



ACCOUNT MANAGEMENT

AlarmBase Professional for Traverse

Manage prospects, customers, contracts, sites, systems, recurring bills and recurring jobs

Because customers are your most valuable assets, AlarmBase Professional makes it a high priority to help you manage all aspects of customer-related information.

The screenshot displays two overlapping windows from the AlarmBase Professional software. The top window is titled "Customers -- AND001 -- ANDERSON" and shows a dropdown menu for "Customer ID" set to "AND001". Below this are tabs for "General", "Defaults", "Defaults 2", "Balance", "History", "Contracts", and "Sites". The "General" tab is active, showing radio buttons for "Residential" (selected) and "Commercial", and an "Inactive" checkbox. The bottom window is titled "AR - Contracts -- ANDERSON" and shows a "Contract ID" of "BURG" and a "Form ID" of "ESS01" (Equipment Sale and Services). The "Contract Date" is "1/2/2003" and the "System Price" is "\$500.00". Under "System and Equipment Defaults", there are dropdowns for "Warranty Plan" (RWP), "Warranty Term" (12), and "Repair Plan" (RRP). The "Recurring Billing Terms" section shows "Frequency" as "MTH", "Initial Term" as "36", and "Renewal Term" as "12". The "Auto Renew" checkbox is checked. Other fields include "Reference", "Signed" (checked), "Altered" (unchecked), "Comments", "Financed By", "Finance Date", and "Finance Ends". The bottom of the window shows a "Record" indicator for "1 of 2".

- ◆ Customers – maintain basic customer information; specify transaction defaults; classify customers for reporting and other purposes
- ◆ Contracts – set up one or more contracts for each customer
- ◆ Sites – track prospects and related contacts; simply convert prospects to active sites; classify sites for reporting and other purposes
- ◆ Systems and Equipment – set up one or more systems for each site; specify central station monitoring information; track equipment warranty, repair and other information
- ◆ Recurring Billing – set up recurring billing for each site to include monitoring, lease, repair and other services
- ◆ Account Cancellations – use the wizard to quickly cancel one or more services for a site; automatically create a final invoice or credit memo; choose to write-off finance charges
- ◆ Collections Management – use the aged receivables and open item reports; track conversations and correspondence with customers; schedule and assign follow-up tasks

Additional Account Management Features:

- ◆ Track customer contracts that are subject to financing agreements
- ◆ Track site information unique to your operation with user-defined fields
- ◆ Track equipment by physical location (i.e. control panel in basement, motion sensor in foyer)
- ◆ Easily maintain important relationships between customers, contracts, systems, recurring billing and jobs
 - Associate systems to customers and contracts
 - Associate recurring bills to customers, contracts and systems
 - Associate recurring jobs to recurring services
- ◆ Choose to group charges for recurring services or print each charge separately on the invoice
- ◆ Set up inspections and other recurring jobs for time & material billing if not covered under a recurring billing contract

The screenshot displays three overlapping windows from the AlarmBase Professional software:

- AR - Sites -- ANDERSON:** Shows site information for Site ID 3, Site Name, and Site Status set to Active. It includes tabs for General, Defaults, Systems, Recur Bill, and Recur Job.
- AR - Systems -- ANDERSON:** Shows system details for System Type ALARM and Description Alarm System.
- AR - Recurring Bill Groups -- ANDERSON:** Shows billing group details for AS1, Alarm Services, with a Next Bill Date of 6/1/2003 and Bill Frequency of MTH. It also includes fields for Bill To ID (AND001), Acct Code (03), Tax Class (1), and Sales Cat (01).

Account Management in AlarmBase Professional is designed to provide important flexibility in managing the different relationships that can exist between alarm customers and sites.