

# **ClientWeb 2**

**Online Web Portal For Customer Access**



## **Users Guide**

**Z-Micro Technologies, LLC.**

*Copyright 2011. Z-Micro Technologies, Inc. All Rights Reserved*



# **Table of Contents**

## **Chapter 1: Overview & Installation**

Features and Benefits Highlights	3
ClientWeb Requirements	5
Installing ClientWeb	6
Registering ClientWeb	7

## **Chapter 2: Setting Up ClientWeb Options In Alarm SQL**

Overview	9
Display Tab Settings	10
Edit Tab Settings	10
Comment Tab Settings	12
Email Tab Settings	13
Registration Tab Settings	14
Pending Service Tab Settings	16

## **Chapter 3: The ClientWeb Web Server Application**

Overview	17
User Log In and Registration Process	17
Customer Account Selection	18
Account Summary	18
Changing Emergency Contact Profile	21
Changing Account Maintenance Profile	21

## **Chapter 4: ClientWeb Features in Alarm SQL**

Overview	27
Pending Service Requests List	27
Modified Emergency Contact List	29

## **Appendix A: Sample Of Email Notifications**

31

## **Appendix B: Optional Them Styles for ClientWeb** (additional fees apply)

33

## **Appendix C: Contact Information and Software License**

Contacting Us	39
Software License	41

# Chapter 1: Overview

Today's consumer, both residential and commercial, have come to expect a high level of service from their utility and service providers. One of these expectations is the ability to go online to check their account, invoice balances, account history, event signal history, etc. and place a service call request any time of day or night. Those providers that offer the convenience of online access for their customers hold an advantage of superior customer service over their competitors that do not offer this option.

ClientWeb is a web-based online portal from which your customers can log into their Alarm SQL account and view vital information 24/7 using any standard web browser on virtually any operating system (i.e. Windows or Mac OSX). As of this writing, current popular web browsers include Internet Explorer, Firefox, Safari and Chrome – all of which are supported by ClientWeb.

With flexible options at your control to determine the extent of information displayed and changes that can be made by your customers, your customers can now directly update their basic account profile information (address, phones, insurance information) as well as their emergency contact list without your staff taking the time to update information for them. In addition, you can select to have your monitoring central station receive an email immediately of the new/changed or deleted emergency contact entered by your customer.

ClientWeb also provides a convenient means for your customers to pay their open balances online. With integration to your ACH Direct merchant account (ACH Direct is the service provider for recurring credit card processing within Alarm), your customers can view their invoice balance and click on Pay Now to pay you immediately with your approved selection of credit card types.

ClientWeb internally tracks all changes made by your clients and provides several means of notification and record-keeping to ensure a history of changes are recorded. Ownership of changes is recorded along with the date and time such change took place. Email notifications can be sent to your staff (with different email addresses receiving different change notifications) showing changed information, and a log of changes is maintained within the Alarm SQL database.

This manual describes the proper setup and use of ClientWeb. A license agreement is included at the end of this manual.

**Please read the software license before installing the software. Your use of ClientWeb is your agreement to the terms and conditions of this license. ClientWeb requires the maintenance of a Z-Micro Technologies annual support contract (which covers support for all Z-Micro Technologies software products including ClientWeb) if a one-time ClientWeb license is purchased. Monthly rates are also available for ClientWeb as an alternative.**

Please contact Z-Micro Technologies, Inc. at [support@z-microtech.com](mailto:support@z-microtech.com) if you have any questions or comments.

*For the sake of clarity, Alarm and Service Express program names are interchangeable throughout this manual. Wherever Alarm is specified, this also represents compatibility with Service Express.*



## **Features And Benefits Highlights**

ClientWeb provides the following features and benefits:

- *Automatic or Manual Customer Registration*
  - Depending upon your ClientWeb setting, Customers may register to use ClientWeb and access their account either with an automated registration system built into ClientWeb (with valid primary email address already on file in Alarm SQL) or manual (your staff must approve access).
- *Comprehensive Customer Information Displayed For Customer*
  - Customer Account Summary including name, address, premise phone, contact name, special monitoring instructions, vacation notes, insurance information
  - Emergency Contact List including 3 phone numbers per contact
  - Premise Zone Descriptions
  - Alarm Signal Event History Listing
  - Past Service History
  - Invoice History (summary of invoice including any open balance per invoice).
  - 'Master' Accounts have access to all sub-accounts as well with one log-in
- *Service Requests*
  - Customer may request a service call online. Requested services appear in Alarm as 'Pending Service Requests' until approved by your staff for scheduling.
  - List of Pending Service Requests viewed within Alarm SQL with easy approval process to convert pending service request into a service ticket and scheduled appointment.
  - Staff may send an email confirmation back to customer of actual date/time of service approved
  - Easy access to newly created service ticket from pending service area to complete additional service information.
- *Email Notifications*
  - Customer Summary changes emailed to your staff
  - Emergency Contact List changes (Added, Changed or Deleted) emailed to your staff
  - Emergency Contact List changes emailed to central station on file for that account
  - Service Requests emailed to your staff
  - Copy of Service Request emailed to customer
  - Each email type can be emailed to a different staff members' email address
  - Email notifications can be turned on/off
  - Approved Service Request in Alarm can be emailed back to Customer for confirmation
- *Audit Log Of Changes Maintained In Alarm SQL*
  - In addition to email notifications sent to you by ClientWeb of any changes made by your customer within ClientWeb, original record data is maintained and logged in a separate log file when a change is made by a customer in their profile or emergency contact list. Log indicates date of change and logged in email address of person authorizing change.
  - Email sent to central station (if email setting turned on) also gets logged into customers' Correspondence Log history within their Alarm SQL account.
  - History of emergency contact changes by customer in ClientWeb can be viewed within Alarm SQL Emergency Contact List.

- *Security Settings*
  - ClientWeb can be setup with optional settings to determine what sections of ClientWeb a customer can see. These settings include:
    - Invoice History Display On/Off
    - Service History Display On/Off
    - Service Performed Field On/Off
    - Vacation Notes Tab On/Off
    - Special Monitoring Instructions Tab On/Off
    - Emergency Contact List Tab On/Off
    - Service Request On/Off
    - Alarm Signal Events On/Off
    - Event Codes On/Off
    - Zone Descriptions On/Off
  - Edit Authorizations can also be set in ClientWeb:
    - Emergency Contact List Edits Allowed (Yes/Display Only)
    - Service Requests Allowed (Yes/No)
    - Customer Summary Profile Information Allowed (Yes/Display Only)
- *Customizable Text Instructions On Screens*
  - 1 or 2 lines of custom text can be displayed on service requests, emergency contact list, vacation notes, special monitoring instructions and summary screens.
- *User Configurable Port Setting*
  - ClientWeb can be set on any Port number convenient for your environment
- *Customizable Logo*
  - Place your own logo on the top of ClientWeb pages. See instructions within this document for graphic file type and resolution settings.
- *Customizable Text Instructions On Screens*
  - 1 or 2 lines of custom text can be displayed on service requests, emergency contact list, vacation notes, special monitoring instructions and summary screens.
- *Optional Color Themes Available From Z-Micro Technologies*
  - In addition to the standard color theme shipped with ClientWeb, further color themes are available from Z-Micro Technologies at no additional cost. For more information on color themes, please call us at 877-864-5010.

## **ClientWeb Requirements**

ClientWeb has the following requirements:

### **ClientWeb Minimum Requirements**

<b>Operating System</b>	Windows XP/Vista/7/Windows 2003 Server/Windows 2008 Server
<b>Memory:</b>	2GB Recommended (amount needed for Alarm SQL Server)
<b>Required Software:</b>	Alarm 7 SQL or Services Express 7 SQL (or higher versions)
<b>Seats:</b>	Sufficient seat licenses. Typically one seat license is enough for dozens of simultaneous users Additional seat licenses may be required for heavy traffic situations
<b>Other:</b>	<ul style="list-style-type: none"><li>- Static IP Address available on server</li><li>- Sufficient Bandwidth Speed (512kbs min upload recommended)</li><li>- Port Number of your choice open on your Router</li><li>- Valid SMTP Email Account For Outgoing Email Notifications</li><li>- Domain Name Registered with forwarding to your IP Address:Port Example: <a href="http://www.yourclientwebURL.com">www.yourclientwebURL.com</a> forwarded to 70.42.54.45:99 (whatever your static IP address is and port number you have setup)</li></ul>



## **Installing ClientWeb**

Clientweb is delivered electronically as a downloadable product. The installation process is relatively simple and takes just a few minutes.

**Please read the Software License Agreement near the end of this manual before installing. Use of this software is your agreement of this license.**

During installation, if for some reason this procedure is interrupted, you may just start the process over again.

To start the installation procedure, please follow these steps:

1. Make sure Alarm SQL server is already installed on your office server and running.
2. Click on the product link within the email you received for your ClientWeb purchase
3. Download ClientWeb to your server. Once downloaded, click on the downloaded file to begin installation.
4. Follow the prompts during installation (it is recommended to use the default paths as is).

For safekeeping, you may take the downloaded Clientweb installation file and save it to a CD-Rom or USB drive. If you ever need to reload your software, you will need this installation file.

## **Running ClientWeb**

Once ClientWeb has been installed successfully, the next step is to register ClientWeb with us as detailed in the next section.

ClientWeb consists of two parts.

- Enhanced features within Alarm SQL which only appear once ClientWeb is registered. These features include ClientWeb settings, approving pending service requests. Viewing modified emergency contact lists, and additional functions.
- ClientWeb Web application, which is run on your server and which your customers will be accessing from their web browser.

To access the Alarm SQL features of ClientWeb, simply bring up your copy of Alarm SQL and once ClientWeb is registered these features will be displayed (see Chapter 2 and Chapter 4 for details on the Alarm SQL functions for ClientWeb).

Once you have registered ClientWeb in Alarm SQL as described on the next page, you can then run the ClientWeb Web Server Application on your server as follows:

- In the ClientWeb menu selection in your windows Start/Programs/ClientWeb area, select 'Set Database Parameters' and make sure your database name is the same as your Alarm SQL database name. If you are not sure of these settings, go to your Alarm SQL menu selection in Windows and select the same 'Set Database Parameters' and enter the same parameters in the ClientWeb section.
- To run the ClientWeb web server, select ' ClientWeb Server'. This will start up the ClientWeb server application, and it will be minimized by default so that it does not constantly show on your server desktop screen.
- Your clients can now access ClientWeb at the domain name you are pointing to your static IP address and port number. You can post that URL in your company website.

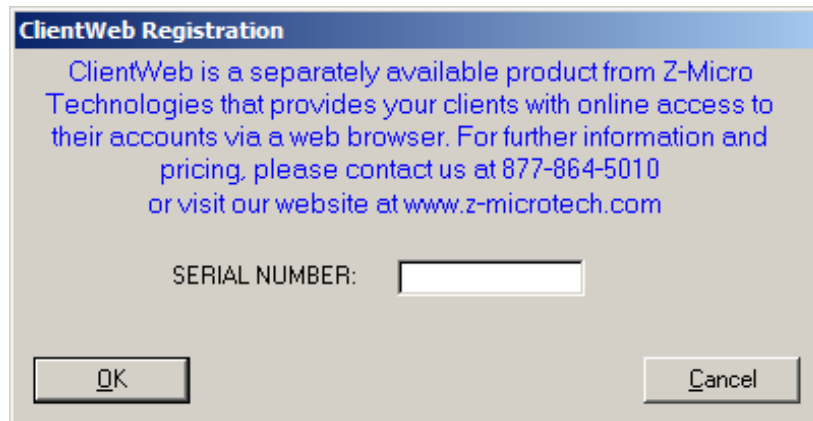
## **Registering ClientWeb**

To register ClientWeb, you will need to enter the serial number that accompanied your purchase. If you did not receive a serial number or can not find it, please call our office at 877-864-5010.

To register ClientWeb, bring up your Alarm SQL software and click on the 'ClientWeb' menu selection on the top menu bar. A drop-down selection called 'ClientWeb Settings' will be displayed. Click on this menu to bring up the Registration Screen (this will only appear the first time you access ClientWeb Settings and on any term renewals required by the license of ClientWeb).

Enter your serial number in the indicated field and click on OK to register.

**Please note you must be logged into Alarm with a supervisor security access level to have access to the settings/registration area.**



The image shows a 'ClientWeb Registration' dialog box. It has a blue title bar with the text 'ClientWeb Registration'. The main area has a light gray background and contains the following text in blue: 'ClientWeb is a separately available product from Z-Micro Technologies that provides your clients with online access to their accounts via a web browser. For further information and pricing, please contact us at 877-864-5010 or visit our website at [www.z-microtech.com](http://www.z-microtech.com)'. Below this text is a label 'SERIAL NUMBER:' followed by a white text input field. At the bottom of the dialog box are two buttons: 'OK' on the left and 'Cancel' on the right.

Once you have completed the registration screen you will want to exit out of Alarm to complete the registration. Once back in Alarm, click on ClientWeb / ClientWeb Settings to bring up the settings area to customize your ClientWeb system as detailed in the next chapter.



## Chapter 2: Setting Up ClientWeb Options in Alarm SQL

ClientWeb can be set with a variety of options and defaults to determine what will be displayed to the customer in ClientWeb, what changes can be made, and what type of email notifications you wish to have sent to your staff and central station(s).

To access the ClientWeb settings, select ClientWeb in the top Alarm menu bar, then select ClientWeb settings:

**ClientWeb System Settings**

Enter Your Settings To Be Used Within ClientWeb

Your Company Name: ABC Security Corporation

Your Phone Number: 800-555-5555

Your ClientWeb URL Address: http://www.yourclientwebURLaddress.com

ClientWeb Port Number: 125

Display Settings | Edit Settings | Comment Settings | Email Settings | Registration Settings | Pending Services

Display Vacation Tab: Yes

Display Instructions Tab: Yes

Display Contacts Tab: Yes

Display Zones Tab: Yes

Display Invoice History: Yes

Display Alarm Events: Yes

Display Zone Code Column: Yes

Display Events Code Column: Yes

Display Service Performed Field: Yes

OK Cancel

*Your Company Name* Your company name as it will appear on email notifications sent to your customers

*Your Phone Number* Your company phone number as it will appear on email notifications

*Your ClientWeb URL* Enter the domain name (URL) that you have ClientWeb assigned to. Your domain name is the URL that you have setup with an ISP or hosting provider (i.e. GoDaddy, 1and1, etc.) and is necessary if you do not want your customers to see your actual IP address of your server. Of course this is highly recommended that you purchase a domain name and forward the name to your IP address and port number. This field represents just the domain name (fully spelled out including the http:// section)

*ClientWeb Port* Default set to 254. You may change ClientWebs' port setting if you want to use a different port number opened on your router. In order for ClientWeb to be accessible, you must open a port

number on your router that matches the port number specified here for ClientWeb.

### **Display Settings Tab**

#### *Display Vacation Tab*

Select Yes to allow your customer to view the Vacation Notes tab in ClientWeb. Select No to hide this tab.

#### *Display Instructions Tab*

Select Yes to allow your customers to view the Special Monitoring Instructions tab in ClientWeb, Select No to hide this tab.

#### *Display Contacts Tab*

Select Yes to allow your customers to view their Emergency Contact List and Emergency Contact details per contact. Select No to hide this tab.

#### *Display Zones Tab*

Select Yes to allow your customers to view their premise Zone Description list in ClientWeb. Select No to hide this tab.

#### *Display Invoice History*

Select Yes to display the Invoice History menu selection and access to the customer invoice history. Select No to hide this menu selection and therefore not displaying invoice histories.

#### *Display Alarm Events*

Select Yes to display the Alarm Signal Event History menu selection and access to the customer event history log. Select No to hide this menu selection and therefore not display the alarm signal event history list.

#### *Display Events Code Column*

Select Yes to display the Events Code column within the Alarm Signal Event History list. Select No to hide this column.

#### *Display Service Performed*

Select Yes to display the Service Performed field in the Service History Detail section of ClientWeb. Select No to hide the Service Performed field (in case your staff enters sensitive information in this field when a service is performed and you prefer not to have your customers see this information).

### **Edit Settings Tab**

Setting	Value	Email To
Allow Account Profile Edits	Yes	support@z-microtech.com
Receive Email Notification	Yes	
Allow Contact Edit	Yes	raz@z-microtech.com
Receive Email Notification	Yes	
Allow Service Request	Yes	zrobert100@gmail.com
Receive Email Notification	Yes	
Email Request Copy To Client	Yes	

<i>Allow Account Edit</i>	<p>To allow your customer to edit their Customer Profile in ClientWeb, including fields such as address, premise phone number, main and secondary contact name, vacation notes (if displayed), special instructions (if displayed) and insurance information, select Yes. An email confirmation of changes made by your customer will be sent to you.</p> <p>To only allow customer to View their Customer Profile information but not make any changes to it, select No.</p>
<i>Receive Email Notification</i>	<p>If you allow Account Profile Edits, select Yes to have an email confirmation sent to you detailing the changes made by your customer (highly recommended). If you do not want an email notification when changes are made, select No.</p>
<i>Send Email To</i>	<p>If you have selected Yes to receive an email notification for Account Profile Edits, enter the email address of a staff member that should receive this email.</p>
<i>Allow Contact Edit</i>	<p>To allow your customer to edit their Emergency Contact List in ClientWeb, which includes their emergency contact name, phone numbers, email address, priority and password, then select Yes. An email confirmation of the emergency contact listing changed will be emailed to you.</p> <p>Select No to only allow your customer to view their Emergency Contact List.</p>
<i>Receive Email Notification</i>	<p>If you allow Emergency Contact Edits by your customers, select Yes to receive an email notification of the changed Emergency Contact record (highly recommended). If you do not want an email notification when the emergency contact list is changed by your customer, then select No.</p>
<i>Send Email To</i>	<p>If you have select Yes to receive an email notification when the Emergency Contact is changed by your customer, then enter the email address of your staff member that should receive this email. Please note that an additional email can be selected in ClientWeb to be sent to your central station automatically that is monitoring this account (the email address for the central station must be entered in the Central Station Validation List of Alarm for each Central Station you have listed). This central station email setting will be discussed in the 'Email Settings Tab' section below.</p>
<i>Allow Service Request</i>	<p>To allow your customers to enter an online Service Request within ClientWeb, select Yes. This service request will be logged as a 'Pending Request' without affecting your current appointment calendar. To approve a Pending Request, you will select the 'Pending Service Request' menu selection and after reviewing your available date/time for service then approve the pending request – at which time a service ticket will be created and an appointment will be scheduled.</p> <p>Select No to disable the Service Request feature of ClientWeb.</p>

Receive Email Notification	<p>If you allow service requests to be created in ClientWeb, then select Yes (highly recommended) to receive an email notification with service request details once a service request has been submitted.</p> <p>Select No if you do not wish to have an email notification of the service request sent to you. If you opt not to have an email sent to you, you may view pending service requests in the ClientWeb/Pending Service Requests menu section of Alarm.</p>
Send Email To	<p>If an email notification is being sent to you for service requests, enter the email address of a staff member who should receive this email and is responsible to verifying and approving the requested services.</p>
Email Request Copy To Client	<p>Select Yes to send a copy of the service request details to your customer once they have submitted the request. This email is a pending service request only and does not guarantee to the customer that the date/time selected is available yet and that further confirmation is to come (you can select the content of the text that explains this on the email with the 'Comment Settings' section described next.</p>

### **Comment Settings Tab**

Setting	Text
Customer Screen Text Line	Please review your account profile
Insurance Screen Text Line	Please enter your insurance company information for an Alarm certificate
Vacation Screen Text Line	For specific monitoring instructions while on vacation, please enter here
Instructions Screen Text Line	If you require any special monitoring instructions, please let us know
Contacts Screen Text Line 1	Please review your contact list and notify us
Contacts Screen Text Line 2	of any changes to your emergency contacts
Service Request Text Line 1	Requests for service will be verified for availability.
Service Request Text Line 2	Our service department will contact you to confirm time and date.

Text Lines	<p>Based upon the section described, each text line will be displayed on it's appropriate screen in ClientWeb. This allows you to display specific instructions to your customer regarding that section of ClientWeb. For example, for Service Request Text Line 1 and 2 (this section has 2 lines) you can let the customer know that requested service dates and times are subject to availability and will be confirmed.</p>
------------	---

## **Email Settings Tab**

The screenshot shows a web-based configuration window with several tabs at the top: 'Display Settings', 'Edit Settings', 'Comment Settings', 'Email Settings' (which is selected), 'Registration Settings', and 'Pending Services'. Below the tabs, there are input fields for 'Your Email Address' (jwalts@abcsecurity.com), 'SMTP Server' (smtp.west.cox.net), 'SMTP Port' (25), 'Authentication User ID' (jwalts@abcsecurity.com), and 'Authentication Password' (abcsecuritypassword). A checkbox labeled 'Automatically Email Emergency Contact Changes To Central Station' is checked. Below this is a text area titled 'Text You Want Added To End Of Central Station Email' containing a sample message: 'The above changes are authorized by ABC Security. If you have any questions on these changes, please contact Jim Bateman at 800-223-2232. Sincerely, Jim Bateman'. At the bottom are 'OK' and 'Cancel' buttons.

<i>Your Email Address</i>	Your primary email address. This email address will be the 'From Sender' email address used in email correspondences to your customers via ClientWeb and the email address/settings which emails are sent out from ClientWeb. However, this is not the email address where change confirmations will be sent to you. Those are determined by the email addresses entered into the 'Edit Settings Tab' described earlier.
<i>SMTP Server</i>	Enter the SMTP server setting for this email address so that emails can be sent out through your standard email ISP email server.
<i>SMTP Port</i>	Enter the SMTP port your ISP email server requires for outgoing emails for this email address.
<i>Authentication User ID</i>	If your internet email provider requires authentication for outgoing emails, enter your authentication User ID in this field (usually this is the same as your email address, but could be different based upon your internet provider requirements). If you do not require authentication then leave this field blank.
<i>Authentication Password</i>	If your internet provider requires authentication for outgoing emails, then enter your authentication password for this email address. Leave blank if your internet provider does not require outgoing email authentication.
<i>Automatically Email Central</i>	ClientWeb can send automatic email notifications to the central station that monitors an account where the customer has changed an emergency contact. These emails are sent immediately upon the customer clicking on SAVE after a change has been made. This email is sent to the email address on file for the central station assigned to that account (Central Station



Field in Alarm on the customer main screen) therefore make sure each central station in your central station validation list (click on the [...] button next to the Central Station field on any customer account to view list) has a valid email address on file. The email will contain all information regarding the emergency contract record just changed, and show which fields were changed including the original values and new values. Your dealer account# and phone number will also appear on the email so the central station knows it came from you, and you may personalize the email further with the next field described below.

#### *Text On Central Email*

If you have selected to have ClientWeb send an email automatically to the central station when a customer changes their emergency contact record, the text you have entered in this field will appear in the body of the email just below the details of the emergency contact. You may use this area as a closing section to the email, to verify which person in your company can be contacted if the central has any questions, or any other specific information which you feel should appear on the email that is sent to the central station.

#### **Registration Settings Tab**

The screenshot shows a software window with several tabs: Display Settings, Edit Settings, Comment Settings, Email Settings, Registration Settings (which is selected), and Pending Services. The Registration Settings tab contains the following fields:

- Registration Type:** A dropdown menu currently set to "Auto". Below it, two lines of blue text provide definitions:
  - \* Auto=Client Self Registration with confirmed email address
  - \* Manual=Your Approval Of Registration Required Before Access Permitted
- Email Registration Requests To:** A text input field containing the email address "llawrence@abcsecurity.com".

At the bottom of the window, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

#### *Registration Type*

Before a customer can start using ClientWeb to access their account, they must first register their email address and password within ClientWeb (instructions on how they register their account are explained in the ClientWeb Registration section later in this document). This email address **MUST** be the primary email address they already have on file with you and is stored in the Alarm SQL database for their account (In Alarm, the Customer Maintenance Screen / Email Tab – Primary Email). The customer creates their own password when registering, and the password is also stored in the same Alarm section as their email address.

ClientWeb offers two options for allowing a customer to register

to use ClientWeb. The selection is Global, meaning whatever method you choose for registration is the method that will affect all customers when they go to register in ClientWeb.

### **AUTO**

Selecting AUTO as the registration type completely automates the registration process and does not require any intervention on your part in order to approve an account for registration. The customer goes to the REGISTER tab in ClientWeb and enters their primary email address (which you must have on file as primary email in their Alarm account) and they enter a password they wish to use. An email is immediately sent to that email address (to ensure it is a valid request for registration from the proper account owner). The customer then clicks on the link found in that email to complete the registration process. Prior to the customer clicking on the confirmation link, their account is placed in a 'pending' status – which you can view in their Alarm account screen next to their email address. They can not log into their account until they have confirmed from the email sent to them by clicking on the confirmation link.

An email of the customer registration will also be sent to you at the 'Email Registration Requests To' email address entered in the next field.

### **MANUAL**

Selecting MANUAL as the registration type prevents any customer from logging into ClientWeb until you have manually authorized them to do so. An email will be sent to you at the 'Email Registration Requests To' email address entered in the next field. The account will be automatically placed in a 'Pending' status until a staff member approves their registration request. To approve a request, go into their Alarm account, click on the Email Tab and remove the checkmark in the 'Pending' status field. Placing a checkmark in the Pending field that does not have a checkmark will place the account back into a Pending status and the customer will not be able to log in (they will receive a 'Pending' message and informed to contact you for further information).

#### *Email Registration To*

Enter the email address of the staff member who should receive email notifications of customers registering their account in ClientWeb (both Auto and Manual registration types will send an email to this email address so that you are aware of what customers are registering for access).

## **Pending Services Tab**

Display Settings | Edit Settings | Comment Settings | Email Settings | Registration Settings | Pending Services

☒ Email Confirmation Of Approved Service Schedule (Default Setting)

Body Text Of Approved Service Schedule Email  
(Date and Time Of Approved Schedule Will Appear On Email Automatically Below This Text)

Your service request has been received and scheduled for the date and time below. If you need to reschedule your service, please be sure to give us a call at 877-555-5555 to schedule another date.

☒ Open Service Ticket Automatically Once Pending Service Has Been Approved (Default Setting)

OK Cancel

**Email Approval Confirmation** This setting is not for ClientWeb itself but rather as a default setting within the Alarm SQL software that determines if an email is sent by Alarm to the customer when you have approved their pending service request (see documentation in later chapter for more detail on this action). With a checkmark in this box, when a staff member approves a pending service request in the 'Pending Service Request' area of Alarm (ClientWeb/Pending Service Requests) this setting will be checked automatically and will result in an email showing the approved date and time of service being sent to the email address entered by the customer when they requested a service call in ClientWeb. This is only a default setting.

**Body Text Of Approved Email** If you send an email confirmation to the customer of the approved service date/time (email sent in the Pending Service Request area of Alarm), then the email will contain the actual date/time that you have scheduled for this service. You may customize the body of this email further by entering your own general text in this body section. This section supports most HTML tags, so for example if you wish to have paragraphs use <br> to do so at the end of your paragraphs to create a line break.

**Open Service Ticket** To improve workflow, the Pending Service Request area has a button that allows you to immediately open up the newly created service ticket once you have scheduled a date/time for the service. This avoids having to bring up the customer account, click on Service History, find the service ticket and bring it up.

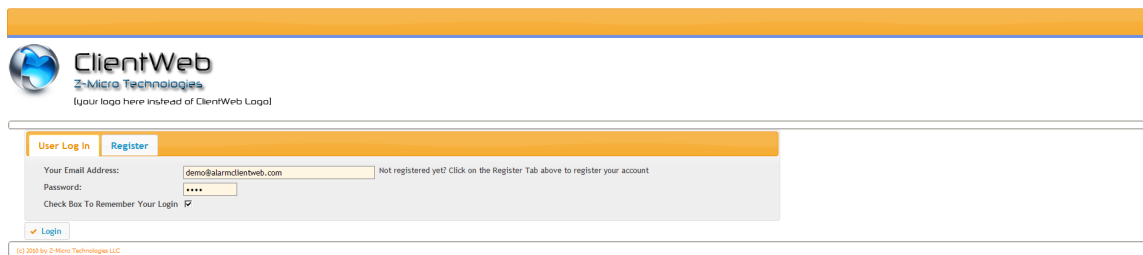
Once the ticket is displayed, you may fill in any additional pertinent information regarding this service job (i.e. technicians assigned, labor rate, timecard scheduling, etc.

## Chapter 3: The ClientWeb Web Server Application

ClientWeb is an advanced internet server and web-based application in one application. We have designed ClientWeb to be easy to install, administer and use by both your staff and your customers. No hosting services are required, and you do not need to know anything about IIS, Apache, or any other internet server systems.

ClientWeb is built around the latest web technologies and tools including JavaScript and Ajax, and utilizes CSS style sheets to control screen styles, colors, fonts, etc. You do not need to be familiar with any of these technologies however as we have created a turnkey system for you with a simple installation on your server.

As an optional service, ClientWeb can be 'themed' with different color styles than what comes standard. For further information on theme selections and nominal pricing for changing the standard theme, please give us a call. We can also assist you in setting up your own Logo on the top of the screen (or you may leave it blank). Ask us about our logo design services if you do not already have a logo you would like to use. Logos are PNG image files, 100DPI at approximately 500x125 (this can vary though based on your logo). We highly recommend compressing your logo so that file size is no more than 75k (the smaller the better), saved as ClientWebTitle.PNG in the Web/Images folder of your ClientWeb installation.



The screenshot shows the ClientWeb login and registration page. At the top, there is a blue header bar with the ClientWeb logo and the text "Z-Micro Technologies" and "(your logo here instead of ClientWeb Logo)". Below the header, there are two tabs: "User Log In" (selected) and "Register". The "User Log In" tab contains a form with fields for "Your Email Address:" (containing "demo@alarmclientweb.com") and "Password:" (containing "\*\*\*\*"). There is a link "Not registered yet? Click on the Register Tab above to register your account." and a checkbox "Check Box To Remember Your Login" which is checked. A "Login" button is at the bottom of the form. At the very bottom, there is a small copyright notice: "(c) 2000 by Z-Micro Technologies LLC".

This chapter will take you through each section of ClientWeb, as experienced by your customer when they log in.

### User Log In and Registration

If your customer is already registered they simply enter their primary email address they used to register in ClientWeb initially (which is the primary email address you have on file for them in Alarm), enter their password and click on Login. If they wish to have their User ID and Password remembered on their computer they can put a checkmark in the 'Remember Log In' checkbox.

If they have not yet registered, they are prompted to click on the REGISTER tab at which time they will be asked to enter their primary email address that is on file with you. This primary email address MUST already be on the Primary Email Address field in their account in Alarm, otherwise they will be not be eligible to register their account. This ensures that you are already familiar with the customer trying to register, and ClientWeb will know what customer account is already assigned to that email address.

If a customer has multiple accounts with us (Master Account and Sub-Account relationships to the Master Account), they will be able to view their Master Account and all Sub-Accounts by simply logging in using the primary email address on their Master Account.

If a customer enters an incorrect email address or password, they will receive an error message and they will be prompted to try again. For security reasons they will not be told which of the two fields are incorrect. Passwords are case-sensitive as well for added security.

Once logged in, your customer's account(s) list will be displayed for their selection.

## Customer Account Selection

Account	Client Name	Client First Name	Address	City	State/Province	Master
9994A	ABC Corporation		3923 Main Street	Phoenix	AZ	Master
9994B	Modavi Jewelers - A Division Of ABC Corp		3923 Fashion Drive	Newport Beach	CA	

Most of your customers will see one account listed in the Customer Account selection screen. However, if a customer is logged into a 'Master' Account (an account in Alarm that has other accounts 'linked' to it via the Dealer Option) then they will see their Master account listed (with the 'Master' designation to the right) along with a list of all of their other accounts linked to this Master account. Accounts are linked in Alarm either when recurring billing is setup on sub accounts to post to a dealer (master) account, or by entering the dealer (master) account number in each sub account's 'Default Dealer Billing Option' section under the Contract/Rates tab. The dealer (master) account must have the word 'DEALER' in the 'Account For Billing Address' field in Alarm within their account.

If you are allowing edits to the customer summary screen, the customer will see the selections 'Change' and 'View'. If you do not allow editing of their account, then they will see only the View button.

Once your customer clicks on the appropriate account radio button and then clicks on either Change or View, the Account Summary screen will be displayed.

## Account Summary

Account Management

Summary Vacation Instructions Insurance Contacts Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 3923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 402-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 402-989-2054 Ext: 202 Phone Type: Evening

Fax or Other: 402-989-5050 Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: j.taylor@abccorporation.com


Save Cancel

Once in the Account Management Summary screen, your customer can navigate easily to all aspects of their account. On the left side are menu selections for various historical views as well as to place a service request. Along the top of the Account Management Screen are a number of tabs that provide further details of the customer account including Vacation Notes, Special Monitoring Instructions, Insurance Agency Information, Emergency Contact Lists (with ability if allowed to add/modify/delete emergency contacts) and premise Zone Descriptions.

Please note that the customer account number, primary name and primary email address can NOT be changed by the customer under any condition - they are for display purposes only.

Here is a view of the Account Management Screen's additional tabs:

## Vacation Notes

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Account Management

SummaryVacationInstructionsInsuranceContactsZones

Vacation Notes


For specific monitoring instructions while on vacation, please enter here

Will be closed from January 5th thru January 18th.  
Please use emergency contacts #2 and #3 for any notifications of Alarm.

☐ Save ☐ Cancel

(c) 2008 by Z-Micro Technologies LLC

## Special Monitoring Instructions

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Account Management

SummaryVacationInstructionsInsuranceContactsZones

Special Instructions


If you require any special monitoring instructions, please let us know

For calls between 11PM and 6AM, please contact John at his cell phone number.

☐ Save ☐ Cancel

(c) 2008 by Z-Micro Technologies LLC

## Insurance Agency Information (for Insurance Certificates)

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Account Management

SummaryVacationInstructionsInsuranceContactsZones

Policy Number

Please enter your insurance company information for an Alarm certificate

ALTY-33422

Insurer Name:

Allstate

Insurance Agency Name:

Arizona Insurance Agency

Insurance Agent Name:

Allison Yates

Insurance Agent Email:

ayates@azinsuranceagency.com

Your Full Name:

Susan Connor

Sensors Installed At Your Location

Smoke Detector

☐

Rate Of Rise Detector

☐

Intrusion

☐

Gas Detection

☐

Temperature Sensor

☐

Carbon Monoxide Sensors

☐

Medical Alert

☐

Water Sensor


☐

Other Sensor Description

☐ Save ☐ Cancel

(c) 2008 by Z-Micro Technologies LLC

## Premise Zone Descriptions

  
(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Account Management

Summary

Vacation

Instructions

Insurance

Contacts

Zones


Your Zone List

Zone ID	Zone Description	Alarm Code
1	Front Door	23
2	Rear Door	54
3	Motion Hallway	21
4	Motion Basement	65
5	Family Room	83
6	Master Bedroom	82
7	Bedroom 1	15
8	Bedroom 2	18
9	Bedroom 3	19
LB	Low Battery	341

Save Cancel

(c) 2010 by Z-Micro Technologies LLC

## Emergency Contact List

  
(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Account Management

Summary

Vacation

Instructions

Insurance

Contacts

Zones

Please review your contact list and notify us of any changes to your emergency contacts

Your Emergency Contact List


Priority	Contact	Phone 1	Phone 2	Phone 3	Email Address
1	John Taylor	602-999-2343	602-777-2343	602-999-8823	jtaylor@abccorporation.com
2	Jim Johnson	602-999-2301	623-989-1232	502-998-2909	jjohnson@abccorporation.com
3	Susan Connor	602-987-6767	602-988-2232	480-998-2343	sconnor@abccorporation.com
4	Laura Becker	602-986-4322	480-653-8878	502-989-2343	laura2343@gmail.com
5	Jack Swanson	480-222-9198	602-989-2343	602-482-9174	jsukbuff@gmail.com

+ Insert Change View

Save Cancel

(c) 2010 by Z-Micro Technologies LLC

The Emergency Contact List has the option (if turned on in settings) to allow the customer to add, change, or delete existing Emergency Contact Records. If this change option is turned off, then the customer will have a View button to bring up the details of any individual emergency contact. In either case, once the customer highlights the emergency contact record to view or change by clicking on the radio button next to the requested record, and then clicks on the appropriate change or view button, the following Emergency Contact profile screen appears:

  
(your logo here instead of ClientWeb Logo)

Logout

Logout

Update Emergency Contact

Emergency Contact Profile

Please review your contact list and notify us of any changes to your emergency contacts

Priority:

Contact Name:

Phone 1 Type:

Phone Number:

Extension:

Phone 2 Type:

Phone Number:

Extension:

Phone 3 Type:

Phone Number:

Extension:

Password:

Email address:

Updating Date:

Modify Or Delete

Enter Number Not Already Used

Required

999-999-9999 Format

999-999-9999 Format

999-999-9999 Format

mm/dd/yyyy

Save Cancel

(c) 2010 by Z-Micro Technologies LLC

### **Changing Emergency Contact Profile**

If your security settings for ClientWeb allows the customer to modify their own emergency contact list, then an Insert and Change button will be added along with a View button along the bottom of the Emergency Contact List display.

A few things to note regarding Emergency Contact Profile changes:

- Changes or additions made are immediately reflected in the Alarm SQL database within the Contact List section for that customer.
- The current date, and type of action (Added, Modified, Delete request) is indicated in the Contact List record in Alarm – along with 'Modified By' set to ClientWeb.
- An audit log record of the 'before' image of the emergency contact record being changed is maintained by Alarm. This audit log can be viewed in the ClientWeb / Modified Emergency Contacts menu in Alarm, and once viewed here will then be permanently stored in the customers' History section of their Emergency Contact List in Alarm. Check further chapters for information on viewing the Alarm modified emergency contact list
- An email detailing the changed Emergency Contact information for the changed or added recorded will be emailed to your staff (based upon the email address in settings). This email contains not only the new and existing field values for the entire contact (even if a field has not changed it will still be reflected in the email so that you have the entire emergency contact information on the email) but it will also list below any changed fields what the original value was – as an added audit trail of changes. We recommend you keep these email confirmations in a separate inbox or print them out for record keeping.
- An email of similar nature as described above will also be emailed immediately to the email address of the central station assigned to that account (if you have this setting turned on). Therefore, it is imperative that if the central station email setting is turned on, each monitored account in Alarm have a Central Station associated with it in the 'Central Station' field, and that the central station validation list (from that section) has an appropriate email address on file along with your Dealer Account#. This is the same information that Alarm's Disconnect Notice uses to send out central station notices.

### **Changing Account Maintenance Profile**

With the exception of changing the Emergency Contact Profile as described above, all other information displayed on the various tabs of the customer's Account Management screen (Summary, Vacation Notes, Special Monitoring Instructions, and Insurance Agency information) can be modified by the customer (if security settings permit) and when they click on SAVE this changed information will immediately be reflected in their Alarm SQL account.

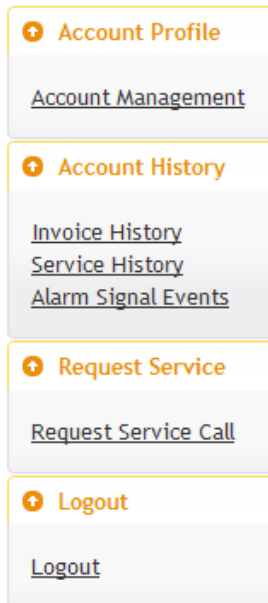
A few notes regarding changed Account Maintenance information:

- An email detailing only what fields were changed, including the new value and the old value of that field, will be emailed to your staff (based upon email in settings).
- An audit log record of the 'before' image of their account is stored in the Alarm SQL database and can be retrieved with standard SQL statements in iSQL (please contact tech support if you need assistance in accessing this area). Although no review or approval process is necessary when a customer changes their account maintenance information, the log record will be maintained for historical purposes.



## **ClientWeb Menu Selections**

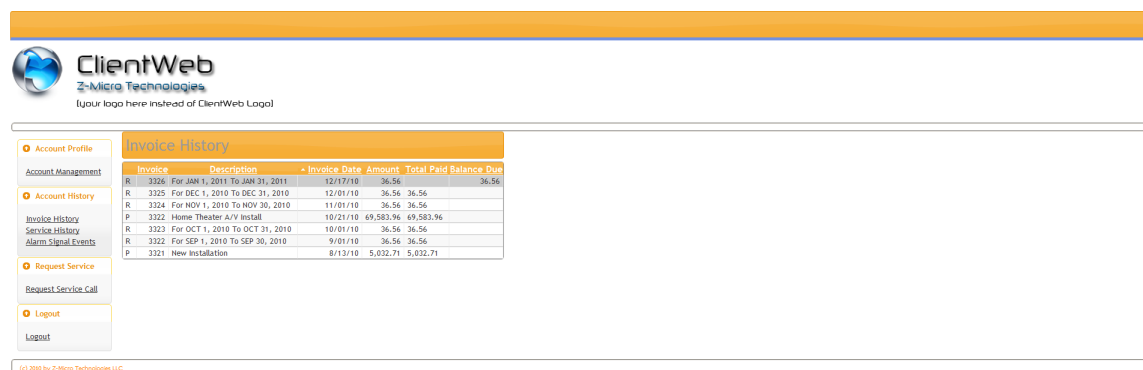
In addition to the Account Management Screen for the account selected being displayed, a main menu will be displayed on the left side of the screen. This menu provides access to additional information and histories for the account displayed on the right, as well as a Request Service Call menu selection. These menus are described below:



## **Account Management**

When the customer clicks on this menu selection, a list of their authorized account(s) will be displayed. Typically this would be one account, however if a customer has a 'Dealer' account in Alarm (essentially a master account) with other accounts (sub accounts) linked to that dealer account, then all sub accounts including the master account will be listed. They would then click on the appropriate account and select CHANGE or VIEW button (change only if settings allow changes) to then view the Account Management Screen as described above.

## **Invoice History**

The screenshot shows the ClientWeb interface. At the top is a blue header with the ClientWeb logo and the text 'Z-Micro Technologies' and '(your logo here instead of ClientWeb Logo)'. Below the header is a sidebar menu on the left with the same four items as the previous image. The main content area is titled 'Invoice History' and contains a table with columns: Invoice, Description, Invoice Date, Amount, Total Paid, Balance Due. The table lists several invoices, including one for 'Home Theater A/V Install' and another for 'New Installation'.

Invoice	Description	Invoice Date	Amount	Total Paid	Balance Due
R 3326	For JAN 1, 2011 To JAN 31, 2011	12/17/10	36.56		36.56
R 3325	For DEC 1, 2010 To DEC 31, 2010	12/01/10	36.56	36.56	
R 3324	For NOV 1, 2010 To NOV 30, 2010	11/01/10	36.56	36.56	
P 3322	Home Theater A/V Install	10/21/10	69,583.96	69,583.96	
R 3323	For OCT 1, 2010 To OCT 31, 2010	10/01/10	36.56	36.56	
R 3322	For SEP 1, 2010 To SEP 30, 2010	9/01/10	36.56	36.56	
P 3321	New Installation	8/13/10	5,032.71	5,032.71	

Clicking on the Invoice History menu displayed a summary of that account's invoices. Invoices that still have a balance will reflect the balance in the 'Balance Due' section. Clicking on the column headings will re-sort the list based on that column (both ascending/descending). The Invoice History menu selection can be hidden with a setting in the ClientWeb settings area.

## Service History

The screenshot shows the ClientWeb interface with the 'Service History' menu selected. The left sidebar contains navigation options: Account Profile, Account Management, Account History, Invoice History, Service History, Alarm Signal Events, Request Service, Request Service Call, Logout, and Logout. The main content area displays a table of service tickets.

Ticket	Title	App. Date	App. Time	Serviced	Code
53,074	Service	12/07/10	10:30AM	12/07/10	Inspection
53,073	Service	9/12/10	2:30PM	9/12/10	Service

Below the table is a 'View' button. The footer indicates '(c) 2008 by 2-Micro Technologies LLC'.

The Service History menu will display a list of service ticket history for this account, sorted by default in service date descending order. Clicking on any column heading will re-sort the list based upon that column, and clicking again on the same column will change the sort order from ascending to descending (a + or – indicator will appear designating the current sort order).

To view details of a service ticket, the customer clicks on the radio button next to the service they wish to view and then clicks on VIEW. The Service Appointment Details screen will then be displayed:

The screenshot shows the 'Appointment Details' screen for a service ticket. The left sidebar is the same as the previous screenshot. The main content area displays the following information:

**Appointment Details**

Date Received: 12/07/10  
Appointment Date: 12/07/10 Time: 10:30AM  
Time Range:   
Serviced Date: 12/07/10  
Type Of Service: Service  
Service Code: Inspection  
Technicians: LAR:   
Problem Reported: Quarterly PM  
Repair Description: PM performed.  
Requested By: Jim  
Scheduled By: SusanM  
Customer PO Number:   
  
Close

The footer indicates '(c) 2008 by 2-Micro Technologies LLC'.

This is a view only section (customers can not change service tickets) providing the customer a detail look at what service was requested, when it was performed, which technician(s) performed the service, and what was performed.

NOTE: The Service Performed column can be hidden from view by selecting that option in the ClientWeb settings area detailed in Chapter 2. This option exists in case your staff tends to enter 'sensitive' information in the Service Performed area of service tickets and you prefer your customers not to see that information.

The Service History menu selection can be hidden with a setting in the ClientWeb settings area.

## **Alarm Signal Events**

The screenshot shows the ClientWeb interface with the 'Alarm Signal History' menu selected. The page displays a table of alarm events with columns for Signal, Date, Time, Alarm Code, and Comment.

Signal	Date	Time	Alarm Code	Comment
	8/19/10	9:25	54	Online Test
	9/14/10	21:48	39	False Alarm
	12/06/10	3:02	54	Dispatched Guards

If you enter (either manually or through an automated import utility) alarm events provided to you by your central station into Alarm SQL, your customer may view those alarm signal events by clicking on this menu selection.

NOTE: The Codes column can be hidden if you prefer your customer not to see the actual code sent for the alarm. This is set in the ClientWeb settings area.

The Signal Event menu selection can be hidden with a setting in the ClientWeb settings area.

## **Request Service Call**

The screenshot shows the ClientWeb interface with the 'Request Service Call' menu selected. The form contains fields for Requested Service Date, Requested Schedule Time, Or Request Time Range, Service Requested, Your Name, Your Phone Number, and Your Email Address. There are also 'Save' and 'Cancel' buttons at the bottom.

Your customer has the ability to request a service call online, at any time of the day. Since this is a 'requested' service and not one that is yet confirmed by you, ClientWeb and Alarm SQL work together to assist in the process of reviewing and approving online service requests. A description of the Request Service Call screen is explained here along with the procedures that take place once the customer clicks on Save. Please see the next chapter for an explanation of procedures in Alarm SQL that your staff will use to review and approve these service requests.

The Request Service Call menu can be hidden with a setting in the ClientWeb settings area.

The Request Service Call screen consists of the following fields:

<i>Requested Service Date</i>	Your customer can enter (or select with the date calendar picker) a date they would like to request service from you. This is a 'requested' date only and does not actually schedule their service request in Alarm SQL at this point. It is only a pending service request, which your staff will then review and approve for an available date and time to be determined (this approval process is explained in Chapter 4).
<i>Requested Service Time</i>	Your customer can enter a specific time they would like to request service. As explained above, this is only a requested time and your staff will approve an actual available time before scheduling this service.
<i>Requested Time Range</i>	In addition to or instead of the Requested Service Time, your customer can enter a time range of when they are available.
<i>Text Notations</i>	There are 2 lines of text that you can customize. It is suggested these two lines of text be used to clarify that this requested service call is only a request, that final approval of availability will be determined by your staff and you will notify them of the approved. These 2 lines are customized in ClientWeb settings.
<i>Service Requested</i>	This is where your customer will enter the problem they are having or the service that they would like to request.
<i>Your Name</i>	This is a required field. Your customer must enter their name, so that you are aware who the person is at this account making this service request.
<i>Your Phone Number</i>	Your customer will enter their contact phone number in this field. This field is required to be filled out.
<i>Your Email Address</i>	Your customer will enter their email address, which is where they will be emailed a confirmation of this service request being sent to you, as well as an approved email sent from within Alarm SQL once you have approved a date and time for the service (see Chapter 4 for details on approval process). This field is required.

To attach a file to this email, click on the [...] lookup button and select from the list of files across your network. Be careful on the type of file you select for attachments, since large attachments may take awhile to send out during the emailing process. You will also want to make sure that the attachment does not contain any viruses and is the type of attachment your recipient would expect to be receiving from you (ie: PDF documents).

Once the client clicks on Save, ClientWeb performs the following steps:

- An email showing details of the requested service call submitted is sent to the customer, at the email address entered in the email address field. The email will also state your two text line notations that this is a requested service only and not yet approved for date/time.
- An email showing details of the requested service call will be emailed to your staff, depending upon your ClientWeb settings for this notification.
- A 'Pending Service' record is created, which is what will be reviewed and approved by your staff in Alarm SQL (see chapter 4).

***Please Note: No service ticket or appointment will be created or scheduled in Alarm until your staff has approved this pending service request.***

### **Logout**

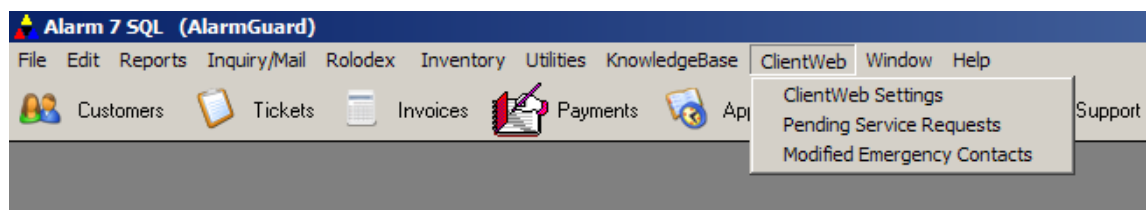
Once your customer is completed with this ClientWeb session, they can click on Logout. This will return them to the Log In screen.

If the customer does not Logout, a built-in timeout will occur after a period of inactivity and they will be logged out of ClientWeb automatically at that time.

## Chapter 4: ClientWeb Features In Alarm SQL

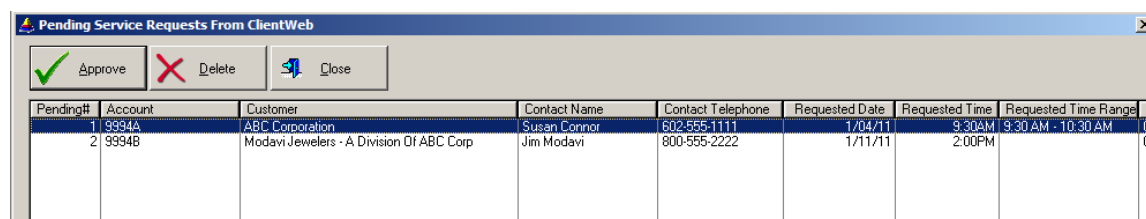
ClientWeb and Alarm SQL are integrated to provide a seamless experience for your customers and your staff. The ClientWeb server application, as described in Chapter 3, is a web-based browser application to provide your customers access to their account.

This chapter will explain how Alarm SQL is used to review changes made by your customers, and approve service requests. Registering and setting up the various ClientWeb security settings has already been described in Chapter 2 and therefore will not be repeated in this section.



The ClientWeb menu on the Alarm SQL top menu bar is available with the drop down selections shown once ClientWeb is registered. The ClientWeb Settings area is described in Chapter 2.

### Pending Service Requests



Every time a customer requests service online in ClientWeb, a Pending Service Request record is created in Alarm SQL and viewed from this section. This is where your service department will review and approve all pending services. A pending service will not be scheduled on your appointment calendar, nor will a service ticket be created, until you have approved pending services from this list. Once a pending service has been approved, it is removed from this list.

To review a pending service request for approval, highlight the pending service from this list and then click on the Approve button. The details of this pending service request will then be displayed as follows:

**Verify Date and Time Available To Provide Service then click on Approve To Create and Schedule Service Ticket**

Account: **9994A**  
 Customer: **ABC Corporation**  
 Contact Name: **Susan Connor**  
 Email Address: **susanconnor392321@gmail.com**  
 Telephone: **602-555-1111**  
 Date Created: **1/03/11**  
 Time Created: **11:04AM**


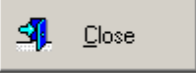
**Service Requested**  
 Downstairs motion sensor tripping frequently. We also need the front door keypad fixed-backlighting not working any longer on display.

**Schedule Requested By Customer**  
 Requested Service Date: **1/04/11**  
 Requested Service Time: **9:30AM**  
 Requested Service Time Range: **9:30 AM - 10:30 AM**

**Approved Schedule**  
 Approved Service Date:   
 Approved Service Time:   
 Approved Time Range:   
☐ Email Confirmation of Approved Schedule To Customer  
☐ Open Service Ticket Automatically After Clicking Approve

- Account Information Section** This top section displays who has requested the service. The contact name, phone number, and email address come from the required fields the customer filled out in ClientWeb so that you know who is requesting the service at that account. The date and time that the service request was created is also displayed here.
- Service Requested** This is the customer's explanation as to what service they are requesting to be performed.
- Scheduled Requested** This section shows the date and time of service being requested by your customer. Please note that no appointment or ticket has yet been created based upon this date and time. It is you're a requested timeframe requested.
- Approved Schedule** This is where your staff enters the actual date and time that you can perform this service. To view your appointment calendar for availability of dates and technicians, you can click on the Appointment Calendar button on the top toolbar of Alarm. Once you have determined your availability, enter the date and time that you can perform the requested service.
- Email Confirmation To Client** Check this box if you want to have Alarm send an email to your customer (at the email address they entered when requesting service) confirming the approved date and time you have entered for their service. The ClientWeb Settings area has a default setting for this field to be checked or not by default.
- Open Service Ticket** Check this box if you would like Alarm to open the newly created service ticket once you click on the Approve button. By having the service ticket opened automatically, you can easily enter additional information for this service on the ticket such as scheduling technicians, labor rates, type of service, etc
- Approve Button** Click on this button to approve this requested service. Approving service will create a service ticket and schedule on calendar.

### **Modified Emergency Contacts**

Customer Modified Emergency Contacts From ClientWeb				
<div> <span>Review</span>  <span>Close</span></div>				
Modify Date	Modify Type	Account	Priority	Contact
1/03/11	Modified	9994A	2	Jim Johnson
1/03/11	Modified	9994A	4	Laura Becker
1/03/11	Modified	9994B	1	Lisa Dane
1/03/11	Added	9994B	2	Jim Alter

Every emergency contact that is added, changed, or marked for deletion by a customer in ClientWeb is first logged into an audit file with the original emergency contact values for that contact. Although the changes enacted by the customer on their emergency contact list are changed immediately in the Alarm SQL database, this audit log allows your staff to review these changes (only unreviewed changes are displayed in this list – to see a history of reviewed changes click on the History button in the customer's contact list). In addition, you can send a central station notice directly from here without having to first go to Reports/Management Reports/Central Station Notice to do so.

**Important Note:** If you have automatic central station email notification turned on in the ClientWeb settings area, you do not need to send your central station a notice here. They will have already received an email notification by ClientWeb of the additions/changes as soon as the customer hit Submit on the changes.

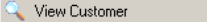
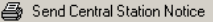
To view details of what changes the customer made to this emergency contact record, click on the Review button after highlighting the appropriate record from the list:

**This customer has made a change to their emergency contact list through ClientWeb**  
Their contact list has already been updated. You may review the changes here.



Modify Status: **Modified**  
Account: **9994A**  
Customer: ABC Corporation  
Modify Date: 1/03/11  
Modified By:

ClientWeb Sent Email Notice Of Change To Central Station ☐

Original Emergency Contact	Changed To
Priority: 2	2
Contact: Jim Johnson	Jim Johnson
Phone 1 Label: Work	Work
Phone 1: 602-999-2301	602-999-2301
Phone 1 Ext: 321	321
Phone 2 Label: Home	<b>Cell</b>
Phone 2: 623-989-1232	623-989-1232
Phone 2 Ext:	
Phone 3 Label: Cell	Cell
Phone 3: 502-998-2909	502-998-2909
Phone 3 Ext:	
Password:	
Email Address: ijohnson@abccorporation.com	ijohnson@abccorporation.com

Reviewed By: **ALARM**  

☐ Mark As Reviewed



<i>Modify Status</i>	The first field displayed indicates whether this emergency contact record has been Modified, Added, or marked for Deletion (you have to delete any emergency contacts that are marked as deleted otherwise they will stay in the customer's contact list).
<i>Sent Email To Central</i>	This checkbox (display only) indicates whether ClientWeb was informed to send the central station an email notification of the change automatically. A check will appear if an email was sent, and a valid central station email address was available to send it to. If there is no email address on file for this central station then even if your ClientWeb settings specifies to send the central station a notification, it will not be sent and there will not be a checkmark in this box to indicate this.
<i>Original Emergency Contact</i>	This section shows the original values for this emergency contact.
<i>Changed To</i>	This section shows the value of the emergency contact once the changes were made. All changed values are indicated in bold red.
Mark As Reviewed	To indicate you have reviewed this change and wish to remove it from this list, place a checkmark in this field. Once reviewed, this log entry will appear in the History section of the customer's account contact list.
View Customer Button	To bring up the customer account management screen in Alarm for further review of their account, click on this button. When you close out of the customer screen you will be returned to this section.

## Appendix A: Sample Of Email Notifications

### Service Request Email Sent To You

(a similar version of this, along with your custom text explaining this is a requested timeframe only, is sent to the customer).

#### ClientWeb - Service Request

The following customer has requested a service appointment with ClientWeb:

Account Number: 9994A  
Customer Name : ABC Corporation

Date Requested: 1/04/11  
Time Requested: 9:30AM  
Time Range : 9:30 AM - 10:30 AM

Service Requested:  
Downstairs motion sensor tripping frequently. We also need the front door keypad fixed- backlighting not working any longer on display.

Requested By : ClientWeb  
Contact Name : Susan Connor  
Contact Phone : 602-555-1111  
Email Address : susanconnor392321@gmail.com

Date Received: 1/03/11  
Time Received: 11:06AM  
User Logged In With Email Address: demo@alarmclientweb.com

To create a service ticket from this pending request, in Alarm go to ClientWeb/Pending Service Requests and confirm

### Customer Account Change Email Sent To You

#### ClientWeb - Customer Account Profile Change Notification

The following customer has clicked on SUBMIT within ClientWeb to change their Account Profile:

Account Number: 9994A  
Last Name: ABC Corporation

Information Changed:

Telephone 1 Label Was: Daytime  
Telephone 1 Label Now: Work

Date Changed: 1/02/11  
Time Changed: 4:27PM  
User Logged In With Email Address: demo@alarmclientweb.com

### Emergency Contact Change Notification

#### ClientWeb - Emergency Contact Change Notification

The following customer has clicked on SUBMIT within ClientWeb to CHANGE an existing emergency contact to:

Account Number : 9994B  
Last Name : Modavi Jewelers - A Division Of ABC Corp  
Type Of Change : Modified  
Contact Name : Lisa Dane  
Phone 1 Type : Home  
Phone 1 Number : 619-422-3432  
Phone 1 Ext :  
Phone 2 Type : Work  
Phone 2 Number : 619-209-2322  
Phone 2 Ext : 112  
Phone 3 Type : Cell  
Phone 3 Type Was: Other  
Phone 3 Number : 619-543-4543  
Phone 3 Ext :  
Email Address : diamondjewelry2@gmail.com  
Password :  
Date Changed: 1/03/11  
Time Changed: 11:08AM  
User Logged In With Email Address: demo2@alarmclientweb.com

### Emergency Contact Add Notification

#### ClientWeb - Emergency Contact Add Notification

The following customer has clicked on SUBMIT within ClientWeb to ADD the following emergency contact:

Account Number: 9994B  
Last Name: Modavi Jewelers - A Division Of ABC Corp  
Type Of Change: Added  
Contact Name: Jim Alter  
Phone 1 Type: Work  
Phone 1 Number: 602-555-9999  
Phone 1 Ext :  
Phone 2 Type: Cell  
Phone 2 Number: 623-666-2232  
Phone 2 Ext :  
Phone 3 Type: Alt Phone  
Phone 3 Number:  
Phone 3 Ext :  
Email Address : jimalter342@modavijewelers2.com  
Password : diamonds  
Date Added: 1/03/11  
Time Added: 11:09AM  
User Logged In With Email Address: demo2@alarmclientweb.com

**Central Station Notification Email**

(this email is sent to the monitoring central station of the account when an emergency contact record is changed by the customer in ClientWeb).

**Emergency Contact Change Notification From ABC Security Corporation**

Central Station Update Notice From:

Dealer Name: ABC Security Corporation  
Dealer Phone: 480-767-5570  
Dealer Acct#: Z110

The following emergency contact listing has been changed online by this monitored account owner:

Account Number: 121-43232  
Customer Name: Z-Micro Technologies LLC

Type Of Change: Update Existing Emergency Contact

Contact Name : Jim Davis

Phone 1 Type : Cell  
Phone 1 Type Was: Alt Phone

Phone 1 Number : 480-111-2222

Phone 1 Ext :

Phone 2 Type : Premise

Phone 2 Number : 480-222-3333

Phone 2 Ext :

Phone 3 Type : Cell

Phone 3 Number : 444-333-4444

Phone 3 Ext :

Email Address :

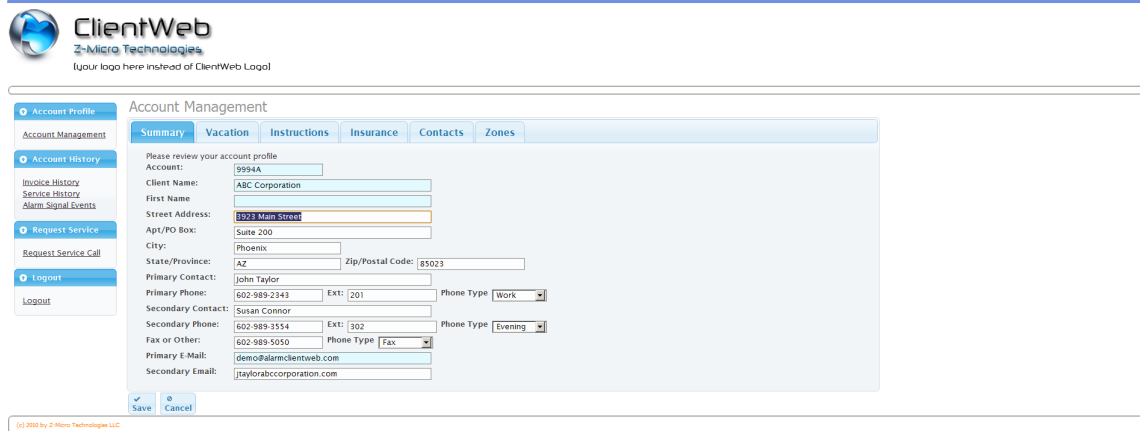
Password : test

Date Added: 1/02/11  
Time Added: 10:27AM

The above changes are authorized by ABC Security. If you have any questions on these changes, please contact Jim Bateman at 800-223-2232. Sincerely, Jim Bateman Account Manager ABC Security Systems



## Appendix B: Optional Theme Styles for ClientWeb (additional nominal fee required per optional Style)



The Cupertino style features a clean, modern design with a light blue header and a sidebar on the left. The main content area is white with a light blue border. The form fields are white with light blue borders and are arranged in a clear, organized manner. The overall aesthetic is professional and user-friendly.

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

**Account Management**

Summary Vacation Instructions Insurance Contacts Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name: [Text Field]

Street Address: 8523 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax

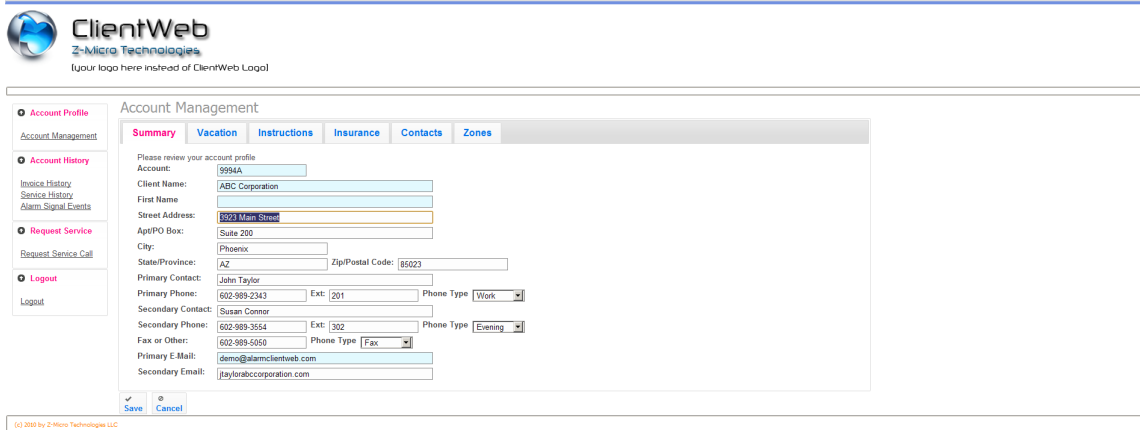
Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2008 by Z-Micro Technologies LLC

### Cupertino Style



The Flick style features a clean, modern design with a light blue header and a sidebar on the left. The main content area is white with a light blue border. The form fields are white with light blue borders and are arranged in a clear, organized manner. The overall aesthetic is professional and user-friendly.

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

**Account Management**

Summary Vacation Instructions Insurance Contacts Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name: [Text Field]

Street Address: 8523 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax

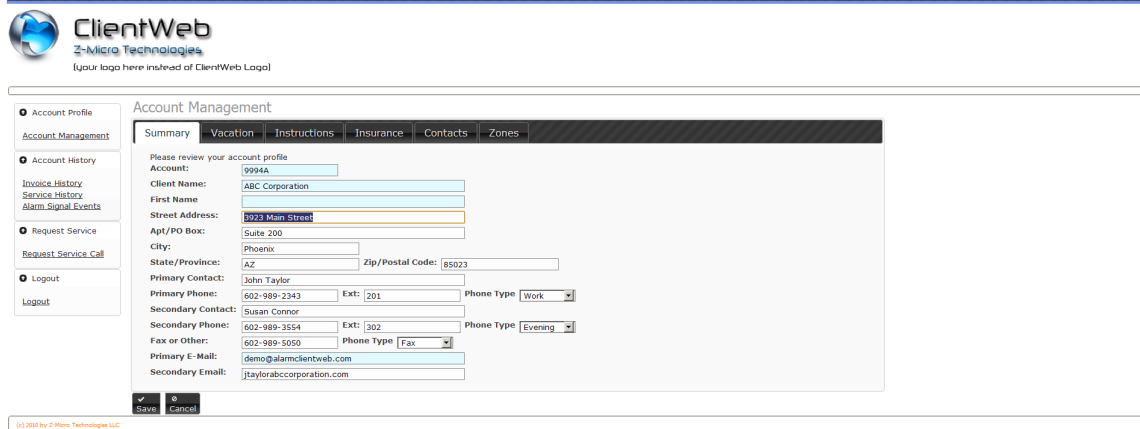
Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2008 by Z-Micro Technologies LLC

### Flick Style



The Black Tie style features a clean, modern design with a dark blue header and a sidebar on the left. The main content area is white with a dark blue border. The form fields are white with dark blue borders and are arranged in a clear, organized manner. The overall aesthetic is professional and user-friendly.

**ClientWeb**  
Z-Micro Technologies  
(your logo here instead of ClientWeb Logo)

**Account Management**

Summary Vacation Instructions Insurance Contacts Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name: [Text Field]

Street Address: 8523 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2008 by Z-Micro Technologies LLC

### Black Tie



ClientWeb

2-Micro Technologies

(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Logout

Account Management

Summary

Vacation

Instructions

Insurance

Contacts

Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 1923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ

Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343

Ext: 201

Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554

Ext: 302

Phone Type: Evening

Fax or Other: 602-989-5050

Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save

Cancel

(c) 2008 by 2-Micro Technologies LLC

Pepper Grinder

ClientWeb

2-Micro Technologies

(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Logout

Account Management

Summary

Vacation

Instructions

Insurance

Contacts

Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 1923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ

Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343

Ext: 201

Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554

Ext: 302

Phone Type: Evening

Fax or Other: 602-989-5050

Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save

Cancel

(c) 2008 by 2-Micro Technologies LLC

Start

ClientWeb

2-Micro Technologies

(your logo here instead of ClientWeb Logo)

Account Profile

Account Management

Account History

Invoice History

Service History

Alarm Signal Events

Request Service

Request Service Call

Logout

Logout

Account Management

Summary

Vacation

Instructions

Insurance

Contacts

Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 1923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ

Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343

Ext: 201

Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554

Ext: 302

Phone Type: Evening

Fax or Other: 602-989-5050

Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com


Save

Cancel

(c) 2008 by 2-Micro Technologies LLC

Sunny





ClientWeb  
3-Micro Technologies  
(your logo here instead of ClientWeb Logo)

- Account Profile
- Account History
- Request Service
- Logout

### Account Management

- Summary
- Vacation
- Instructions
- Insurance
- Contacts
- Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 3923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax


Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2009 by 3-Micro Technologies LLC

South Street



ClientWeb  
3-Micro Technologies  
(your logo here instead of ClientWeb Logo)

- Account Profile
- Account History
- Request Service
- Logout

### Account Management

- Summary
- Vacation
- Instructions
- Insurance
- Contacts
- Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 3923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax


Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2009 by 3-Micro Technologies LLC

Smoothness



ClientWeb  
3-Micro Technologies  
(your logo here instead of ClientWeb Logo)

- Account Profile
- Account History
- Request Service
- Logout

### Account Management

- Summary
- Vacation
- Instructions
- Insurance
- Contacts
- Zones

Please review your account profile

Account: 9994A

Client Name: ABC Corporation

First Name:

Street Address: 3923 Main Street

Apt/PO Box: Suite 200

City: Phoenix

State/Province: AZ Zip/Postal Code: 85023

Primary Contact: John Taylor

Primary Phone: 602-989-2343 Ext: 201 Phone Type: Work

Secondary Contact: Susan Connor

Secondary Phone: 602-989-3554 Ext: 302 Phone Type: Evening

Fax or Other: 602-989-5050 Phone Type: Fax

Primary E-Mail: demo@alarmclientweb.com

Secondary Email: jtaylor@abccorporation.com

Save Cancel

(c) 2009 by 3-Micro Technologies LLC

Overcast

## **Appendix C: Contact Information and Software License**

### **Contacting Us**

Z-Micro Technologies, Inc

Phone: 877-864-5010

Fax: 480-767-5595

Email: [support@z-microtech.com](mailto:support@z-microtech.com)

Web: [www.z-microtech.com](http://www.z-microtech.com)



## **Software License and Copyright**

ClientWeb is a software product and is copyrighted with all rights reserved by Z-Micro Technologies, LLC and its subsidiaries. It is published exclusively by Z-Micro Technologies, LLC. The distribution and sale of this product are intended for the use of the original purchaser only and can be installed on one (1) computer. The purchaser of this program is hereby licensed to read from its medium into memory of the computer for the purpose of executing the program or to copy the program for the purpose of archival back-up or convenient access, provided such copies are made solely in support of the purchaser's operation of the program only those computers they are licensed to run with Alarm. Copying (except as above), duplicating, transferring, selling or otherwise distributing this product is a violation of the law.

This software is licensed for use by the original purchasing company (if a corporation/partnership) or person (if a sole proprietorship) and is NOT TRANSFERABLE.

### **Annual Support Contract Requirement – PLEASE READ CAREFULLY.**

The licensing of ClientWeb requires the maintenance of a Z-Micro Technologies annual support contract, charged automatically each year for renewal using the last valid form of payment. This licensing requirement is valid for the one-time license purchase option for ClientWeb. Monthly fee users (an alternative to one-time license purchase) do not require an annual support contract however contracted customers receive a discount on the monthly ClientWeb fee. Your use of this product is your agreement to these terms and authorizes Z-Micro Technologies to charge automatically for the annual support contract using the last valid form of payment we have on file. Failure to maintain annual support contract for one-time license purchasers, or failure to maintain monthly payments for monthly payment users, will void the ClientWeb license and requires the licensee to remove ClientWeb from their systems.

### **Limited Warranty**

This software product and associated instructional materials are sold "AS IS" without warranty as to their performance, merchantability or fitness for any particular purpose. The entire risk as to the quality and performance of the software is assumed by the user. All software purchased from Z-Micro Technologies, Inc. is sold with the understanding that it is non-returnable and non-refundable.

To the original purchaser, Z-Micro Technologies, Inc. warrants the CD-Rom on which the software is recorded to be free from defects in materials and faulty workmanship for a period of ninety (90) days from the date the software is delivered. If during this period a defect in the diskette should occur, you may return the diskette to Z-Micro Technologies, Inc. for a replacement diskette without charge. Your sole and exclusive remedy in the event of a defect is expressly limited to replacement of the diskette.

In no event shall Z-Micro Technologies, Inc. or anyone else who has been involved in the creation, production or delivery of this software be liable for any direct, incidental or consequential damages, such as, but not limited to, loss of anticipated profits, benefits, use, or data resulting from the use of this software, or arising out of any breach of any warranty. Some states do not allow the exclusion or limitation of direct, incidental or consequential damages so the above limitations may not apply to you.

Your use of this software is your agreement to the above license and warranty provisions.