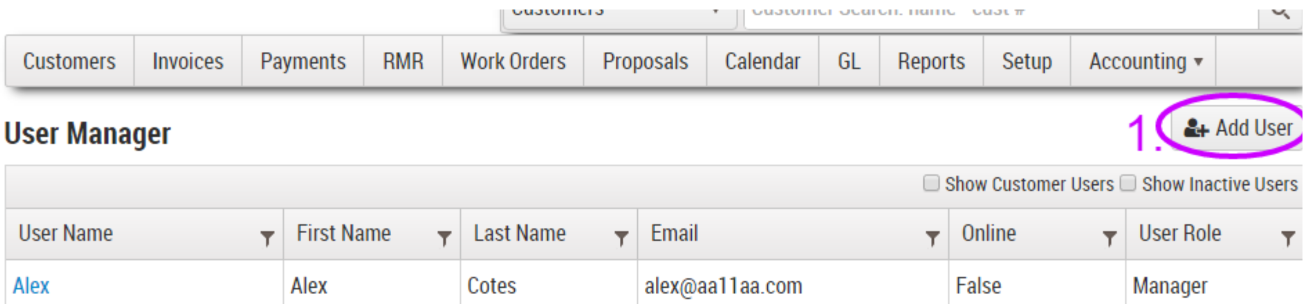
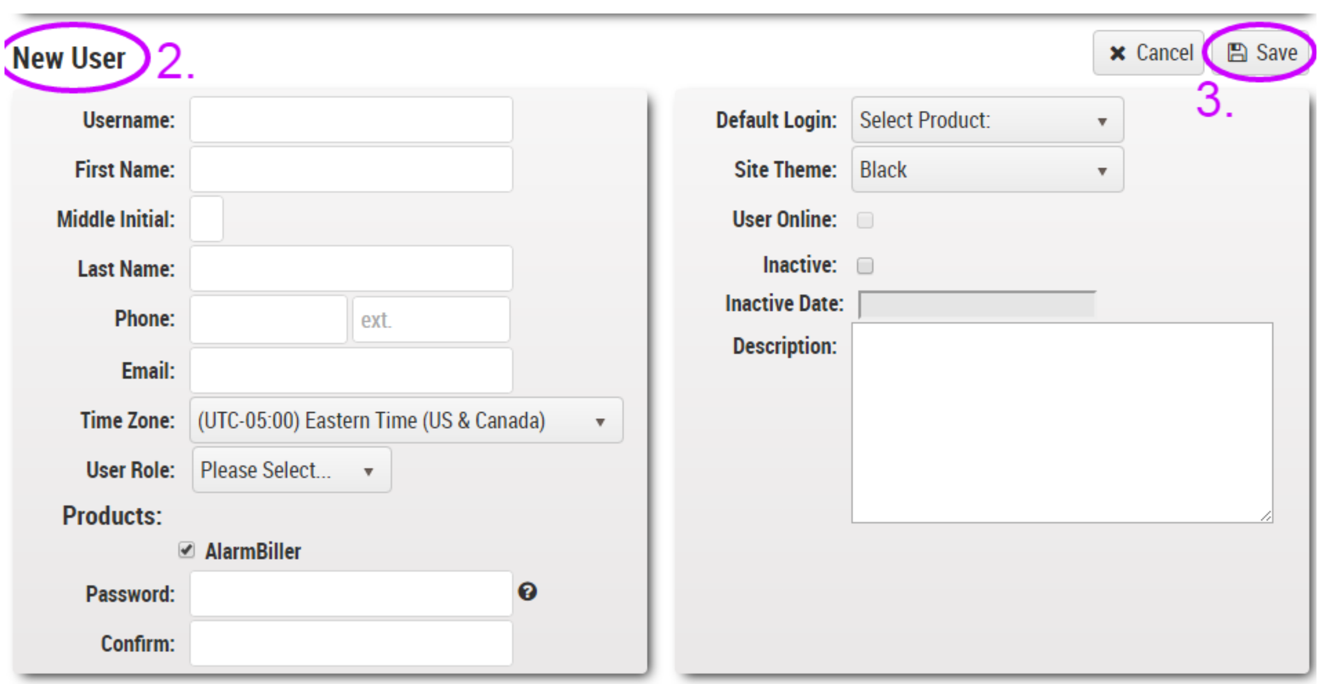
Users

Last Modified on 01/04/2023 10:18 am EST

Adding a New User

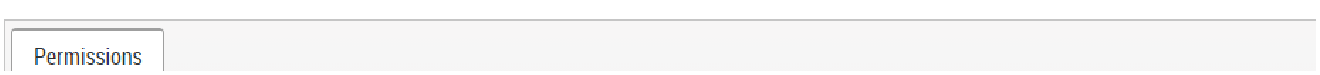
First, go to setup, and then in the top right click 'user'. Click 'add user' and then fill out the respective information and click save:





User Role

This field determines what this user can see and do within AlarmBiller. You can select what you want this user to be able to view and edit by choosing one of our preset roles ("Administrator", "Manager", "User", "Technician", or "Salesperson") or you can choose “Custom” to select exactly what you want to allow the user to access yourself. Scroll down to “User Security Permissions” to view and customize what the user has access to. If you add or remove permissions from any of our default user roles, it becomes a Custom role:



User Security Permissions:

Accounts Payables

- Add
- Delete
- Edit
- Read

Miscellaneous

Company Setup	Access to all company setup information.
Deliver	Ability to Deliver Individual Invoices and Credits. (Mark All as printed)
Deliver All	Ability to Deliver all Invoices and Credits. (Mark All as printed)
Export	Ability to export data to excel using the 'Export to Excel' button on various grids.
Financial	Ability to view Financial Information.
Quick Books	Ability to export/reverse Quickbooks files.
Supervisor	Ability to see all work orders, proposals, and calendar appointments.
User Administration	Manage all users and user roles.

Credits

- Add
- Apply
- Delete
- Edit
- View

Customer Manager

- Add
- Delete
- Edit
- View

Payments

Deposit	
Add	
Apply	
Delete	
Edit	
Payment Method Add	Add CC/eChecks.
Payment Method Delete	Delete CC/eChecks.
Payment Method Edit	Edit CC/eChecks.
Refund	
Submit	Submit individual CC/eCheck transactions.
Submit All	Submit all CC/eCheck transactions.
Unapply	
View	

Documents

- Add
- Delete
- Download

- View

Reports

- Financials
- Generals
- Pivots

General Ledgers

- General Ledger

Inventory

Inventory	Manage Invoice Items and Parts under Setup.
Quick Add	Add items and parts on the fly. (Proposals, Work Orders, Invoices, Credits)

Invoices

- Add
- Delete
- Edit
- View

Proposals

- Add
- Delete
- Edit
- View

Recurring Work Orders

- Delete
- Edit
- Generation
- View

RMR

Add	
Delete	
Edit	
Invoice Generation	
Rate Change	Ability to use rate change utility.
View	

Sites

- Add
- Delete
- Edit
- View

Statements

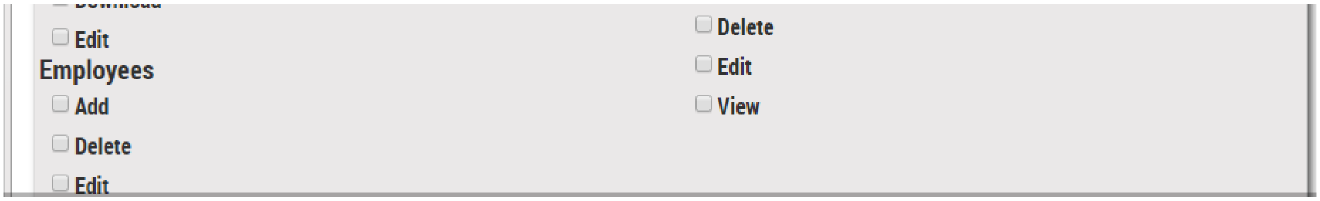
- Statements

Systems

- Add
- Delete
- Edit
- View

Work Orders

- Add



Administrator has the rights to view and edit everything specified under “User Security Permissions”.

Manager has the rights to everything but the “Set Up” page.

Technician can view their own calendar and can also create, edit, and update their work orders.

Salesperson can create new customers, create proposals, and also view their own calendar. By default, they can only view their own proposals.

Password

Choose a password for this User’s AlarmBiller account. Click on the question mark next to the password field to see the security requirements that must be met.

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Note: this is a temporary password. All users will reset their passwords upon their first login.
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Default Login

This field is for a feature to be used in a future enhancement.

Site Theme

This adjusts the background color theme this user will see when using AlarmBiller. We recommend selecting “Default” for our regular template design.

Inactive

To make the user inactive, select the “Inactive” checkbox.

Saving a User

To save click the “Save” box in the top right corner of the page.