ADT Canada

Dealer Data Entry Help Guide

Table of Content

Step 1. Fill out the Customer Information in the main Customer Tab 2

Personal Contact Info Section 2

Sale Information Section 3

Installation and Equipment Information Section 3

Step 2. Default Billing Method 4

Step 3. Equipment 5

Step 4. Emergency Contacts 6

Step 5. ADT Canada Tab 7

General Information Tab 10

Zones Tab 10

Contacts/Users Tab 10

Contract Tab 11

Contract – Services Tab 12

Billing Account Tab 12

Step 6. Activate the Account 13

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.

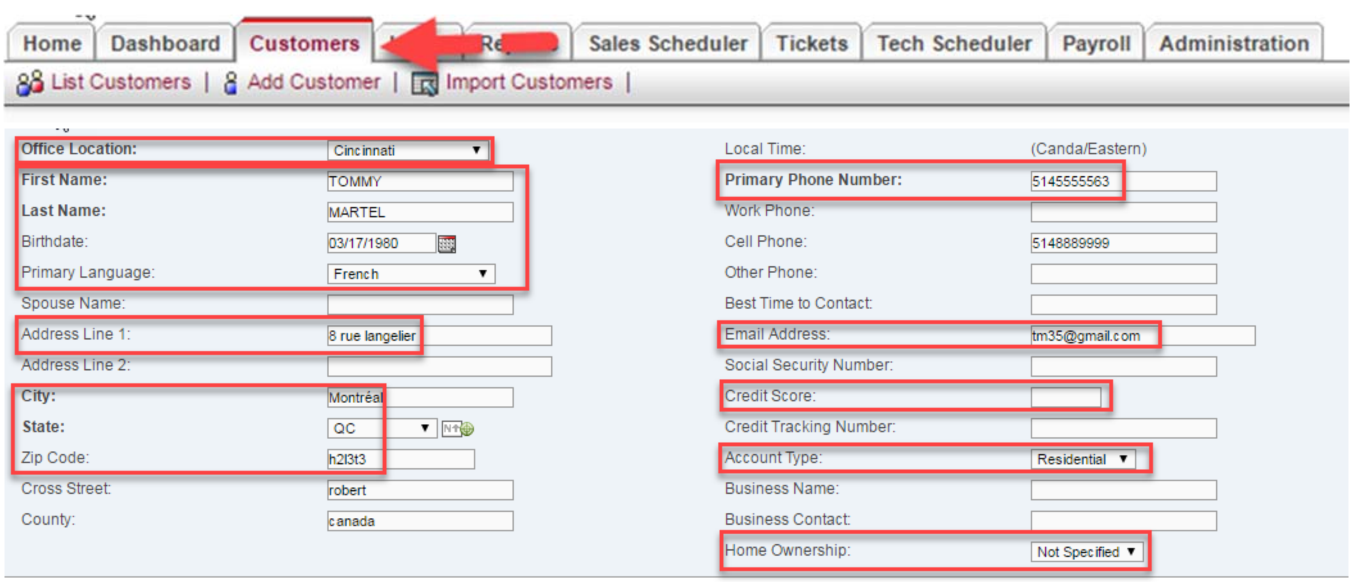
**** As a disclaimer, these instructions are not in stone and requirements may change over time ****

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

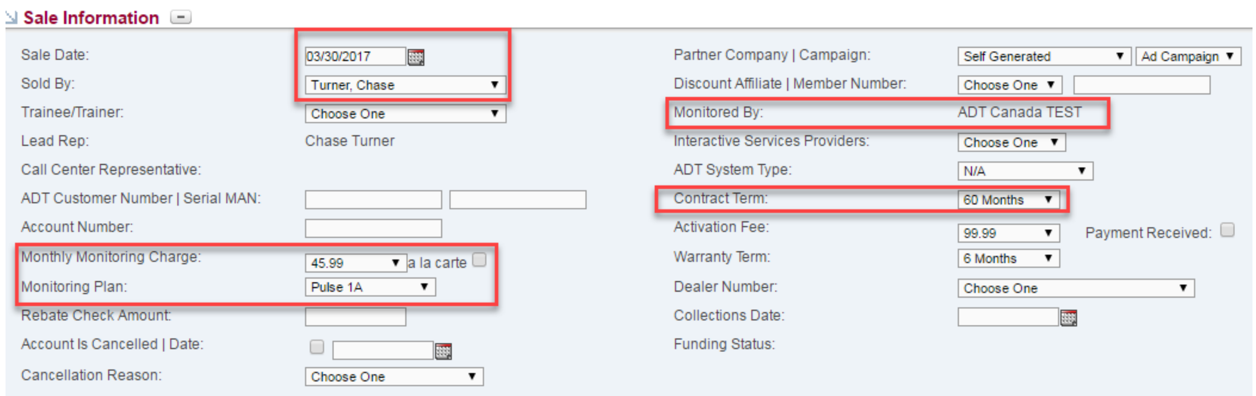
- Customer first and last name
- Address
- Cross Street
- Preferred Language
- Phone Number
- Email
- Credit score
- Residential or Commercial* account type



** 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.*

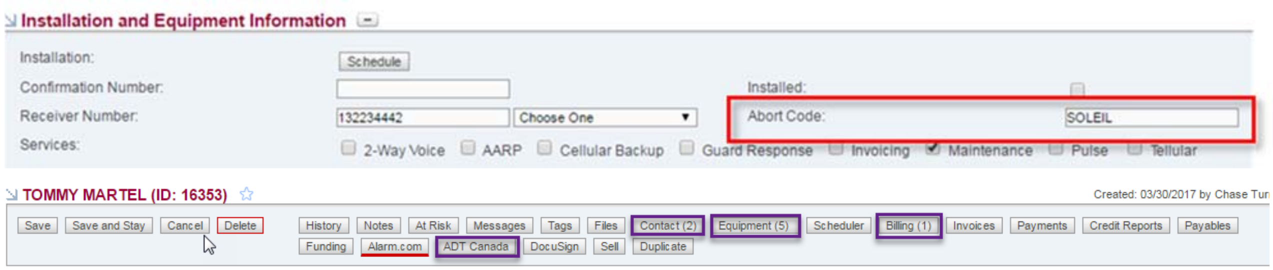
Sale Information Section

- 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



Installation and Equipment Information Section

- Abort Code: Maximum character limit is 10



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

Step 2. Default Billing Method

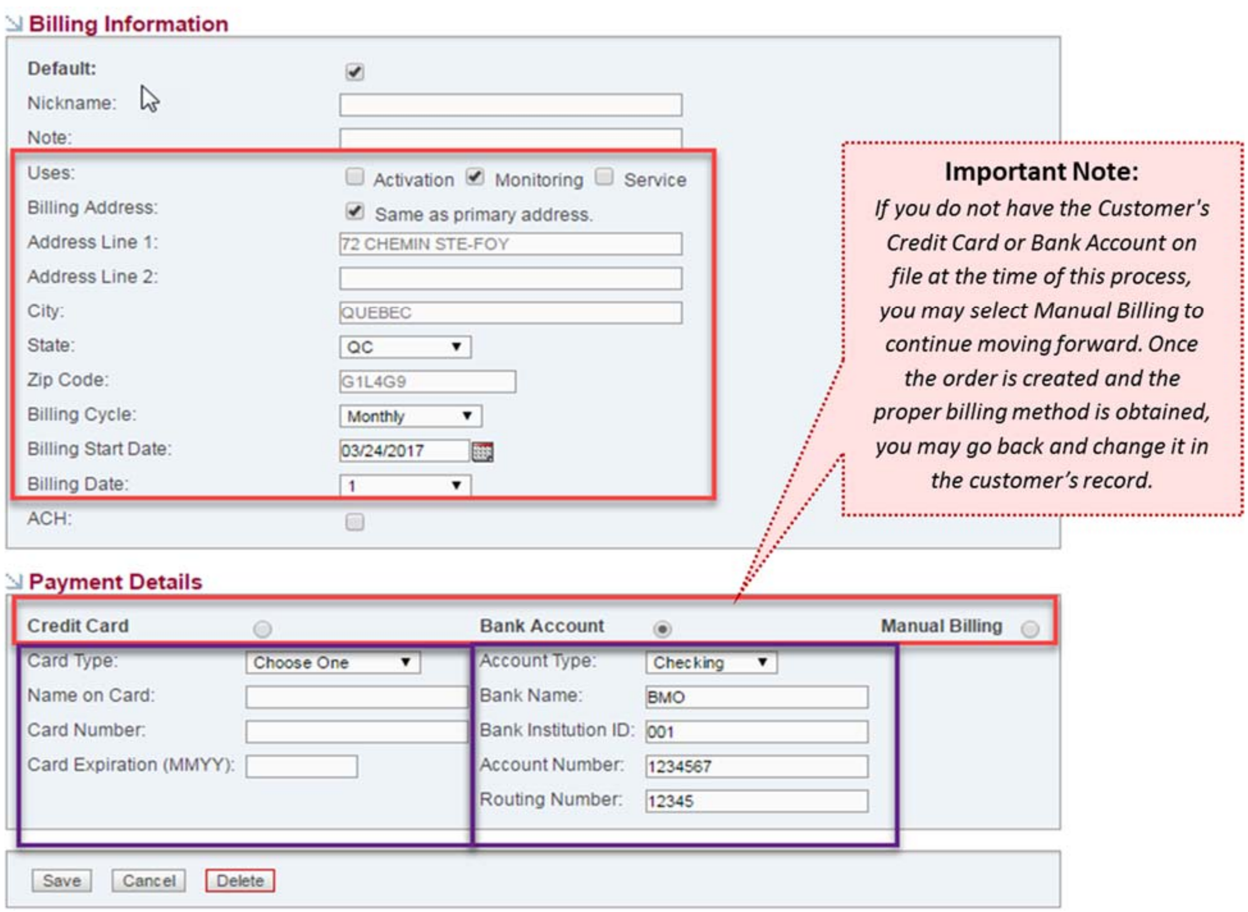
> In the images below:
>
> - **Red boxes** indicate mandatory fields. They are required in order to move forward.
> - **Purple boxes** indicate fields that are only required if you choose either credit card or bank account for billing.

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.*



Step 3. Equipment

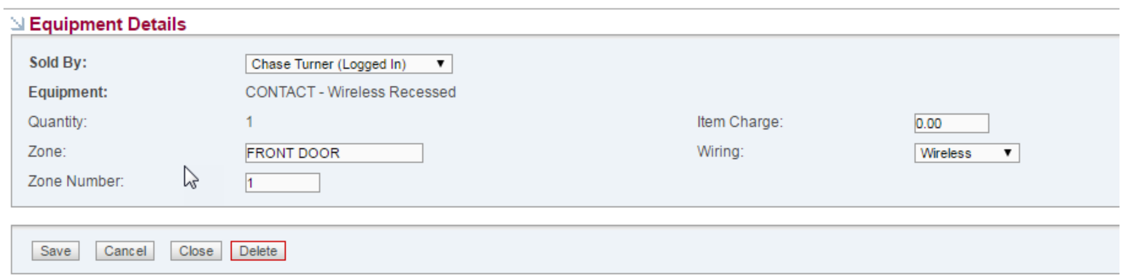
In the images below:

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

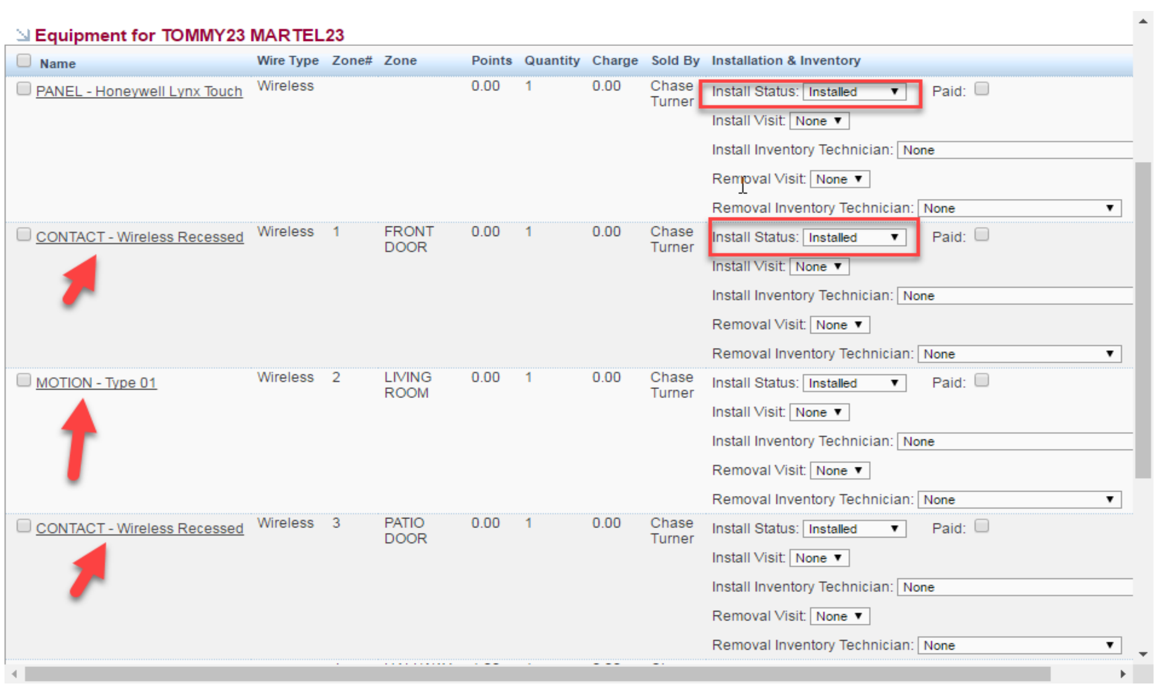
There are a few steps when choosing the equipment for the account:

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**.

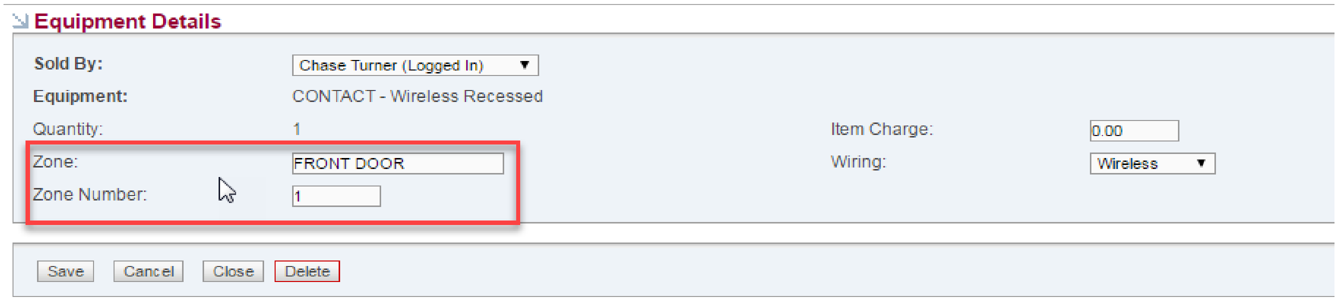
   Note: *Ensure you have the proper type of equipment for the monitoring plan/service package selected.*



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”.



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



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.

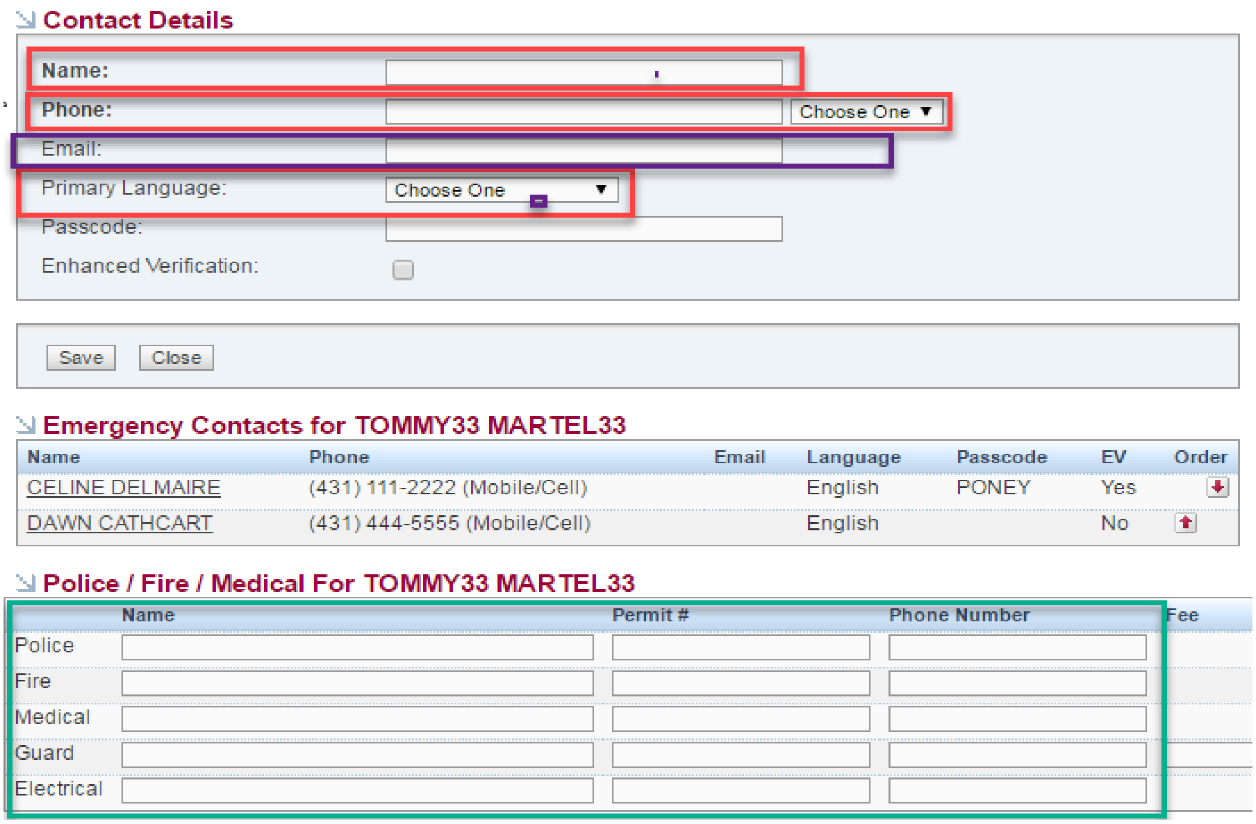
Indications for emergency contacts – Each account must…

- 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.



Step 5. ADT Canada Tab

In the images below:

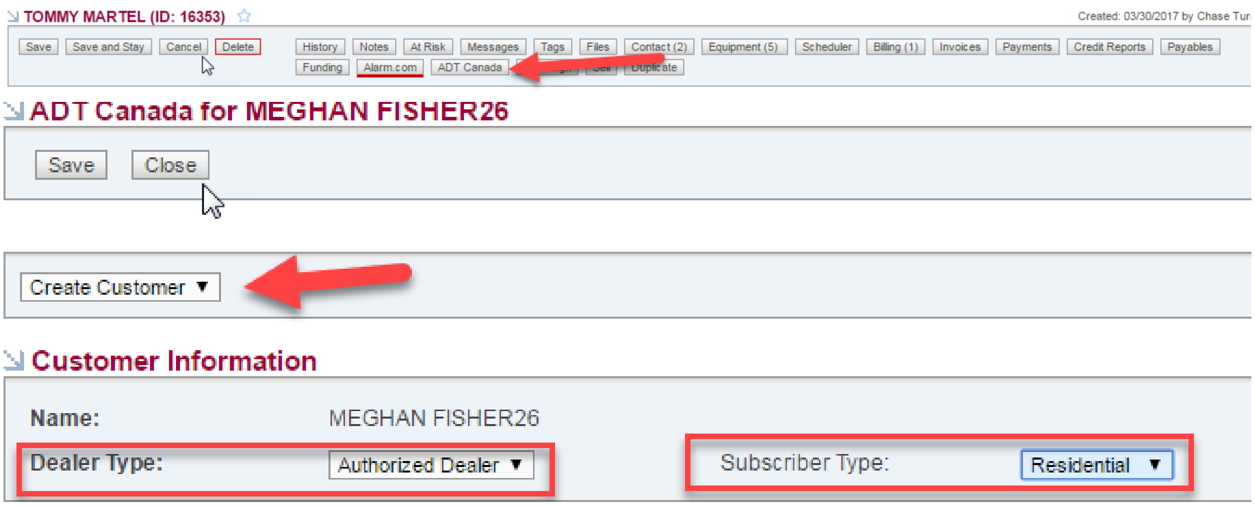
- **Red boxes** indicate mandatory fields. They are required in order to move forward.
- **Purple boxes** indicate optional fields.

IMPORTANT NOTE!!!

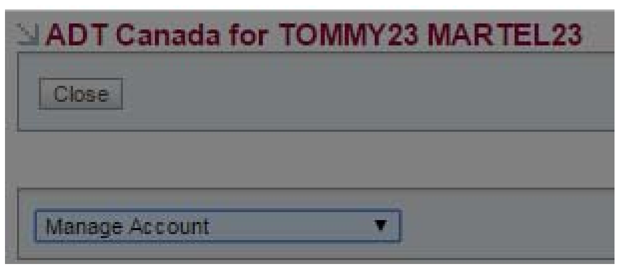
The ADT Canada window does not save your dropdown selections as you select them, each area has a save button on the upper right side. You will need to click this button in order to save your selection.

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.

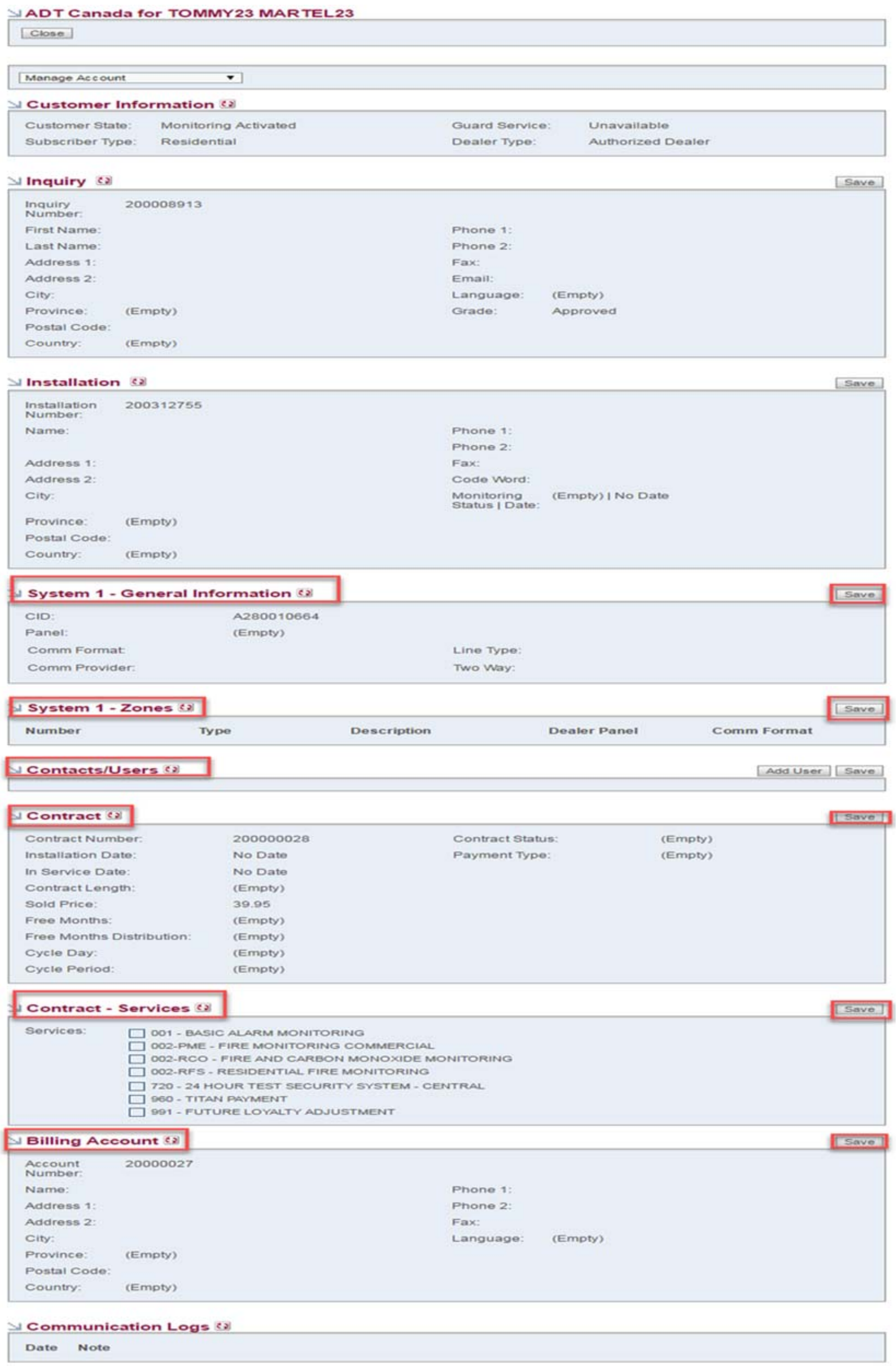


3. Select **Manage Account** from the drop down menu. This will open the ADT Canada tab.



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.*


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 Save

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 Save

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

System 1 - General Information Save

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

System 1 - Zones Save

Number	Type	Description	Dealer Panel	Comm Format

Contacts/Users Add User Save

Contract Save

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 Save

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 Save

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

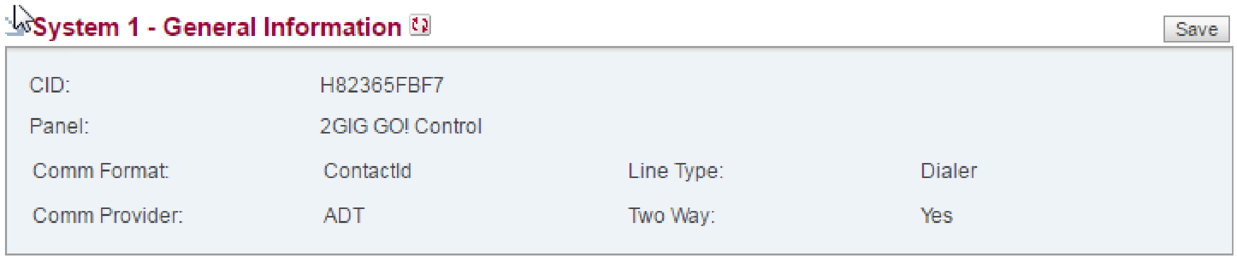
Communication Logs

Date	Note

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**.

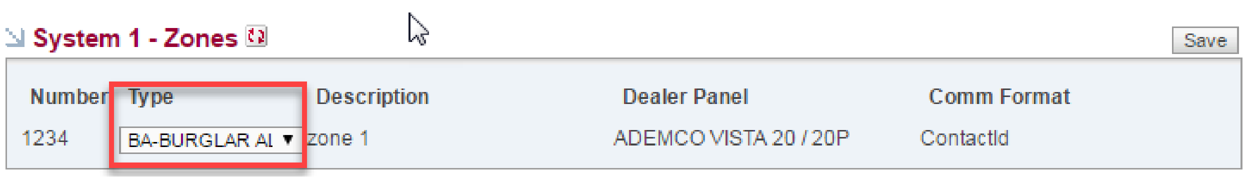
Once you have made your selections in the drop down menu and hit save. You will be able to generate a **CID number**. Once a CID is created the General system information will look like this.



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.*



Contacts/Users Tab

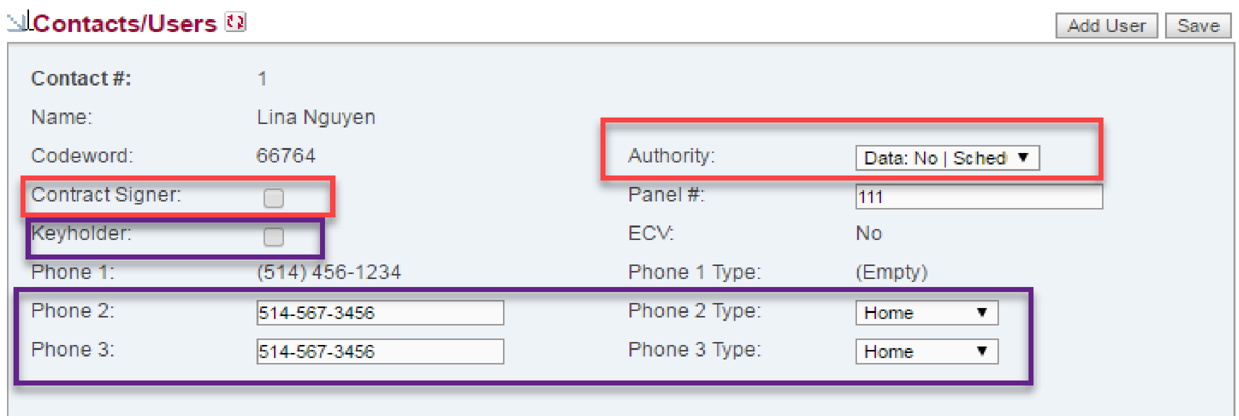
In this tab, you will see the contacts you have entered during step 4. From the list of contacts, select the **Contract Signer**.

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.*

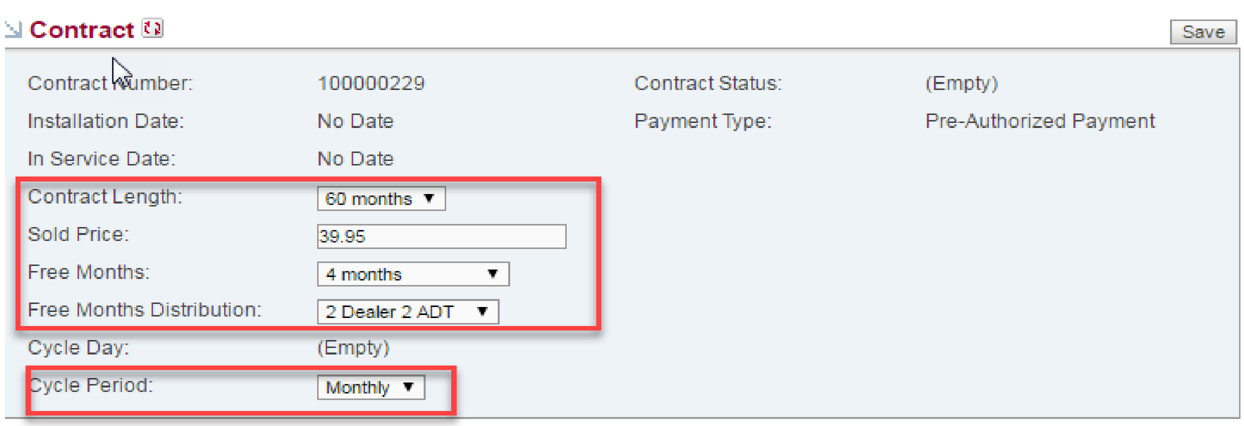
In this area, you will also enter additional phone numbers for each contact (only one number will transfer over from the Contacts tab). Additional numbers are optional.



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.

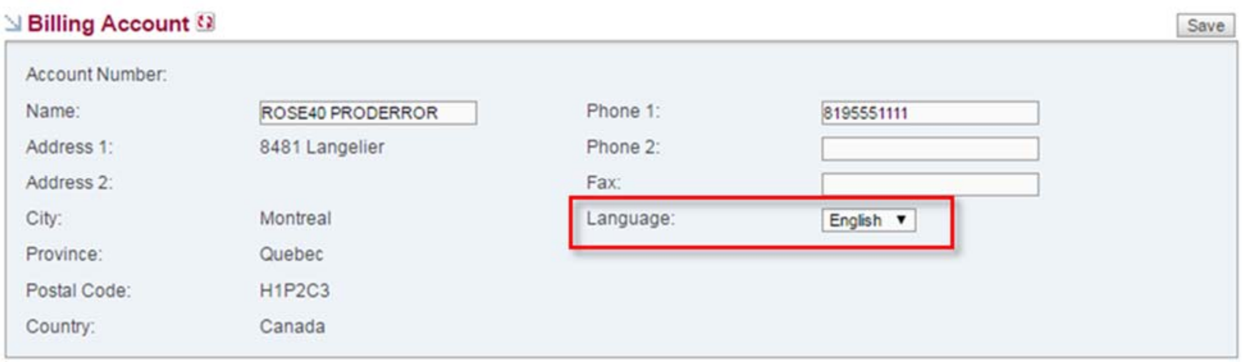


Contract – Services Tab

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

Billing Account Tab

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



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.

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**.

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.