TRAINING MANUAL

SECURITYTRAX

SAFE HAVEN
SECURITY

SECURITYTRAX

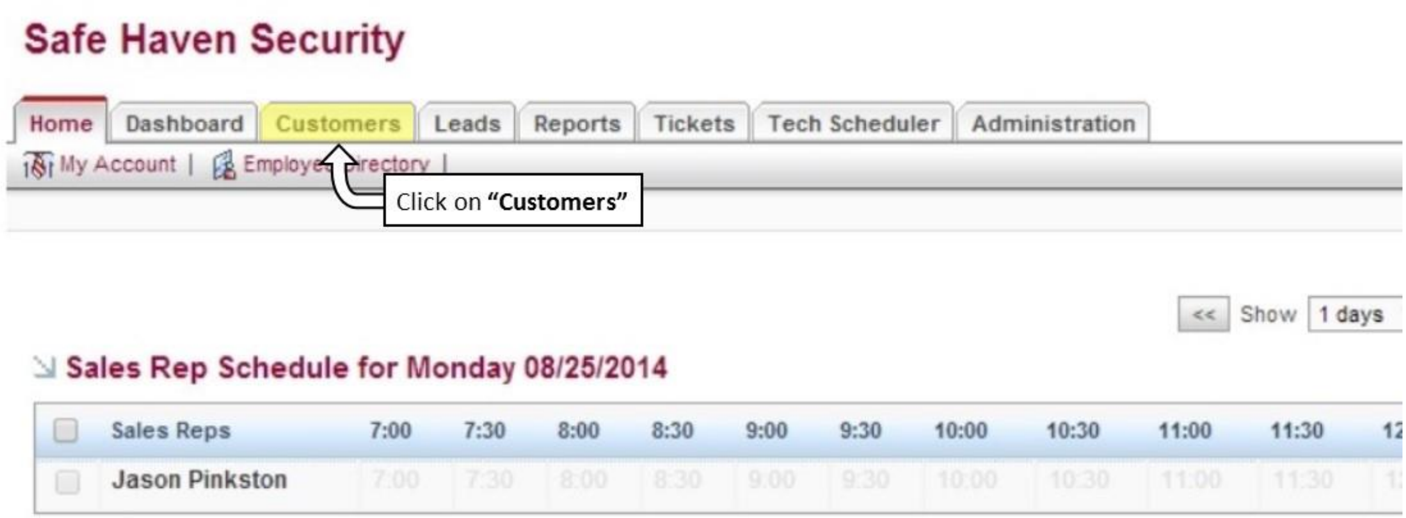
SecurityTrax is a web based application we use as our Point of Sale System. You will keep track of all your sales within this application. We also use this as a communication tool for scheduling technicians, customer issues, and our rebate/gift card process. It is extremely important for information 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.

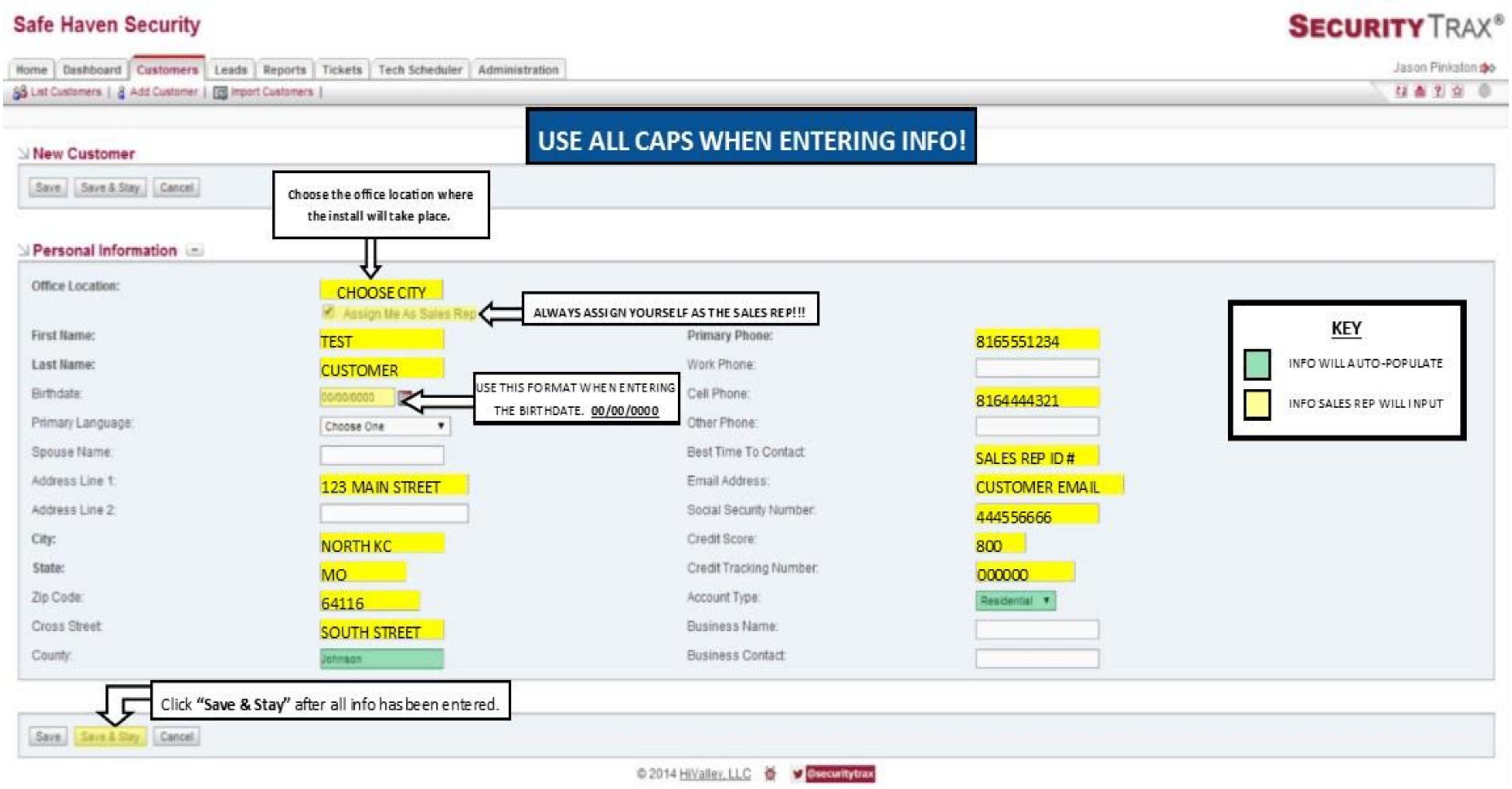
Home Screen

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.

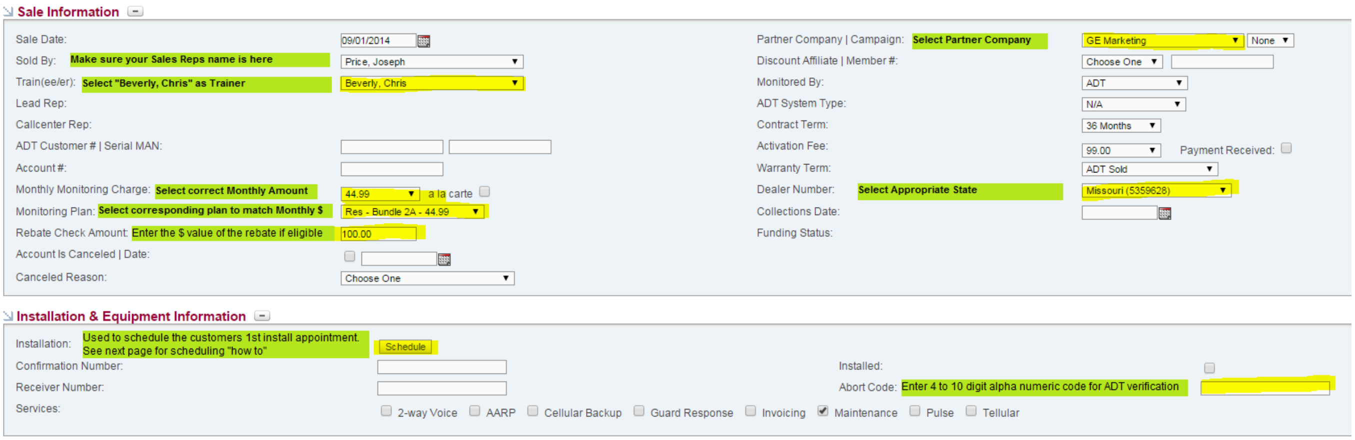


Customers Tab

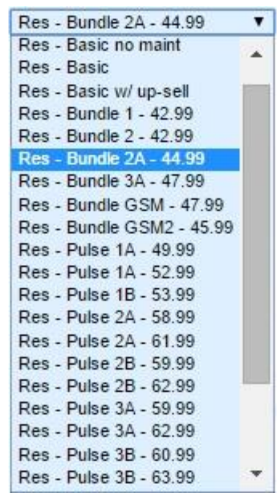
In the Customers Tab you will be able enter your sales and execute a detailed search within those sales. Keep in mind, you will only be able to view your own sales in this tab. In order to enter a sale, you'll need to click on **"Add Customer"**.



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



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

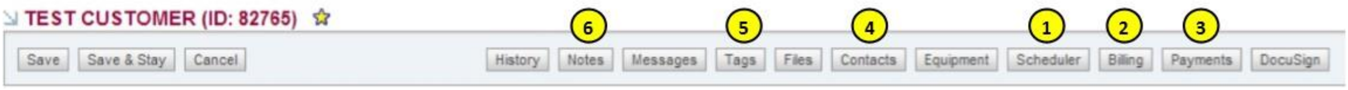


<u>NOTE</u>: FOR LANDLINE MONITORING, ALWAYS CHOOSE "**<u>Res-Basic w/up-sell</u>**"

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

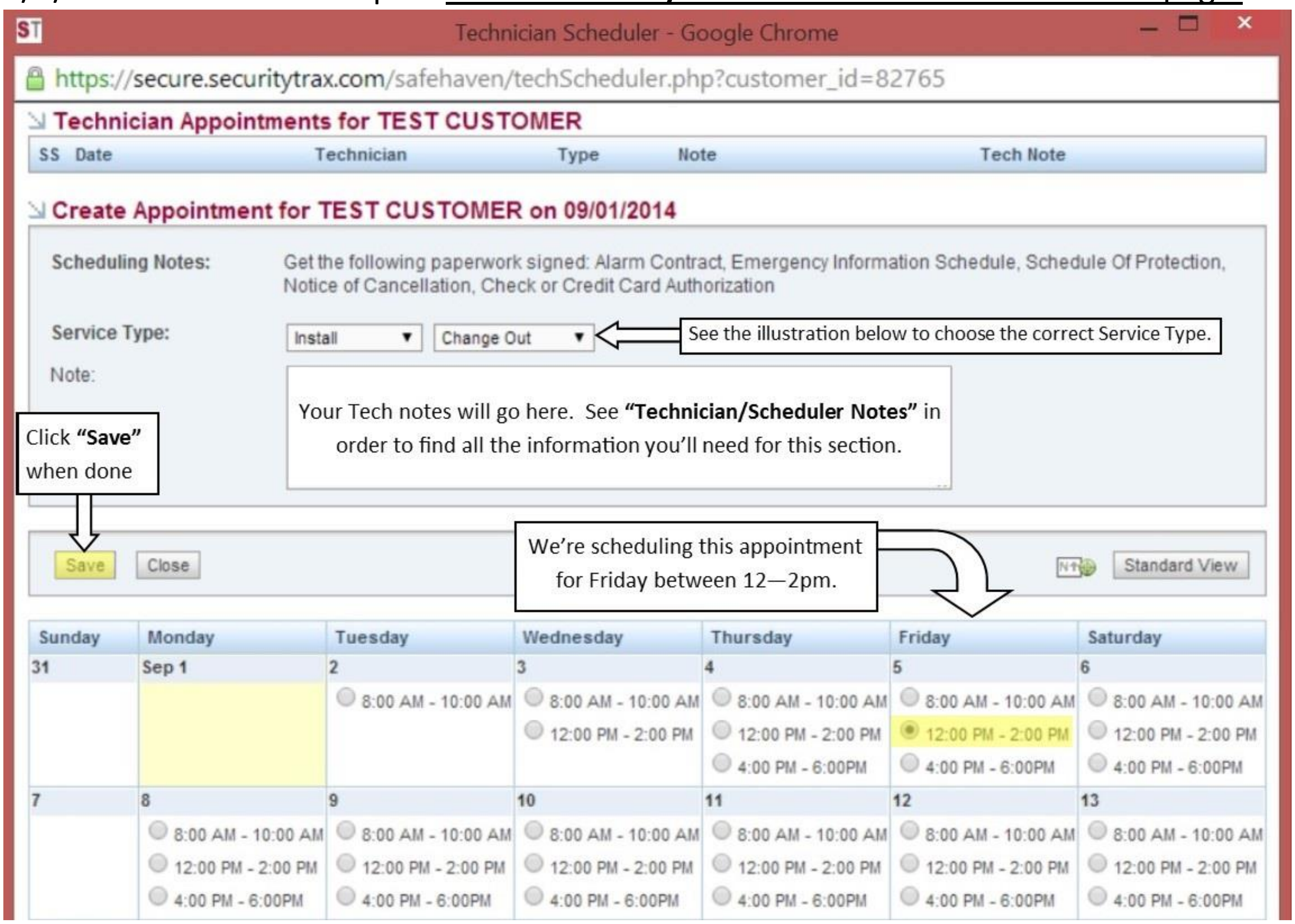
Account Tabs

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

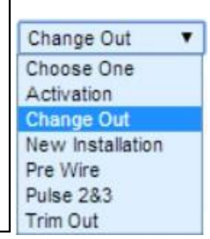
The Scheduler is where we will schedule the install appointment with the technician. For this example, we are going to schedule an appointment for Friday 8/5/2014 between 12 – 2pm. <u>The **Technician/Scheduler Notes** are on the next page.</u>



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.

<u>NOTE:</u> 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

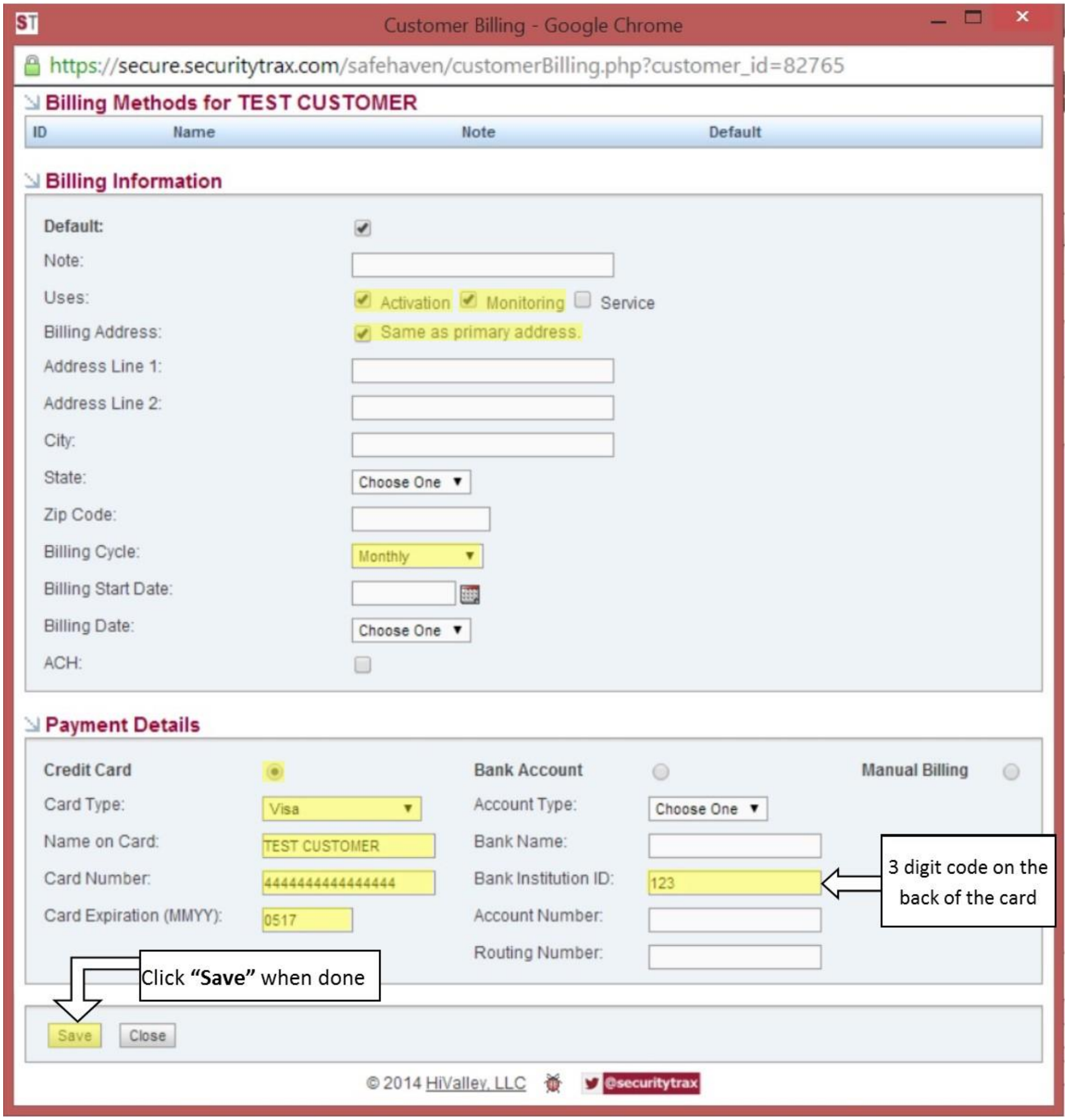
5. Type in the type of monitoring that was sold.
    a. Landline Monitoring w/AT&T U-Verse at $36.99/Month
    b. Cell Monitoring @ $44.99/Month
    c. Pulse Monitoring @ $52.99/Month
    d. Pulse Tier 2 Monitoring @ $61.99/Month
    e. Pulse Tier 3 Monitoring @ $62.99/Month

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

Standard Install	**Standard w/Cell Primary**	**Pulse Tier 2 & 3 w/Activation**
$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.

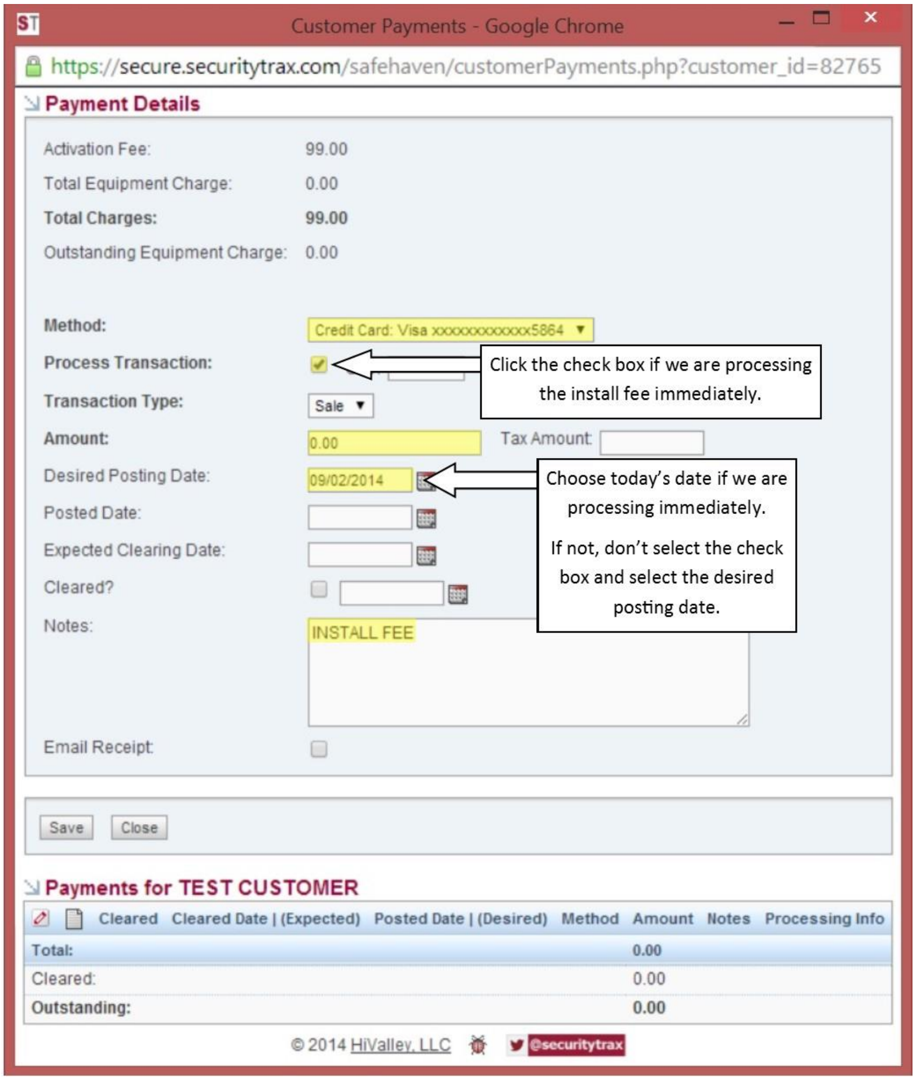


3. Payments

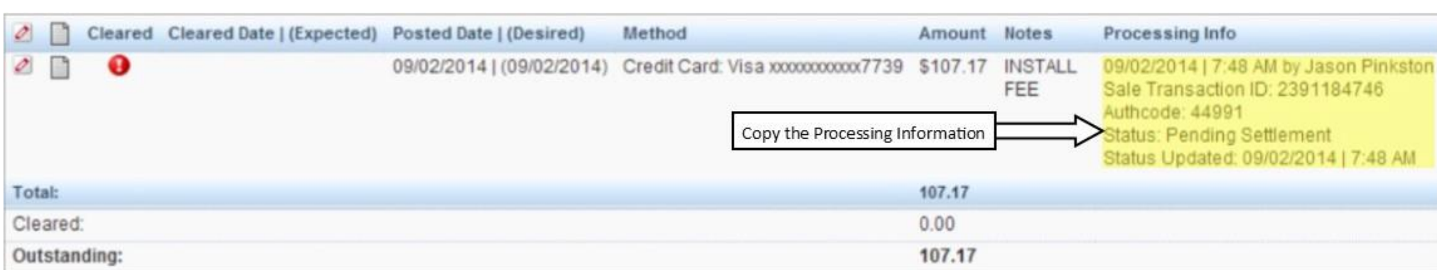
In the Payments Tab, you'll be able charge a customer's Credit Card.

MUST HAVE CREDIT CARD INFORMATION FOR EVERY ACCOUNT

ANY PAYMENT NOT PROCESSED IMMEDIATELY MUST HAVE MANAGER APPROVAL!

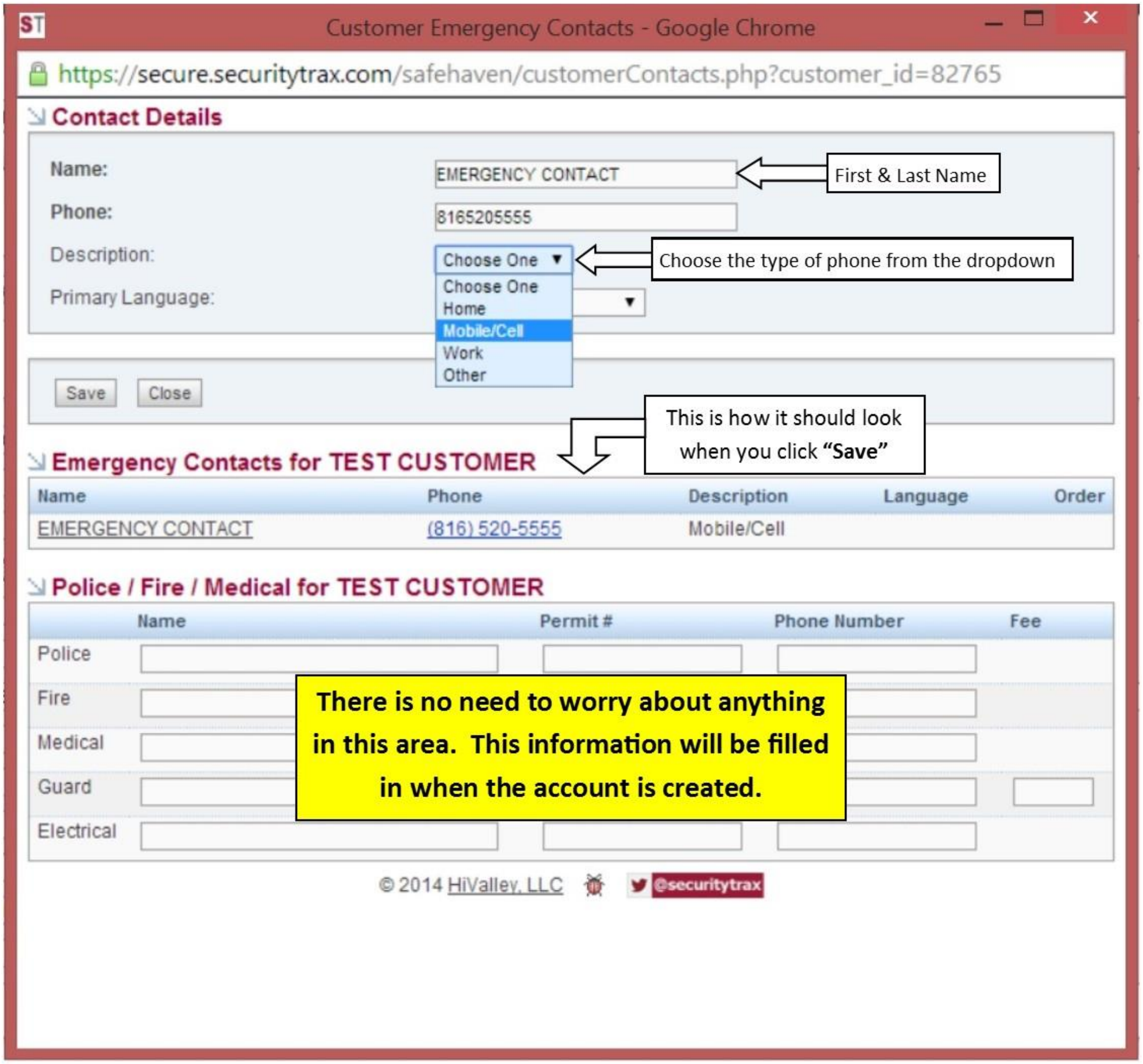


After processing the payment, you'll want to copy the Processing Info and paste it into the notes. Copy the information highlighted in the example below.



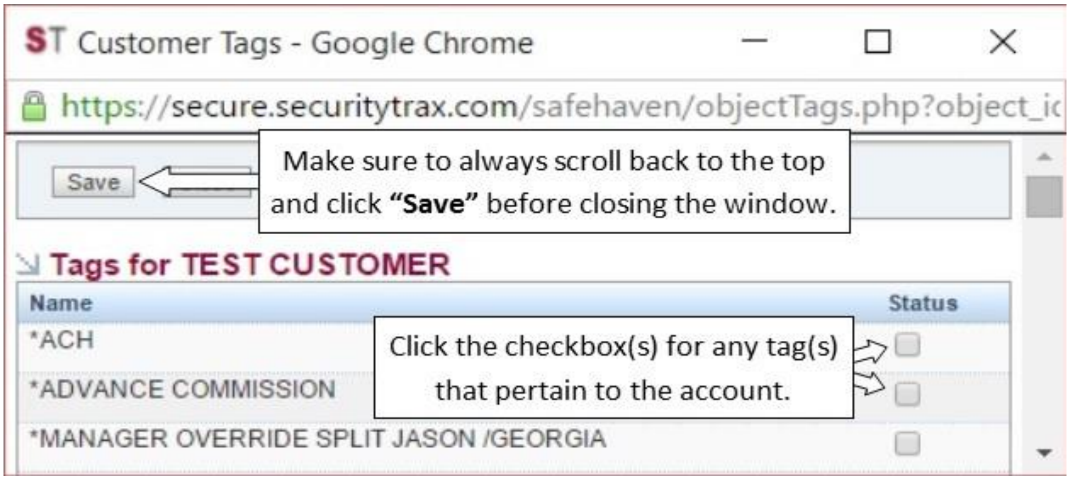
4. CONTACTS

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.

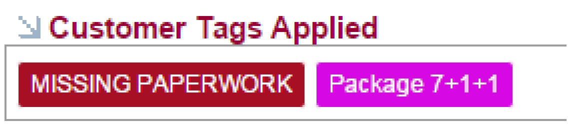


5. TAGS

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.

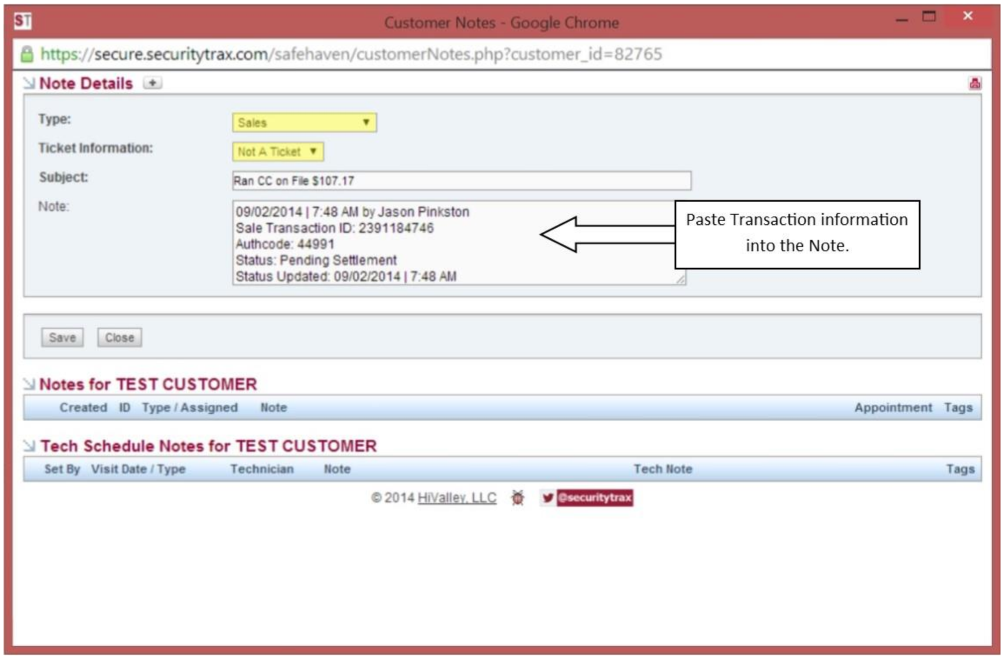
NO VISA DUE – USED TOWARDS EQUIP. – Used if customer not getting a rebate because of your offer to them.

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

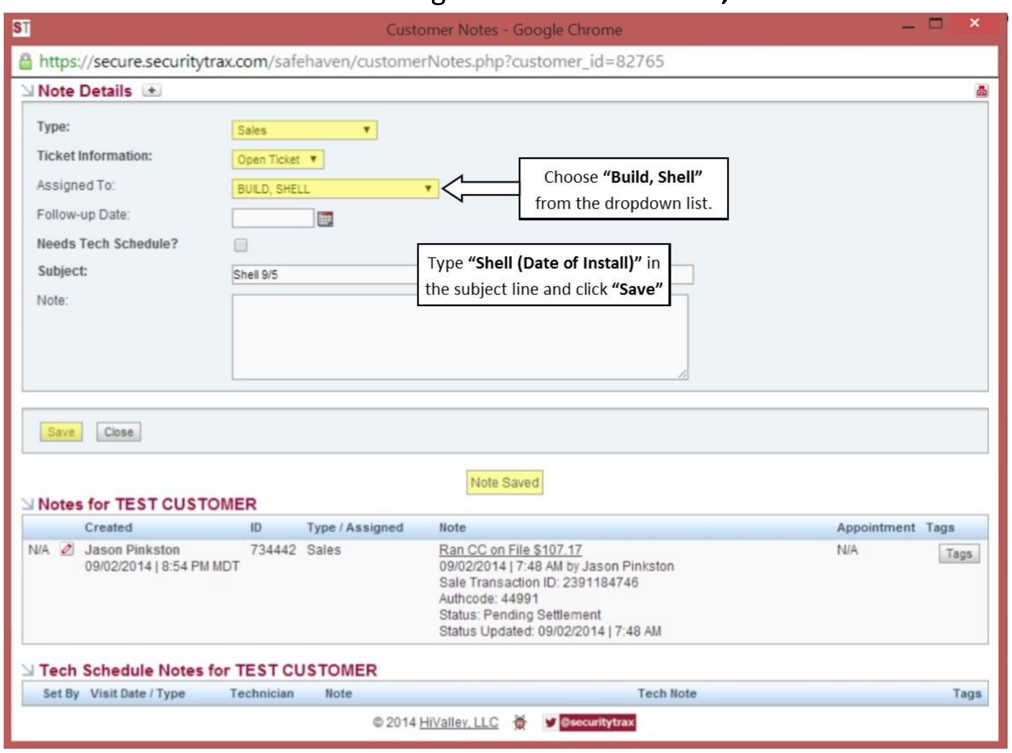
6. NOTES

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 <u>700 OR HIGHER</u>.

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)