

Flow of AlarmBiller

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Customer Flow:

Customer→Site→System→Recurring (RMR)

1. Customer

The meat of the AlarmBiller structure starts with a Customer.

2. Site

Within a customer, you have a site, which is the physical location/premises of the customer. A customer can have multiple sites, as some customers have multiple locations.

3. System

This is the actual security system. Systems are always attached to a site, as you are always installing a security system at/for a physical location.

4. Recurring (RMR)

This is the billing information that is associated with the system that the customer has.

Billing Flow:

Customer→Proposal→Work Order→Invoice

1. Customer

To create Proposals, Work Orders, or Invoices, first create a customer to link these items to.

2. Proposal

After adding a new customer, a proposal can be sent to and reviewed by the customer.

3. Work Orders

After a proposal is accepted, change the status to 'sold', and complete the proposal to turn it into a work order. All the information in the proposal will copy over. From here you can edit the content of the work order and create

appointments for your technicians to complete the job(s).

4. Invoice

Once a work order is completed it will generate an invoice. This invoice can be paid out in the field or through AlarmBiller.