


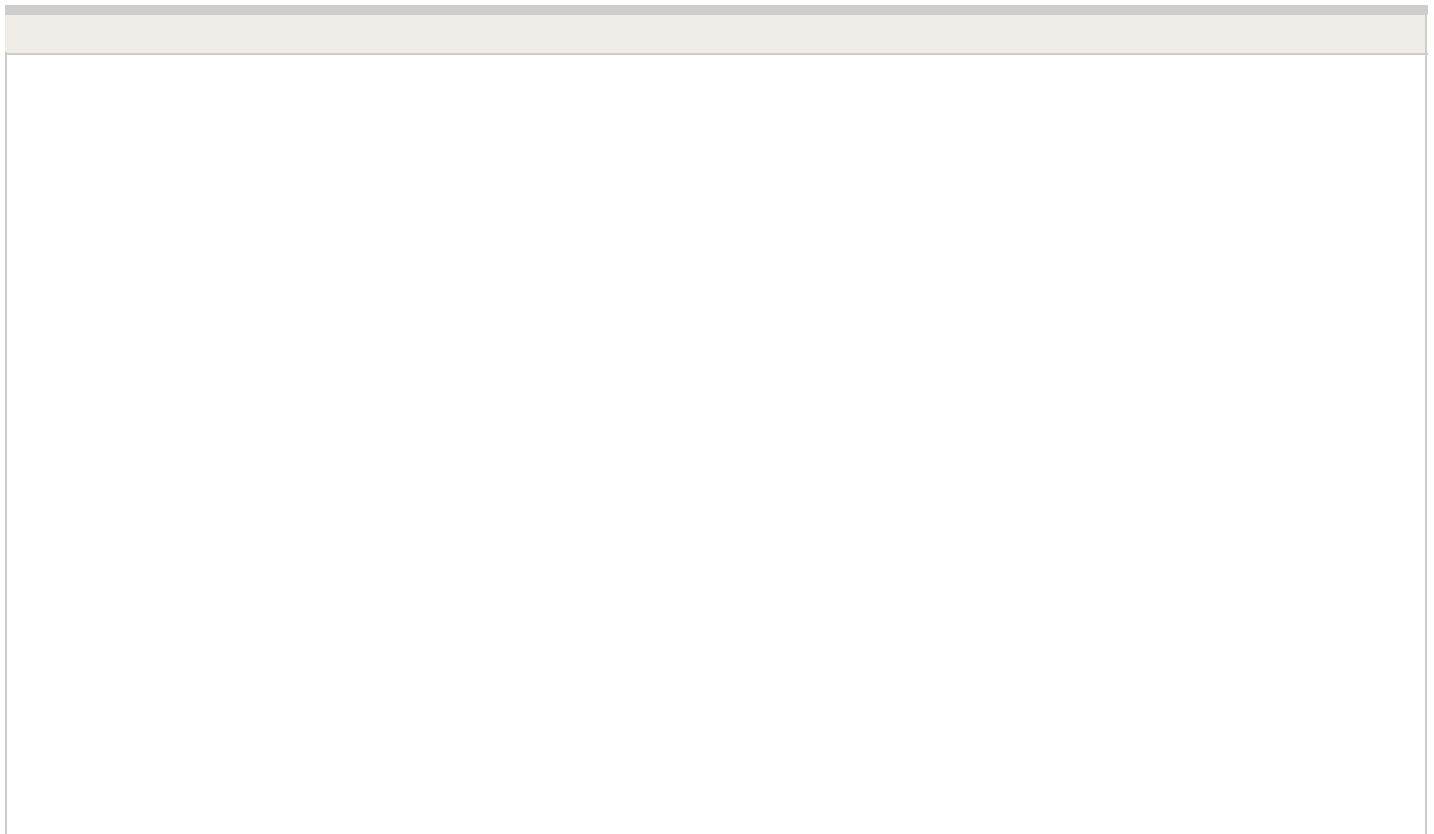
Contractor - Configure Customer Controllers

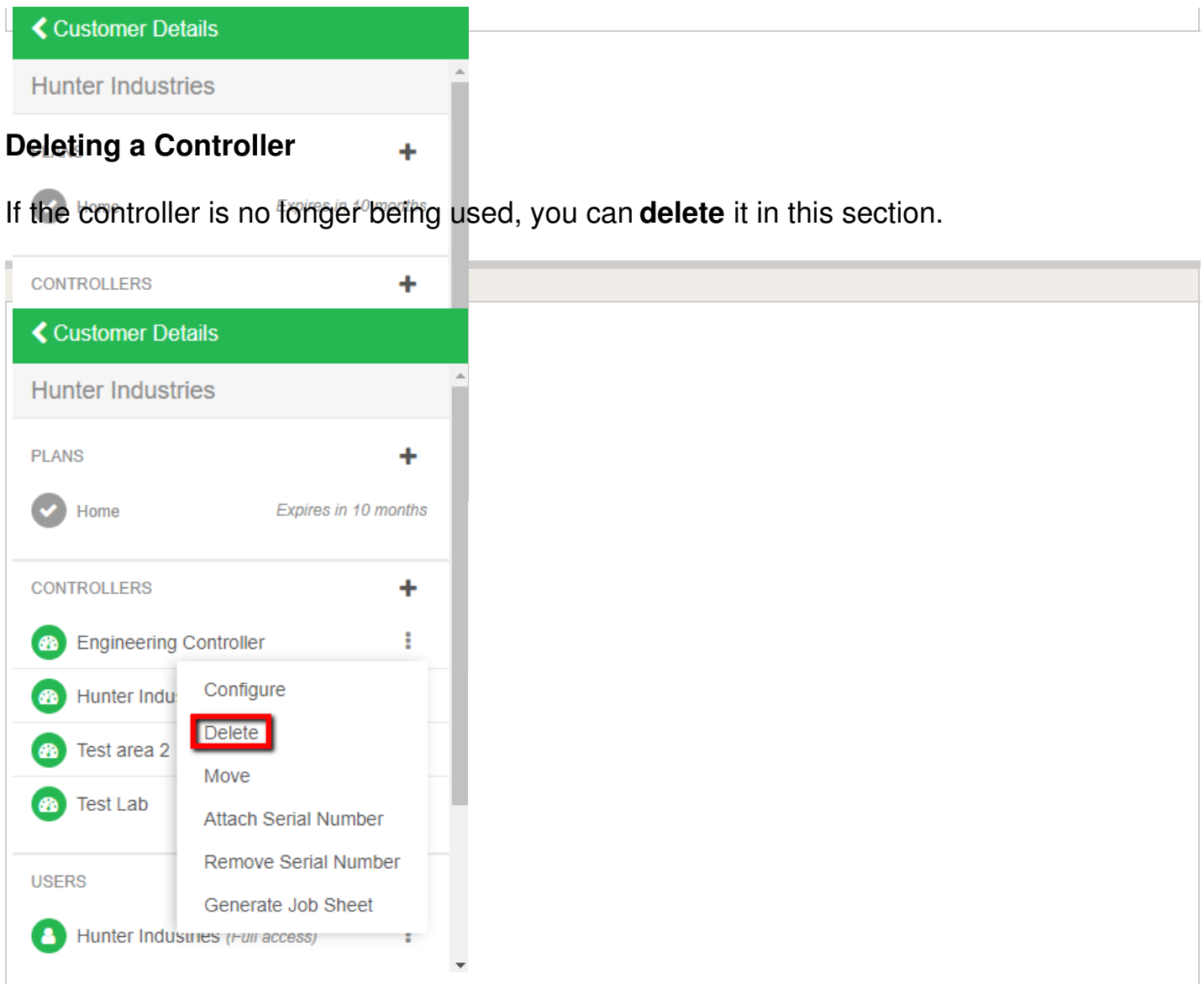
In the contractor portal, find your customer and click on their name to configure their details. Find the controller you're interested in and use the menu to:

1. Configure a controller
2. Delete a controller
3. Move a controller to another customer
4. Attach a serial number to the controller
5. Remove a serial number from a controller
6. Generate a job sheet for a controller

Configuring a Controller

Use the  button next to the controller to **EDIT**.

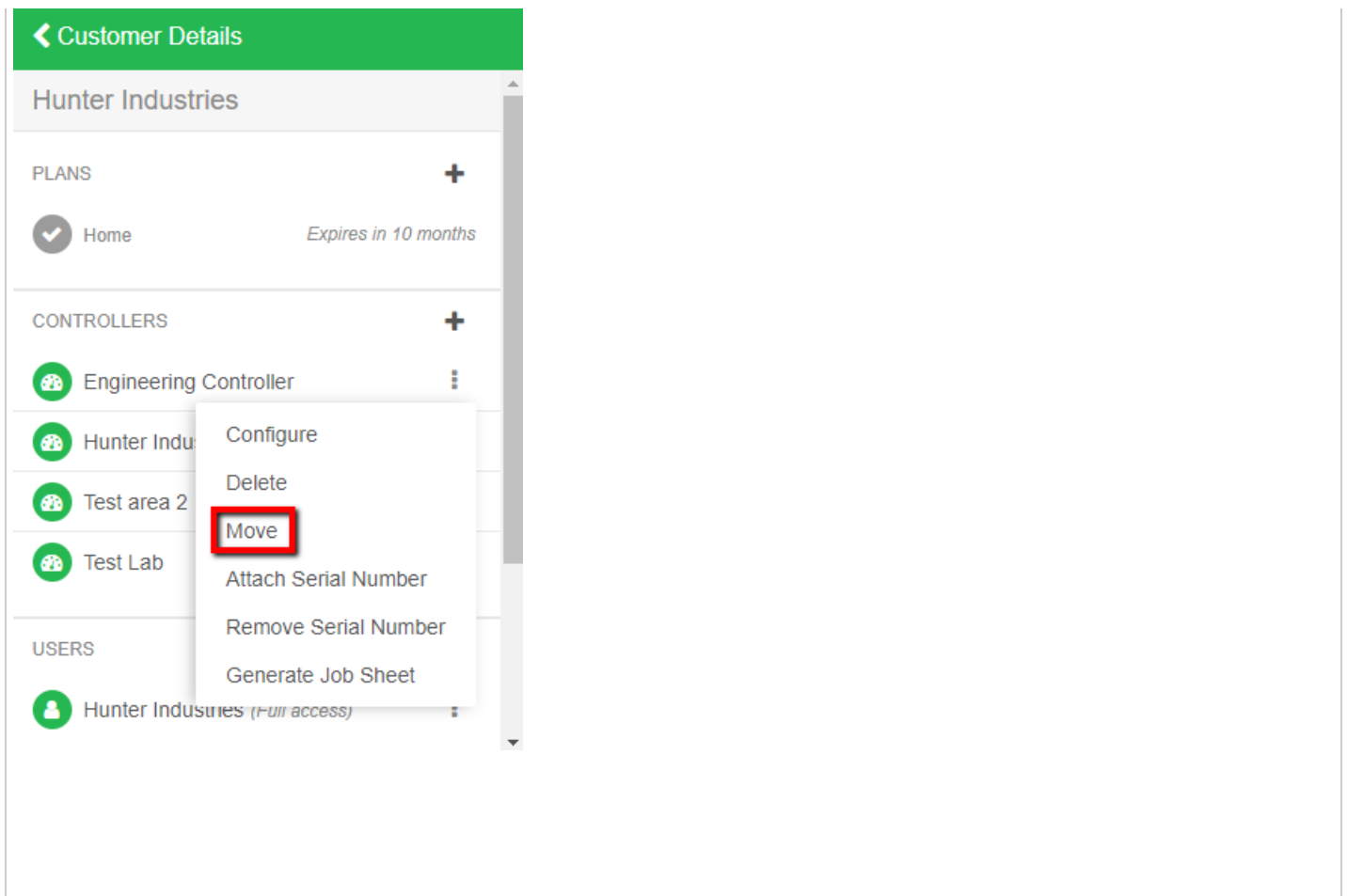




Moving a Controller

You can move a controller from your own account to a customer account. However, you can't move the controller between customers.

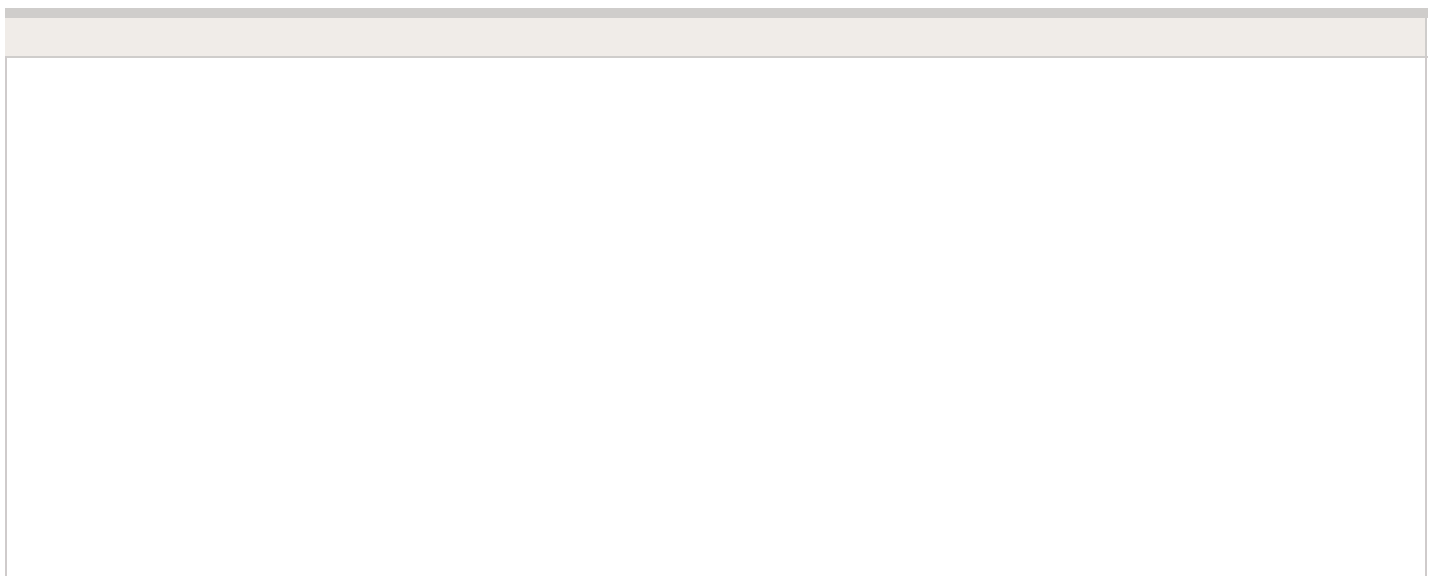
1. Select the account to which you're moving the controller and click **Move**. For additional information on moving a controller in your business a account click [here](#) [1].

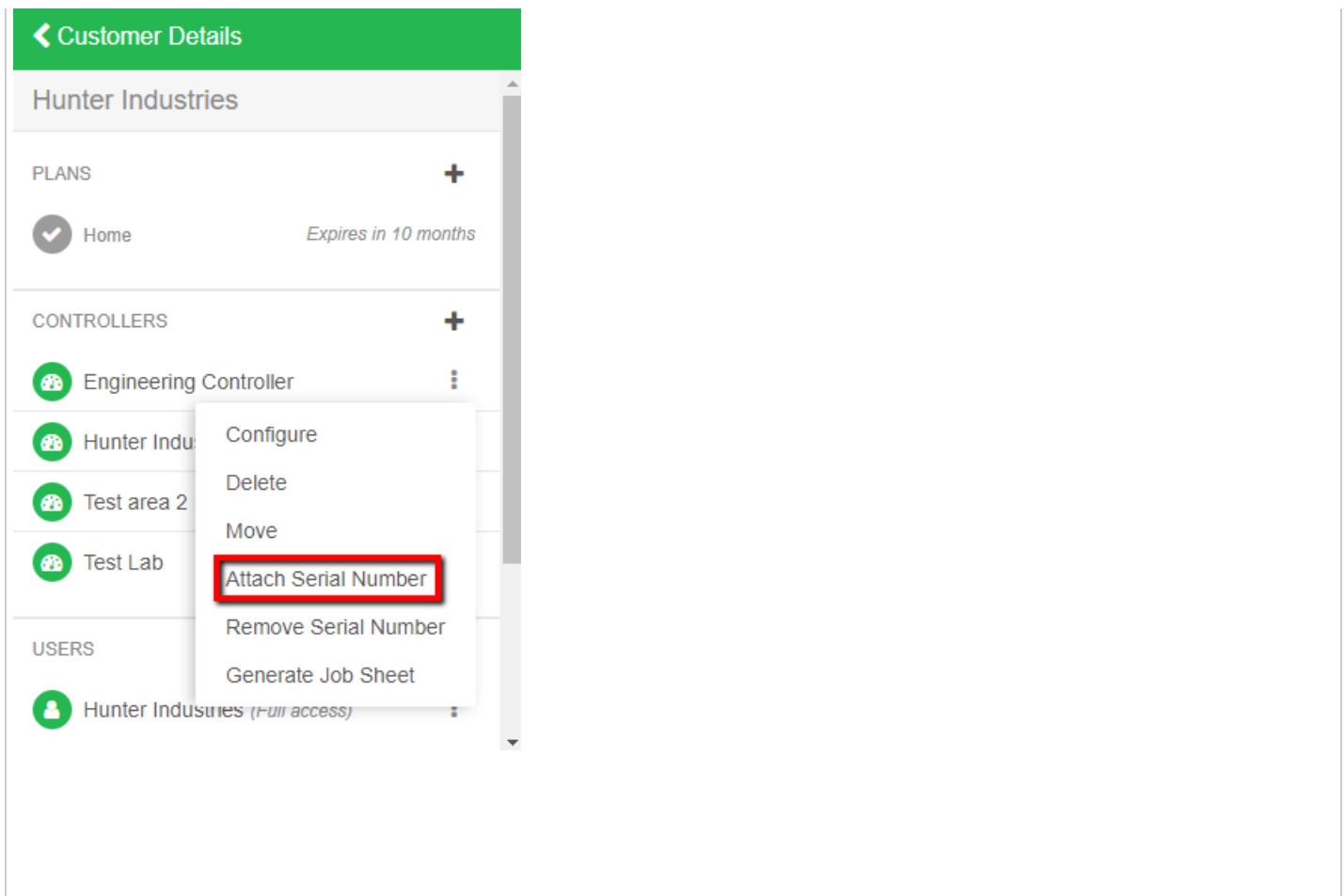


Attaching a Serial Number

This allows you to associate the serial number with the controller. Remember that serial numbers can only be linked to one controller at a time.

1. Enter the serial number and click **Link to Controller**.

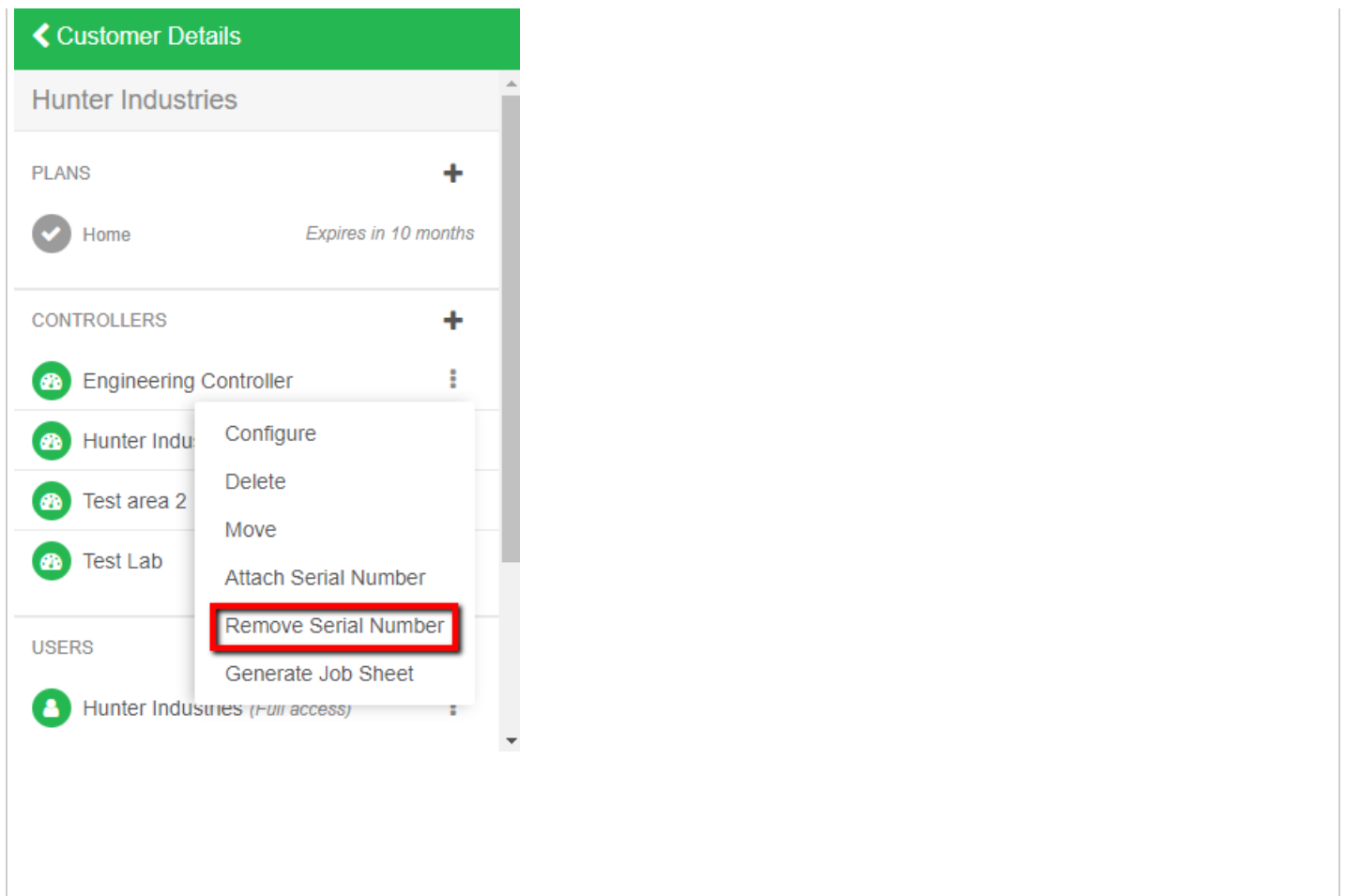




Removing a Serial Number

You can remove a serial number attached to a customer's controller account. You may want to do this if ownership of the controller changes (eg. you are moving it from one customer to another).

Once you have removed a serial number from a customer's controller account it can be used elsewhere.



Generating Job Sheets

A job sheet is a handy summary of information about a controller which you or your staff can use when you go out on site to make changes or fix a problem.

You can generate a job sheet from three different places:

1. In the contractor portal, find your customer and click on their name to configure the Find the relevant controller, click on the **plus** sign and select Generate Job Sheet.
2. In the contractor portal, click on the controller on the map and use the menu to select Generate Job Sheet.
3. Select **Generate Job Sheet** from the menu in the top right hand corner to generate a job sheet for the currently selected.

You can choose to include or exclude certain parts of the job sheet, as outlined below. Assuming you include all available information, the job sheet will show:

- Job Number and job-specific instructions
- Customer Name and Address
- Controller Name and alerts summary
- An area for you or your staff to record details on when the job was done and how long

- it took
- Zone Information
- Alert details
- Files (email only)

Printing a Job Sheet

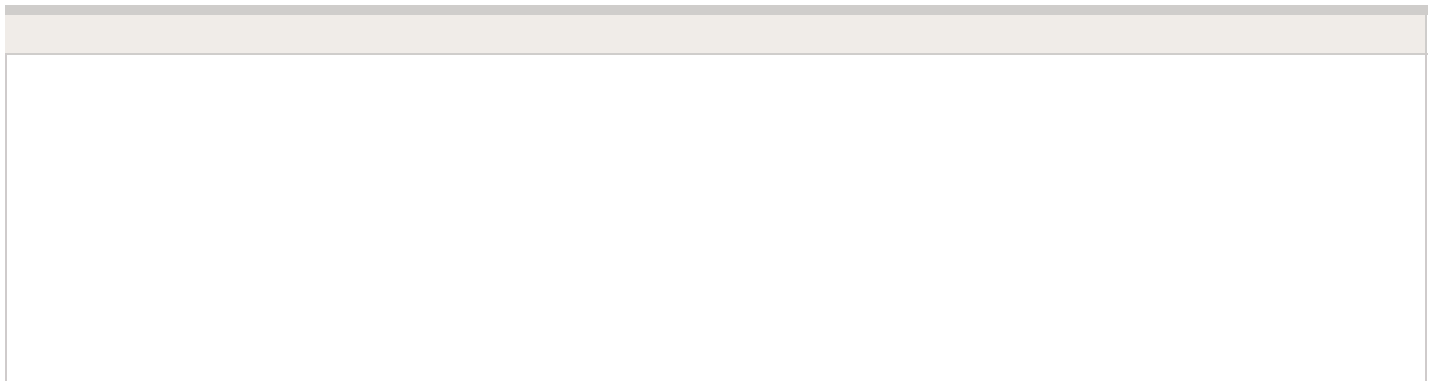
If you choose to print a job sheet, a PDF file will be created which you can then print.

- **Job Number** - Enter an optional job number
- **Include Zone Details** - Choose to include or exclude information about each zone
- **Include Zone Pictures** - Choose to include or exclude pictures for each zone
- **Include Alerts** - Choose to include or exclude details about alerts for the controller
- **Add an Instruction** - Add an optional instruction to the person completing the job

Emailing a Job Sheet

If you choose to email a job sheet, an email will be sent from you to your selected recipients and you'll also receive a copy. You can choose from a list of users on the customer's account and/or your own staff.

- **Job Number** - Enter an optional job number
- **Browse emails** - Choose one or more users associated with the customer's account or one or more of your staff members.
- **Add** - Add specific email addresses.
- **Include Zone Details** - Choose to include or exclude information about each zone
- **Include Zone Pictures** - Choose to include or exclude pictures for each zone
- **Include Alerts** - Choose to include or exclude details about alerts for the controller
- **Add Files** - Choose to include files associated with the customer – these will be attachments to the email
- **Add an Instruction** - Add an optional instruction to the person completing the job
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Hunter Industries

PLANS



Home

Expires in 10 months

CONTROLLERS



Engineering Controller



Hunter Indu

Configure

Test area 2

Delete

Test Lab

Move

Attach Serial Number

Remove Serial Number

USERS

Hunter Industries (Full access)

Generate Job Sheet