Customer Additional Data Entry

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Once a new Customer record has been saved, there is additional setup that is not contained within the Customer Wizard. Setting up additional information is optional depending on your company's policies and procedures. The chart below lists the additional setups available at the customer, site and system level.

Setup Option	Comments
Customer	
CC/eCheck	Required if the customer is on auto-pay for RMR invoices or if you want an EFT payment method on file for the customer.
Notes	May want to enter notes related to the new customer.
Contacts	Enter a list of billing contacts.
Documents	Attach any customer related documents such as contracts.
Custom Fields (Customer)	If custom fields have been setup, enter information.
Custom Fields (RMR)	If custom fields have been setup, enter information.
Site	
Notes	Enter any site related notes.
Contacts	Enter a list of site contacts.
Documents	Attach any site related documents such as floor plans.
Custom Fields (Site)	If custom fields have been setup, enter information.
Item Defaults	If you have a certain price you charge the customer for particular invoice items that is different than the default price, you may create a list for the customer's site.
System	
Notes	Enter any system related notes.
System Parts	Enter a list of installed parts for the system.
Call List	Enter a list of individuals to be called if an alarm is received by the central station.
Zones	Enter a zone list for the system.
Documents	Attach any system related documents.
Custom Fields (System)	If custom fields have been setup, enter information.