	X	X	X	
Taking over a system that was installed by another company	X	X	X	X

Customer Setup

The data entry fields on the Customer form contain mostly billing related information. Data entry fields with a red bullet next to the field name are required.

Each data entry field is described below.



Data Entry Fields

Data entry fields preceded with an asterisk are required.

- *__Residential/Commercial__: Select the appropriate radio button.
- **Master Customer?**: If this customer is a Master Customer, set this toggle button to On.
- *__Customer Number__: This auto-fills with the next customer number.
- *__Full Name__: If Commercial was selected in the first field, this field changes to Business Name. Type in either the business name or if residential, the first and last name for the customer. This is the billing name that will appear on customer invoices and statements.
- *__Address__: Enter the billing address for the customer.
- *__Timezone__: Select the customer's time zone.
- **Phone**: Enter the billing telephone number for the customer.
- **Cell Phone**: Enter the cell phone for the customer.
- *__Email__: Enter the email address for the customer. If invoices are to be emailed to the customer, you must enter an email address.
- *__Branch__: Select a branch for the customer.
- *__Customer Since__: Enter the date the person or company became your customer. Typically the date on which the customer signed a contract with your company.
- **PO Number**:
- **Comments**: This is a free-form text field to enter any important information related to the customer. Maximum of 250 characters allowed.
- **No Statements**: If this toggle is set to Yes, the customer will not receive statements.
- **Prevent RMR Delivery**: If this toggle is set to Yes, RMR invoices will not be sent to the customer. Typically, if a customer is on auto-pay, this option is set to Yes.
- *__Customer Status__: This field defaults to Active. If the customer you are creating is a sales lead, set this field to Prospect. Terminated makes the customer inactive.
- *__Priority Level__: This field is for future development, however you must make a selection from the drop-down list.
- *__Customer Type__: Make a selection from the drop-down list. The choices that appear are maintained in the Customer Types setup table (Setup > Other > Customer Types).

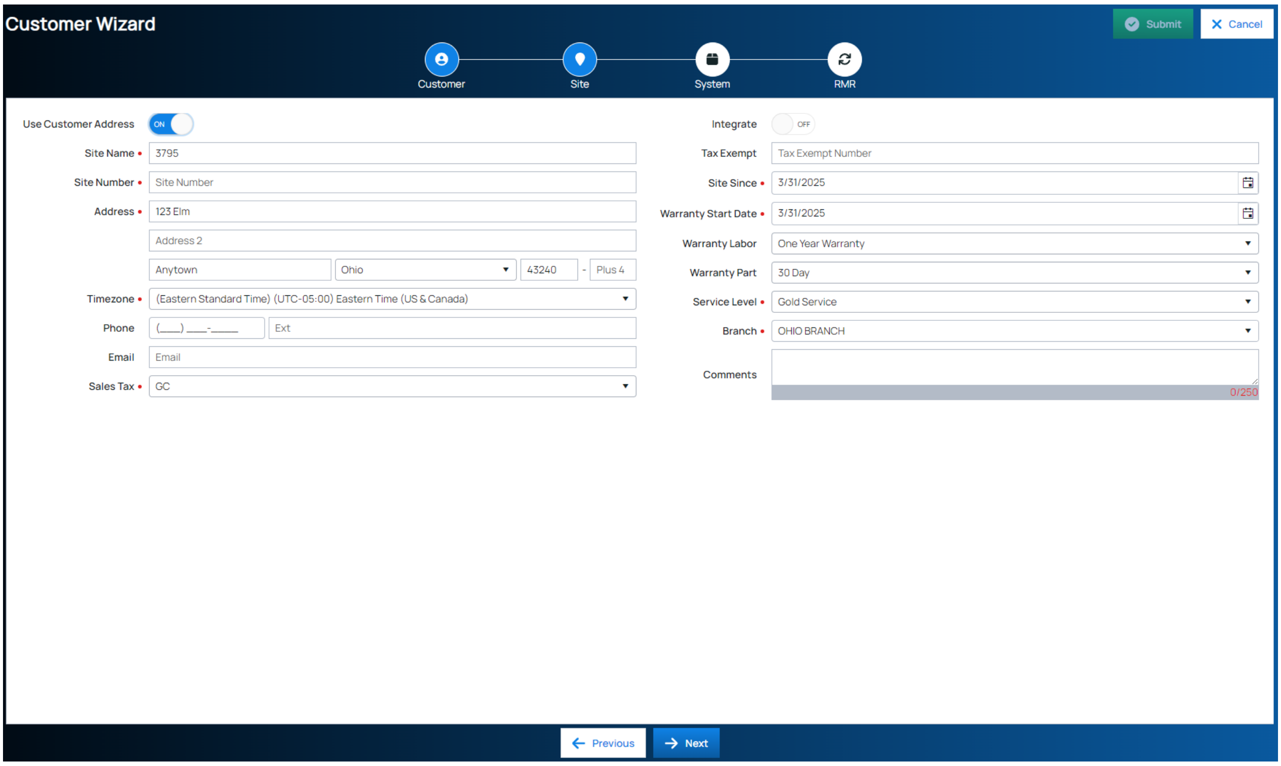
- *__Salesperson__: Make a selection from the drop-down list.
- *__Default Term__: This field defaults from the Default Term code that was selected in setup (Setup > Company > System Defaults). You can change this if necessary. If a selection was not made in Recurring Term, Service Invoice Term, or Manual Invoice Term, the selection made is this field will be used on invoice types where a Term code was not selected.
- *__Delivery Method__: Select how the customer is to receive invoices and statements. The choices are email, mail, or print.
- *__Recurring Term__: This is the Term code that defaults into a customer invoice when generating recurring invoices. This field defaults from the Recurring Term code that was selected in setup (Setup > Company > System Defaults). You may change this if necessary.
- **Service Invoice Term**: This is the Term code that defaults into a customer invoice when invoicing a work order. This field defaults from the Service Invoice Term code that was selected in setup (Setup > Company > System Defaults). You may change this if necessary.
- *__Manual Invoice Term__: This is the Term code that defaults when creating a manual invoice. This field defaults from the Manual Invoice Term code that was selected in setup (Setup > Company > System Defaults). You may change this if necessary.
- **Part Pricing Level**: If you are using part pricing, select one for the customer. For more information, readPart Pricing Levels.
- **Master Customer**: If you want to link this new customer to an existing Master Customer, select the master customer from the drop-down list.
- **Show Open Invoices**: When printing invoices, if you want to print all other open invoices for the custom, set this toggle button to Yes.
- **Do Not Enter Collections**: Choose if this customer should enter collections or not.
- **No Late Fees**: If the customer is eligible for late fees, set this toggle button to No.
- **Show Contacts On Sites**: If this switch is set to YES, users can select customer contacts and site contacts on work orders. If this switch is set to NO, users can select only customer contact on work orders.

When finished filling in this form, click the **Next** button at the bottom of the page, which will advance you to the Site form.

Site Setup

The data entry fields on the Site form contain information related to physical property. Data entry fields with a red bullet next to the field name are required.

Each data entry field is described below.



Data Entry Fields

Data entry fields preceded with an asterisk are required.

- **Use Customer Address**: If the Site address is the same as the customer address, set this toggle button to On, and the address information fills in with the customer address information.
- *__Site Name__: If the Use Customer Address toggle button was set to On, this field auto-fills with what was entered for the Customer Name. You may change this if necessary.
- *__Site Number__: Enter a number for the site, typically start with 1.
- *__Address__: If you did not select to use the Customer Address, enter the Site address information.
- *__Timezone__: Select a time zone for the site.
- **Phone**: Enter the telephone number for the site.
- *__Email__: Enter the email address for the site.
- *__Sales Tax__: From the drop-down list, select the Sales Tax code that applies to this site. If this site is non-taxable, you still need to select a value in this field. Sales Tax codes are maintained in setup (Setup > Accounting > Sales Tax).
- **Integrate**: Switch to on if this site is integrated with Manitou or Stages.
- **Tax Exempt**: If a value is entered into this field, no sales tax will be calculated on any invoice for this site.
- *__Site Since__: Enter the date the person or company became your customer. Typically the date on which the customer signed a contract with your company.
- **Warranty Start Date**: If there is already an installed system at the site, enter the start date of your warranty for the site.
- **Warranty Labor**: From the drop-down list, select the appropriate warranty code for labor charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Warranty Part**: From the drop-down list, select the appropriate warranty code for part charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Service Level**: From the drop-down list, select the appropriate service level to be used in calculating billable charges on work orders. Service Level codes are maintained in setup (Setup > Operations > Service Levels).
- *__Branch__: From the drop-down list, select the appropriate branch code for the site. Branch codes are maintained in setup (Setup > Accounting > Branches).

- **Comments**: This is a free-form text field to enter any important information related to the site. Many companies type in directions to the site address. Maximum of 250 characters allowed.

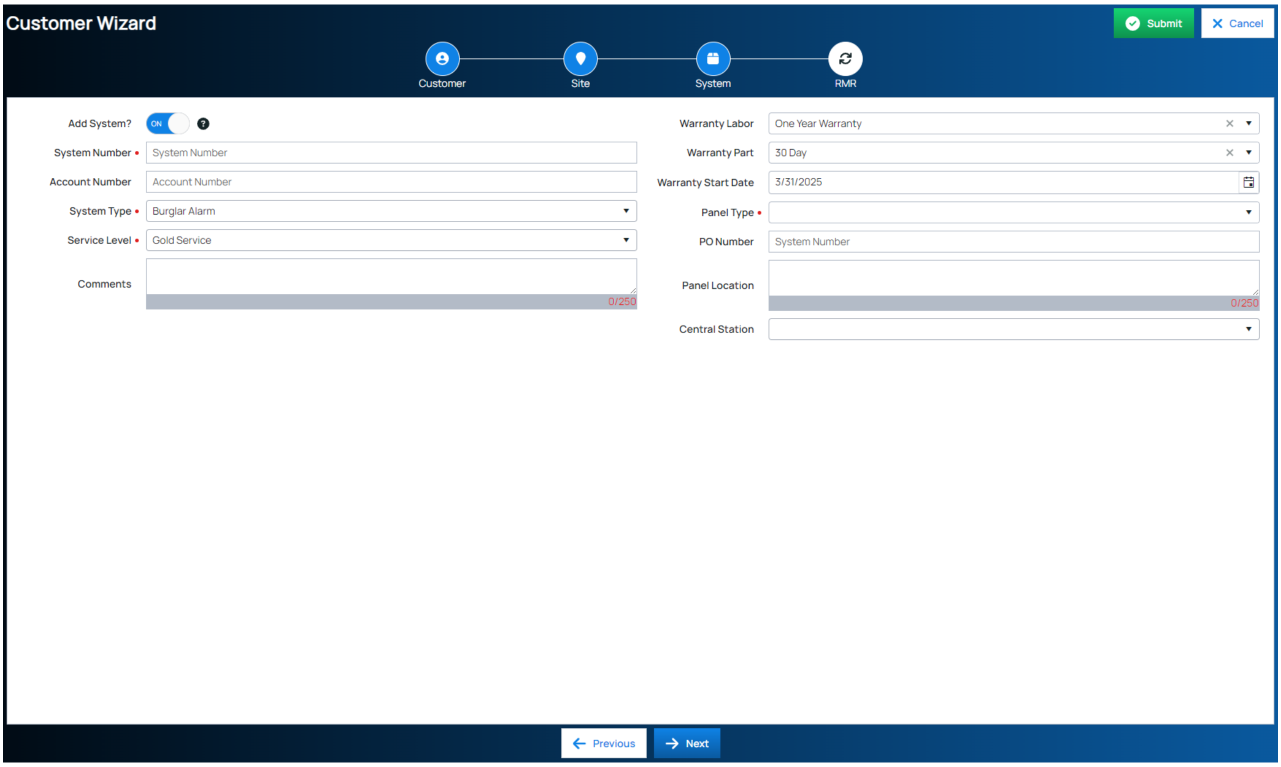
When finished filling in this form, click the Next button at the bottom of the page, which advance you to the System form.

If you are just creating a customer and site at this time, click the Submit button at the upper right of the page to save the information.

System Setup

The data entry fields on the System form contain information related to a system that will be installed or already exists at the site. Data entry fields with a red bullet next to the field name are required.

Each data entry field is described below.



Data Entry Fields

Data entry fields preceded with an asterisk are required.

- **Add System**: Set the toggle button to On to have access to the data entry fields.
- ***System Number**: Enter a number for the site, typically start with 1.
- **Account Number**: If this is a monitored account, enter the central station account number.
- ***System Type**: From the drop-down list, select the appropriate System Type. System Type codes are maintained in setup (Setup > Other > System Types).
- ***Service Level**: From the drop-down list, select the appropriate service level to be used in calculating billable charges on work orders. Service Level codes are maintained in setup (Setup > Operations > Service Levels).
- **Comments**: This is a free-form text field to enter any important information related to the system. Many companies type in directions to the site address. Maximum of 250 characters allowed.
- ***Warranty Labor**: From the drop-down list, select the appropriate warranty code for labor charges on work

orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).

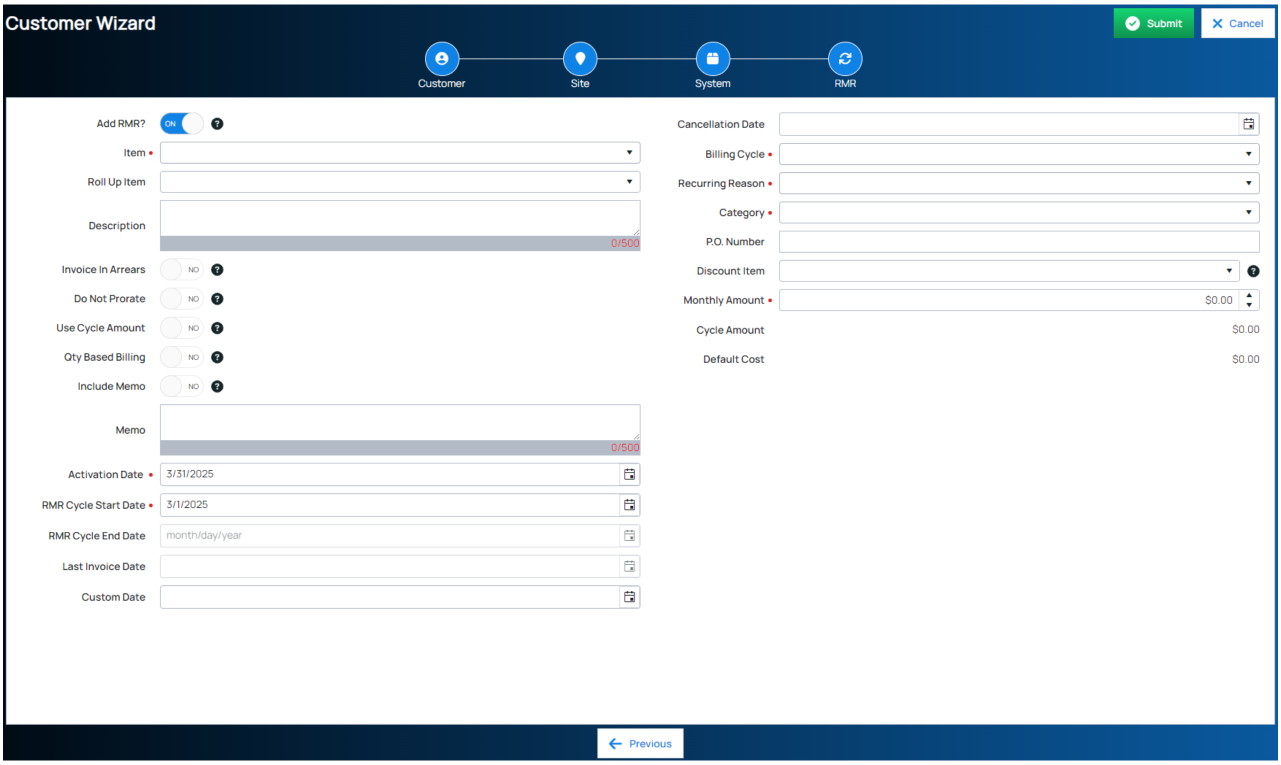
- ***Warranty Part**: From the drop-down list, select the appropriate warranty code for part charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Warranty Start Date**: If there is already an installed system at the site, enter the start date of your warranty for the system.
- ***Panel Type**: From the drop-down list, select the appropriate panel type for the system. The choices that appear in the drop-down list are inventory Parts that were flagged as being a Panel.
- **PO Number**:
- **Panel Location**: Type in where the panel is or will be physically installed. Maximum of 250 characters allowed.
- Central Station: If needed, select the central station from the list.

When finished filling in this form, click the Next button at the bottom of the page, which advances to the RMR form.

If you are not creating RMR at this time, click the Submit button at the upper right of the page to save the information.

RMR Setup

The data entry fields on the RMR form contain the information needed to invoice the customer for a recurring service. Data entry fields with a red bullet next to the field name are required.



Prorating

This is a toggle button (Do Not Prorate) on the RMR that controls the date on which billing will begin. Below is a chart explaining the results you will receive based upon the toggle setting.

Do Not Prorate Setting	Billing Cycle	Activation Date	Next Invoice Month	Billing Period on First Invoice
Off	M	03/10	March	03/10: 03/31
Off	Q	03/10	March	03/10: 05/31
On	M	03/10	March	04/01: 04/30

Do Not Prorate Setting	Billing Cycle	Activation Date	Next Invoice Month	Billing Period on First Invoice
On	Q	03/10	March	04/01: 06/30

Quantity Based Billing

Quantity Based Billing is an available option if you are billing your customer for a number of devices or objects.

Situations where you would use quantity based billing:

- The customer is invoiced based upon the number of monitored devices (points of protection) at the site.
- You are invoicing for elevator monitoring and want to bill by the number of elevators monitored.

If the Qty Based Billing toggle button is set to Yes, a new field is displayed on the RMR data entry form to enter the quantity.

Each data entry field will be described below.

Data Entry Fields

Data entry fields preceded with an asterisk are required.

- **Add RMR**: Set the toggle button to On to have access to the data entry fields.
- ***Item**: From the drop-down list, select the Item code for the recurring service. Item codes are maintained in setup (Setup > Items & Parts > Items > Invoice Items).
- **Roll Up Item**:
- **Description**: This auto-fills with the description on the Item code setup. You can change this if needed. Maximum of 250 characters allowed.
- **Invoice In Arrears**: If you cannot invoice the customer until the service period is over, set this toggle button to On.
- **Do Not Prorate**: If the activation date is not on the first of the month, and you do not want to prorate the first month of service, set this toggle button to On.
- **Use Cycle Amount**: If the billing cycle is other than monthly, and you want to enter the cycle amount instead of the monthly amount, set this toggle button to On.
- **Qty Based Billing**: If quantity based billing will be used, set this toggle button to On.
- **Include Memo**: If text is entered into the Memo field and you want that information to print on the recurring invoice, set this toggle button to On.
- **Memo**: This is a free-form text field that may be printed on the customer invoice or just be internal information. This information will only print if the Include Memo toggle button is set to On. Maximum of 500 characters allowed.
- **Activation Date**: Enter the date the monitored system was activated at the central station. This is also the date when the RMR will start billing.
- ***RMR Cycle Start Date**: Enter the month/year to begin billing the RMR.
- **RMR Cycle End Date**:
- **Last Invoice Date**: Once the RMR has been invoiced for the first time, this field auto-fills with the last invoice date.
- **Custom Date**: Currently, this field is for informational purposes only.
- **Cancellation Date**: If this there is a known end date for this RMR, enter the end date, otherwise skip this field.
- **Billing Cycle**: From the drop-down list, select the billing cycle.
- **Recurring Reason**: From the drop-down list, select the appropriate reason for creating this new RMR: typically New. Recurring Reason codes are maintained in setup (Setup > Other > Recurring Reasons).
- **PO Number**: If the customer has provided a purchase order number that must print on the invoice, enter that

value in this field.

- **Discount Item**: If you are offering the customer a discount, select the discount Item code from the drop-down list. If an Item code was selected in this field, a new field will be displayed below this field to enter the discount percentage.
- **Monthly Amount**: Enter the monthly amount for the RMR. If the toggle button Use Cycle Amount was set to On, this field will not be displayed.
- **Cycle Amount**: If the toggle button Use Cycle Amount was set to On, enter the cycle amount.
- **Default Cost**: If a value was entered for the cost on the Item code setup, a value will be displayed. This is for informational and reporting purposes only.

When finished filling in this form, click the **Submit** button at the upper right of the page to save the information.