



DEALER ADMIN LAB GUIDE

Instructor-Led Training

CUSTOMERS

1. **SEARCH** for a customer using the search bar or select a customer manually
2. Add a customer by selecting the **PLUS ICON** in the top left corner next to Customer
 - › Activating interactive app services is not required
3. Give the customer an Internal Account Number
4. Fill in the customer's information and select **SAVE**

SYSTEMS

1. Select the customer you just created from the list
2. Add a system by selecting the **PLUS ICON** next to Systems
3. Fill in the information for the new system
4. Select the Virtual Keypad App and Website plan
5. Add any additional features you want the customer to have and select **SAVE**

APP USERS

1. Add an app user by selecting the **PLUS ICON** next to App Users in the Customer Summary
2. Fill in the New App User's information
3. Select what features you want the new app user to see for which systems and select **SAVE**

SYSTEM INFORMATION

1. Select a customer from the customers menu
2. View customer and system information in the **SYSTEM INFORMATION** menu
3. Edit a system by selecting **EDIT**
4. In the side menu, select **SYSTEM ANALYTICS** or **SYSTEM REPORTS** to view specific information

SYSTEM PROGRAMMING TOOLS

1. Click the system name from the side menu and select **REMOTE UPDATE** to check for available firmware updates and push them to the panel remotely
2. Select **FULL PROGRAMMING** to configure all programming settings
3. Select **AUTOMATION** to view a list of Z-Wave **FAVORITES** and **DEVICE** types
4. Select **SCHEDULES** to add time schedules
5. Select **USER CODES** to add, edit or delete user codes
6. Select **PRINT PROGRAMMING** to print or save a copy of the programming sheet

TOOLS

1. Select **TOOLS** from the side menu
2. Select **REMOTE UPDATE DASHBOARD** to view a list of all systems and their update status
3. Select **DEFAULT PROGRAMMING** to add, edit or delete programming defaults
4. Select **CELLULAR SUNSET** to generate a report that enables you to view all of your CDMA and HSPA modems
5. Select **SERVICE REQUEST** to create a request in Dealer Admin that sends a Tech APP notification to the assigned technician
 - › Access to the Service Request Dashboard and the ability to create, edit, and delete service requests is restricted to users with Admin authority.

SETTINGS

1. Select **SETTINGS** from the side menu
2. Edit or configure **DEALER SETTINGS** that will display in Virtual Keypad
3. View your dealer **APP KEY** in the top right
4. Select **CUSTOMER REFERRALS** check box in the bottom left corner
5. Select **LOGIN AS CUSTOMER** check box
6. Select **LOGOS** tab to upload a dealer logo that will display in the Virtual Keypad mobile app
7. Select **CENTRAL STATION VIDEO VERIFICATION** to configure video verification settings
8. Select **CUSTOMER REFERRALS** tab to setup what the Refer a Friend message will look like
9. Select **EMAIL CAMPAIGNS** tab to setup different email campaigns
10. Select **SAVE** to save changes in the top right corner

PROGRAMMING TEMPLATES

1. Select **SETTINGS** from the side menu and select **PROGRAMMING TEMPLATES**
2. Select the **PLUS ICON** next to Programming Templates to add a new XTLtouch template
3. Name the template and choose **XTLTOUCH** for the system type
4. In communication, choose a Communication Type
 - › You must choose a Communication Type for the system. If you choose Cell, you must select a rate plan and text plan
5. In System Options, configure the arming type, entry and exit delays, and time settings
6. In System Reports, select any reports that you would like to receive from the system
7. Select **SAVE** to save your changes

