

Multiple ways of looking up a customer site

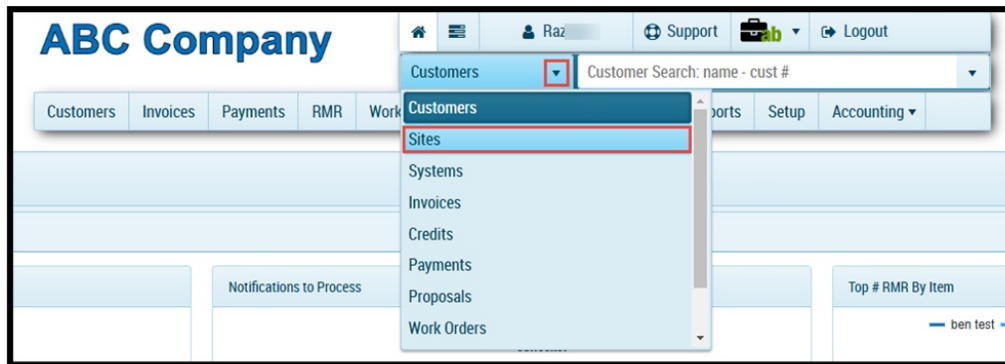
11/15/2024 7:51 am EST

The site in AlarmBiller is the physical location where the services are installed.

In AlarmBiller a customer site can be looked up in multiple ways.

There are multiple ways of looking up a customer site in AlarmBiller by the site number or address.

1. Switch the search criteria from the top drop-down from Customers to Sites (then type the site number or address in the search area and push the Enter key):



2. Search the site from the main menu by accessing Customers -> Sites:

ABC Company

Customers

Customer Search: name - cust #

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Customers

New Customer

Customers

Sites

Systems

Available Columns

Show Custom Fields

Custom Grid Layouts

Search Sites

Export to Excel

Show Inactive Sites

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

Customer #	Site #	Site Name	Address	City	State
ashtest4	1	# 2 LOCATION	125 E. RALEIGH AVE	Liberty	NC
5555	121	121	ATTN: Tony Chepelevich	Portland	OR
1000	0096	121484	3889 BARGER ST	SHRUB OAK	NY
1000	0050	121570	624 ROBINWOOD CT	WHEATON	IL
1000	0108	121614	404 GARDEN ST	BELLMORE	NY

3. Access the site from the customer’s account by accessing the Sites/Sys tab (on the customer's account):

My Test-Customer - 1326

Edit

5775 Joy Rd

Canton, MI 48188

Phone: (999) 999-8521

Cell:

Email: just.a.test@gm.99.aill.com

Customer Type: COMMERCIAL

Salesperson: Test Tech

Status: Active

Priority: Normal

Customer Since: 02/11/2020

Last Statement: 10/18/2024

Default Term: Net 10 Days

Recurring Term: Net 60

Service Term: Net 30 Days

Manual Term: 90 Days

Delivery Method: Mail

Deliver RMR Inv: Yes

Open Invoices: \$1,792.15

Open Credits: (\$10.00)

Unapplied Cash: \$0.00

Balance Due: \$1,782.15

Late Fee Balance: \$10.00

Total Balance Due: \$1,792.15

Total RMR: \$73.49

Auto Pay:

Comments

These comments do not appear anywhere on customer's portal.

Invoices

Credits

Sites/Sys

RMR

Work Orders

Proposals

Payments

CC/eCheck

Notes

Contacts

Utilities

Sites/Systems

New Site

Show Inactive Sites

Site #	Site Name	Address	City	State
1	My Test-Customer	5775 Joy Rd	Canton	MI
123	Site #2	5775 Joy Rd	Canton	MI

