

TRAINING MANUAL

SECURITYTRAX



SAFE HAVEN
SECURITY

SECURITYTRAX

SecurityTrax is a web based application we use as our Point of Sale System. You will keep track of all your sales within this application. We also use this as a communication tool for scheduling technicians, customer issues, and our rebate/gift card process. It is extremely important for information within this system to be accurate! In this tutorial, you'll be shown how to input sales, schedule technicians, and send/receive tickets.

LOGGING IN

Go to <https://secure.securitytrax.com/safehaven> in Web Browser. This will take you to the login screen below and your Username & Password will need to be entered to access the site.

SECURITYTRAX[®]

Safe Haven Security

Please enter your username and password.

Username:

Password:

Click "Login" → Login

Your Username & Password

GOADDY VERIFIED & SECURED VERIFY SECURITY

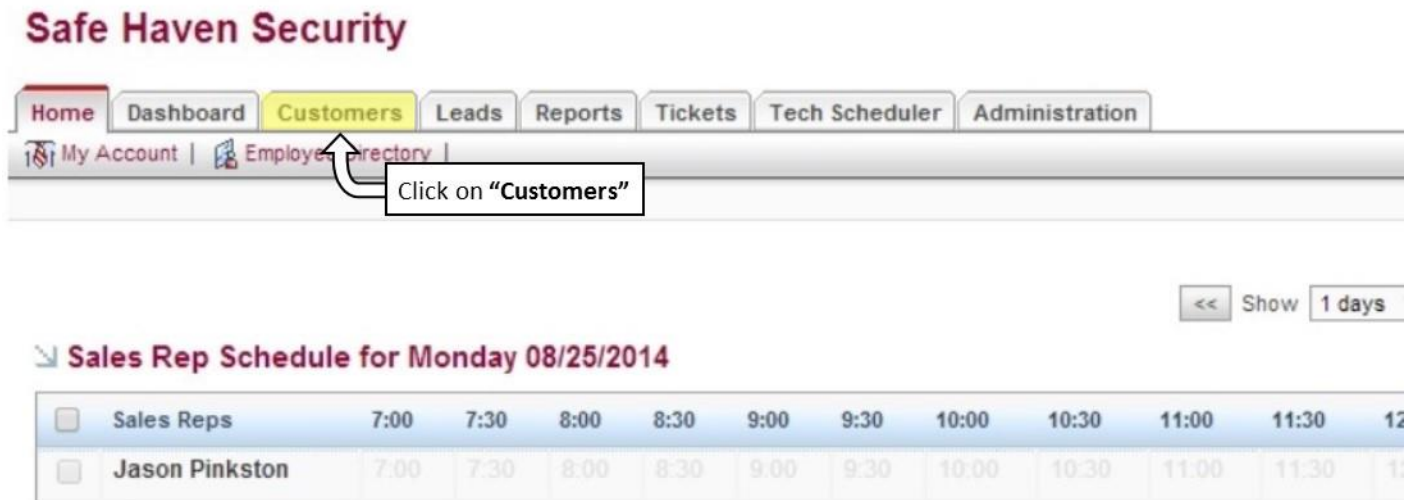
@securitytrax

SecurityTrax Mobile

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Home Screen

Once you click **“Login”** you’ll be taken to the SecurityTrax Home Screen as shown below. From here you’ll be able to view any open tickets. We’ll get to this later, for now we’ll assume you just sold an account and need to input all the information. Click on the **“Customers”** Tab.



Customers Tab

In the Customers Tab you will be able enter your sales and execute a detailed search within those sales. Keep in mind, you will only be able to view your own sales in this tab. In order to enter a sale, you’ll need to click on **“Add Customer”**.



USE ALL CAPS WHEN ENTERING INFO!

Choose the office location where the install will take place.

CHOOSE CITY
Assign Me As Sales Rep
TEST
CUSTOMER

ALWAYS ASSIGN YOURSELF AS THE SALES REP!!!

USE THIS FORMAT WHEN ENTERING THE BIRTH-DATE. 00/00/0000

KEY

- INFO WILL AUTO-POPULATE
- INFO SALES REP WILL INPUT

Personal Information

Office Location:

First Name:

Last Name:

Birthdate:

Primary Language:

Spouse Name:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Cross Street:

County:

Primary Phone:

Work Phone:

Cell Phone:

Other Phone:

Best Time To Contact:

Email Address:

Social Security Number:

Credit Score:

Credit Tracking Number:

Account Type:

Business Name:

Business Contact:

8165551234

8164444321

SALES REP ID #

CUSTOMER EMAIL

444556666

800

000000

Risk/Normal

123 MAIN STREET

NORTH KC

MO

64116

SOUTH STREET

Johnson

Click "Save & Stay" after all info has been entered.

Save Save & Stay Cancel

TEST CUSTOMER (ID: 82765)

Save Save & Stay Cancel

History Notes Messages Tags Files Contacts Equipment Scheduler Billing Payments DocuSign

NOTE: You can find the cross street by simply searching for the customer's address on Google.

Sale Information

Sale Date:	09/01/2014	Partner Company Campaign:	Select Partner Company	GE Marketing	None
Sold By:	Make sure your Sales Reps name is here	Price, Joseph	Discount Affiliate Member #:	Choose One	
Train(ee)er:	Select "Beverly, Chris" as Trainer	Beverly, Chris	Monitored By:	ADT	
Lead Rep:			ADT System Type:	NIA	
Callcenter Rep:			Contract Term:	36 Months	
ADT Customer # Serial MAN:			Activation Fee:	99.00	Payment Received: <input type="checkbox"/>
Account #:			Warranty Term:	ADT Sold	
Monthly Monitoring Charge:	Select correct Monthly Amount	44.99	Dealer Number:	Select Appropriate State	Missouri (5359626)
Monitoring Plan:	Select corresponding plan to match Monthly \$	Res - Bundle 2A - 44.99	Collections Date:		
Rebate Check Amount:	Enter the \$ value of the rebate if eligible	100.00	Funding Status:		
Account Is Canceled Date:	<input type="checkbox"/>				
Cancelled Reason:	Choose One				

Installation & Equipment Information

Installation:	Used to schedule the customers 1st install appointment. See next page for scheduling "how to"	Schedule	Installed:	<input type="checkbox"/>
Confirmation Number:			Abort Code:	Enter 4 to 10 digit alpha numeric code for ADT verification
Receiver Number:				
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			

From the Monitoring Plan drop down list. Choose the plan that corresponds with the monthly monitoring rate we'll be charging the customer.

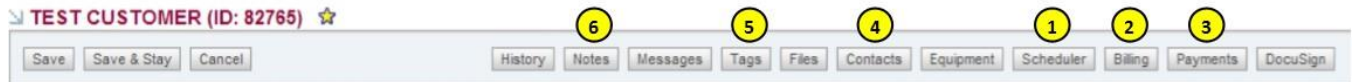
NOTE: FOR LANDLINE MONITORING, ALWAYS CHOOSE "Res-Basic w/up-sell"

- Res - Bundle 2A - 44.99
- Res - Basic no maint
- Res - Basic
- Res - Basic w/ up-sell
- Res - Bundle 1 - 42.99
- Res - Bundle 2 - 42.99
- Res - Bundle 2A - 44.99**
- Res - Bundle 3A - 47.99
- Res - Bundle GSM - 47.99
- Res - Bundle GSM2 - 45.99
- Res - Pulse 1A - 49.99
- Res - Pulse 1A - 52.99
- Res - Pulse 1B - 53.99
- Res - Pulse 2A - 58.99
- Res - Pulse 2A - 61.99
- Res - Pulse 2B - 59.99
- Res - Pulse 2B - 62.99
- Res - Pulse 3A - 59.99
- Res - Pulse 3A - 62.99
- Res - Pulse 3B - 60.99
- Res - Pulse 3B - 63.99

TIP: Click "Save & Stay" each time you make any changes within an account!

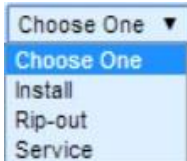
Account Tabs

There are 11 tabs within each account created in SecurityTrax. We will only be dealing with 6 of them while entering a sale. The diagram below shows each of those 6 tabs and the order in which they will be explained.



1. Scheduler

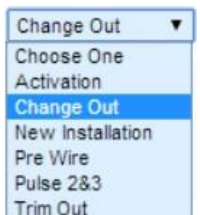
The Scheduler is where we will schedule the install appointment with the technician. For this example, we are going to schedule an appointment for Friday 8/5/2014 between 12 – 2pm. The **Technician/Scheduler Notes** are on the next page.



The first drop down list will require you to select the type of visit the technician will be making. In this case, it's an **Install**.

The second drop down list will ask for the type on install. In this case, we'll choose Change out. This means there is an existing system that we'll replace.

NOTE: You **MUST** choose "**Pulse 2&3**" if you sold the customer on **Pulse Tier 2 or 3**.



Technician/Scheduler notes

Follow this Basic Format:

1. Does the customer qualify for Flex Payments?
2. Paperwork Info and what to collect, check/CC Form and amount.
3. Additional Notes – Anything additional that may be pertinent to the install
4. What we are doing...change out, activation, new installation etc.
5. Type of Monitoring and Rate (Landline or Cell Primary)
 - a. **Provide the Landline Provider as this will help our technicians.**
6. Details of Equipment Charges to Customer

Service Visit Notes:

1. CUSTOMER DOES/DOES NOT QUALIFY FOR FLEX PAYMENT.
 - a. **Must have a credit score of 650 or above to qualify!**
2. ****Please collect all signed paperwork and CC form (or Live Check) in the amount of \$99 ****
Or
****Please collect all signed paperwork and CC form or Check for \$107.17, 8.25% tax****

NOTE: WE ONLY CHARGE TAX IN ARIZONA, CALIFORNIA, & WASHINGTON STATE

3. ADDITIONAL NOTES
 - a. Example: Call 30 Minutes prior to arrival. [Client Name & Number]
 - b. Example: Gated Community, code entry _____.
- ADD YOUR CELL PHONE NUMBER IF THE INSTALL IS TAKING PLACE OUTSIDE OF BUSINESS HOURS**
4. PLEASE CHANGE OUT EXISTING (MANUFACTURER) SYSTEM. ADD CELL PRIMARY (**IF NEEDED**) AND KEY FOB.
Or
PLEASE INSTALL NEW 3+1 DSC IMPASSA KIT. ADD CELL PRIMARY (**IF NEEDED**) AND KEYFOB
 5. Type in the type of monitoring that was sold.
 - a. Landline Monitoring w/AT&T U-Verse at \$36.99/Month
 - b. Cell Monitoring @ \$44.99/Month
 - c. Pulse Monitoring @ \$52.99/Month
 - d. Pulse Tier 2 Monitoring @ \$61.99/Month
 - e. Pulse Tier 3 Monitoring @ \$62.99/Month

6. Details of Charges to Customer. **NOT REQUIRED WHEN CHARGING \$99 & NO TAX**

<u>Standard Install</u>	<u>Standard w/Cell Primary</u>	<u>Pulse Tier 2 & 3 w/Activation</u>
\$99 Equipment	\$99 Equipment	\$99 Equipment
\$8.17 Tax	\$150 Cell Primary	\$25 Activation
\$107.17 Total	\$20.54 Tax	\$10.23 Tax
	\$269.54 Total	\$134.23 Total

2. Billing

The Billing tab is where you will enter the customer's Credit/Debit Card, Bank Account Information, or select Manual Billing if they qualify. The example below illustrates how to enter a credit/debit card.

The screenshot shows a web browser window titled "Customer Billing - Google Chrome" with the URL https://secure.securitytrax.com/safehaven/customerBilling.php?customer_id=82765. The page displays "Billing Methods for TEST CUSTOMER" with a table header: ID, Name, Note, Default.

Billing Information

Default:
Note:
Uses: Activation Monitoring Service
Billing Address: Same as primary address.
Address Line 1:
Address Line 2:
City:
State: Choose One ▼
Zip Code:
Billing Cycle: Monthly ▼
Billing Start Date:
Billing Date: Choose One ▼
ACH:

Payment Details

Credit Card Bank Account Manual Billing
Card Type: Visa ▼ Account Type: Choose One ▼
Name on Card: TEST CUSTOMER Bank Name:
Card Number: 4444444444444444 Bank Institution ID: 123
Card Expiration (MMYY): 0517 Account Number:
Routing Number:

Annotations:
- A box around the "123" in the Bank Institution ID field with an arrow pointing to it says "3 digit code on the back of the card".
- A box around the "Save" button with an arrow pointing to it says "Click 'Save' when done".

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3. Payments

In the Payments Tab, you'll be able charge a customer's Credit Card.

MUST HAVE CREDIT CARD INFORMATION FOR EVERY ACCOUNT

ANY PAYMENT NOT PROCESSED IMMEDIATELY MUST HAVE MANAGER APPROVAL!

Customer Payments - Google Chrome
https://secure.securitytrax.com/safehaven/customerPayments.php?customer_id=82765

Payment Details

Activation Fee: 99.00
Total Equipment Charge: 0.00
Total Charges: 99.00
Outstanding Equipment Charge: 0.00

Method: Credit Card: Visa xxxxxxxxxxxxxx5864

Process Transaction: Click the check box if we are processing the install fee immediately.

Transaction Type: Sale

Amount: 0.00 Tax Amount:

Desired Posting Date: 09/02/2014 Choose today's date if we are processing immediately. If not, don't select the check box and select the desired posting date.

Posted Date:

Expected Clearing Date:

Cleared?

Notes: INSTALL FEE

Email Receipt:

Save Close

Payments for TEST CUSTOMER

Cleared	Cleared Date (Expected)	Posted Date (Desired)	Method	Amount	Notes	Processing Info
Total:				0.00		
Cleared:				0.00		
Outstanding:				0.00		

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After processing the payment, you'll want to copy the Processing Info and paste it into the notes. Copy the information highlighted in the example below.

Cleared	Cleared Date (Expected)	Posted Date (Desired)	Method	Amount	Notes	Processing Info
<input checked="" type="checkbox"/>		09/02/2014 (09/02/2014)	Credit Card: Visa xxxxxxxxxxxxxx7739	\$107.17	INSTALL FEE	09/02/2014 7:48 AM by Jason Pinkston Sale Transaction ID: 2391184746 Authcode: 44991 Status: Pending Settlement Status Updated: 09/02/2014 7:48 AM
Total:				107.17		
Cleared:				0.00		
Outstanding:				107.17		

Copy the Processing Information

4. CONTACTS

You will enter the emergency contact in the Contacts Tab. You MUST have a first and last name for this contact and at least 1 entry. You can have multiple emergency contacts if the customer wishes.

The screenshot shows the 'Customer Emergency Contacts' page in Google Chrome. The URL is https://secure.securitytrax.com/safehaven/customerContacts.php?customer_id=82765.

Contact Details

Name: EMERGENCY CONTACT (Annotation: First & Last Name)

Phone: 8165205555

Description: Choose One (Annotation: Choose the type of phone from the dropdown)

Primary Language: Choose One

Buttons: Save, Close

Emergency Contacts for TEST CUSTOMER

Name	Phone	Description	Language	Order
EMERGENCY CONTACT	(816) 520-5555	Mobile/Cell		

Police / Fire / Medical for TEST CUSTOMER

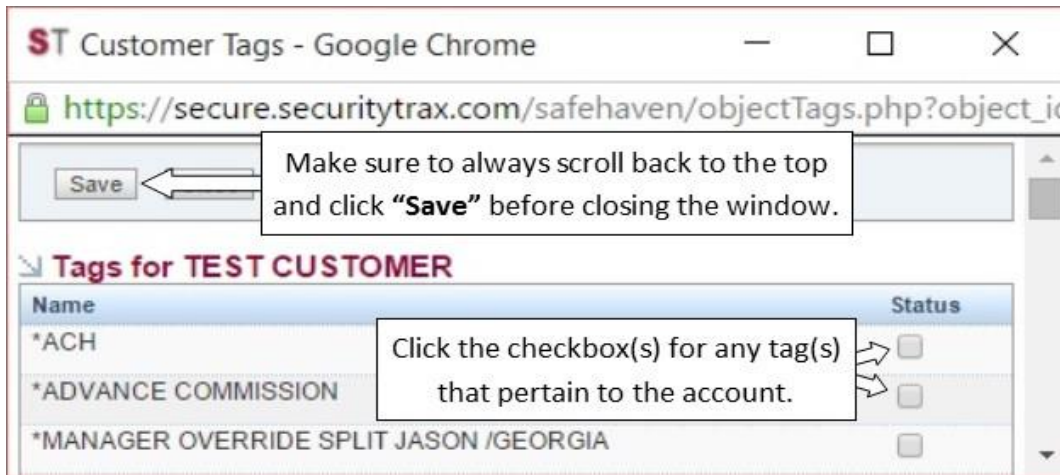
	Name	Permit #	Phone Number	Fee
Police	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Fire	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Medical	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Guard	<input type="text"/>	<input type="text"/>	<input type="text"/>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

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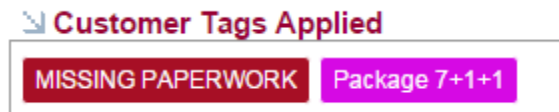
There is no need to worry about anything in this area. This information will be filled in when the account is created.

5. TAGS

In the Tags tab we can “Tag” an account for quick reference. This also allows us to run reports and search for any accounts with these specific tags.



Tags will appear at the top of the account just above the Personal Information.



Here is a list of common tags we will use in the Sales Department. You may see other tags added from other Departments. (Ask your Trainer/Manager with any questions)

MANUAL INVOICE – Used if the customer chooses Manual Invoicing.

NO VISA/REBATE DUE – USED TOWARDS EQUIP. – Used if customer applied their Rebate towards equipment.

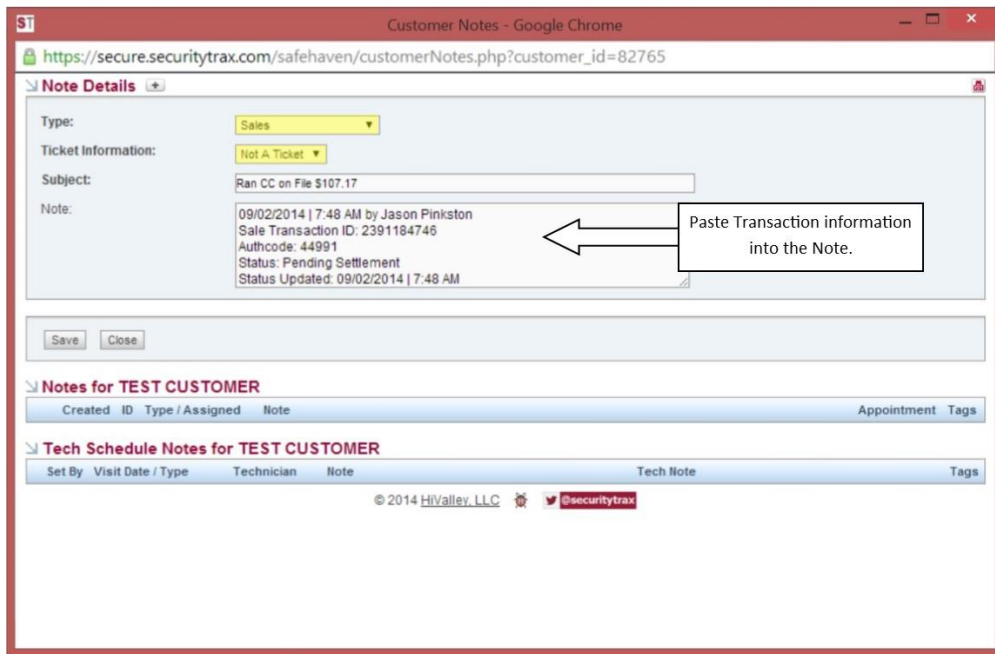
NO VISA DUE – USED TOWARDS EQUIP. – Used if customer not getting a rebate because of your offer to them.

Package 7+1+1 or 10+1+1 – Used if one of these packages were given.

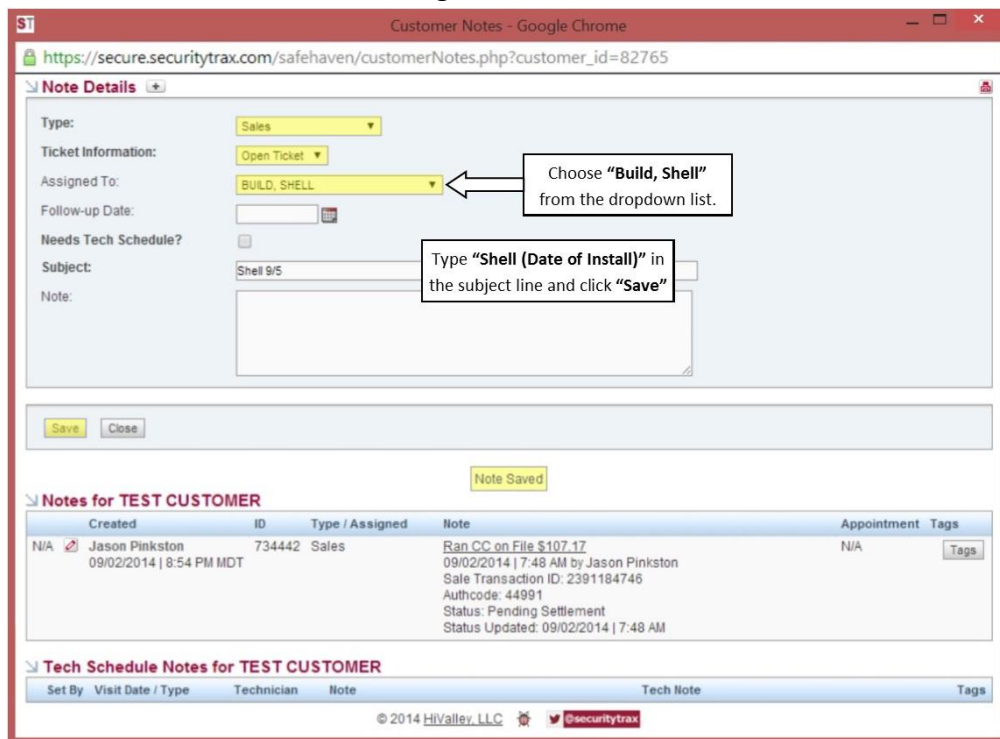
6. NOTES

From here you will be able to create 2 types of notes. Those designated “**Not a Ticket**” and those designated “**Open Ticket.**” “Open Tickets” are notes sent to a specific department or person as a task to be completed. Notes designated as “Not a Ticket” are general notes for the account that aren’t assigned to anyone.

We have copied the transaction information and now need to make a general note letting everyone know we have charged the credit card.



Click **“Save”** once you paste the transaction information. Now we need to create a ticket to build the shell. We will assign this ticket to **“Build, Shell”**



DEFINITIONS

SHELL: AN INACTIVE ACCOUNT THAT HOLDS ALL THE CUSTOMER'S INFORMATION REQUIRED BY ADT. CREATED (BY OUR SHELLING DEPARTMENT) BEFORE AN INSTALLATION APPOINTMENT SO THE TECHNICIAN IS NOT REQUIRED TO COLLECT THE CUSTOMERS PERSONAL INFORMATION.

2 WAY VOICE: ADDITIONAL FEATURE THAT ALLOWS COMMUNICATION WITH A MONITORING REPRESENTATIVE FROM ADT, IN THE EVENT OF AN ALARM, DIRECTLY THROUGH THE KEYPAD.

GUARD RESPONSE: A REQUIRED PATROL SERVICE IN SPECIFIC COUNTIES AROUND THE COUNTRY. THE PATROL SERVICE WILL RESPOND TO ANY ALARM AND ASSESS IF THE AUTHORITIES NEED TO BE SENT TO THE HOME.

- AN ADDITIONAL FEE WILL BE REQUIRED WITH THE MONITORING RATE.
- **PLEASE SEE ADT CONTRACTED PATROL SERVICES PAGE**

INVOICING: APPLIES TO MANUAL BILLING CUSTOMERS. CUSTOMER WILL RECEIVE AN INVOICE IN THE MAIL QUARTERLY (EVERY 3 MONTHS).

- \$1 WILL BE ADDED TO THE MONTHLY MONITORING RATE (REQUIRED).
- CUSTOMER MUST HAVE A CREDIT SCORE OF 700 OR HIGHER.

MAINTENANCE: THIS REFERS TO ADT'S LIMITED WARRANTY. ALL EQUIPMENT (INSTALLED OR ACTIVATED) WILL BE WARRANTIED AS LONG AS THE SYSTEM IS BEING MONITORED.

PULSE: APPLE/ANDROID APPLICATION THAT ALLOWS A DEVICE TO COMMUNICATE WITH THE SECURITY SYSTEM REMOTELY. (WINDOWS PHONE USERS CAN USE THEIR BROWSER TO ACCESS THEIR SYSTEM)