

# Shortcuts

Last Modified on 09/18/2017 9:42 am EDT

## Filter

Click funnel to the right of the column heading you wish to filter results by. Sort as you wish by completing the fields in the box that appears and click "Filter" to sort results:

The screenshot shows the ABC Company AlarmBillr interface. At the top, there is a navigation bar with the company name, user profile (Barbie), support center, and login options. Below this is a search bar for customers and a menu with various system modules like Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. The main section is titled "Proposals" and contains a table with columns: #, Site, System Type, Salesperson, Status, Follow Up, and Total Amount. A filter dropdown menu is open for the "System Type" column, showing options like "Is equal to" and a "Filter" button highlighted in orange.

## Sort by Column Header

Click on a column header to sort information according to this category items will sort in ascending order after clicking once (up arrow next to the header title),

descending order after clicking a second time (down arrow next to the header title), and will unsort by this category after clicking three times.

The screenshot shows a portion of the proposals table. The "Site" column header is circled in purple, indicating it has been selected for sorting. The table contains three rows of data.

#	Site	System Type	Salesperson	Status	Follow Up	Total Amount
2250	Avroham Sauer 137 Schofield Av...	Burglar Alarm	Oliver Astra	Open	05/27/2016	\$0.00
2261	Henry Barker 55 Main Street, link	Burglar Alarm	Brad Solomon	Open	06/10/2016	\$214.95
2248	John Smith 137 Schofield Avenu...	Burglar Alarm	Brad Solomon	Open	04/27/2016	\$37.50

## Search

The search box in alarmbillr is located at the top of the screen. Choose a search category from the dropdown box to the left of the search box. begin typing the name or ID number in the white search box and select the item when it

appears in the dropdown below. This will take you to the Details Page for this item.

**ABC Company**

Customers Customer Search: name - cust #

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

**Open Receivables & Aging Past Due**

Current:	\$2,640.26
1 - 30 Days:	\$3,224.11
31 - 60 Days:	\$6,075.55
61 - 90 Days:	\$15,236.77

**Notifications to Process**

Unassigned Mobile Payments:	0
Credit Cards:	10
eChecks:	0
Forté Error Transactions:	0

**Top 5 RMR By Item**

Monitoring	Payments	new one
Radio Backup	INSPECTION	

\$717.00 \$200.00 \$100.00

## Access Home Page

Access the AlarmBiller home page by clicking your company's logo in the upper left corner of the page. You can also do this by clicking the home icon on the top of the page.

**ABC Company**

Customers Customer Search: name - cust #

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

## Hyperlinks

Any text in blue is a hyperlink leading to further information on the item.

**Proposals**

Open / Closed Proposals Accepted Proposals Rejected Proposals

Show Closed Proposals

#	Site	System Type	Salesperson	Status	Follow Up	Total Amount
2230	Lauren Connolly 25350 US Highw...	Burglar Alarm	Lorena Mobley	Open	08/06/2015	\$413.31

## Tracking History

You can view the complete history of edits made in a customer manager page or any details pages by clicking the circular arrow icon to the left of the page title.

Customers Customer Search: name - cust #

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

**Matt Grossman - 1028** Edit

11 Eastway Huntington, CT 11111 Phone: (555) 555 5555	Status: Active Priority: Normal Customer Since: 02/11/2014	Open Invoices: \$29,094.38 Open Credits: (\$1,366.39) Unassigned Cash: (\$1,366.39)
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Tracking History will appear with a description of the actions taken, which users performed them, and the date and

time the changes occurred.

Action	Message	User	Created
Update	Customer #1028 was Updated	Savani, Barbie	7/7/2016 4:33:50 PM
Update	Customer #1028 was Updated	Savani, Barbie	7/7/2016 1:37:49 PM
Message	Invoice #10990 Deleted	Savani, Barbie	6/29/2016 11:33:32 AM
Update	Customer #1028 was Updated	Savani, Barbie	6/29/2016 11:32:54 AM
Update	Customer #1028 was Updated	Solomon, Brad	6/28/2016 12:10:29 PM
Message	Customer #1028 statement was mailed.	Savani, Barbie	5/23/2016 3:52:50 PM
Update	Customer #1028 was Updated	Solomon, Brad	5/23/2016 1:49:10 PM
Message	Customer #1028 statement was printed.	Solomon, Brad	5/23/2016 1:49:10 PM
Message	Customer #1028 statement was printed.	Solomon, Brad	5/18/2016 8:46:52 AM
Update	Customer #1028 was Updated	Solomon, Brad	5/18/2016 8:46:07 AM

1 - 10 of 33 items

Click the arrow to the left of a tracking entry to view more detailed information.

Action	Description	Old Value	New Value
Update	Invoice Method	Email	Print
Update	Email	"brads@PERENNIAL...	

## Edit User Account

Click your name at the top of the page to access a shortcut to editing your user account. Edit fields (hyperlink to setup user fields) and click "Save" in the upper right corner to update changes. Click "Change Password" in the upper right corner of the screen to change your AlarmBiller user password.

## Logout

Click "Logout" in the upper right corner of the screen to log out of your AlarmBiller account.

**ABC Company**

Home | Barbie | Support Center | AlarmBiller | **Logout**

Customers | Customer Search: name - cust #

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