



THE FIELD-TO-CLOSE PLATFORM

OFFICIAL TRAINING / 2026

THE COMPLETE

# USER MANUAL

Clear instructions. Confident execution.

From first lead to documented customer acceptance.

## ILLUSTRATIVE WORKFLOW OVERVIEW

### DISCOVER

Find a prospect

### DOCUMENT

Capture the site

### ADVANCE

Prepare next steps

1

Research

2

Qualify

3

Walkthrough

4

Quote

5

Close

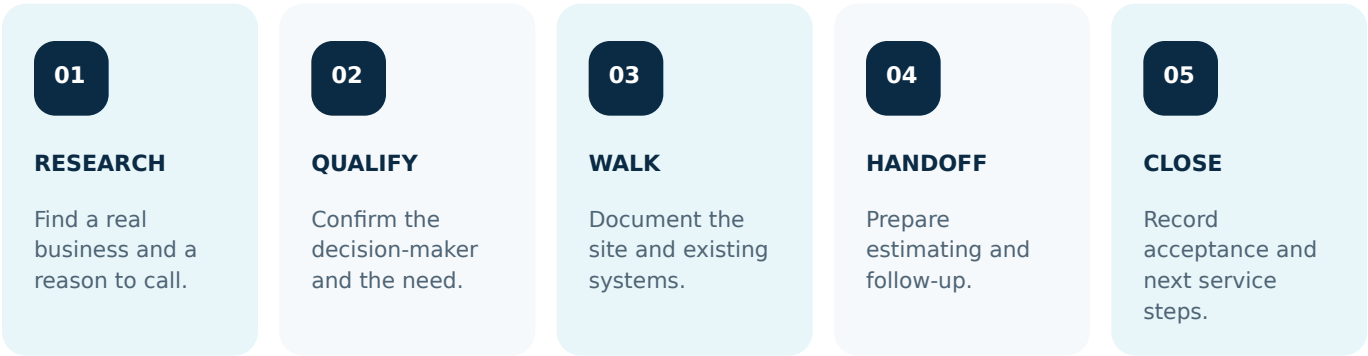
2026 EDITION / V1.0

25 CHAPTERS • 159 STEP-BY-STEP INSTRUCTIONS

# Start here.

This manual is built for the field: short instructions, precise controls and clear outcomes.

## THE FIVE-STEP SALES CYCLE



## WHO THIS GUIDE SERVES

- FIELD REPRESENTATIVES**  
Research, calls, route planning, photos, door surveys and site notes.
- SALES LEADERS**  
Priorities, pipeline, proposals, follow-ups, reporting and coaching.
- OFFICE COORDINATORS**  
Structured quote handoffs and internal office review where authorized.

### IMPORTANT PRODUCT AVAILABILITY

The documented CRM is currently restricted to authorized internal users. The public demo is fictional. Automatic subscriptions, external company workspaces and employee onboarding are not active.

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25 chapters / 159 practical steps / clickable links

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## GETTING STARTED

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# Getting Started: Your First Login

Learn who can sign in, where the app lives, and how to navigate.

## BEFORE YOU BEGIN

An approved internal user account. Visitors can try the interactive demo without a login.

## STEP-BY-STEP WORKFLOW

**5 ACTIONS****01**

### Open the app

Visit SecuritySalesApp.com and select Log In.

**02**

### Sign in

Enter credentials for an existing authorized team account and complete any required verification.

**03**

### Find Dashboard

After login, open Dashboard. If access is restricted, request authorization instead of using another person's account.

**04**

### Explore navigation

On desktop use the left sidebar; on a phone swipe the horizontal menu to see additional tools.

**05**

### Practice safely

Try the public Interactive Demo with fictional data before changing real customer records.

## EXPECTED RESULT

You can find Dashboard, Lead Research, Accounts, Pipeline, Field Walkthrough and this manual.

## FIELD NOTE / BEST PRACTICE

Bookmark the dashboard and user manual. Independent-company paid registration is not yet open.

# Dashboard: Plan Your Sales Day

Prioritize calls, walkthroughs, follow-ups, proposals and service opportunities.

## BEFORE YOU BEGIN

Sign in and open Dashboard.

## STEP-BY-STEP WORKFLOW

5 ACTIONS

01

### Review Today's Attack List

Select a high-priority account to open its exact record.

02

### Scan the summary

Review total accounts, active leads, monthly recurring values and open pipeline; these reflect recorded CRM data, not audited accounting.

03

### Check Today's Sales Focus

Review overdue follow-ups, stale leads, contracts approaching expiration, takeovers and proposal-stage customers.

04

### Use the account map

Open a mapped customer profile from the map when location data is available.

05

### Choose one next action

Contact the decision-maker, document the result and schedule a specific follow-up.

## EXPECTED RESULT

Your most valuable next customer action is documented.

## FIELD NOTE / BEST PRACTICE

Prioritize decision-maker conversations, site walks, estimates and recurring service over email volume.

# Lead Research: Find Qualified Commercial Prospects

Search businesses, inspect available evidence and convert useful prospects into customer accounts.

## BEFORE YOU BEGIN

Open Lead Research. Browser location permission is optional.

## STEP-BY-STEP WORKFLOW

6 ACTIONS

### 01 Choose a search mode

Use Business Name or Category for a lookup, or Find Best Nearby for territory discovery.

### 02 Set the territory

Enter a neighborhood, city or address, or select Use my location if you approve browser location access.

### 03 Choose the search radius

Pick a practical distance for your field schedule.

### 04 Review results

Inspect business names, locations, available contact details, sources and reasons to pursue an opportunity.

### 05 Verify before contacting

Confirm current details and decision-makers. Never guess email addresses or assume a buying signal is verified.

### 06 Convert and open

Use the conversion action for a qualified prospect, then select Open exact account to continue with that customer.

## EXPECTED RESULT

A researched prospect becomes an actionable account with a clear reason to contact it.

## FIELD NOTE / BEST PRACTICE

Look for existing-system evaluations, monitoring takeovers, service needs, poor nighttime coverage and walkthrough opportunities.

## IMPORTANT / VERIFY BEFORE ACTING

Research and AI-derived buying signals may be incomplete. Verify source evidence before using it in outreach.

# Rapid Load: Import Lead Lists

Convert pasted information or selected files into candidate customer records.

## BEFORE YOU BEGIN

Open Rapid Load and prepare business information you are authorized to use.

## STEP-BY-STEP WORKFLOW

**6 ACTIONS****01 Open Rapid Load**

Select Rapid Load in the internal navigation.

**02 Paste a lead list**

Add company names, addresses and available contact information in the input. Separate businesses clearly.

**03 Or choose files**

Select Upload photos or documents, then Choose Files for existing items or Take Photo for a new picture.

**04 Set batch defaults**

Choose the lead source, assigned representative, branch, stage and priority when applicable.

**05 Review the candidates**

Correct extraction errors and potential duplicate companies before saving.

**06 Confirm the result**

Return to Accounts, locate the new records and add a meaningful next action.

## EXPECTED RESULT

Imported prospects are organized for follow-up.

## FIELD NOTE / BEST PRACTICE

Start with a small test batch and check the saved accounts before importing more.

## IMPORTANT / VERIFY BEFORE ACTING

Uploading a file does not guarantee every entry was successfully extracted or saved.

# Accounts: Create and Manage Customer Records

Keep verified contacts, services, sales stages and follow-ups together.

## BEFORE YOU BEGIN

Open Accounts.

## STEP-BY-STEP WORKFLOW

6 ACTIONS

01

### Search first

Look up the company by name, phone, address or contact to prevent duplicates.

02

### Create the account

Select New Account and enter verified company and location details.

03

### Add sales context

Set priority, stage, system interests, opportunity type and lead source where known.

04

### Save the account

Select Save and verify the company appears in the Accounts list.

05

### Use quick filters

Try Due, Takeovers, Proposals, No Follow-Up, High Priority or Unmapped.

06

### Keep it current

Open the exact account after every interaction and update its status and next action.

## EXPECTED RESULT

The customer has one findable record with useful next-step information.

## FIELD NOTE / BEST PRACTICE

Evaluate usable existing equipment before proposing unnecessary replacement.

# Account Detail: Work the Exact Customer

Use the customer profile as the center of calls, visits, AI updates, deals and quote requests.

## BEFORE YOU BEGIN

Open an account from Accounts, the dashboard, a map or a converted research result.

## STEP-BY-STEP WORKFLOW

**5 ACTIONS****01**

### Verify identity

Check the business name and site address at the top of the account.

**02**

### Review decision-maker information

Check contacts, phone numbers and email addresses before reaching out.

**03**

### Choose an action

Select Call & Track, Log Call, AI Rapid Update, Manual check-in or Request Quote.

**04**

### Read activity history

Review existing calls, check-ins, deals and follow-ups to avoid repeating work.

**05**

### Save the next step

Update the record after a real milestone, including a date and purpose for follow-up.

## EXPECTED RESULT

Your work stays attached to the correct customer profile.

## FIELD NOTE / BEST PRACTICE

A useful account makes it clear who decides, what they need and what should happen next.

# Call Tracking and Manual Check-ins

Record phone calls, visits and commitments in the customer timeline.

## BEFORE YOU BEGIN

Open a customer account.

## STEP-BY-STEP WORKFLOW

5 ACTIONS

01

### Start a call

Choose Call & Track when a phone number is available; your device may open its dialer.

02

### Record the outcome

Use the call review workflow or Log Call to describe what actually happened.

03

### Log in-person activity

Use Manual check-in for a visit or conversation not initiated by Call & Track.

04

### Capture essentials

Record the decision-maker, system needs, objections, quote requests and promised next action.

05

### Set the follow-up

Choose a real date and verify the activity appears on the account timeline.

## EXPECTED RESULT

Another representative can understand the interaction and next step.

## FIELD NOTE / BEST PRACTICE

Do not record a signed agreement, completed walk or sale unless it actually happened.

# AI Rapid Update: Turn Notes into CRM Activity

Use AI to structure pasted conversations and uploaded supporting documents into check-ins.

## BEFORE YOU BEGIN

Open the correct customer and select AI Rapid Update.

## STEP-BY-STEP WORKFLOW

7 ACTIONS

01

### Open AI Rapid Update

Choose the AI Rapid Update action on Account Detail.

02

### Paste your notes

Enter relevant call notes, customer messages or email text.

03

### Choose supporting files

Use Take Photo for a new image or Choose Files for existing photos, screenshots, PDFs, Word documents or text.

04

### Watch progress

Wait for uploads and processing to finish; correct any file format or size errors.

05

### Review the result

Check names, requested services, dates and suggested changes against the source conversation.

06

### Confirm milestones manually

AI cannot automatically mark a customer won or lost. Review proposed closed stages yourself.

07

### Check the timeline

Confirm the saved check-in and correct next follow-up.

## EXPECTED RESULT

A dated check-in captures the conversation without silently closing a deal.

## FIELD NOTE / BEST PRACTICE

Existing verified contact details are preserved when conflicting AI suggestions need human review.

## IMPORTANT / VERIFY BEFORE ACTING

AI can make mistakes; do not promise compatibility, compliance, pricing or customer acceptance from an AI summary.

# Follow-ups, Priorities and Monitoring Takeovers

Give each open opportunity a specific next action and due date.

## BEFORE YOU BEGIN

Open Dashboard or Accounts.

## STEP-BY-STEP WORKFLOW

5 ACTIONS

01

### Choose the milestone

Target a decision-maker call, 15-minute site walk, system evaluation, estimate review or signature.

02

### Set the follow-up

Enter a Next Follow-Up date on the customer record.

03

### Assign priority carefully

Use High for opportunities with real urgency, fit and a practical next step.

04

### Find stalled work

Use Due, Takeovers, Proposals and No Follow-Up filters.

05

### Close the loop

After each interaction, log the result and set another action or accurately close the opportunity.

## EXPECTED RESULT

Open opportunities have clear objectives and deadlines.

## FIELD NOTE / BEST PRACTICE

Monitoring and service takeovers often start with a technical evaluation rather than a full replacement promise.

# Maps and Route Planner: Plan Field Visits

Organize mapped customers into an efficient visit list.

## BEFORE YOU BEGIN

Accounts need usable addresses and coordinates for map routing.

## STEP-BY-STEP WORKFLOW

**6 ACTIONS**

**01 Open Route Planner**  
Select Route Planner in the navigation.

**02 Find available stops**  
Search Available Accounts and use High, Due or Proposals filters as needed.

**03 Build the route**  
Select individual customers or Add Visible to create a stop list.

**04 Review stops**  
Check each address, remove unsuitable stops and confirm appointments.

**05 Open external navigation**  
Use Open in Maps to hand off to the available maps application.

**06 Log visits**  
Return to the exact customer account and record the outcome.

## EXPECTED RESULT

Your day has an organized field route with follow-up documentation.

## FIELD NOTE / BEST PRACTICE

Estimated distances are planning aids. Confirm real-world travel, appointment times and access permissions.

## IMPORTANT / VERIFY BEFORE ACTING

Unmapped accounts may be excluded until usable coordinates are recorded.

# Pipeline: Track Deals and Revenue

Track actual opportunity stages and one-time or recurring sales values.

## BEFORE YOU BEGIN

Open Pipeline. Create the customer account first when needed.

## STEP-BY-STEP WORKFLOW

**6 ACTIONS**

**01 Open Pipeline**  
Select Pipeline in the internal menu.

**02 Add a deal**  
Choose New Deal and associate it with the correct customer.

**03 Enter the scope**  
Add opportunity name, relevant system type and supported financial information.

**04 Set the stage**  
Place the deal in the appropriate stage based on documented progress.

**05 Record the next action**  
Schedule the site walk, estimate review, decision-maker call or signature request.

**06 Confirm wins accurately**  
Mark won only when the required customer acceptance or agreement has actually occurred.

## EXPECTED RESULT

Pipeline reflects opportunities and documented values rather than assumptions.

## FIELD NOTE / BEST PRACTICE

Separate monthly monitoring/service value from one-time installation revenue when recording a deal.

# Field Walkthrough: Start a Site Assessment

Collect site details an estimator needs before developing a technical proposal.

## BEFORE YOU BEGIN

Choose an existing account and obtain permission before photographing the site.

## STEP-BY-STEP WORKFLOW

**8 ACTIONS****01**

### Select the customer

Open Field Walkthrough and choose the correct account under Account & Scope.

**02**

### Identify the services

Select the system interests relevant to the site.

**03**

### Record existing equipment

Document panels, recorders, components, network availability and power conditions.

**04**

### Locate the hub

Identify the central panel, NVR, network rack or equipment location.

**05**

### Document entrances

Use Add Door for each relevant opening and record doorbell or intercom conditions.

**06**

### Document camera regions

Use Add Camera Region to record proposed viewing areas and preliminary cable lengths.

**07**

### Add site photos

Use Take Photo for a new image or Upload / Choose for existing photos and supported documents.

**08**

### Save the walkthrough

Select Save Walkthrough and verify the success message before leaving.

## EXPECTED RESULT

A saved site assessment connects the customer to field notes and supporting links.

## FIELD NOTE / BEST PRACTICE

Document what exists, what needs verification and what problem the customer wants solved.

## IMPORTANT / VERIFY BEFORE ACTING

Site notes are preliminary and do not replace technical design, installation verification or code review.

# CCTV Walkthrough: Camera Zones and Cable Runs

Capture coverage outcomes, lighting and cable paths needed for a camera proposal.

## BEFORE YOU BEGIN

Start a Field Walkthrough for the correct customer.

## STEP-BY-STEP WORKFLOW

7 ACTIONS

### 01 Ask what the customer needs to see

Discuss entrances, parking, cash handling, loading docks, blind spots and nighttime concerns.

### 02 Add camera regions

Use Add Camera Region for each viewing zone and give every zone a recognizable location.

### 03 Record mounting conditions

Note indoor/outdoor exposure, approximate mounting positions and obstructions.

### 04 Estimate cabling

Record preliminary distances between camera regions and the central hub, including routing challenges.

### 05 Check network and power

Document available network connection, switches, power and recorder location.

### 06 Capture supporting images

Photograph the scene with permission, avoiding unnecessary sensitive information.

### 07 Summarize the outcome

Describe desired visibility, remote viewing and alert needs without promising unsupported AI features.

## EXPECTED RESULT

The estimator understands desired coverage and what must be verified.

## FIELD NOTE / BEST PRACTICE

Sell visibility, deterrence, event review and remote access-not a camera count alone.

## IMPORTANT / VERIFY BEFORE ACTING

Never promise AI detection, two-way audio, compatibility or low-light performance before checking specific equipment.

# Access Control: Document Doors and Hardware

Capture access points, door hardware and intercom requirements during a site visit.

## BEFORE YOU BEGIN

Open a Field Walkthrough with access control in scope.

## STEP-BY-STEP WORKFLOW

7 ACTIONS

01

### Walk the site with permission

Identify doors needing managed access and who uses them.

02

### Add each relevant door

Use Add Door and label each opening clearly.

03

### Document hardware

Note locks, strikes, closers, readers, door condition and power where visible.

04

### Review intercom needs

Record whether a doorbell, video doorbell or intercom already exists.

05

### Identify infrastructure

Note hub location, available cabling routes and network connection.

06

### Capture exceptions

Document fire/life-safety interfaces, accessibility and egress questions for qualified review.

07

### Prepare the handoff

Save the walkthrough and list decisions the estimator still needs to confirm.

## EXPECTED RESULT

Doors and access requirements are organized for technical review.

## FIELD NOTE / BEST PRACTICE

Ask about user turnover, access schedules, visitor management and emergency access.

## IMPORTANT / VERIFY BEFORE ACTING

A salesperson's notes do not certify life-safety or code compliance.

# Request Quote: Prepare an Office Handoff

Create a quote request from an account and prepare a separate email draft.

## BEFORE YOU BEGIN

Open the correct Account Detail page and confirm contact information.

## STEP-BY-STEP WORKFLOW

**7 ACTIONS**

**01 Select Request Quote**  
Choose Request Quote from the account actions.

**02 Choose services**  
Select the systems involved and describe opportunity type and urgency.

**03 Write the scope**  
Include site needs, existing equipment, open questions and desired outcome.

**04 Save and prepare**  
Select Save & Prepare Request and confirm the request was saved.

**05 Review recipients**  
Check displayed office recipient addresses and any optional personal signature.

**06 Open the email draft**  
Select Open Email Draft, review it in your mail application and explicitly send it.

**07 Track the next action**  
Return to the account or Office Quote Queue for review and follow-up.

## EXPECTED RESULT

The office has a structured handoff that can be reviewed and sent deliberately.

## FIELD NOTE / BEST PRACTICE

Prepared means saved in the app; it does not mean emailed or accepted.

## IMPORTANT / VERIFY BEFORE ACTING

Opening a mail draft is not delivery confirmation.

# Office Quote Queue: Review and Follow Up

Manage prepared quote requests in the existing Security First Alarm internal office workflow.

## BEFORE YOU BEGIN

This page is restricted to authorized internal users; it is not an independent-subscriber feature.

## STEP-BY-STEP WORKFLOW

**7 ACTIONS****01 Open Office Quotes**

Select Office Quotes from internal navigation.

**02 Filter requests**

Search by customer, site or estimator; filter by Prepared, In Review, Quoted or Due.

**03 Open the exact account**

Choose Exact Account to confirm the customer and inspect related history.

**04 Assign responsibility**

Authorized editors enter an estimator and next follow-up date.

**05 Update status and notes**

Record office progress and select Save Office Update.

**06 Prepare correspondence**

Use Prepare Office Email or Copy Handoff when a separate message is needed.

**07 Verify the real outcome**

Confirm an email was sent or a quote was delivered before reporting completion.

**EXPECTED RESULT**

Estimating work has an accountable status, owner and follow-up.

**FIELD NOTE / BEST PRACTICE**

Prepared requests are not automatically emailed. Office status changes do not send messages.

**IMPORTANT / VERIFY BEFORE ACTING**

The current queue is specific to Security First Alarm.

# Export Center: Download and Review Data

Understand available CSV exports and their limits before sharing them.

## BEFORE YOU BEGIN

Use an authorized account for a legitimate business purpose.

## STEP-BY-STEP WORKFLOW

**6 ACTIONS****01 Open Export Center**

Select Export Center from the internal navigation.

**02 Refresh**

Choose Refresh and check for loading or data errors.

**03 Select a dataset**

Choose an available account, activity or other supported export.

**04 Download the CSV**

Save the file to an approved secure location.

**05 Check completeness**

Compare counts, dates and warnings before treating an export as comprehensive.

**06 Protect the file**

Restrict access and avoid sending customer data to unauthorized recipients.

## EXPECTED RESULT

You have a reviewed data export for an authorized business use.

## FIELD NOTE / BEST PRACTICE

CSV is useful for reporting but is not automatically a complete verified backup.

## IMPORTANT / VERIFY BEFORE ACTING

Some exports may be limited to incomplete record samples.

# Sales Intelligence: Learn from Activity

Review sales learning summaries and identify repeatable behaviors.

## BEFORE YOU BEGIN

Open Sales Intelligence after recording real sales activity.

## STEP-BY-STEP WORKFLOW

6 ACTIONS

**01 Open the learning page**  
Select Sales Intelligence in navigation.

**02 Run an analysis**  
Choose Study My Sales when available.

**03 Review the playbook**  
Read the summary, sample size and available insights.

**04 Check the evidence**  
Compare suggestions with recorded conversations, estimates and signed outcomes.

**05 Choose an improvement**  
Try one measurable change to discovery, follow-up or walkthrough preparation.

**06 Re-study later**  
Repeat after enough new real activity has accumulated.

## EXPECTED RESULT

Sales learning informs a practical process improvement.

## FIELD NOTE / BEST PRACTICE

AI recommendations are hypotheses; validate them against real close rates.

# Producer Command: Execute a Sales Plan

Use the execution playbook to focus on decision-makers and closed business.

## BEFORE YOU BEGIN

Open Producer Command.

## STEP-BY-STEP WORKFLOW

5 ACTIONS

01

### Review the daily system

Start with valuable open opportunities rather than a raw activity target.

02

### Identify decision-makers

Use decision-maker guidance before considering a lead qualified.

03

### Prepare discovery questions

Ask about existing systems, pain, approval process, timeline and next action.

04

### Choose a close path

Aim for a walkthrough, estimate, service evaluation or agreement review.

05

### Track the result

Return to Accounts or Pipeline to record real progress.

## EXPECTED RESULT

Your plan emphasizes measurable progress and qualified opportunities.

## FIELD NOTE / BEST PRACTICE

Sell business outcomes and service relationships rather than equipment quantities.

# User Account and Company Setup

Review user identity and company identity settings in the existing internal environment.

## BEFORE YOU BEGIN

Sign in with an authorized internal account.

## STEP-BY-STEP WORKFLOW

7 ACTIONS

### 01 Open User Account

Select User Account in navigation.

### 02 Review your profile

Check your name, email and available personal profile fields.

### 03 Review My Company

Find existing company identity and supported settings.

### 04 Check quote recipients

Review corporate recipient addresses and the company sales signature.

### 05 Verify AI suggestions

If AI Company Setup is available, confirm every proposed company detail before saving.

### 06 Save permitted changes

Choose Save Company Identity where your role allows.

### 07 Verify on the next quote

Reopen a quote request and confirm the intended recipients and signature.

## EXPECTED RESULT

Supported profile and company settings reflect verified information.

## FIELD NOTE / BEST PRACTICE

Some settings are restricted to internal users; independent subscribers cannot yet create workspaces.

# iPhone and Mobile: Camera vs Choose Files

Select existing photos and documents without accidentally opening only the camera.

## BEFORE YOU BEGIN

Open Field Walkthrough, Rapid Load or AI Rapid Update on your device.

## STEP-BY-STEP WORKFLOW

**6 ACTIONS****01**

### Take a new image

Select Take Photo to open the device camera when supported.

**02**

### Select an existing item

Use Upload / Choose or Choose Files to access the available library and document picker.

**03**

### Choose the file

Select a photo, screenshot, PDF or other type supported by that workflow.

**04**

### Wait for upload

Watch for progress and confirmation before closing the page.

**05**

### Handle permissions

Allow camera or file access as appropriate; browser behavior varies by device.

**06**

### Retry safely

If upload fails, check size, type and connection; verify whether a record was saved before resubmitting.

## EXPECTED RESULT

The correct file is selected and the workflow confirms whether it saved.

## FIELD NOTE / BEST PRACTICE

Choose Files is for existing files; Take Photo is the separate camera action.

## IMPORTANT / VERIFY BEFORE ACTING

A preview does not prove upload. Public demo photos stay on your device.

# Troubleshooting: Login, Uploads, Maps and Email

Resolve common issues without duplicating customers or exposing information.

## BEFORE YOU BEGIN

Use an approved browser and stable network connection.

## STEP-BY-STEP WORKFLOW

8 ACTIONS

01

### Login denied?

Confirm you have an authorized internal account. Other companies should request early access.

02

### Account missing?

Clear filters, search by name and address, then refresh before creating another record.

03

### Map pin missing?

Check address and coordinates; device location permission does not repair missing customer coordinates.

04

### File picker opens camera?

Choose the separate Choose Files / Upload control rather than Take Photo.

05

### AI update incorrect?

Review the original conversation and correct the customer record.

06

### Quote email missing?

Check the mail application's Sent folder. Save & Prepare does not automatically send.

07

### Export incomplete?

Check record limits, errors and warnings. Do not call an incomplete CSV a backup.

08

### Still blocked?

Note the page, time, steps and error text; share only redacted screenshots with an authorized administrator.

## EXPECTED RESULT

You can isolate the problem and avoid unsafe retries.

## FIELD NOTE / BEST PRACTICE

Never share passwords, customer secrets or unredacted payment information.

# Company Subscriptions and Employee Access: Current Status

Understand what the public can try today and what remains locked for outside companies.

## BEFORE YOU BEGIN

This chapter is public and requires no login.

## STEP-BY-STEP WORKFLOW

6 ACTIONS

01

### Explore the public site

Read this manual and use the interactive demo with fictional data.

02

### Request early access

Submit the Early Access form with your company and contact information.

03

### Understand the offer

The displayed \$49.99/month starter plan for up to three total seats is planned, not an active checkout offer.

04

### Wait for verified onboarding

Internal registration is restricted to approved users; early access does not create a login.

05

### Review future capabilities

Company branding, staff roles, billing and tenant isolation are still under development.

06

### Avoid unofficial payment requests

Do not assume a subscription is active without an authorized verified billing process.

## EXPECTED RESULT

You know what is available and how to request product access.

## FIELD NOTE / BEST PRACTICE

The manual describes existing internal workflows and a separate fictional demo, not a promise that all tools are available to subscribers.

## IMPORTANT / VERIFY BEFORE ACTING

Automatic paid signup, company provisioning, employee invitations and independent CRM access remain disabled.

# Security, Privacy and Accurate Sales Records

Protect customer information and keep sales records trustworthy.

## BEFORE YOU BEGIN

Follow your organization's authorization and data-handling policies.

## STEP-BY-STEP WORKFLOW

7 ACTIONS

01

### Use your own account

Never share passwords or another representative's credentials.

02

### Verify customer details

Record confirmed decision-makers and sources; avoid guessing emails or buying intent.

03

### Limit sensitive uploads

Only use photos and documents needed for a legitimate sales purpose.

04

### Review recipients

Check quote emails and exports before sending them outside the organization.

05

### Record actual milestones

A prepared quote, verbal interest or AI suggestion is not a signed agreement.

06

### Preserve evidence

Use verified notes; do not claim monitoring compatibility without technical review.

07

### Report suspicious access

Escalate exposed data or cross-company access concerns to an authorized administrator.

## EXPECTED RESULT

Your records remain useful, defensible and respectful of customer data.

## FIELD NOTE / BEST PRACTICE

Use least privilege and verify before sending; the app does not replace company security policies.

# Complete Sales Workflow: Prospect to Agreement

Follow one repeatable process from research through signed customer acceptance.

## BEFORE YOU BEGIN

Have an approved internal account and a legitimate commercial opportunity.

## STEP-BY-STEP WORKFLOW

**10 ACTIONS**

### 01 Find the prospect

Use Lead Research or an approved lead list and verify the business.

### 02 Open the account

Check for duplicates and record decision-maker, services and opportunity type.

### 03 Make contact

Use Call & Track or Log Call to document discovery.

### 04 Schedule a walkthrough

Confirm the site, decision-maker and intended outcome.

### 05 Document the site

Use Field Walkthrough for existing equipment, doors, camera regions, cabling and photos.

### 06 Prepare a quote request

Use Request Quote or Save + Prepare Bid Email, then review and explicitly send the message.

### 07 Track office review

Use Office Quotes where authorized; record estimator, status and follow-up.

### 08 Present the proposal

Discuss outcomes, service scope and recurring monitoring terms where appropriate.

### 09 Record acceptance

Update the deal only after actual customer approval or a signed agreement.

### 10 Maintain the relationship

Coordinate service, installation and follow-up through approved processes.

## EXPECTED RESULT

A traceable opportunity moves from research to documented customer acceptance.

## FIELD NOTE / BEST PRACTICE

One qualified walkthrough or signed monitoring agreement beats dozens of unqualified messages.

# Frequently asked questions

Operational answers and honest availability notes, without guesswork.

**01 Can I read this manual without logging in?**

Yes. The manual is public. Customer records and internal tools require authorized accounts.

**02 Can another security company subscribe today?**

Not yet. Early access records interest; it does not charge a card or activate a company workspace.

**03 Does Save & Prepare Bid Email send a message?**

No. It saves a handoff and offers an email draft. You must review and send it separately.

**04 Can AI automatically close a sale?**

No. AI Rapid Update does not independently mark an account won or lost.

**05 Do uploaded photos attach to the quote email?**

No. The current walkthrough email contains saved photo links rather than attached image files.

**06 How do I select an existing iPhone photo?**

Use Choose Files or Upload / Choose. Take Photo is the separate camera action.

**07 Can I export all my customer records?**

Available exports may have limits. Review counts and warnings before treating a file as complete.

**08 How do I add employees from another company?**

Independent-company employee onboarding is not yet active.

**09 Is the \$49.99 starter subscription available?**

It is a planned offer. Checkout and independent-company activation remain disabled.

**10 Can I use the interactive demo with real customers?**

Use fictional or non-sensitive data only. The demo does not save records or upload selected images.

# Glossary of sales terms

Shared definitions keep field reps, managers and office teams aligned.

**Account**

A CRM record for a business or customer, with contacts, activity and next steps.

**Field walkthrough**

A site assessment of equipment, openings, camera zones and notes.

**Qualified lead**

A prospect with verified details and a practical reason for sales contact.

**Quote handoff**

Information prepared for an estimator; not necessarily a delivered proposal.

**Takeover**

A potential service or monitoring relationship involving an existing installed system; compatibility requires review.

**Recurring revenue**

Ongoing monitoring or service value, separate from one-time installation revenue.

**Check-in**

A dated record of a call, visit or customer conversation.

**Tenant isolation**

Controls that keep different companies' records private from one another.

**Pipeline**

Opportunity stages used to track sales progress.

**Seat**

A permitted user allocation under a company subscription plan.

# Your daily close-out checklist

Print this page and keep it with your field notes.

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## QUALIFY

Decision-maker identified, service need verified, next conversation agreed.

☐

## DOCUMENT

Account profile updated; call or visit logged with accurate notes.

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## ASSESS

Existing equipment, network, doors, cameras, photos and cable routes reviewed.

☐

## HAND OFF

Quote request prepared; recipients and separate email sending confirmed.

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## ADVANCE

Proposal, appointment, signature or service action clearly scheduled.

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## VERIFY

No invented compatibility, AI capability, pricing or customer acceptance.

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