

AlarmBiller & Stages Integration Instructions

12/29/2023 11:31 am EST

AlarmBiller & Stages Integration Instructions

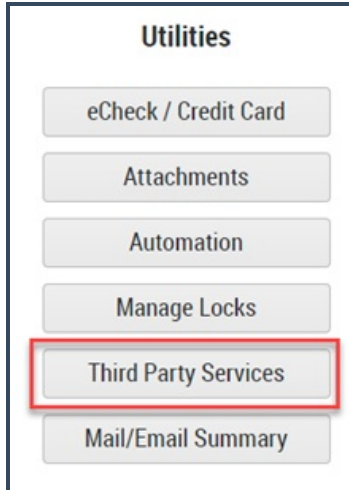
Welcome to the AlarmBiller Stages Integration. This integration ensures greater continuity between linked databases with two-way sync functionality, reduces data entry as much as possible on both ends of the integration, and includes a smooth user experience that creates ease of use when transferring, linking, and syncing accounts.

Integration Setup

The AlarmBiller Stages integration is enabled for all dealers. Before setting up the integration, the dealer will need the endpoint URL to use for the Stages integration setup in AlarmBiller, the username and password for the connection, as well as contact Stages to have a task setup with the appropriate task type and task parameters. This task setup information will be used to define the credentials for the Stages Site Group.

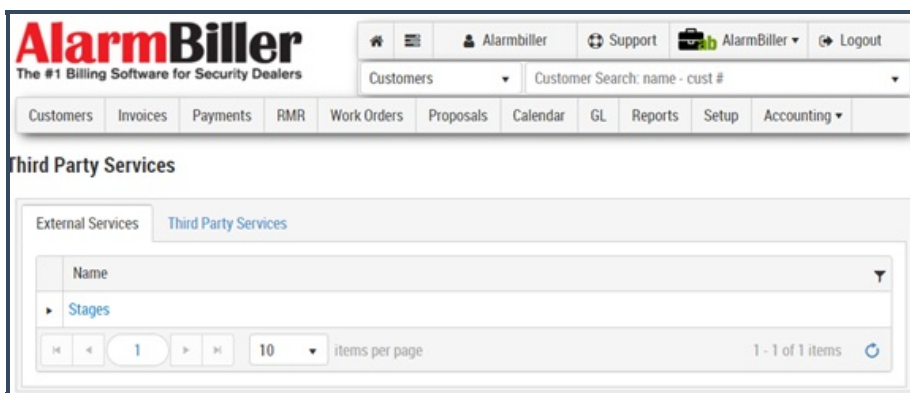
AlarmBiller Setup

To make use of the integration, in AlarmBiller navigate to Setup > Utilities > Third Party Services.

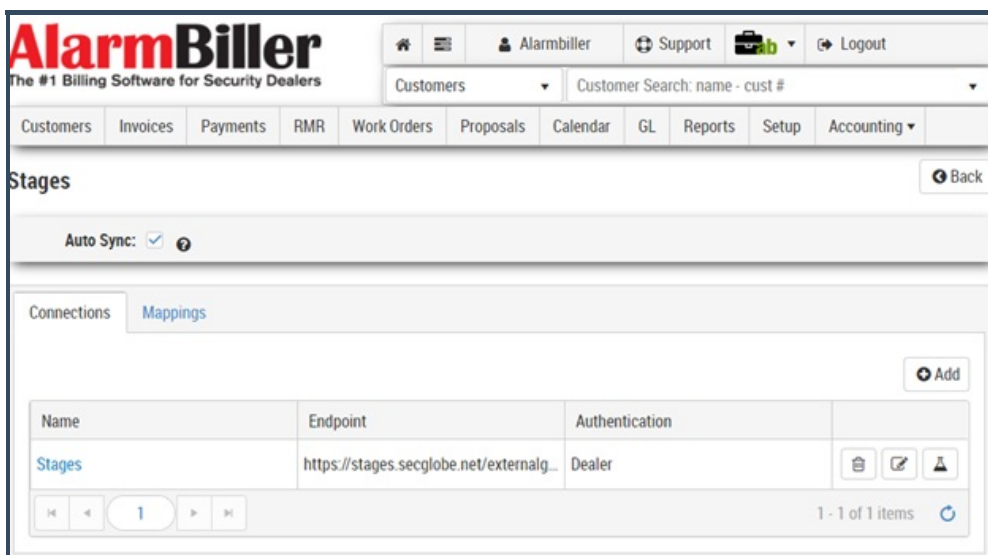


There are two tabs within Third Party Services; External Services and Third Party Services.

To set up the Stages Integration, click the first tab labeled 'External Services'.



Click the Stages link to define the Connection.



The Connections tab is where the link to Stages is configured. It is possible to connect to multiple Stages endpoints, though this scenario will be rare. Additionally, if there are any existing Stages integrations (via the old integration) these will be automatically migrated.

The Auto Sync checkbox will enable or disable auto-syncing for the integration. The Auto Sync is checked by default. If the Auto Sync is enabled, then if there is a linked record in AlarmBiller to one in an external Stages system, any updates in AlarmBiller will automatically be pushed to Stages.

If Auto Sync is not checked, then to sync the changes in AlarmBiller with a linked record in Stages either Account Sync or Sync record processes will need to be performed to sync the appropriate data.

To add a new connection to Stages or other central station integrations, click the Add button. This launches the Create Connection for Stages page where the information for your Stages database is entered.

The screenshot shows the AlarmBiller software interface. At the top left is the logo "AlarmBiller" with the tagline "The #1 Billing Software for Security Dealers". To the right of the logo is a navigation bar with icons for home, menu, user profile (labeled "Alarmbiller"), support, a dropdown menu (labeled "ab"), and a logout button. Below the navigation bar is a search bar with a dropdown menu set to "Customers" and a search field containing "Customer Search: name - cust #". A secondary navigation bar contains tabs for "Customers", "Invoices", "Payments", "RMR", "Work Orders", "Proposals", "Calendar", "GL", "Reports", "Setup", and "Accounting". The main content area is titled "Create Connection for Stages" and includes a "Save" button. The form fields are: "Name" (text input with "Stages" and a copy icon), "Endpoint" (text input with "https://stages.secglobe.net/externalgateway/OpenAPI/method"), "Authentication" (dropdown menu with "Please Select"), "Username" (text input), and "Password" (text input with a copy icon).

The 'Name' field will automatically populate with the name of the integration currently in use, which in this case will be 'Stages'. Users can rename this connection, which may be the case if the name of the monitoring company for the dealer is more apparent for their regular use such as "Rapid". The name of each connection must be unique for ease of identifying the connection throughout the integration process.

The 'Endpoint' field is the URL that points to the Stages API; it is prepopulated with the test endpoint, but this will need to be changed to the endpoint for the dealer's Stages database.

The Authentication portion (Username and Password) can be either Dealer or User-based. Dealer-based authentication means that there is a single user account for the Stages company and every user in AlarmBiller is granted access to the functions of the integration. User-based authentication means that each user has their own credentials. Select the one that is most appropriate and add the username and password to the respective fields that would be used to log in to Stages.

Note: If electing to use User-based authentication, each user must edit the existing connection and enter their own credentials into the username and password field, then save.

If the Authentication = User, then a single connection is defined with unique connection username and password. The user will access the connection and enter their own credentials. Once the user credentials are defined, the user will only have access to their own username and password.



Before the user can use the integration, the user must define the username and password associated with their Stages user.

Creating the User Connection

Edit the Connection

Stages Back


Connections **Mappings** Add

Name	Endpoint	Authentication	
Stages	https://intstages.boldgroup.solutions...	Dealer	  
StagesKA	https://stages.secglobe.net/externalg...	Dealer	  
StagesUser	https://stages.secglobe.net/externalg...	User	  

1 - 3 of 3 items Refresh

Enter the username and password.

Edit Connection for StagesUser Cancel Save

Name: StagesUser 

Endpoint: https://[REDACTED]

Authentication: User


Username:

Password:

The next time the user logs in, only the credentials for that user will be displayed.

User 'abdealer201' has defined their credentials and logs in:

Edit Connection for StagesUser Cancel Save

Name: StagesUser 

Endpoint: https://[REDACTED]


Authentication: User

Username: abdealer201

Password:

User 'userone' has defined their credential and logs in:

Edit Connection for StagesUser Cancel Save

Name: StagesUser 

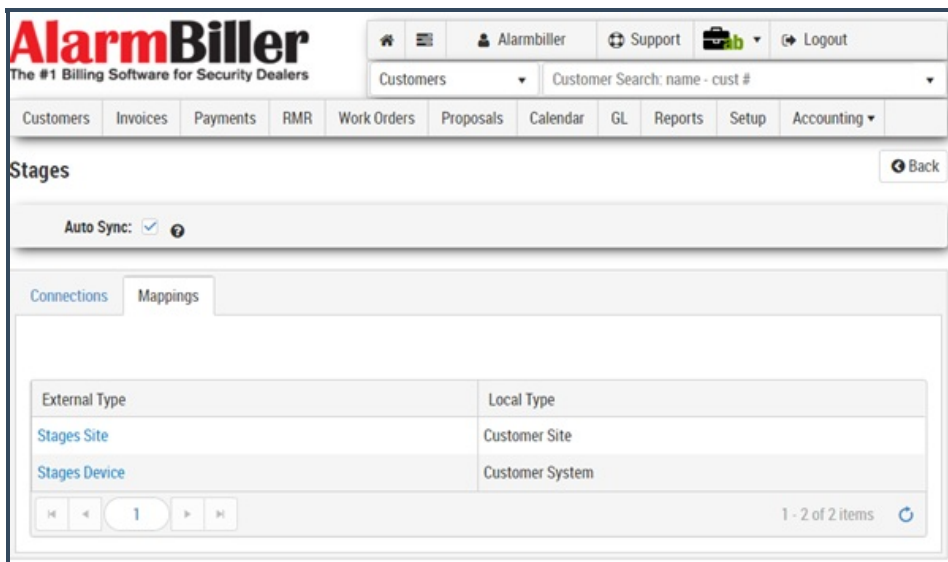
Endpoint: https://[REDACTED]

Authentication: User

Username: userone

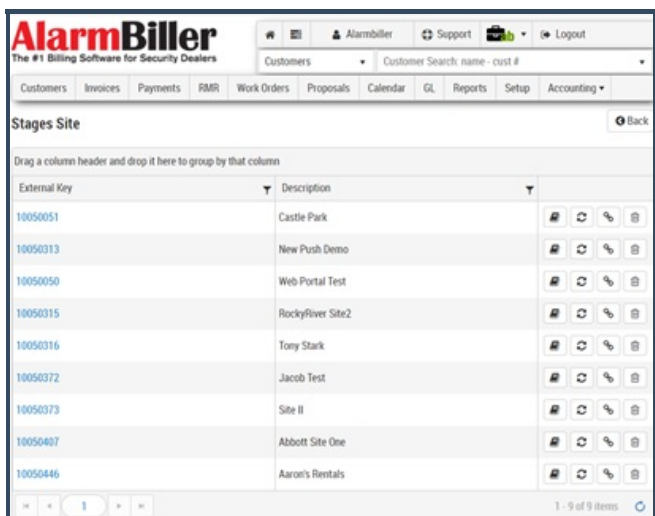
Password:

The second tab, Mappings, shows which AlarmBiller records map to which Stages records. Clicking the links will show the current linked records of the type selected.



The following are examples of sites and devices that are integrated for this test AB Dealer:

Example of the Stages Site detail:



Example of the Stages Device detail:

AlarmBiller
The #1 Billing Software for Security Dealers

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Customers Customer Search: name - cust #

Stages Device Back

Drag a column header and drop it here to group by that column

External Key	Description	
10050059	XBC1234	[Icons]
10050299	202010291023	[Icons]
10050058	20190708	[Icons]
10050301	202010291052	[Icons]
10050338	202102021454	[Icons]
10050339	202102021455	[Icons]
10050379	SN 001	[Icons]

1 - 7 of 7 items

On both the Connection page and the Connections grid, there is a Test button:

Stages - Stages Service Test Edit

Endpoint: <https://stages.secglobe.net/externalgateway/OpenAPI/method>

Authentication: Dealer

Stages Back

Auto Sync: [Icon]

Connections Mappings

Add

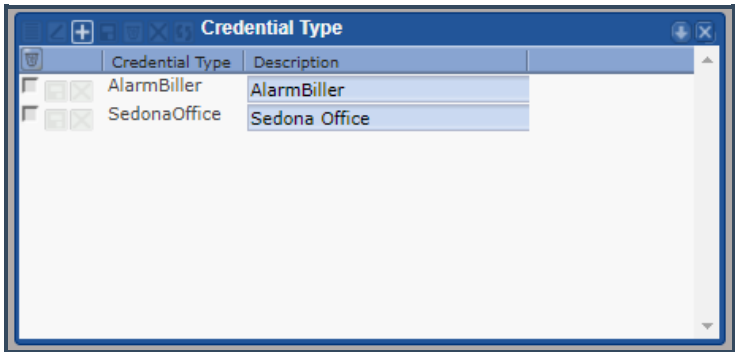
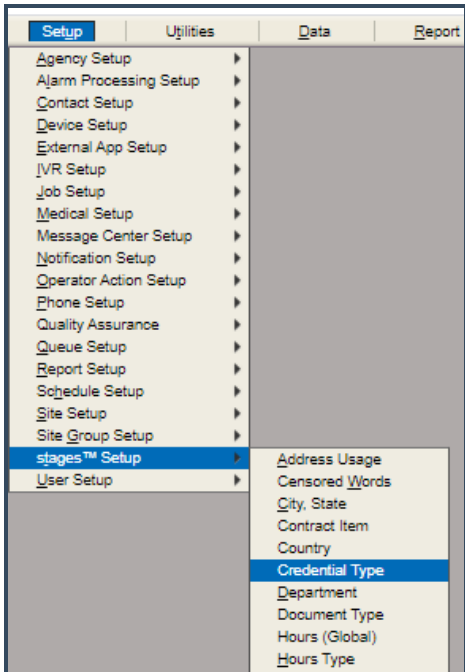
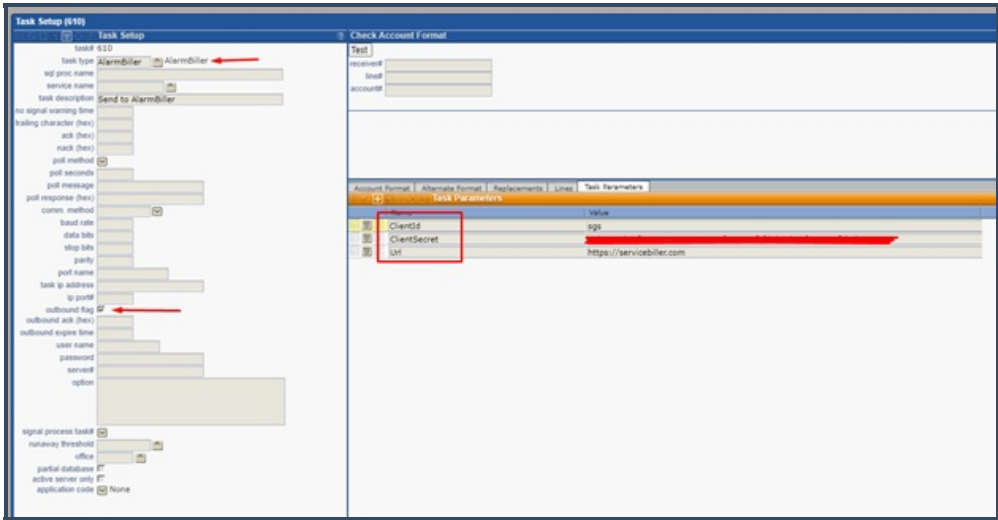
Name	Endpoint	Authentication	
Stages	https://stages.secglobe.net/externalg...	Dealer	[Icons]

1 - 1 of 1 items

Clicking this will test the credentials to ensure that they are correct and that the integration will function.

Stages Setup

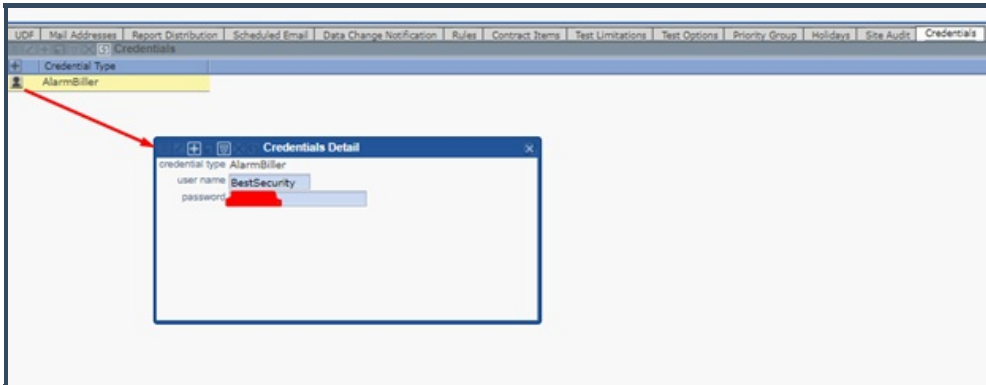
During the implementation phase of the integration, the credential setup will be performed by the Central Station user via a task in Stages.



In Stages dealer login, navigate to Setup > Site Group Setup. Select the Site Group used for AlarmBiller. From the Detail tab on the right side of the page, click the Credentials tab.

The Site Group must have credentials defined with the Credential Type = AlarmBiller with the username and password

defined. The credential types are defined via Task Setup during the implementation phase of the integration.



Integration Process

AlarmBiller Integration Customer Wizard

The AlarmBiller customer wizard provides the option of pushing the Site/System into Stages from AlarmBiller or pulling an existing Site/Device from Stages into AlarmBiller.

When creating a new customer within AlarmBiller, on the Customer Site tab there is a new checkbox: 'Integrate'. Clicking this will enable the integration. Selecting the Stages connection adds a new set of fields to the customer site and customer system tabs in AlarmBiller.

There are two options for adding a site to a new customer:

1. Existing: Select an existing Site from Stages and link to the new customer site.
2. New: Insert a new Site to Stages based on the one being created in AlarmBiller.

Add Existing Site and Devices from Stages to a New Customer in AlarmBiller

A site in Stages that is not linked to a customer site in AlarmBiller can be added as a new site to an existing or new customer in AlarmBiller. The site can also be linked to an existing customer's site in AlarmBiller that is not already linked to a site in Stages.

Example: Site and devices created in Stages that do not exist in AlarmBiller:

Site

site name: COOPER1

address: 404 Sunshine Road Building H
TAMPA_FL_33610_US

region: KW Key West

time zone: 13 (GMT-05:00) Eastern Time (US & Canada)

site type: C Commercial

permit: []

language: []

runaway threshold: []

info: The Master Site Info Template[LockBoxCode]
[LockBoxLocation]

jurisdiction: []

address info: []

cross street: West Blvd and Main St

directions: 3 blocks south of Main St

lockbox code: []

lockbox location: []

map, page, coord: []

notify codes: []

subdivision: []

pets: []

keys: []

id1: [] id2: []

report group: []

ul code: []

billing id: []

Site Data		Site View
Xmit#	Status	site name COOPER1
TRAN101	OOS	site type Commercial
TRAN202	Normal	address 404 Sunshine Road Building H TAMPA_FL_33610

Note: The billing id of the site is blank. Therefore, there is no link between this site in Stages and a customer site in AlarmBill.

Create a new customer in AlarmBill.

New Customer: 15738 Next ▶▶

Customer Customer Site Customer System Customer Recurring

Business Customer:

Master Customer:

Business Name*: Cooper Cabinets

Address: 822 Main Street

Address 2:

Tampa Florida 33610 - Plus 4

Phone: (888) 555-3412 ext.

Cell Phone:

Email: test@cooper.com

Customer Status: Active ▼

Customer Type: Commercial ▼

Priority Level: Normal ▼

Salesperson: Mike Berry ▼

Default Term: Net 30 ▼

Recurring Term: Due on Receipt ▼

Service Invoice Term: Due on Receipt ▼

Manual Invoice Term: Due on Receipt ▼

Master Customer: Select Master Customer: ▼

Delivery Method: Email ▼

Prevent RMR Delivery: Prevents the recurring invoices from printing.

No Late Fees: Prevents customer from accruing late fees.

No Statements: Prevents statements from generating for customer.

Show Open Invoices: Displays open balance on invoice.

Click Next

On the Customer Site tab, check the Integrate option, select the Connection, and select 'Existing' for the Stages Information. This will add the fields Site and Description in the Stages section of the page.

New Customer: 15738 Next ▶▶

Customer Customer Site Customer System Customer Recurring

Integrate:

Connection: Stages x ▼

Stages Information: Existing New

Stages

Site*: Select Site ▼

Description:

Use the dropdown in the Site field to select the existing Stages site that is to be associated with this new customer. The data from the site in Stages is used to populate the Customer Site information.

Customer Customer Site Customer System Customer Recurring

Integrate:

Connection: Stages

Stages Information: Existing New

Stages

Site: COOPER1

Description: COOPER1

Customer Site

Use Customer Address:

Site Number: 10050467

Site Name: COOPER1

Address: 404 Sunshine Road

: Building H

: TAMPA Florida 33610 Plus 4

Phone: (877) 529-1483 ext.

Email: test2@cooper.com

Sales Tax: SC Horry County - 8.00...

Tax Exempt:

Site Since: 4/12/2021

Warranty Labor: 1 YEAR

Warranty Parts: No Warranty

Warranty Start Date: 4/12/2021

Service Level: A/V. T&M SC

Comments:

Enter any additional information and click Next.

If using an Existing Site in Stages, you may select an existing device that is associated with the site in Stages or create a new Device in AlarmBiller that will then be pushed to the Stages site selected.

New Customer: 15738 Next ▶▶ Submit

Customer Customer Site Customer System Customer Recurring

Create System?: If Checked, a System will be created.

Stages Information Existing New

Stages

Device: TRAN101
Description: TRAN101

Customer System

System Number: TRAN101
System Type: AV/NETWORK
Panel Type: Vista120
Panel Location: Maintenance Room rear closet
Warranty Labor: 1 YEAR
Warranty Parts: 1 YEAR
Warranty Start Date: 4/12/2021
Service Level: A/V After Hours NC
Central Station: Security Central
Account Number: TRAN101

Select the Device from Stages or Create a new Device (System).

Enter the required data.

Click Next and enter Customer Recurring if applicable.

Click Submit.

Site and System (Device) are linked to a new customer in AlarmBiller.

Cooper Cabinets - 15738

822 Main Street
Tampa, FL 33610
Phone: (888) 555-3412
Cell:
Email: test@cooper.com
Customer Type: Commercial
Salesperson: Mike Berry

Status: Active
Priority: Normal
Customer Since: 04/12/2021
Last Statement:
Default Term: Net 30
Recurring Term: Due on Receipt
Service Term: Due on Receipt
Manual Term: Due on Receipt
Delivery Method: Email
Deliver RMR Inv: Yes

Open Invoices: \$0.00
Open Credits: \$0.00
Unapplied Cash: \$0.00
Balance Due: \$0.00
Total RMR: \$0.00
Auto Pay:

Comments

Invoices 0 Credits 0 Sites/Sys 1 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Utilities

Sites/Systems New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
10050467	COOPER1	404 Sunshine Road	TAMPA	FL

System Number	System Type	Panel Type	Warranty Start Date
TRAN101	AV/NETWORK	Vista120	04/12/2021

1 - 1 of 1 items

The Site 'billing id' in Stages contains the customer site id from AlarmBiller.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.

Site

site name: COOPER1

address: 404 Sunshine Road Building H
TAMPA FL 33610 US

region: KW Key West

time zone: 13 (GMT-05:00) Eastern Time (US & Canada)

site type: C Commercial

permit:

language:

runaway threshold:

info: The Master Site Info Template[LockBoxCode]
[LockBoxLocation]

jurisdiction:

Device

xmit# TRAN101 alt device id signals forwarded to
oos category OFF LINE LETTER RECEIVED oos date 04/12/21 13:45:10
device type **A2000** Ademco 2000 xyz

timer test

default

type **4** Any Signal. Auto-Reschedule
days **1** hours **0** minutes
fail event
alternate interval alternate when disarmed

ivr#

primary xmit#

communication type

platform **alarm.com** Alarm.com Platform
ip address port
line security

listen in device type

url text url target

program label

program path

program argument

signal format action plan

entry/exit period

location

information

billing id **7505**

New Customer's Site and System in AlarmBiller pushed to Stages

Add New Customer in AlarmBiller

New Customer: Next ▶▶

Customer Customer Site Customer System Customer Recurring

Business Customer:

Master Customer:

Business Name*:

Address:

Phone:
Cell Phone:

Email:

Customer Status:

Customer Type:

Priority Level:

Salesperson:

Default Term:

Recurring Term:

Service Invoice Term:

Manual Invoice Term:

Master Customer:

Delivery Method:

Prevent RMR Delivery: Prevents the recurring invoices from printing.

No Late Fees: Prevents customer from accruing late fees.

No Statements: Prevents statements from generating for customer.

Show Open Invoices: Displays open balance on invoice.

Enter the customer's information used by AlarmBiller.

Click Next

On the Customer Site tab, check Integrate, select the connection defined for the Stages integration

Select New for Stages Information.

Enter the site information.

Scroll to access the Stages fields.

The gray boxes are synched between the corresponding fields in Stages. After filling in the remaining required fields (marked with an asterisk), a System (Device) can be added.

New Customer: 15739

Next >>

Submit

Customer Customer Site Customer System Customer Recurring

Integrate:

Connection: Stages

Stages Information: Existing New

Customer Site

Use Customer Address:

Site Number: HTH1

Site Name: Hometown1

Address: 965 Albany Avenue

Address 2:

Cincinnati Ohio 45215 Plus 4

Phone: (877) 855-2425 ext.

Email: hometown2@test.com

Sales Tax: SC Horry County - 8.00...

Tax Exempt:

Site Since: 4/12/2021

Warranty Labor: 1 YEAR

Warranty Parts: 1 YEAR

Warranty Start Date: 4/12/2021

Service Level: Please Select:

Comments:

Stages

Site Name*: Hometown1

Site Status: Active

Address: 965 Albany Avenue

Address 2:

City: Cincinnati

State: OH

ZIP Code: 45215

County:

Region*: Test

Time Zone*: (GMT-05:00) East...

Site Type*: Commercial

Dispatch Type: Intrusion

Permit:

Jurisdiction: Select Jurisdiction

Address Info:

Cross Street:

Directions:

Subdivision:

Pets:

Keys?:

Report Group: Monthly

UL Code: National Industria...

Restricted Access: Select Restricted ...

Authority: Basic

Contacts

+ Create

Order	First Name	Last Name	PIN	Contact Type
1	Keith	Thomas		Reg

✎ 🗑

Stages Site Field Definitions:

REGION: A region is a way for the Central Station to group together locations to deal with Storm conditions.

TIME ZONE: The Time Zone of the account. The available selections are administered by the central station.

SITE TYPE: The type of account. The available selections are administered by the central station.

DISPATCH TYPE: A Central Station defined as a way to group sites together for dispatch-related rules such as Action Plans and notifications.

PERMIT: Police Agency Permit for the account.

SUBDIVISION: This is a description field to display information that has no impact on Dispatching but can be displayed on the Dispatch window.

PETS: This is a description field to display information that has no impact on Dispatching but can be displayed on the Dispatch window.

KEYS: This is to indicate if the Central Station holds keys to the account. (UL Requirement)

UL CODE: If the account is a UL Certificated Account, the type of UL Certificate. The available selections are administered by the central station.

AUTHORITY: Default Authority level for the Site Contacts. The available selections are administered by the central station.

An arbitrary number of Stages contacts can be added. Please note these are not linked to your contacts in AlarmBiller. Contacts can be added, edited, or deleted from within the wizard. The Contacts for AlarmBiller are defined from the Billing Contacts tab of the Site.

The screenshot shows an 'Edit' dialog box with the following fields and values:

First Name:	Keith	Expire Date:	
Middle Name:		Expire Time:	
Last Name:	Thomas	Authority:	Basic
Title:		Relation:	Owner
PIN:		Contact Type:	Regular
Effective Date:		Order:	1
Effective Time:		ECV:	<input type="checkbox"/>
		Keys:	<input type="checkbox"/>
		Member Only:	<input type="checkbox"/>

Buttons: Update, Cancel

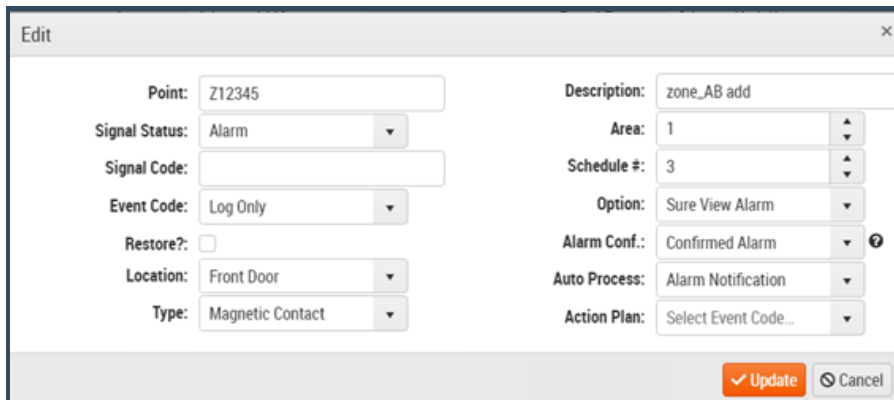
Click "Next" at the top of the page to access the Customer System tab.

To create a new System (known as a 'Device' in Stages), check the "Create System?" box. When pushing a new Site to Stages, a new Device can be created. There would not be an existing Device available for a site that does not yet in Stages.

IMPORTANT NOTES:

The System Number field is grayed out and not accessible, it will be updated with the value entered for the Transmitter Code in the Stages section of the page.

Zones (also called Configurations in Stages) can be created, edited, and added to the system. These Zones are not linked to the Zones in AlarmBiller. The Zones for AlarmBiller are defined from the Billing Zones tab of the Site.

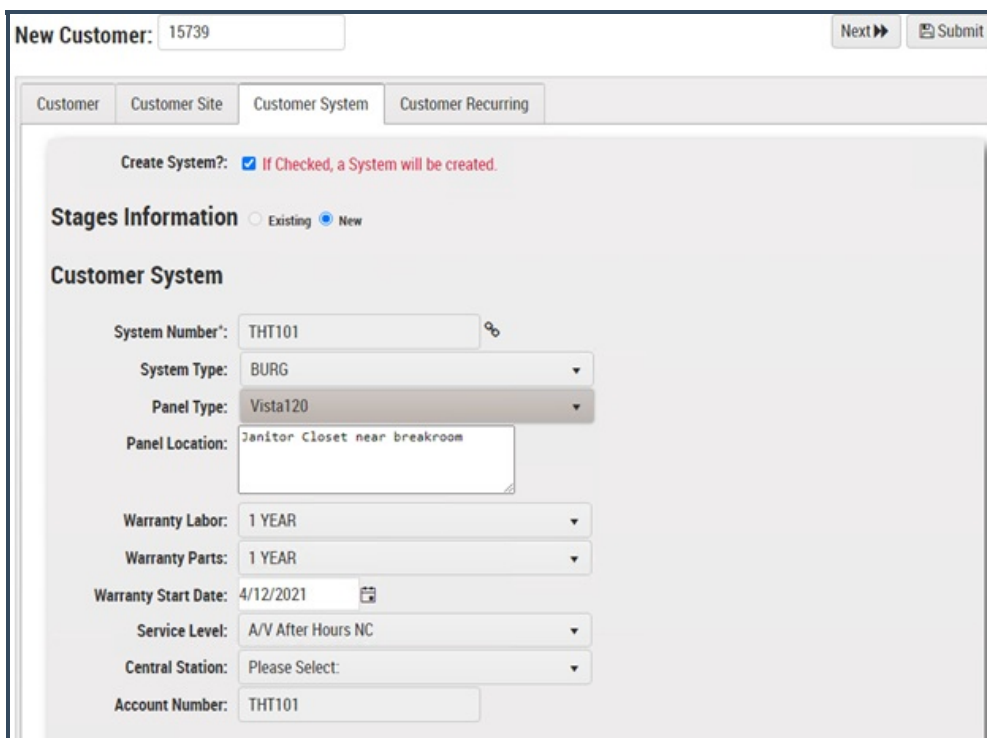


The 'Edit' dialog box contains the following fields and options:

Point:	Z12345	Description:	zone_AB add
Signal Status:	Alarm	Area:	1
Signal Code:		Schedule #:	3
Event Code:	Log Only	Option:	Sure View Alarm
Restore?:	<input type="checkbox"/>	Alarm Conf.:	Confirmed Alarm
Location:	Front Door	Auto Process:	Alarm Notification
Type:	Magnetic Contact	Action Plan:	Select Event Code...

Buttons: Update (orange), Cancel (gray)

Click 'Update' to save the zone



New Customer: 15739 [Next] [Submit]

Customer | Customer Site | Customer System | Customer Recurring

Create System?: If Checked, a System will be created.

Stages Information Existing New

Customer System

System Number:	THT101
System Type:	BURG
Panel Type:	Vista120
Panel Location:	Janitor Closet near breakroom
Warranty Labor:	1 YEAR
Warranty Parts:	1 YEAR
Warranty Start Date:	4/12/2021
Service Level:	A/V After Hours NC
Central Station:	Please Select:
Account Number:	THT101

Stages

<p>Transmitter Code*: <input type="text" value="THT101"/></p> <p>Alt. Device ID: <input type="text"/></p> <p>OOS Category: <input type="text" value="OFF LINE LETTER ..."/></p> <p>Device Type: <input type="text" value="Ademco 1440"/></p> <p>TT Type: <input type="text" value="Any Signal, Auto-..."/></p> <p>TT Days: <input type="text" value="2.00"/></p> <p>TT Hours: <input type="text" value="6.00"/></p> <p>TT Minutes: <input type="text" value="15.00"/></p> <p>Fail Event: <input type="text" value="Log Only"/></p> <p>IVR#: <input type="text"/></p> <p>Primary Xmit#: <input type="text" value="Select Primary Tr..."/></p> <p>Comm. Type: <input type="text" value="Dialer"/></p> <p>IP Address: <input type="text"/></p> <p>Line Security: <input type="text"/></p>	<p>LID Type: <input type="text" value="Acme Alarm Panel"/></p> <p>URL Text: <input type="text"/></p> <p>URL Target: <input type="text"/></p> <p>Signal Format: <input type="text" value="Ademco High Spe..."/></p> <p>Action Plan: <input type="text" value="Fire - Demo"/></p> <p>Entry/Exit Period: <input type="text"/></p> <p>Location: <input type="text"/></p> <p>Info: <input type="text"/></p> <p>First Signal Date: <input type="text"/></p> <p>First Signal Time: <input type="text"/></p> <p>Silent?: <input type="checkbox"/></p> <p>Config Only?: <input type="checkbox"/></p>
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Zones

+ Create

Point	Description	
Z12345	zone_AB add	✎ 🗑
55123	test	✎ 🗑

Stages System (Device) Field Definitions:

TRANSMITTER CODE: This is the Account Identifier. (CSID#, XMIT#, Account#...etc)

ALT DEVICE ID: This is an alternative TRANSMITTER CODE for the account. (Phone#, Backup account...etc.)

OOS CATEGORY: Out of Service Category. This will set the account to not active. The available selections are administered by the central station.

DEVICE TYPE: This is typically used for default zoning and may correspond to the manufacturer or panel name/model. The available selections are administered by the central station.

TT Type, TT Days, TT Hours, TT Minute, Fail Event: The Timer Test configuration. The available selections for Time Test Type are administered by the central station. The Days, Hours, and Minutes are the expected interval of Timer Tests. The Fail Event an override for the default Event that will be created if the expected timer test signal is not received.

IVR#: This is a numeric number that the account can be accessed from using the IVR system.

PRIMARY XMIT: If the system is a Secondary/Backup, the Primary system is entered here.

COMM TYPE: The Communication Type of the panel. This is for informational purposes only. The available selections are administered by the central station.

LINE SECURITY: This is a UL Required field. (examples: Encrypted, Standard, or None (blank))

LID TYPE: A two-way communication system may have a Listen In Device Type for how the Listen In functions.

URL Text/Target: A device can display a URL on the dispatch window.

SIGNAL FORMAT: The signal format that the panel sends. This is for display purposes only.

ENTRY/EXIT PERIOD: The time allowed to enter in the Device User Code in the panel. This is for informational purposes only. Format mm:ss

LOCATION: A description of where the panel is located in the premise.

INFO: General information about the system.

FIRST SIGNAL DATE/TIME: The date and time of the first signal received.

SILENT?: If the panel alarm is silent. This is for informational purposes only.

CONFIG ONLY?: This is an option to ONLY use zones that are configured on the system, and not to use any default zoning.

If Customer Recurring is to be added, click Next to access the Customer Recurring page.

If Customer Recurring is not to be added at this time, click 'Submit' to save the customer, site, and system to AlarmBiller and push the site and device (system) to Stages.

The customer's Site and System (if added) are saved to AlarmBiller.

Hometown Hardware - 15739 Edit

1824 Clearview Avenue Building G Toledo, OH 43610 Phone: (877) 888-1212 Cell: Email: hometown@test.com Customer Type: Commercial Salesperson: Mike Berry	Status: Active Priority: Normal Customer Since: 04/12/2021 Last Statement: Default Term: Net 30 Recurring Term: Net 30 Service Term: Due on Receipt Manual Term: Due on Receipt Delivery Method: Email Deliver RMR Inv: Yes	Open Invoices: \$0.00 Open Credits: \$0.00 Unapplied Cash: \$0.00 Balance Due: \$0.00 Total RMR: \$0.00 Auto Pay:
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Comments

Invoices 0 Credits 0 Sites/Sys 1 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Utilities

Sites/Systems New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
HTH1	Hometown1	965 Albany Avenue	Cincinnati	OH

System Number	System Type	Panel Type	Warranty Start Date
TH101	BURG	Vista120	04/12/2021

1 - 1 of 1 items

The Site and Device are available in Stages.

Site:

Site

site name: **Hometown1**

address: **965 Albany Avenue**
Cincinnati, OH 45215 US

region: **1** Test

time zone: **13** (GMT-05:00) Eastern Time (US & Canada)

site type: **C** Commercial

permit:

language:

runaway threshold:

info:

jurisdiction:

address info:

cross street:

directions:

lockbox code:

lockbox location:

map, page, coord:

notify codes

subdivision

pets

keys

id1 id2

report group **M** Monthly

ul code **NIS** National Industrial Security

billing id **13582**

Sites in Stages will have the Billing ID field populated with the AlarmBiller Customer Site ID. This code is used to identify the customer site when sending updates to AlarmBiller.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.

Device (System in AlarmBiller)

Device

xmit# THT101 alt device id signals forwarded to

oos category OFF LINE LETTER RECEIVED oos date 04/12/21 17:28:22

device type **A1440** Ademco 1440

timer test

default

type **4** Any Signal, Auto-Reschedule

days **2** hours **6** minutes **15**

fail event **87** Log Only

alternate interval alternate when disarmed

ivr#

primary xmit#

communication type **Dialer** Dialer

platform

ip address port

line security

listen in device type **Acme** Acme Alarm Panel

url text url target

program label

program path

program argument

signal format **AdemcoH** Ademco High Speed action plan **1355** Fire - Demo

entry/exit period **00:00**

location

information

billing id **7506**

Devices in Stages will have the Billing ID field populated with the AlarmBiller Customer System ID. This code is used to identify the customer system when sending updates to AlarmBiller.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.

Changes are logged in Stages:

Reference	Table	Type	Time	User Name
Site: Hometown1,	Site	Update	17:28:29	Alarm Biller Dealer
Site: Hometown1, Xmit#: THT101	SignalRule	Insert	17:28:24	Alarm Biller Dealer
Site: Hometown1, Xmit#: THT101	SignalRule	Insert	17:28:24	Alarm Biller Dealer
Site: Hometown1,	Transmitter	Insert	17:28:23	Alarm Biller Dealer
Site: Hometown1,	Device	Insert	17:28:23	Alarm Biller Dealer
Site: Hometown1 Contact: Thomas, Keith	Contact	Insert	17:28:21	Alarm Biller Dealer
Site: Hometown1 Contact:	ContactLink	Insert	17:28:21	Alarm Biller Dealer
Site: Hometown1, Dispatch Type: Intrusion	SiteDispatchTy	Insert	17:28:19	Alarm Biller Dealer
Site: Hometown1, Dispatch Type: Intrusion	SiteDispatchTy	Update	17:28:19	Alarm Biller Dealer
Site: Hometown1,	MailAddress	Insert	17:28:19	Alarm Biller Dealer
Site: Hometown1,	Site	Insert	17:28:18	Alarm Biller Dealer
Site Group#: 201-Alarm Biller Dealer 201	SiteGroupLink	Insert	17:28:18	Alarm Biller Dealer

Contact is updated in Stages:

Name	PIN	Authority	Relation	Order#	UserID	ECV	Keys	Phones
Keith Thomas		Basic	Owner	1		<input type="checkbox"/>	<input type="checkbox"/>	

The Zone (Configuration) is also pushed to Stages:

Point	Status	Sig Code	Event Code	RST	Description	Area	Sched	Alt Xmit#
1111	A		163-Tank Level Ind	<input type="checkbox"/>	liquid nitrogen			
5555	A		110-Fire!!!	<input type="checkbox"/>	Smoke Detector			
55123	A			<input type="checkbox"/>	test			
Z12345	A		87-Log Only	<input type="checkbox"/>	Front Door Magnetic Contact : 1		3	

Linking

If there is an existing Site in AlarmBiller and an existing Site in Stages, linking is the preferred method. From the Site page in AlarmBiller, click the Utilities tab, and from there select the External tab. At least one System (Device) is required in Stages when creating a site. Therefore; during the linking process at least one device must be selected when linking a site in AlarmBiller.

Site in Stages:

site name: AAAB1
address: 6200 Dillon Drive
Columbia, SC 29566 US
region: 1 Test
time zone: 13 (GMT-05:00) Eastern Time (US & Canada)
site type: C Commercial
permit:
language:
runaway threshold:
info: The Master Site Info Template[LockBoxCode]
[LockBoxLocation]
jurisdiction:
address info:
cross street:
directions:
lockbox code:
lockbox location:
map, page, coord:
notify codes:
subdivision:
pets:
keys:
id1:
id2:
report group: M Monthly
ul code: NIS National Industrial Security
billing id:

The billing id is blank. This indicates that this site is not currently linked to a site in AlarmBiller.

Add Devices to the site in Stages

Open the customer record.

Select the Sites/System tab of the customer.

Select the Site to be linked with the site in Stages

From the Utilities tab of the customer site, select the External tab:

Site: AAA Blind & Shutter Factory - AAAB1

Customer: AAA Blind & Shutter Factory - 15593
Site: AAA Blind & Shutter Factory
6200 Dillon Drive
Columbia, SC 29566
(843) 280-6877

Site Number: AAAB1
Sales Tax: SC Horry County
Tax Rate: 8.0000%
Tax Exempt:
Site Since: 05/21/2020
Inactive Date:

Warranty Start: 05/21/2020
Warranty Labor: 1 YEAR
Warranty Part: 1 YEAR
Service Level: Access T&M SC

Comments:

Notes Systems RMR Work Orders Site Parts 0 Contacts 0 Zones 0 Authorities Utilities

Docs 0 Custom Fields eForms 0 Part Ledger External

Add Link Push

Drag a column header and drop it here to group by that column

Name	External Key	Description
No items to display		

Click 'Add Link' to launch the page for adding a link to this site.

Select the connection to Stages:

Link to Site

Cancel Save

Connection*: Stages x

Site System System

Site*: Select Site

Description:

There is a tab for the Site and one tab for each System associated with that site. Selecting the Site from the dropdown will limit the Devices that can be selected on the System tabs to be only children of that Site in Stages.

Select the Site defined in Stages from the dropdown.

From the System tab, select the device from Stages.

Click Save.

A new 'Stages' tab is added:

Site: AAA Blind & Shutter Factory - AAAB1 Map Customer Edit

Customer: AAA Blind & Shutter Factory - 15593
Site: AAA Blind & Shutter Factory
 6200 Dillon Drive
 Columbia, SC 29566
 (843) 280-6877

Site Number: AAAB1
Sales Tax: SC Horry County
Tax Rate: 8.0000%
Tax Exempt:
Site Since: 05/21/2020
Inactive Date:

Warranty Start: 05/21/2020
Warranty Labor: 1 YEAR
Warranty Part: 1 YEAR
Service Level: Access T&M SC

Comments:

Notes Systems RMR Work Orders Site Parts Billing Contacts Billing Zones Authorities Utilities Stages

Site Number: 10050462 Account Sync Sync

Site Name: AAAB1

Site Type: C

Address: 6200 Dillon Drive
Columbia, SC 29566

Devices Notes Contacts History

Drag a column header and drop it here to group by that column

Transmitter Code	▼
D1 AAAB	✎ 🔗
D2 AAAB	✎ 🔗

◀ ▶ 1 ▶ ▶ 10 items per page 1 - 2 of 2 items

In Stages the billing id of the site and device are updated:

Xmit#	Status
D1 AAAB	Normal
D2 AAAB	Normal

Site View
 site name AAAB1
 site type Commercial
 address 6200 Dillion Drive
 Columbia, SC 29566

Site
 site name AAAB1
 address 6200 Dillion Drive
 Columbia, SC 29566 US
 region 1 Test
 time zone 13 (GMT-05:00) Eastern Time (US & Canada)
 site type C Commercial
 permit
 language
 runaway threshold
 info The Master Site Info Template[LockBoxCode]
 [LockBoxLocation]
 jurisdiction
 address info
 cross street
 directions
 lockbox code
 lockbox location
 map, page, coord
 notify codes
 subdivision
 pets
 keys
 id1 id2
 report group M Monthly
 ul code NIS National Industrial Security
 billing id 8409

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBillr.

Unlinking a System:

To unlink a system:

Select the customer.

Click the Site/Sys tab:

AB Customer 1 - 3452

[Edit](#)

100 High Street
Dallas, TX 75104
Phone: (888) 555-2456
Cell:
Email: abcus@test.com
Customer Type: Business
Salesperson: Doe, John

Status: Active
Priority: Normal
Customer Since: 04/23/2021
Last Statement:
Default Term: Due on Receipt
Recurring Term: 1st of Month
Service Term: 1st of Month
Manual Term: 1st of Month
Delivery Method: Email
Deliver RMR Inv: Yes

Open Invoices:	\$0.00
Open Credits:	\$0.00
Unapplied Cash:	\$0.00
Balance Due:	<u>\$0.00</u>
Total RMR:	\$0.00
Auto Pay:	

Comments

Invoices ₀ Credits ₀ Sites/Sys ₁ RMR ₀ Work Orders ₀ Proposals ₀ Payments ₀ CC/eCheck ₀ Notes ₀ Contacts ₀ Utilities

Sites/Systems

[+ New Site](#)

Show Inactive Sites

Site #	Site Name	Address	City	State
1	AB Customer 1	100 High Street	Dallas	TX

System Number	System Type	Panel	Warranty Start Date
ABCUS01	Burglar Alarm	Vista 100 Control Panel	04/23/2021
ABCUS02	Fire Alarm	Vista 100 Control Panel	04/23/2021
ABCUS03	CCTV	Vista 100 Control Panel	04/23/2021
ABCUS04	PERS	Vista 100 Control Panel	04/23/2021

1 10 items per page 1 - 4 of 4 items

Click the link for the system # to be unlinked.

Click the Utilities Tab of the selected system:

System: PERS - ABCUS04



Customer

Back to Site

Edit

Customer: AB Customer 1 - 3452
System Number: ABCUS04
System Type: PERS
Panel Type: Vista 100
Panel Location:

Warranty Labor: One Year Warranty
Warranty Part: 30 Day
Warranty Start: 04/23/2021
Service Level: T&M
Central Station: CMS
Inactive Date:

Comments:

Notes

- RMR
- Work Orders
- System Parts
- Call List
- Billing Zones
- Utilities
- StagesKA

Notes

Add Note

Note	Modified	Modified By	Type	Expiration
No items to display				

0 10 items per page

No items to display

Click the External Tab:

Customer: AB Customer 1 - 3452
System Number: ABCUS04
System Type: PERS
Panel Type: Vista 100
Panel Location:

Warranty Labor: One Year Warranty
Warranty Part: 30 Day
Warranty Start: 04/23/2021
Service Level: T&M
Central Station: CMS
Inactive Date:

Comments:

Notes 0 RMR 0 Work Orders 0 System Parts 0 Call List 0 Billing Zones 0 Utilities StagesKA

Docs 0 Custom Fields eForms 0 External

Documents

*Max File Size 5MB

Show Deleted Documents

File Name	Description	Type	Security	Modified
No items to display				

* Click File Name to rename/replace a document.

Click the Delete icon:

System: PERS - ABCUS04 Customer Back to Site Edit

Customer: AB Customer 1 - 3452
System Number: ABCUS04
System Type: PERS
Panel Type: Vista 100
Panel Location:

Warranty Labor: One Year Warranty
Warranty Part: 30 Day
Warranty Start: 04/23/2021
Service Level: T&M
Central Station: CMS
Inactive Date:




Comments:


Notes ₀ RMR ₀ Work Orders ₀ System Parts ₀ Call List ₀ Billing Zones ₀ Utilities StagesKA

Docs ₀ Custom Fields eForms ₀ External

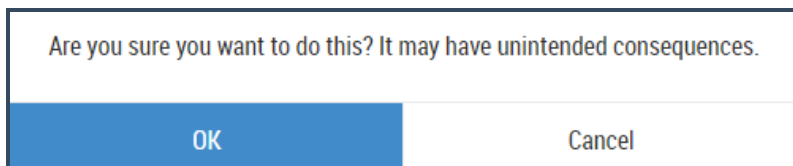
Account Sync Add Link Push

Drag a column header and drop it here to group by that column

Name	External Key	Description	
StagesKA	10050506	ABCUS04	  

1 - 1 of 1 items 

A warning is received: "Are you sure you want to do this? It may have unintended consequences."



If the link to the system is to be removed, click OK.

From the Stages connection tab for the Site, the system is now showing a link icon to create a new link if needed.

Site: AB Customer 1 - 1 Map Customer Edit

Customer: AB Customer 1 - 3452
Site: AB Customer 1
 100 High Street
 Dallas, TX 75104
 (888) 555-2456
 abcus@test.com

Site Number: 1
Sales Tax: Geauga
Tax Rate: 6.5550%
Tax Exempt:
Site Since: 04/23/2021
Inactive Date:

Warranty Start: 04/23/2021
Warranty Labor: 30 Day
Warranty Part: 30 Day
Service Level: Installation

Comments:

Notes Systems RMR Work Orders Site Parts 0 Billing Contacts 0 Billing Zones 0 Authorities Medical Utilities

StagesKA

Site Number: 10050527 Account Sync Sync
Site Name: AB Customer 1
Site Type: C
Address: 100 High Street
 Dallas, TX 75104

Devices Notes Contacts History

Drag a column header and drop it here to group by that column

Transmitter Code	
ABCUS02	
ABCUS03	
ABCUS04	
ABCUS01	

In Stages, the Device remains.

Pushing

Alternatively, if there is a Site defined in AlarmBiller, but the Site is not defined in Stages, the AlarmBiller site can be pushed to Stages. In addition to pushing the data to Stages, the Push Button on the External Tab can be used to also push the data to other integrations. If the Site is already linked, upon clicking the Push button only connections in which the record has not been previously linked will appear in the dropdown.

Open the Customer Record

From the Sites/Sys tab, select the site to be pushed to Stages.

Click the Utilities tab, and select the External tab:

Site: AAASite2 - SITE2AAA

Customer: AAA Blind & Shutter Factory - 15593
Site: AAASite2
3599 Willow Lane
Cincinnati, OH 45215
(877) 445-2121
site2@test.com

Site Number: SITE2AAA
Sales Tax: SC Horry County
Tax Rate: 8.0000%
Tax Exempt:
Site Since: 04/12/2021
Inactive Date:

Warranty Start: 04/19/2021
Warranty Labor: 1 YEAR
Warranty Part: 1 YEAR
Service Level: Access T&M SC

Comments:

Notes Systems RMR Work Orders Site Parts Contacts Zones Authorities Utilities

Docs Custom Fields eForms Part Ledger External

Add Link Push


Drag a column header and drop it here to group by that column

Name	External Key	Description
No items to display		

Click the Push button.

Select the Stages Connection.

Enter the required and desired option information:

Push Site ✕ Cancel  Save

Connection: Stages

Site: AAASite2

Site Name: AAASite2	Jurisdiction: Select Jurisdiction
Site Status: Select Site Status	Address Info: Distribution Center
Address: 3599 Willow Lane	Cross Street: Main and Center
Address 2:	Directions: two blocks south of center rear building
City: Cincinnati	Subdivision:
State: OH	Pets:
ZIP Code: 45215	Keys?: <input type="checkbox"/>
County:	Report Group: Monthly
Region: Test 2	UL Code: National Industria...
Time Zone: (GMT-05:00) East...	Restricted Access: Select Restricted ...
Site Type: Commercial	Authority: Default Site Authori ✕
Dispatch Type: Intrusion	
Permit:	

Contacts

[+ Create](#)

Order	First Name	Last Name	PIN	Contact Type

Click Save.

After the site is successfully pushed, the AlarmBiller Site page is displayed. The Site page contains a Stages tab. From the Stages tab there are additional tabs for Stages-related Devices, Notes, Contacts, and History.

Site is pushed to Stages:

Site

site name: AAASite2

address: 3599 Willow Lane
Cincinnati, OH 45215 US

region: 2 Test 2

time zone: 13 (GMT-05:00) Eastern Time (US & Canada)

site type: C Commercial

permit:

language:

runaway threshold:

info:

jurisdiction:

address info: Distribution Center

cross street: Main and Center

directions:

lockbox code:

lockbox location:

map, page, coord:

notify codes
 subdivision
 pets
 keys
 id1 id2
 report group: M Monthly
 ul code: NIS National Industrial Security
 billing id: 13584

The billing id is the customer site id from AlarmBiller.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.

The External Tab

Account Sync Add Link Push

Drag a column header and drop it here to group by that column

Name	External Key	Description
Stages	10050442	SYS301

The External Tab from either the customer site or system pages includes three options.

Account Sync

The Account Sync button will only show up if there is an External reference in the grid.

The Account Sync will sync the entire hierarchy of the current record. A sync for a system will also sync the associated Site. However, a sync of a Site will not sync any associated systems, contacts, or zones.

The Use AlarmBiller Data button will resolve the differences between the AlarmBiller and Stages record using the AlarmBiller data. The Use Stages Data will resolve the differences between the AlarmBiller and Stages record using the Stage data. Account Sync is the same operation for Systems associated with the selected Site.

Account Sync

Select a Connection...

Select the Stages Connection:

Account Sync

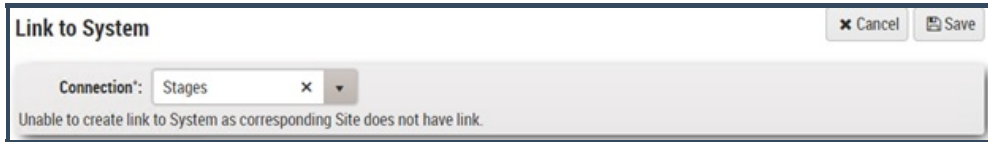
Stages

Use AlarmBiller Data Use Stages Data

Add Link

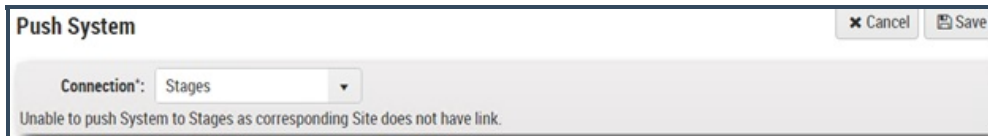
The Add Link option allows for an existing Site in AlarmBiller to be linked to an existing Site in Stages. To link a System in AlarmBiller with a Device in Stages, a corresponding Site must exist in Stages. The Add Link from the Contacts or Zone

pages will not push to the Stages integration.



Push

The Push option allows for a Site defined in AlarmBiller that is not currently linked to a Site in Stages to be pushed to Stages. To push a System in AlarmBiller to a device in Stages, a corresponding Site must exist in Stages. The Push button from the Contacts or Zone pages will not push to the Stages integration.



Each grid row has the following features:

View the external reference (the hyperlink in the External Key column)

The external Site information shows the Stages devices, notes, contacts, and history information.

The external System (Device) will show the Stages configurations and history information.

Sync



The Sync button on the External Reference grid will only sync the selected record (not its children). However, this method gives more granular control over what gets synced.

Take AlarmBiller – sync the values from the AlarmBiller column to Stages.

Reset - undo all the Takes options.

Take Stages – sync the values from the Stages column to AlarmBiller.

In the grid:

Merge field - reflects what values will sync upon clicking Save.

The icons in each row do the same thing as the Take AlarmBiller <, Take Stages > and Reset buttons, but only on the given row.

Cancel – cancels the selection.

Save – launches the Sync for the selected options.

Currently, there is no way to put a manual entry in the Merge. The data must either exist in AlarmBiller or Stages. To change what is in a particular field, the change must be made in the applicable page: Site, System, or both. If using AutoSync and a change is made in AlarmBiller, the change will get pushed to Stages automatically.

Site Sync:

Sync 10050469 - SS101 ✕ Cancel < Take AlarmBiller ↻ Reset > Take Stages 💾 Save

	AlarmBiller	Merge	Stages	
Site Name:	ABSITE101		SS101	< ↻ >
Address:	633 Woodbridge Road West		633 Woodbridge Road	< ↻ >
Address 2:	Suite 101			< ↻ >
City:	Cincinnati		Cincinnati	< ↻ >
State:	OH		Ohio	< ↻ >
ZIP Code:	43216		45215	< ↻ >

Select the sync option per field:

Sync 10050469 - SS101 ✕ Cancel < Take AlarmBiller ↻ Reset > Take Stages 💾 Save

	AlarmBiller	Merge	Stages	
Site Name:	ABSITE101		SS101	< ↻ >
Address:	633 Woodbridge Road West	633 Woodbridge Road West	633 Woodbridge Road	< ↻ >
Address 2:	Suite 101	Suite 101		< ↻ >
City:	Cincinnati		Cincinnati	< ↻ >
State:	OH	Ohio	Ohio	< ↻ >
ZIP Code:	43216	45215	45215	< ↻ >

Verify the data in the merge column is the data to sync.

Click Save:

📍 Site: ABSITE101 - SS101 📍 Map 📄 Customer ✎ Edit

Customer: Antiques and More - 15740 Site: ABSITE101 633 Woodbridge Road West Suite 101 Cincinnati, OH 45215 (877) 555-4444 email@test.com	Site Number: SS101 Sales Tax: SC Horry County Tax Rate: 8.0000% Tax Exempt: Site Since: 04/13/2021 Inactive Date:
---	--

(OH and Ohio are synonymous in both Stages and AlarmBiller, therefore the value did not update.)

System Sync

Sync 10050439 - XMT633 ✕ Cancel < Take AlarmBiller ↻ Reset > Take Stages 💾 Save

	AlarmBiller	Merge	Stages	
Transmitter Code:			XMT633	< ↻ >

Click the Take Stages icon on the record:

Sync 10050439 - XMT633

Cancel Take AlarmBiller Reset Take Stages Save

AlarmBiller	Merge	Stages
Transmitter Code:	XMT633	XMT633

The Merge field is updated to allow verification prior to the sync.

Click Save to sync the record

The Account Number field in AlarmBiller is updated with the Transmitter Code in Stages:

System: ACCESS/GATE - ABSYS1

Customer: Antiques and More - 15740
System Number: ABSYS1
System Type: ACCESS/GATE
Panel Type: Vista120
Panel Location:

Warranty Labor: No Warranty
Warranty Part: Lifetime Warranty
Warranty Start: 04/13/2021
Service Level: CCTV After Hours NC
Central Station: Universal Monitoring
Account Number: XMT633
Inactive Date:

Edit Link

Edit Link for a Site allows the user to change the link to a different Site in Stages that is not currently linked to AlarmBiller. The Edit Link for a System allows the user to change the link to a different Device in Stages for a Device that is not currently linked to AlarmBiller.

Delete

Deleting will remove this reference between Stages and AlarmBiller. The record (Site or System) in AlarmBiller and the referenced record in Stages will not be altered. Any changes to the records in either Stages or AlarmBiller after the linked reference has been deleted will not be pushed. To re-link these items, the Add Link function can be used.

The Stages Tab

Each linked item has a new tab that is named after the External Service defined in the Third Party Services setup. (In this example, the External Service is called "Stages".) The information displayed shows how this record is linked to external records (Stages).

Tom's Tackle Shop - 15749

Edit

4215 Riverview Road
 Dallas, TX 75106
 Phone: (877) 424-1567
 Cell:
 Email: tts@test.com
 Customer Type: Residential
 Salesperson: Mike Berry

Status: Active
 Priority: Normal
 Customer Since: 04/15/2021
 Last Statement:
 Default Term: Net 30
 Recurring Term: Due on Receipt
 Service Term: Due on Receipt
 Manual Term: Due on Receipt
 Delivery Method: Email
 Deliver RMR Inv: Yes

Open Invoices: \$0.00
 Open Credits: \$0.00
 Unapplied Cash: \$0.00
 Balance Due: \$0.00
 Total RMR: \$0.00
 Auto Pay:

Comments

Invoices 0 Credits 0 Sites/Sys 1 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Utilities

Sites/Systems

New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
TTS101	TTStoreOne	9348 Sportsman	Dallas	TX

System Number	System Type	Panel Type	Warranty Start Date
TTSSYS01	AV	Vista120	04/15/2021

1 10 items per page 1 - 1 of 1 items

1 10 items per page 1 - 1 of 1 items

Site: TTStoreOne - TTS101

Customer: Tom's Tackle Shop - 15749
Site: TTStoreOne
 9348 Sportsman
 Dallas, TX 75104
 (877) 252-4444
 tts01@test.com

Site Number: TTS101
Sales Tax: SC Horry County
Tax Rate: 8.0000%
Tax Exempt:
Site Since: 04/15/2021
Inactive Date:

Warranty Start: 04/15/2021
Warranty Labor: 1 YEAR
Warranty Part: 1 YEAR
Service Level: A/V After Hours NC

Comments:

Notes Systems RMR Work Orders Site Parts Billing Contacts Billing Zones Authorities Utilities Stages

Site Number: [10050488](#) Account Sync Sync
Site Name: TTSite1
Site Type: C
Address: [9348 Sportsman Way](#)
[Dallas, TX 75104](#)

Devices Notes Contacts History

Drag a column header and drop it here to group by that column

Transmitter Code	
TTX01	
TTX02	

10 items per page 1 - 2 of 2 items

Clicking the Site Number link will open the tab's content in a new page. The Address link will open the address in Google Maps. The Sync button will take you to the individual Sync page (as described above).

There are four tabs. Devices tab, which shows all the Stages Devices associated with this Site. Notes tab, which shows you the associated notes. Contacts tab, which shows all the contacts (including the ones you pushed, if any). Finally, the History tab, which shows the test history for the Devices associated with this Site.

This data is being pulled directly from Stages, and therefore is going to represent the latest information available from Stages.

In the Devices tab, a collection of Devices from Stages will be listed. Clicking the link will take you to a page for that device. There are different buttons in the Devices grid. The Edit icon lets you edit the Device in Stages, whether it's linked to a System in AlarmBiller or not. However, if it is linked, it will synchronize those changes to the linked record in AlarmBiller. If the device is linked, the book icon can be used to access the linked System in AlarmBiller. If linked, there is also a Stages tab for this Device. If the device is not linked, the link button can be used to select a System in AlarmBiller to link to this Device.

From the Contacts tab, the Contact information is used to view or edit the Contact. This contact is only stored in Stages and not linked to AlarmBiller, therefore will not be reflected anywhere in the application outside of this grid. The Create button also pushes a new Contact directly to Stages.

System: AV - TTSSYS01 Customer Back to Site Edit

Customer: Tom's Tackle Shop - 15749
System Number: TTSSYS01
System Type: AV
Panel Type: Vista120
Panel Location: maint. room

Warranty Labor: 1 YEAR
Warranty Part: 1 YEAR
Warranty Start: 04/15/2021
Service Level: A/V After Hours NC
Central Station:
Inactive Date:

Comments:

Notes ₀ RMR ₀ Work Orders ₀ System Parts ₀ Call List ₀ Billing Zones ₀ Utilities Stages

Device Number: 10050458 Activate Test Mode
Transmitter Code: TTX01
Site Number: 10050488
Device Status: Normal

Configurations History

+ Create

Drag a column header and drop it here to group by that column

Point	Signa...	Signa...	Event...	Resto...	Descr...	Area ...	Sche...	Alter...	Effect...
212	A			false					Fire - De...
3310	A			false	config fr...				EXT TestV

The Stages tab on the System page shows data Stages has for that Device. If the Device Status is Normal, then the Activate Test Mode button is activated.

The Configurations tab shows the Configurations (Zones) that Stages has for this Device. New Configurations can be sent in Stages directly by clicking the Create button.

The History tab shows a subset of the History tab from the Site grid, filtered to only show the test history affecting this device.

Clicking the Activate Test Mode button will bring up a panel. Currently, only the All Points on test is supported. When putting a System or a Site on test via the integration, the Stages Site Time Zone is used.

Place On Test

Type: All points will be p...

Category: ONE HOUR TEST

Effective Date: 4/15/2021

Effective Time*: 11:51

Expire Date: 4/15/2021

Expire Time*: 13:51

Test Comment: enter comments related to the test here

Site Test:

Notify Option: Select Auto Notify...

Notify Recipient:

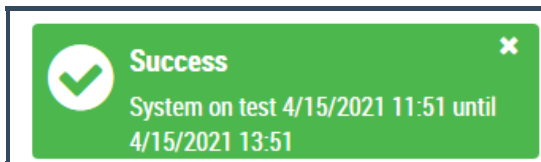
Save Cancel

Fill in the required fields (marked with an asterisk), and this will put that device on test.

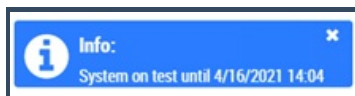
Note: The Dates and Times for the test are in the Site's time zone, which might differ from the current time zone.

Click Save.

A confirmation regarding the test status is received:



If accessing the customer record while a system test is running, the user is notified.



When a test is running, the 'Deactivate Test Mode' button is activated. Clicking the Deactivate Test Mode button will display the list of active tests from which any currently active test for that Device can be disabled.

System: AV - TTSSYS01 Customer Back to Site Ed

Customer: Tom's Tackle Shop - 15749
 System Number: TTSSYS01
 System Type: AV
 Panel Type: Vista120
 Panel Location: maint. room

Warranty Labor: 1 YEAR
 Warranty Part: 1 YEAR
 Warranty Start: 04/15/2021
 Service Level: A/V After Hours NC
 Central Station:
 Inactive Date:

Comments:

Notes | RMR | Work Orders | System Parts | Call List | Billing Zones | Utilities | **Stages**

Device Number: 10050458 Deactivate Test Mode
 Transmitter Code: TTX01
 Site Number: 10050488
 Device Status: Test

Configurations | History

+ Create

Drag a column header and drop it here to group by that column

Point	Signa...	Signa...	Event...	Resto...	Descr...	Area ...	Sche...	Alter...	Effect...
212	A			false					Fire - De... ✎
3310	A			false	config fr...				EXT TestV ✎

Deactivate Test ✕

Drag a column header and drop it here to group by that column

Category	Type	Details	App#	Test Effective	Test Expires	Comment
ONE HOUR TEST	All	All Points	2	Thu Apr 15 2021 ...	Thu Apr 15 2021 ...	enter comments r... ✕

◀ ◁ 1 ▷ ▶ 10 items per page 1 - 1 of 1 items ↻

Clicking the X button in the grid will deactivate that test.

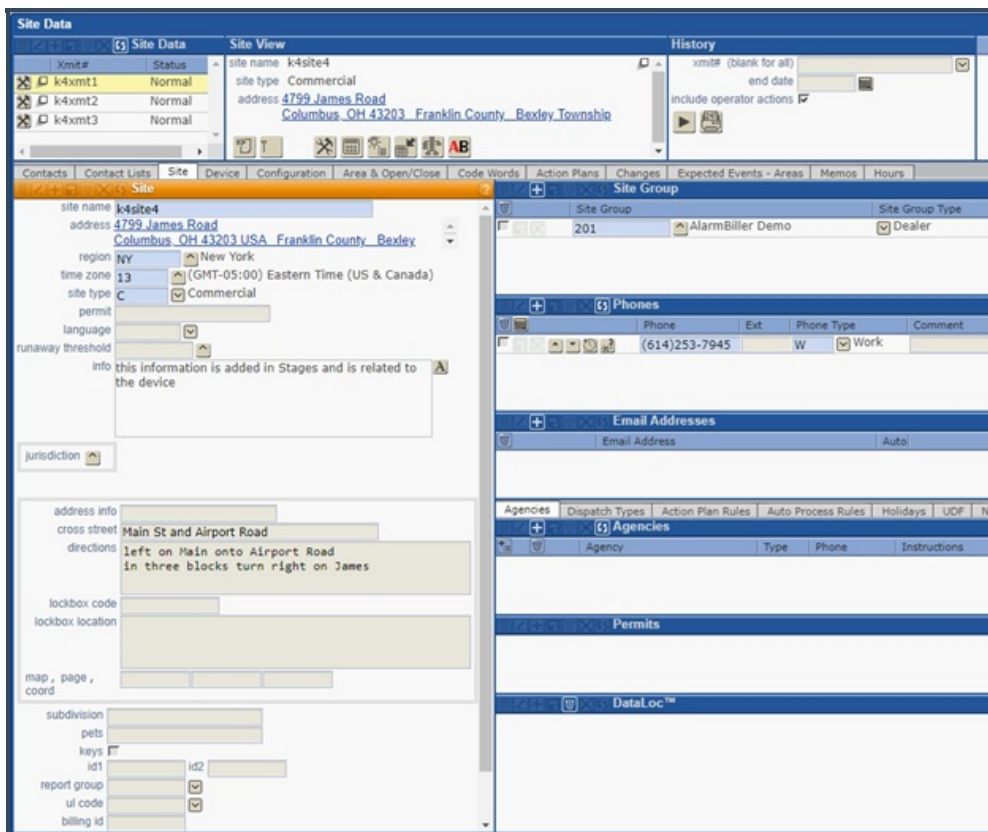
If an Alarm is active on the system, the Device Status indicates 'Alarm'.

Notes | RMR | Work Orders | System Parts | Call List | Billing Zones | Utilities | **Stages**

Device Number: 10050458
 Transmitter Code: TTX01
 Site Number: 10050488
 Device Status: Alarm

Pushing Site from Stages to AlarmBiller for New Customer

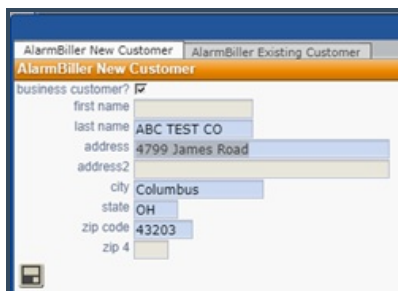
In Stages, add a new Site and Device or Select a Site that is not linked with AlarmBiller.



Click the AB (AlarmBiller Send) icon in the Site View section:



From the 'AlarmBiller New Customer' tab, select if the customer is a business customer. If business customer, check the 'business customer?' check box and confirm that the last name is the name to be used for the new customer:

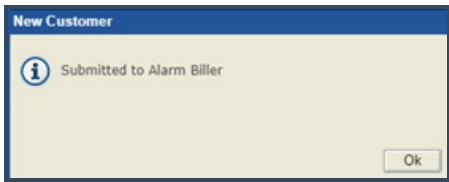


If not a business customer, do not select the 'business customer?' check box, add a first name and confirm that the last name is the last name to be used for the new customer.

Confirm the remaining address information.

Click the AlarmBiller Save icon.

A message will be received indicating if the customer was successfully added to AlarmBiller.



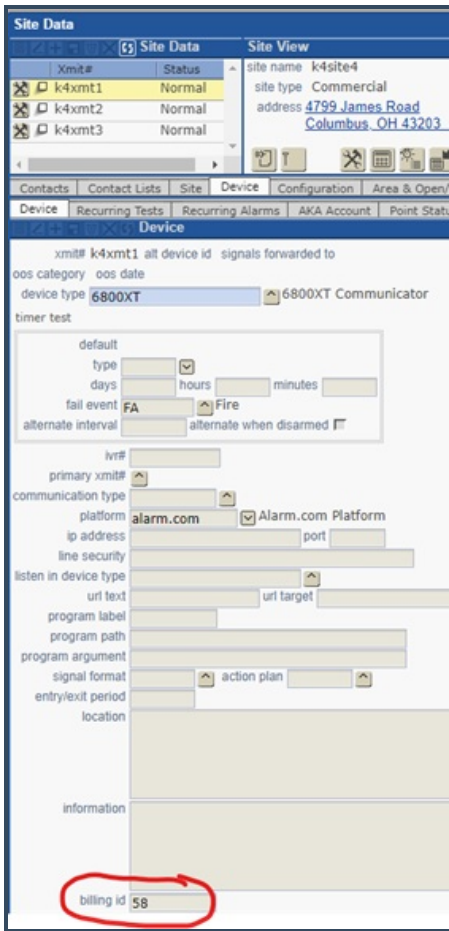
Refresh the Site Data

Click the Site tab. Note: The billing id is updated with the site id from AlarmBiller.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.



Click the Device tab. Note: The billing id is updated with the system id from AlarmBiller.



Each device will have a unique billing id.

Note: The AB (AlarmBiller Send) icon is no longer available since the site is already linked with AlarmBiller.

From AlarmBiller > Customer > Search and select the new customer.

Check and update any information for the customer needed by AlarmBiller such as Salesperson, Terms, Delivery Method, etc by clicking the Edit button on the customer view. Save any changes.

Edit Customer: ABC TEST CO Cancel Save

Customer Number:

Business Customer:

Billing Address:

ABC TEST CO

4799 James Road

Address 2

Columbus Ohio 43203 Plus 4

Phone: ext.

Cell Phone:

Email:

Customer Status: Active

Priority Level: Normal

Customer Type: Residential

Salesperson: Ima Seller

Default Term: Due on Receipt

Recurring Term: Net 15 Days

Service Invoice Term: Net 30 Days

Manual Invoice Term: Due on Receipt

Master Customer: Select Master Customer:

Delivery Method: Print

Prevent RMR Delivery: Prevents delivery of recurring invoices.

No Late Fees: Prevents late fees from accruing.

Late Fee: \$0.00

No Statements: Prevents statements from generating.

Show Open Invoices: Displays the open balance on invoices.

Customer Since: 5/4/2021

To confirm the information updated by the push from Stages:

Click the Sites/Sys tab of the customer.

ABC TEST CO - 7954 Edit

4799 James Road
Columbus, OH 43203

Phone:
Cell:
Email:

Customer Type: Residential
Salesperson: Ima Seller

Status: Active
Priority: Normal

Customer Since: 05/04/2021
Last Statement:

Default Term: Due on Receipt
Recurring Term: Net 15 Days
Service Term: Net 30 Days
Manual Term: Due on Receipt

Delivery Method: Print
Deliver RMR Inv: Yes

Open Invoices: \$0.00
Open Credits: \$0.00
Unapplied Cash: \$0.00
Balance Due: \$0.00

Total RMR: \$0.00
Auto Pay:

Comments

Invoices 0
Credits 0
Sites/Sys 1
RMR 0
Work Orders 0
Proposals 0
Payments 0
CC/eCheck 0
Notes 0
Contacts 0
Utilities

Sites/Systems New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
1	k4site4	4799 James Road	Columbus	OH

System Number	System Type	Panel	Warranty Start Date
1	Burglar Alarm	Vista 100 Control Panel	05/04/2021
2	Burglar Alarm	Vista 100 Control Panel	05/04/2021
3	Burglar Alarm	Vista 100 Control Panel	05/04/2021

◀ 1 ▶ 10 items per page 1 - 3 of 3 items

◀ 1 ▶ 10 items per page 1 - 1 of 1 items

Confirm that the site and any associated devices are listed.

Click the hyperlink for the Site.

Click the Stages Tab (the name of the tab will be the name of the Stages connection defined).

Site: k4site4 - 1

Customer: ABC TEST CO - 7954
Site: k4site4
4799 James Road
Columbus, OH 43203
(614) 253-7945

Site Number: 1
Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt:
Site Since: 05/04/2021
Inactive Date:

Warranty Start:
Warranty Labor: One Year Warranty
Warranty Part: One Year Warranty
Service Level: T&M

Comments: this information is added in Stages and is related to the device

Notes Systems RMR Work Orders Site Parts 0 Billing Contacts 0 Billing Zones 0 Authorities Utilities **Stages**

The Site and Transmitter Code from Stages are displayed. The Contacts tab contains the contacts defined for the Site in Stages.

Devices Notes **Contacts** History

+ Create

Drag a column header and drop it here to group by that column

Name	PIN	Authority	Relation	Order	ECV	Keys
Tim Brown	12345	Full	0	1	false	false

The contact can be edited. The Create button can be used to add Stages related contacts.

The information on the History tab will be updated with tests performed on the site.

Click the Utilities Tab and then the External Tab.

The External Tab will show the Stages link information for the Site.

Notes Systems RMR Work Orders Site Parts 0 Billing Contacts 0 Billing Zones 0 Authorities **Utilities** Stages

Docs 0 Custom Fields eForms 0 **External**

Account Sync Add Link Push

Drag a column header and drop it here to group by that column

Name	External Key	Description
Stages	223	k4site4

1 - 1 of 1 items

Click the Systems Tab.

From the list of Systems, click the hyperlink to the System Number.

System Number	System Type	Panel	Warranty Start Date
1	Burglar Alarm	Vista 100 Control Panel	5/4/2021
2	Burglar Alarm	Vista 100 Control Panel	5/4/2021
3	Burglar Alarm	Vista 100 Control Panel	5/4/2021

Click Edit to make any changes to the system information used by AlarmBiller.

Save the changes.

Click the Stages Tab (the name of the tab will be the name of the Stages connection defined).

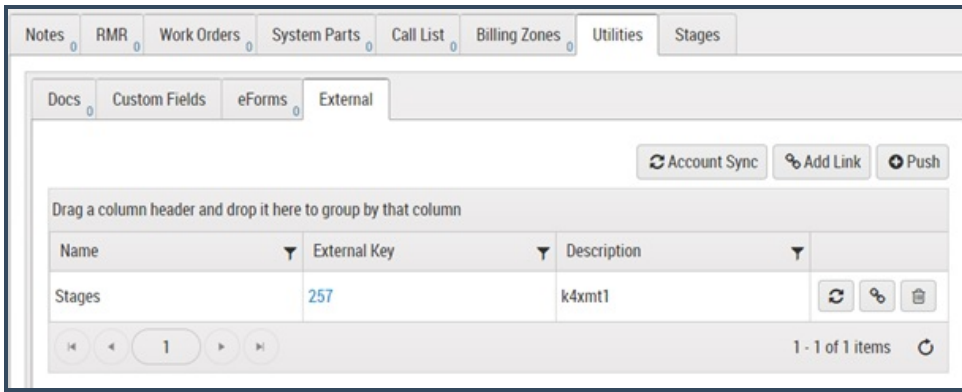
The Configuration created in Stages will be displayed.

Point	Signa...	Signa...	Event...	Resto...	Descr...	Area ...	Sche...	Alter...	Effect...	Standard...
4040	A			false	point con...					Standard...

From the Stages Tab of the System, the Activate Test Mode button can be used to put the system (device) on test.

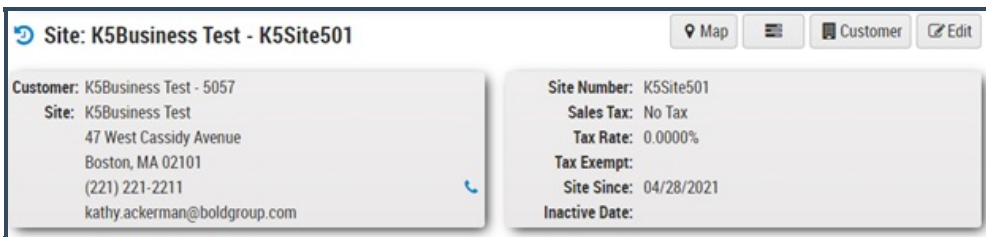
Click the Utilities Tab and then the External Tab.

The External Tab will show the Stages link information for the System (Device).



Push Site and Devices from Stages to Existing Customer in AlarmBiller

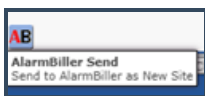
In AlarmBiller, identify the customer that is not currently linked to AlarmBiller.



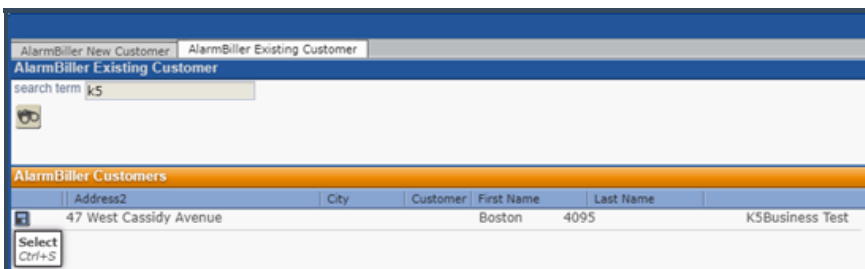
In Stages, add a new Site and Device or Select a Site that is not linked with AlarmBiller



Click the AB (AlarmBiller Send) icon in the Site View section

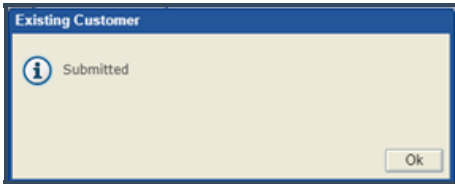


From the 'AlarmBiller Existing Customer' tab, search for the AlarmBiller customer to be linked with the Stages site.



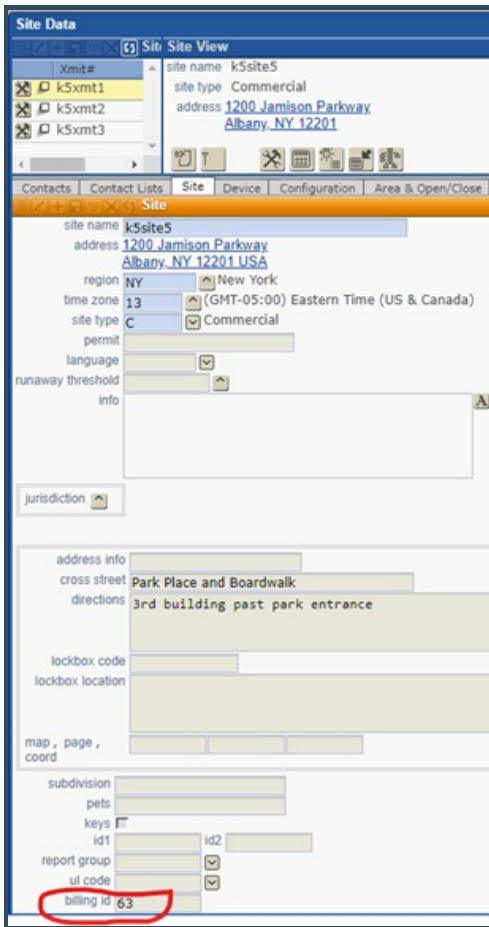
Click the Select icon to the left of the customer to be linked.

A message will be received indicating if the site and related devices are submitted to AlarmBiller.



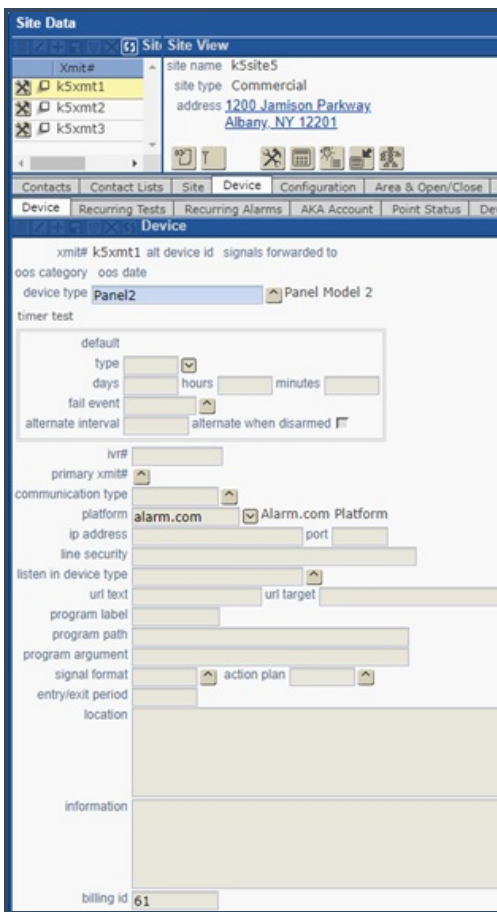
Refresh the Site Data.

Click the Site tab. **Note:** The billing id is updated with the site id from AlarmBill.



Click the Device tab. **Note:** The billing id is updated with the system id from AlarmBill.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBill.



Each device will have a unique billing id.

NOTE: Do not delete or change any billing id values as this will break the link between Stages and AlarmBiller.

Note: The AB (AlarmBiller Send) icon is no longer available since the site is already linked with AlarmBiller.

From AlarmBiller > Customer > Search and select the customer.

To confirm the information updated by the push from Stages:

Click the Sites/Sys tab of the customer.

K5Business Test - 5057 Edit

47 West Cassidy Avenue Boston, MA 02101 Phone: (221) 221-2211 Cell: Email: kathy.ackerman@boldgroup.com Customer Type: Commercial Salesperson: Ima Seller	Status: Active Priority: Normal Customer Since: 04/28/2021 Last Statement: Default Term: Due on Receipt Recurring Term: Due on Receipt Service Term: Due on Receipt Manual Term: Net 15 Days Delivery Method: Mail Deliver RMR Inv: Yes	Open Invoices: \$0.00 Open Credits: \$0.00 Unapplied Cash: \$0.00 Balance Due: \$0.00 Total RMR: \$0.00 Auto Pay:
--	--	--

Comments

Invoices 0 Credits 0 Sites/Sys 2 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Utilities

Sites/Systems New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
K5Site501	K5Business Test	47 West Cassidy Avenue	Boston	MA
1	k5site5	1200 Jamison Parkway	Albany	NY

1 - 2 of 2 items

Confirm that the site newly pushed site from Stages is listed.

Note: There are now multiple sites: the original site(s) created in AlarmBiller and the new site pushed from Stages.

Click the hyperlink for the Site that was pushed from Stages.

Click the Edit button to make any Site information used by AlarmBiller and Save.

Edit Site: K5Business Test - 5057 Cancel Save

Site Info: <input type="checkbox"/> Use Customer Address k5site5 1200 Jamison Parkway Address 2 Albany New York 12201 Plus 4 Phone: (888) 566-1245 ext. Email: kathy.ackerman@boldgroup.com	Site Info: Site Number: k5site5 Sales Tax: None - 0.0000% Tax Exempt: Site Since: 5/4/2021 Inactive: <input type="checkbox"/> Inactive Date:
Service Info: Warranty Start Date: 5/4/2021 Warranty Labor: One Year Warranty Warranty Part: One Year Warranty Service Level: T&M	Comments <div style="border: 1px solid gray; height: 50px;"></div>

Click the Stages Tab (the name of the tab will be the name of the Stages connection defined).

Site: k5site5 - k5site5

Map Customer Edit

Customer: K5Business Test - 5057
Site: k5site5
 1200 Jamison Parkway
 Albany, NY 12201
 (888) 566-1245
 kathy.ackerman@boldgroup.com

Site Number: k5site5
Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt:
Site Since: 05/04/2021
Inactive Date:

Warranty Start: 05/04/2021
Warranty Labor: One Year Warranty
Warranty Part: One Year Warranty
Service Level: T&M







Comments:

Notes Systems RMR Work Orders Site Parts Billing Contacts Billing Zones Authorities Utilities Stages

Site Number: 227 Account Sync Sync
Site Name: k5site5
Site Type: C
Address: 1200 Jamison Parkway
 Albany, NY 12201

Devices Notes Contacts History

Drag a column header and drop it here to group by that column

Transmitter Code	
k5xmt1	 
k5xmt2	 
k5xmt3	 


1 10 items per page 1 - 3 of 3 items

The Site and Transmitter Code from Stages are displayed on the Devices Tab.
 The Contacts tab contains the contacts defined for the Site in Stages.

Devices Notes Contacts History

+ Create

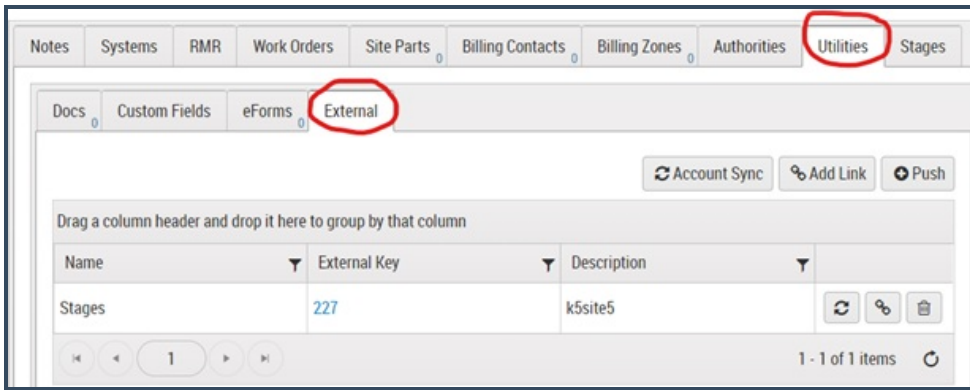
Drag a column header and drop it here to group by that column

Name	PIN	Authority	Relation	Order	ECV	Keys	
Bob Quincy		Full	0	10	false	false	

1 10 items per page 1 - 1 of 1 items

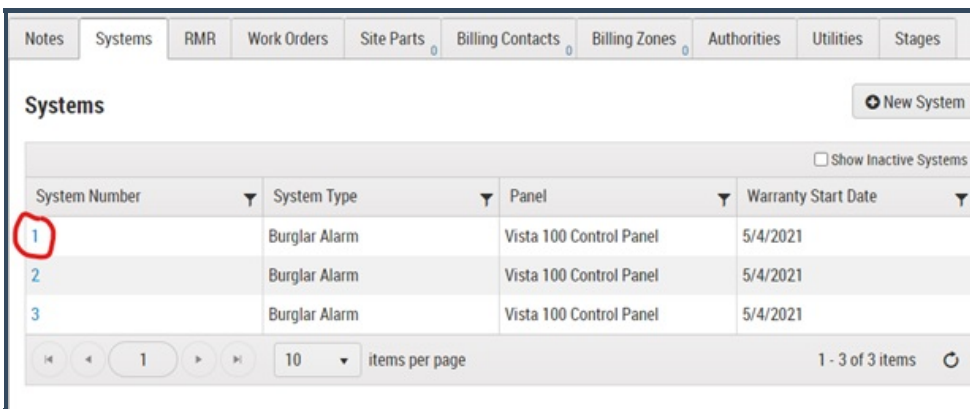
The information on the History tab will be updated with tests performed on the site.
 Click the Utilities Tab and then the External Tab.

The External Tab will show the Stages link information for the Site.



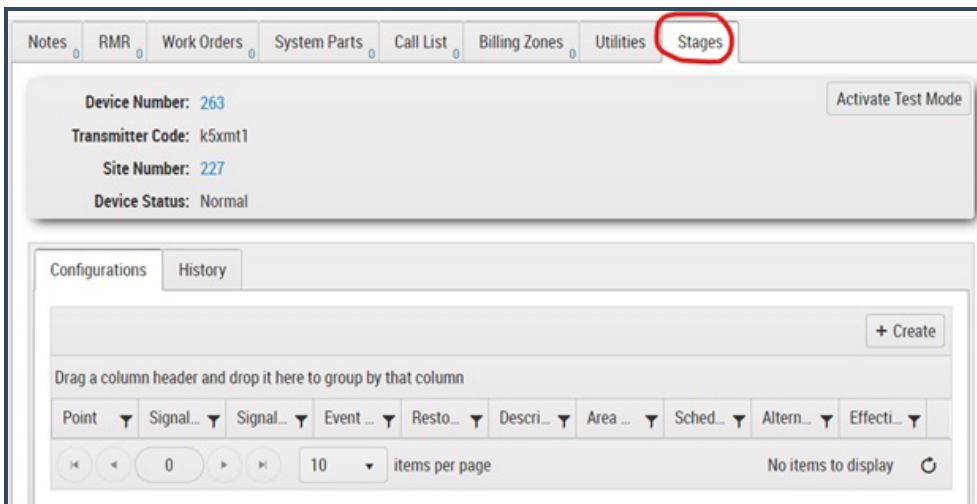
Click the Systems Tab.

From the list of Systems, click the hyperlink to the System Number.



Click the Edit button to make any changes to the system used by AlarmBiller, such as Panel Type, Panel Location, Warranty information, etc. Save the changes.

Click the Stages Tab (the name of the tab will be the name of the Stages connection defined).

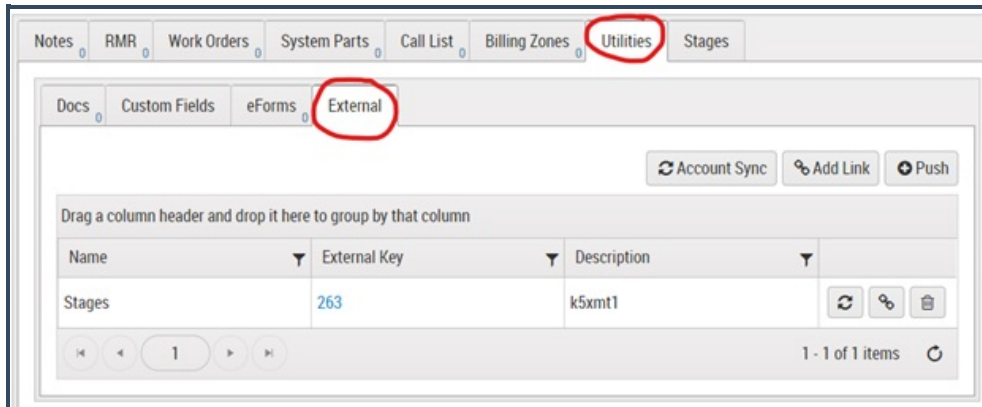


If any Configurations were created in Stages, they will be displayed.

From the Stages Tab of the System, the Activate Test Mode button can be used to put the system (device) on test.

Click the Utilities Tab and then the External Tab.

The External Tab will show the Stages link information for the System (Device).



Sync updates from Stages to AlarmBillr

The following Site Data are automatically updated in AlarmBillr when updated in stages:

- Site Address
- Site Info
- Site Phone
- Device Xmit#