DEALER ADMIN LAB GUIDE

Instructor-Led Training

CUSTOMERS

Search For A Customer

1. Select the **SEARCH** tab on the side menu
2. Select **CUSTOMER** under the **SELECT A CATEGORY** drop-down menu
3. Enter in the customer's name and select **SEARCH**

Customer Menu

1. Select the **CUSTOMERS** tab on the side menu
2. By default you will see the **ACCOUNT**, **CUSTOMER**, **SYSTEM**, **TYPE**, **VERSION**, and **CONNECTION** columns.
   - Select an **ACCOUNT NUMBER** to open the system information page for that account number
   - Select a **CUSTOMER** to open the customer summary page
   - Select a **SYSTEM** to open the system information page for that system

Create A Customer

1. Select the **CUSTOMERS** tab on the side menu
2. Select the **PLUS ICON** in the top-left corner next to Customers
3. Fill in the customer's information and press **SAVE**

Edit A Customer

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **CUSTOMER** to open the customer summary page
3. Select **EDIT** next to the customer's name

Delete A Customer

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **CUSTOMER** to open the customer summary page
3. Select **DELETE** next to the customer's name

SYSTEMS

Add A System

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **CUSTOMER** to open the customer summary page
3. Select the **PLUS ICON** next to Systems
4. Enter a name for the system
5. Select the system type under the **SELECT A SYSTEM TYPE** drop-down menu
6. Fill in the system's information and select a Virtual Keypad package
7. Select any additional features then press **SAVE**

Edit A System

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **SYSTEM** to open the system information page for that system
3. Select **EDIT** in the top-right corner

Delete A System

1. Select the **CUSTOMERS** tab on the side menu
2. Select the **THREE DOTS ICON** under Systems for the system you want to delete
3. Select **DELETE** then select **DELETE** again

APP USERS

Add An App User

1. Select the **CUSTOMERS** tab on the side menu
2. Select a customer from the list
3. Select the **PLUS ICON** next to App Users
4. Fill in the app user's information then press **SAVE**

Edit An App User

1. Select the **CUSTOMERS** tab on the side menu
2. Select a customer from the list
3. Select the **THREE DOTS ICON** under App Users for the user you want to edit
4. Select **EDIT**
5. Edit the app user's information as needed

Delete An App User

1. Select the **CUSTOMERS** tab on the side menu
2. Select a customer from the list
3. Select the **THREE DOTS ICON** under App Users for the user you want to edit
4. Select **DELETE** then select **DELETE** again

SYSTEM INFORMATION

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **SYSTEM** to open the system information page for that system

SYSTEM PROGRAMMING TOOLS

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **SYSTEM** to open the system information page for that system
3. Select one of the following:
   - Select **AUTOMATION** to view a list of Z-Wave favorites and device types
   - Select **PROGRAMMING** to configure all programming settings
   - Select **PRINT PROGRAMMING** to print or save a copy of the programming sheet
   - Select **PROFILES** to edit profiles
   - Select **REMOTE UPDATE** to check for available firmware updates
   - Select **SCHEDULES** to edit schedules

- Select **SYSTEM ANALYTICS** to view system analytics
- Select **SYSTEM INFORMATION** to view system information
- Select **SYSTEM REPORTS** to create reports
- Select **SYSTEM STATUS** to view the status of the system
- Select **SYSTEM TESTS** to test the system's communication
- Select **USER CODES** to edit user codes

AUTO PROGRAMMING

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **CUSTOMER** to open the customer summary page
3. Select the **PLUS ICON** next to Systems
4. Enter a name for the system
5. Select the system type under the **SELECT A SYSTEM TYPE** drop-down menu
6. Select **AUTO-PROGRAMMING**
   - When Auto-Programming is selected, Pre-Program System will automatically be selected
7. Select the **INSTALLATION DATE**
8. Fill in the system's information and select a Virtual Keypad package
9. Select any additional features then press **SAVE**
10. Select **PROGRAMMING** to configure all programming settings
11. Select **SAVE TO DEALER ADMIN**

PRE-PROGRAMMING

1. Select the **CUSTOMERS** tab on the side menu
2. Select a **CUSTOMER** to open the customer summary page
3. Select the **PLUS ICON** next to Systems
4. Enter a name for the system
5. Select the system type under the **SELECT A SYSTEM TYPE** drop-down menu
6. Select **PRE-PROGRAMMING**
7. Select the **INSTALLATION DATE**
8. Fill in the system's information and select a Virtual Keypad package
9. Select any additional features then press **SAVE**
10. Select **PROGRAMMING** to configure all programming settings
11. Select **SAVE TO DEALER ADMIN**
12. Select **SEND ALL CHANGES** when the system comes online

TOOLS

1. Select the **TOOLS** tab on the side menu
2. Select one of the following:
   - Select **BULK REMOTE UPDATE** to update multiple panel firmwares at once
   - Select **CELLULAR SUNSET** to generate a report that enables you to view all of your CDMA and HSPA modems
   - Select **MASS PROGRAMMING** to create a programming change that can be made to multiple panels at once
   - Select **TEMPLATES** to create a template that can be applied across multiple systems
     1. Select the **PLUS ICON** next to **TEMPLATES**
     2. Enter a name for the template
     3. Select a system type under the **SYSTEM TYPE** drop-down menu
     4. Select the tab on the side menu for each aspect of programming that should be added to the template
     5. Select the checkbox next to each aspect of programming that should be added to the template
     6. Edit the enabled fields as desired
     7. Select **SAVE TEMPLATE**
   - Select **MOBILE CREDENTIALS** to purchase credentials, view available credentials, and view purchase history
   - Select **REMOTE UPDATE DASHBOARD** to view a list of all systems and their update status
   - Select **REPORTING & ANALYTICS** to view analytics for your Dealer Admin and to run quick or custom reports
   - Select **SERVICE REQUEST DASHBOARD** to view all service requests
   - Access to the Service Request Dashboard and the ability to create, edit, and delete service requests is restricted to users with Admin authority.

SETTINGS

Monitoring Center

1. Select the **SETTINGS** tab on the side menu
2. Select **MONITORING CENTER**
3. Follow these steps to add a Monitoring Center
   - Select the **PLUS ICON** next Monitoring Centers
   - Select your monitoring center under the Choose Integration drop-down menu
   - Select **ADD**
   - Fill in the login information for the Monitoring Center then press **SAVE**
4. Follow these steps to add a Receiver
   - Select the **PLUS ICON** next to Receivers
   - Fill in the receiver information
   - Press **SAVE**

Monitoring Center Video Verification

1. Select the **SETTINGS** tab on the side menu
2. Select **DEALER**
3. Select the **MONITORING CENTER VIDEO VERIFICATION** tab
4. Select **ALLOW MONITORING CENTER VIDEO VERIFICATION**
5. Edit the Monitoring Center Video Verification settings as desired
6. Select **SAVE** in the top-right corner

Virtual Keypad Defaults

7. Select **VIRTUAL KEYPAD**
8. Select the options that you want defaulted for Virtual Keypad settings
9. Select **SAVE**

QUESTIONS

What else would you like to learn about Dealer Admin?

NOTES: