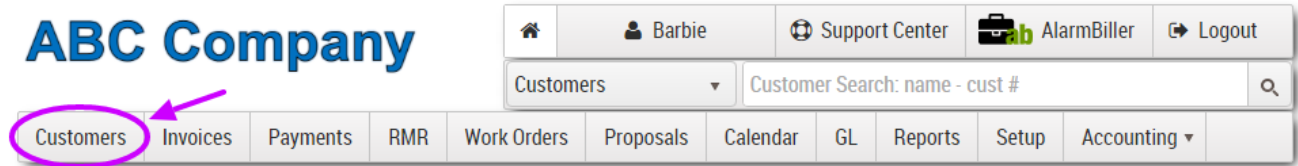# New Customer: Customer Tab

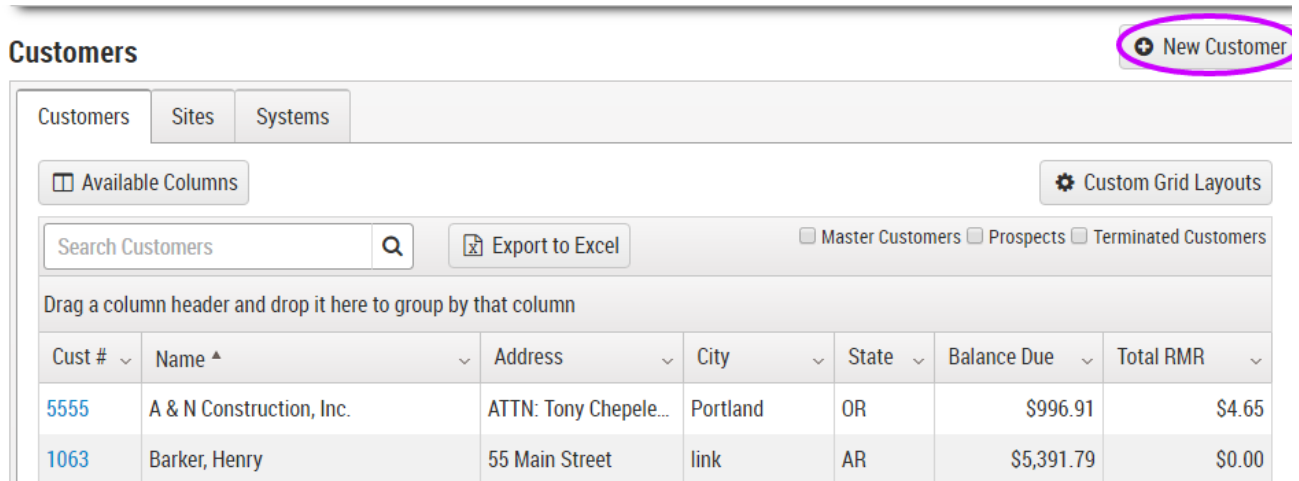Last Modified on 01/23/2023 1:40 pm EST

Adding a New Customer

This covers how to add a new customer in the "Customer" section of AlarmBiller. To do this, we need to fill out the customer wizard:

First, Click "Customers" in the upper left corner:

Click "New Customer" on the upper right side of the page:

Fill out the fields necessary. Each specific field will be explained further down this page.

New Customer: 1167

Customer	Customer Site	Customer System	Customer Recurring

Business Customer: ☐

Master Customer: ☐

Full Name:: [First] [Last]

Address: [Address 1]

: [Address 2]

: [City] [Please Select: ▼] [Zip] - [Plus 4]

Phone: [   ] [ext.]

Cell Phone: [   ]

Email: [   ]

Customer Status: Active ▼

Customer Type: Residential ▼

Priority Level: Normal ▼

Salesperson: Please Select: ▼

Term: Due on Receipt ▼

Master Customer: Select Master Customer: ▼

Delivery Method: Mail ▼

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.

Customer Since: 5/20/2016 📅

Comments:

Note: AlarmBiller will automatically create a new customer number in increments of one. The default of where this number starts can be found within the setup under defaults. You can also change the number right from the customer wizard:

Business Customer

Select this checkbox if this is a business customer. It will automatically change the format for the name portion of the customer from 'First Name' and 'Last Name' to 'Business Name'.

Master Customer**

Check this box if this customer is a Master Customer. Open this document to find out if you will need to make a customer a master customer or not:

Example 1: Temporary Billing

One of your customers is a builder called Joe. Joe is currently building 10 homes and you will be installing the pre-wiring. You would set Joe up as a "Master Customer" and each of the 10 homes needs to be set up as a regular "Customer" linked to the Master Customer.

You are now ready to generate an invoice for the pre-wiring. You have the option of invoicing the Master Customer or the regular Customer. Since no one is living in these homes yet, you would bill to the Master address.

Two weeks pass by, and Sally moves into one of Joe's houses. Simply change the customer name to "Sally" and unlink the home from Joe's Master account. Now when you generate an invoice for Sally, it will go directly to her new home.

Example 2: Multiple Methods of Payment

One of your customers is Mary, who owns a chain of 5 donut shops. Mary wants her recurring invoices to be sent to one location but will be using a separate method of payment (different bank accounts, credit cards, etc.) to pay for the invoices for each location. You would set Mary up as a "Master Customer" and each of her donut shops as regular "Customers" linked to the master. Now Mary can pay all her invoices using separate methods of payment. Or, the account can be set up so that all of the customer RMR's are itemized on one invoice, and the invoice can be sent to the Master Customer for payment.

Note: Once you create a customer as a master customer you cannot change him/her to a regular customer.
Similarly, once you create a regular customer, they cannot be changed to a "Master Customer".
To make these changes, you will need to inactivate the customer and re-enter their information.

Note: Just because a customer has multiple sites does not necessarily mean they should be set up as a master customer.

Note: Feel free to contact customer support if you need help determining if someone is a master customer.

Address

The address that should be placed here is the billing address.

Contact Information

Input the customer's "Phone", "Cell Phone", and "Email" information.

Customer Status

Select the customer's status from the dropdown box. (Customer's status)

Customer Type

Select "Customer Type" from the dropdown box. These will not affect the billing of a customer and are mostly for your reference. These can be created in the setup table in the customer types area.

Priority Level

Select the customer's priority level from the dropdown box. This also will not affect anything billing wise, it is mostly for your reference to help you understand the importance level of a customer.

Salesperson

Select the salesperson assigned to this customer. This is a required field.

Term

Select how many days you would like to give this customer to pay their invoices relative to the invoice date. You can set up terms within the setup table.

Master Customer Dropdown

(For regular customers only) If this is a sub-customer linked to a master customer, select the (already created) master they are linked to from the dropdown box.

Delivery Method

Select the way you would like this customer to receive invoices from the dropdown box. AlarmBiller offers 3 ways to

deliver; email, mail, and print.

Email

AlarmBiller will automatically deliver invoices to the email address you input in the "Email" field on this page.

Mail

Your generated invoices will be sent by AlarmBiller. We will print, fold, and stuff these invoices with a return envelope and postage and send them out for you. (Please contact your sales representative for information on fees pertaining to using the Mail option).

Print

AlarmBiller will generate invoices for you to print and mail manually.

Prevent RMR Delivery

Select this checkbox if you don't want to deliver a recurring invoice to this customer. This is generally used when a customer is setup for autopay, and therefore doesn't want an invoice, as they know they will be paying each month.

No Late Fees

Select this checkbox if you never want late fees to be charged to this customer.

No Statements

Select this checkbox if you do not want to send statements to this customer. (Statements in AlarmBiller are past due notices and can be edited in the statement rules area of setup.)

Show Open Invoice

Select this checkbox if you would like the customer's total open balance to appear on each invoice as a pleasant reminder that they owe you more money.

Customer Since Date

The customer since date is just how long they have been a customer with you. This does not affect billing.

Comments

Input any comments you might have about this customer. These comments are kept internally.

Next

Click "Next" in the upper right corner of the page after you have entered all the required fields to move on to the next

customer tab.