



**ADT Canada**

**Dealer Data Entry Help Guide**

**SECURITY** TRAX<sup>®</sup>  
from  **ALARM.COM**<sup>®</sup>



ADT Canada Dealer Data Entry Help Guide for SecurityTrax

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## ADT Canada Dealer Data Entry Help Guide for SecurityTrax

Throughout this document, please ensure to pay attention to the specific data required for the ADT integration window. Below you will find steps to help with the process and lifecycle of a new customer, as well as using the ADT integration Tab.

\*\*\* As a disclaimer, these instructions are not in stone and requirements may change over time \*\*\*

### Step 1. Fill out the Customer Information in the main Customer Tab

In the images below:

- **Red boxes** indicate mandatory fields. They are required in order to move forward.
- **Purple boxes** indicate buttons that will open another box with mandatory information.

### Personal Contact Info Section

- Customer first and last name
- Address
- Cross Street
- Preferred Language
- Phone Number
- Email
- Credit score
- Residential or Commercial\* account type

\* When creating a Commercial customer, enter the name of the Business in the **Business Name** field and the name of the person in charge of the account in the **First Name** and **Last Name** fields.



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### Sale Information Section

- Proper MMR
- Dealer #: populated in the backend of the system, verify the correct dealer number is on the Customer record.
- Proper Contract term
- Activation Fee: \$ amount
- Sold By: must have a Representative selected

Sale Information

Sale Date:	03/30/2017	Partner Company   Campaign:	Self Generated	Ad Campaign
Sold By:	Turner, Chase	Discount Affiliate   Member Number:	Choose One	
Trainee/Trainer:	Choose One	Monitored By:	ADT Canada TEST	
Lead Rep:	Chase Turner	Interactive Services Providers:	Choose One	
Call Center Representative:		ADT System Type:	N/A	
ADT Customer Number   Serial MAN:		Contract Term:	60 Months	
Account Number:		Activation Fee:	99.99	Payment Received: <input type="checkbox"/>
Monthly Monitoring Charge:	45.99 <input type="checkbox"/> a la carte	Warranty Term:	6 Months	
Monitoring Plan:	Pulse 1A	Dealer Number:	Choose One	
Rebate Check Amount:		Collections Date:		
Account Is Cancelled   Date:	<input type="checkbox"/>	Funding Status:		
Cancellation Reason:	Choose One			

### Installation and Equipment Information Section

- Abort Code: Maximum character limit is 10

Installation and Equipment Information

Installation:	Schedule	Installed:	<input type="checkbox"/>
Confirmation Number:		Abort Code:	SOLEIL
Receiver Number:	132234442		
Services:	<input type="checkbox"/> 2-Way Voice <input type="checkbox"/> AARP <input type="checkbox"/> Cellular Backup <input type="checkbox"/> Guard Response <input type="checkbox"/> Invoicing <input checked="" type="checkbox"/> Maintenance <input type="checkbox"/> Pulse <input type="checkbox"/> Tellular		

TOMMY MARTEL (ID: 16353) ☆ Created: 03/30/2017 by Chase Tur

Save Save and Stay Cancel Delete History Notes At Risk Messages Tags Files Contact (2) Equipment (5) Scheduler Billing (1) Invoices Payments Credit Reports Payables Funding Alarm.com ADT Canada DocuSign Sell Duplicate

**Note:** Some of this information is filled in as things are set up.

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### Step 2. Default Billing Method

In the images below:

- **Red boxes** indicate mandatory fields. They are required in order to move forward.
- **Purple boxes** indicate fields that are only required if you choose either credit card or bank account for billing.

You must select a default billing method for monitoring, the options are:

- Credit card;
- Bank account;
- Manual billing (invoicing).

**Note:** You have the option to select a different billing method for either the installation or a service call.

**Note:** If you select “**Manual billing**”, you must indicate a billing frequency – either quarterly, semi-annual or annual.

**Billing Information**

Default:

Nickname:

Note:

Uses:  Activation  Monitoring  Service

Billing Address:  Same as primary address.

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Billing Cycle:

Billing Start Date:

Billing Date:

ACH:

**Important Note:**  
If you do not have the Customer's Credit Card or Bank Account on file at the time of this process, you may select Manual Billing to continue moving forward. Once the order is created and the proper billing method is obtained, you may go back and change it in the customer's record.

**Payment Details**

**Credit Card**  **Bank Account**  **Manual Billing**

Card Type:

Name on Card:

Card Number:

Card Expiration (MMYY):

Account Type:

Bank Name:

Bank Institution ID:

Account Number:

Routing Number:

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### Step 3. Equipment

In the images below:

- **Red boxes** indicate mandatory fields. They are required in order to move forward.

There are a few steps when choosing the equipment for the account:

1. You must choose the package and/or the individual devices that will be installed in the premise. When adding this equipment you must select a Representative in the field **Sold By**.

**Note:** Ensure you have the proper type of equipment for the monitoring plan/service package selected.

2. Once saved the equipment to be installed, click on each monitored device to add a zone number and zone location description. Additionally, you must select the install status as **Installed** in order to have these parts transferred to the “ADT tab”.

Equipment for TOMMY23 MARTEL23									
Name	Wire Type	Zone#	Zone	Points	Quantity	Charge	Sold By	Installation & Inventory	
<input type="checkbox"/> PANEL - Honeywell Lynx Touch	Wireless			0.00	1	0.00	Chase Turner	Install Status: <b>Installed</b> (red box)	Paid: <input type="checkbox"/>
<input type="checkbox"/> CONTACT - Wireless Recessed	Wireless	1	FRONT DOOR	0.00	1	0.00	Chase Turner	Install Status: <b>Installed</b> (red box)	Paid: <input type="checkbox"/>
<input type="checkbox"/> MOTION - Type 01	Wireless	2	LIVING ROOM	0.00	1	0.00	Chase Turner	Install Status: <b>Installed</b>	Paid: <input type="checkbox"/>
<input type="checkbox"/> CONTACT - Wireless Recessed	Wireless	3	PATIO DOOR	0.00	1	0.00	Chase Turner	Install Status: <b>Installed</b>	Paid: <input type="checkbox"/>



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The equipment detail box opens by clicking on the device installed.

**Equipment Details**

Sold By: Chase Turner (Logged In) ▼

Equipment: CONTACT - Wireless Recessed

Quantity: 1

Item Charge: 0.00

Zone: FRONT DOOR

Wiring: Wireless ▼

Zone Number: 1

Buttons: Save, Cancel, Close, Delete

### Step 4. Emergency Contacts

In the images below:

- **Red boxes** indicate mandatory fields. They are required in order to move forward.
- **Purple boxes** indicate optional fields.
- **Green boxes** indicate fields that are filled in the backend of SecurityTrax, no data entry is required.

Indications for emergency contacts – Each account must...

- Have at least one emergency contact.
- Have a minimum of 2 separate phone numbers in order to be monitored. One of these phone number may be the premise number.
- Either have a general password or a password added to each contact.

**Important note about Enhanced Verification – The alarm dispatch procedure is as follows:**

1. The central station calls the premise/primary phone number;
2. If there is no answer, they must have an Enhanced Call Verification Contact (ECV), before the Agency is called and authorities are dispatched, for burglary alarms only:
  - a. If the ECV knows the password: they can stop the false alarm.
  - b. If they cannot confirm the verbal password: the central station will dispatch.

Police, Fire, and Medical contacts will be populated by the system, you do not have to complete these fields.



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### Contact Details

Name:	<input type="text"/>
Phone:	<input type="text"/> Choose One ▾
Email:	<input type="text"/>
Primary Language:	Choose One ▾
Passcode:	<input type="text"/>
Enhanced Verification:	<input type="checkbox"/>

### Emergency Contacts for TOMMY33 MARTEL33

Name	Phone	Email	Language	Passcode	EV	Order
CELINE DELMAIRE	(431) 111-2222 (Mobile/Cell)		English	PONEY	Yes	↓
DAWN CATHCART	(431) 444-5555 (Mobile/Cell)		English		No	↑

### Police / Fire / Medical For TOMMY33 MARTEL33

	Name	Permit #	Phone Number	Fee
Police	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Fire	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Medical	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Guard	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Electrical	<input type="text"/>	<input type="text"/>	<input type="text"/>	

## Step 5. ADT Canada Tab

In the images below:

- **Red boxes** indicate mandatory fields. They are required in order to move forward.
- **Purple boxes** indicate optional fields.

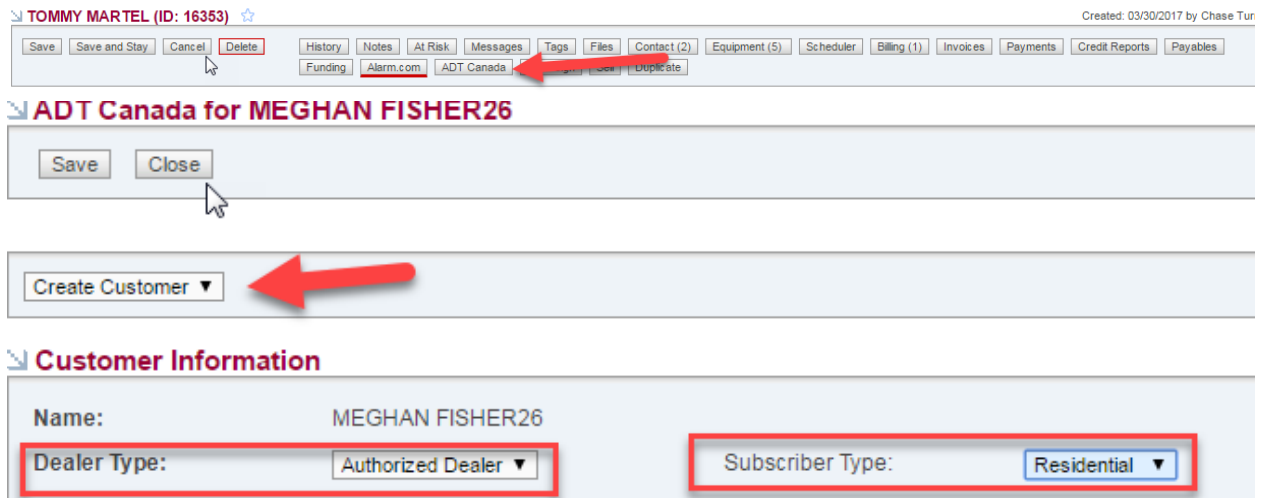
### IMPORTANT NOTE!!!

The ADT Canada window does not save your dropdown selections as you select them, each area has a save button on the upper right side. You will need to click this button in order to save your selection.

1. Click on the ADT Canada button.
2. In the drop down menu, choose **Create Customer**. This will prompt the **Dealer Type** and **Subscriber Type** fields. Please be careful when choosing the **Dealer Type** as this will drive whether the account is a 3rd party (wholesale) or a corporate Authorized Dealer account.



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The screenshot shows the top navigation bar with a dropdown menu for 'ADT Canada' highlighted by a red arrow. Below this, the 'ADT Canada for MEGHAN FISHER26' tab is active, with 'Save' and 'Close' buttons. A 'Create Customer' dropdown menu is also shown with a red arrow pointing to it. The 'Customer Information' section contains fields for 'Name: MEGHAN FISHER26', 'Dealer Type: Authorized Dealer' (highlighted with a red box), and 'Subscriber Type: Residential' (highlighted with a red box).

3. Select **Manage Account** from the drop down menu. This will open the ADT Canada tab.



The screenshot shows the 'ADT Canada for TOMMY23 MARTEL23' tab. It features a 'Close' button and a 'Manage Account' dropdown menu.

4. Once in the ADT Canada tab, confirm the information you want to appear on the customer's actively monitored account (the following pages will guide you through this confirmation).

**Note:** All areas with a **red box** require some adjustments before saving and activating the account.



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ADT Canada for TOMMY23 MARTEL23

Close

Manage Account

**Customer Information**

Customer State: Monitoring Activated      Guard Service: Unavailable  
 Subscriber Type: Residential      Dealer Type: Authorized Dealer

**Inquiry**

Inquiry Number: 200008913  
 First Name:      Phone 1:  
 Last Name:      Phone 2:  
 Address 1:      Fax:  
 Address 2:      Email:  
 City:      Language: (Empty)  
 Province: (Empty)      Grade: Approved  
 Postal Code:  
 Country: (Empty)

**Installation**

Installation Number: 200312755  
 Name:      Phone 1:  
 Address 1:      Phone 2:  
 Address 2:      Fax:  
 City:      Code Word:  
 Province: (Empty)      Monitoring Status | Date: (Empty) | No Date  
 Postal Code:  
 Country: (Empty)

**System 1 - General Information**

CID: A280010664  
 Panel: (Empty)  
 Comm Format:      Line Type:  
 Comm Provider:      Two Way:

**System 1 - Zones**

Number	Type	Description	Dealer Panel	Comm Format

**Contacts/Users**

Add User Save

**Contract**

Contract Number: 200000028      Contract Status: (Empty)  
 Installation Date: No Date      Payment Type: (Empty)  
 In Service Date: No Date  
 Contract Length: (Empty)  
 Sold Price: 39.95  
 Free Months: (Empty)  
 Free Months Distribution: (Empty)  
 Cycle Day: (Empty)  
 Cycle Period: (Empty)

**Contract - Services**

Services:

- 001 - BASIC ALARM MONITORING
- 002-PME - FIRE MONITORING COMMERCIAL
- 002-RCO - FIRE AND CARBON MONOXIDE MONITORING
- 002-RFS - RESIDENTIAL FIRE MONITORING
- 720 - 24 HOUR TEST SECURITY SYSTEM - CENTRAL
- 960 - TITAN PAYMENT
- 991 - FUTURE LOYALTY ADJUSTMENT

**Billing Account**

Account Number: 20000027  
 Name:      Phone 1:  
 Address 1:      Phone 2:  
 Address 2:      Fax:  
 City:      Language: (Empty)  
 Province: (Empty)  
 Postal Code:  
 Country: (Empty)

**Communication Logs**

Date	Note



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### General Information Tab

First, select a panel. Your panel selection will drive drop down options for your communication format: **Two Way** voice option and **Line Type**.

Once you have made your selections in the drop down menu and hit save. You will be able to generate a **CID number**. Once a CID is created the General system information will look like this.

**System 1 - General Information** Save

CID:	H82365FBF7		
Panel:	2GIG GO! Control		
Comm Format:	ContactId	Line Type:	Dialer
Comm Provider:	ADT	Two Way:	Yes

### Zones Tab

Next, you need to complete the zoning information. This information should be driven by the equipment tab you have already completed. Select the **Action Plan Type**, for example burglary, fire, panic, etc.

**Note:** If no equipment is showing in the ADT Canada tab, go back to the Equipment tab to ensure all selected equipment is at **Installed** status.

**System 1 - Zones** Save

Number	Type	Description	Dealer Panel	Comm Format
1234	BA-BURGLAR AL	zone 1	ADEMCO VISTA 20 / 20P	ContactId

### Contacts/Users Tab

In this tab, you will see the contacts you have entered during step 4. From the list of contacts, select the **Contract Signer**.

**Note:** there must be a minimum of 1 contract signer selected per account.

**Authority level:** we no longer have only “Limited” or “All authority” in this list. The levels are now broken down per the exact permissions allowed for each contact. It is possible to allow authority for the contacts for these areas: data entry, irregular open and closes, as well as booking a service request. Each of these options will show a yes or no to identify if this specific user has the authority to make changes to these particular areas.

**Note:** The “personal identification code” option in the authority levels should only be chosen if you are creating a contact for a general password on the account.



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In this area, you will also enter additional phone numbers for each contact (only one number will transfer over from the Contacts tab). Additional numbers are optional.

**Contacts/Users** ⓧ Add User Save

Contact #:	1	Authority:	Data: No   Sched ▾
Name:	Lina Nguyen	Panel #:	111
Codeword:	66764	ECV:	No
Contract Signer:	<input type="checkbox"/>	Phone 1:	(514) 456-1234
Keyholder:	<input type="checkbox"/>	Phone 1 Type:	(Empty)
Phone 2:	514-567-3456	Phone 2 Type:	Home ▾
Phone 3:	514-567-3456	Phone 3 Type:	Home ▾

### Contract Tab

Complete the contract information: select the **Contract Length**, **Cycle Period**, **Free Months** and **Free Months Distribution** from the drop down menus.

Also enter the monthly monitoring rate for the customer in the **Sold Price** field.

**Contract** ⓧ Save

Contract Number:	100000229	Contract Status:	(Empty)
Installation Date:	No Date	Payment Type:	Pre-Authorized Payment
In Service Date:	No Date		
Contract Length:	60 months ▾		
Sold Price:	39.95		
Free Months:	4 months ▾		
Free Months Distribution:	2 Dealer 2 ADT ▾		
Cycle Day:	(Empty)		
Cycle Period:	Monthly ▾		



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### Contract – Services Tab

Select the services sold to the customer by checking the checkboxes under the **Services** area:

Services:

- 001 - BASIC ALARM MONITORING
- 002-PME - FIRE MONITORING COMMERCIAL
- 002-RCO - FIRE AND CARBON MONOXIDE MONITORING
- 002-RFS - RESIDENTIAL FIRE MONITORING
- 009-COF1 - TELECARD COM O/C 5 MODIF YEARLY - BASIC SER.
- 009-ROF1 - TELECARD RES O/C 1 ADDRESS
- 014 - FLOOD SIGNALS
- 015 - CARBON MONOXIDE MONITORING
- 015-P - SIGNALS - PROPANE OR NATURAL GAS
- 021 - FIRE PANEL MONITORING

### Billing Account Tab

Verify the billing information and select the preferred **Language**.

**Billing Account** Save

Account Number:		Phone 1:	8195551111
Name:	ROSE40 PRODERROR	Phone 2:	
Address 1:	8481 Langelier	Fax:	
Address 2:		Language:	English ▼
City:	Montreal		
Province:	Quebec		
Postal Code:	H1P2C3		
Country:	Canada		

**Once the account is in the status “Contract Pending”, you will not be able to cancel the order through the application, you must call Dealer Services.**



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### Step 6. Activate the Account

Before activating the account, ensure you have saved each of the above areas (the Save button can be found at the very top of the ADT Canada tab).

Select **Activate Customer**.

ADT Canada for TOMMY MARTEL

Save Close

Activate Customer ▼

Activate Customer

Activate Customer:

***Congratulations!!***  
***The account is now active for monitoring***

➔ Your last step is to send the customer agreement to Dealer Services in order to be funded for the account and have the customer billing activated.