



Customer Creation

CoPilot - Web Version

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Qualification

Customer Tab Customer Qualification

Here you will input the customer's name, date of birth, email, phone number, last for of SSN, and address. The customer will need to sign at the bottom of the page and then the credit will be run. If the customer qualifies you will be able to move forward.

If you would like to try to run another member of the household you can change the needed information (name, DOB, SSN)

You can
reflect to the
customer's
device

The previous
address is added
here if needed

Customer Creation

CREATE CUSTOMER FROM SFNEW CUSTOMER

QUALIFICATION

QualifiedContactsEquipmentSummaryBillingContract

REFLECT

Reflect status: session is **Not active**

Account Type

Residential

Name

First NameLast NameEmail

MatteestSmithtestrmark@safestreets.com

SPLIT

Personal Information

Date of BirthPhone NumberSocial Sec. #

11/20/1989(855) 980-25451234

Address

Address Line 1Address Line 2City

175 W 2nd SEnter Address Line 2Rexburg

StateZip CodeTeam Leader

Idaho83440Select Team Leader

ADD PREVIOUS ADDRESS

I agree to a credit inquiry for the sole purpose of qualifying for the promotion.

✓

B (Invoice) -Qualified

The customer is qualified (B (Invoice))


OK

Contacts

Customer Creation

CREATE CUSTOMER FROM SFNEW CUSTOMER

CONTACTS

Qualified ContactsEquipmentSummaryBillingContract

Matttest Smithtest - ID: 525282 Credit Grade: B (Invoice)

REFLECT

Reflect status: session is **Not active**

Additional Customer Information

Verbal Password

Cloud

Emergency Contact Information

Contact 1

Full Name

Susietest Smithtest

Phone Number

(804) 412-0430

Contact 2

Full Name

Enter Full Name, min 6 symbols, must contain only letters or space

Phone Number

XXX-XXX-XXXX

BACK

SAVE NEXT

Once the customer has qualifying credit run the abort code and emergency contact needs to be added. The abort code is required and cannot be (test, install, alarm, etc) and must be between 3-9 characters long.

At least one emergency contact is required and the phone number must be different than the primary phone number for the customer.

Equipment

Here is where you will select the package and equipment to be installed. The pre-selected equipment will be automatically applied when the package is selected. Any additions or removals to the equipment are made here.

Nest Aware Plus is not automatically added when a package is selected, it must be added manually. Unless a second camera is added, then NAP will be automatically added to the account.

Nest Aware Plus

EQUIPMENT | Qualified ☒ | Contacts ☒ | **Equipment** | Summary | Billing | Contract











Reflect status: session is **Not active**

Package: Video Lite ☒ Nest Aware Plus ☒ Remote Access

ADT Products

Find Product By Name

All Security Automation Camera Panel Lock Detector

 5in Control Panel	Cost: \$0 points: 0.0	+ 1 -	 7in Control Panel	Cost: \$109 points: 0.0	+ 1 -
 Door/Window Contact	Cost: \$159 points: 1.0	+ 3 -	 LTE Cell Radio - Verizon	Cost: \$0 points: 0.0	+ 1 -
 Smoke Detector	Cost: \$299 points: 2.0	+ 1 -	 Shock Sensor	Cost: \$199 points: 2.0	+ 1 -
 Glass Break Detector	Cost: \$299 points: 2.0	+ 1 -	 ADT Command- Motion Detector Wireless	Cost: \$299 points: 2.0	+ 1 -
 ADT Command- Motion Detector Wireless	Cost: \$149	+ 1 -	 ADT Command- Motion Detector Wireless	Cost: \$149	+ 1 -

BACK NEXT

Item	Quantity
LTE Cell Radio - Verizon	1
ADT Sign	1
5in Control Panel	1 ✕
Door/Window Contact	3 ✕
ADT Command- Motion Detector Wireless	1 ✕
Google Doorbell Camera (White)	2 ✕
Integration Fee	1 ✕
Total	
Retail Price: \$1574	

Toggles to quickly pull up specific equipment types

Order Summary

Here is where you will update the equipment cost for any of the equipment, including the activation fee and MMR.

If you would like to split the quantity of equipment to give some at no cost and charge for the rest, you can do that from this page.

Any refund/rebate for the customer after installation will be added in the Other Options section

The customer will need to sign stating they agree to the sales order at the bottom of the page. Once the customer signs, you will be unable to make any changes to the order. For any changes needed, you will need to reach out to our Sales Support or Dealer Support Team via call or case.

Split Quantity

ORDER SUMMARY

Qualified ✓ Contacts ✓ Equipment ✓ Summary ✓ Billing Contract

Matteest Smithtest - ID: 525282 Credit Grade: B (Invoice)

REFLECT

Reflect status: session is Not active

Customer Name - Matteest Smithtest

ADT

Equipment Summary

Item	Quantity	Retail Value	Customer investment	Total Tax
ADT Command- Motion Detector Wireless	1	\$299	<input type="text" value="0"/>	\$0.0
ADT Sign	1	\$0	<input type="text" value="0"/>	\$0.0
Integrat...	1	\$100	<input type="text" value="0"/>	\$0.0
Door/Window Contact	2	\$159	<input type="text" value="0"/>	\$0.0
Door/Window Contact	<div>SPLIT QTY</div>	\$159	<input type="text" value="50"/>	\$0.0
Google Doorbell Camera (White)	2	\$349	<input type="text" value="0"/>	\$0.0
5in Control Panel	1	\$0	<input type="text" value="0"/>	\$0.0
LTE Cell Radio - Verizon	1	\$0	<input type="text" value="0"/>	\$0.0
Total Retail	10	\$1574	\$50	Loading...

Service Summary

Package	Video Lite
Base ADT Monitoring	\$63.99
Additional Addons: Nest Aware Plus	\$6
Taxes	Loading...
Total Monthly	\$69.99
Total Due	\$149

Equipment Summary

Retail Value	\$1574
Total Investment	\$149

Activation Fee

\$99

MMR

\$ 69.99

Other Options

\$0

Verbal Password

Cloud

Contact 1

Full Name

Susietest Smithtest

Phone Number

8044120430

If you receive an error and are unable to move forward, go back to the equipment list and then summary again

Billing

BILLING

QualifiedContactsEquipmentSummaryBillingContract

Matttest Smithtest - ID: 525282 Credit Grade: B (Invoice)

REFLECT

Reflect status: session is Not active

Payment Preference

Payment Method

Checking Account

Billing Cycle

Monthly

Uses for

Monitoring And Activation/Hardware

Bank Name

Routing Number

Routing number

Account Number

Account number

ADD SECOND BILLING

Payment Summary

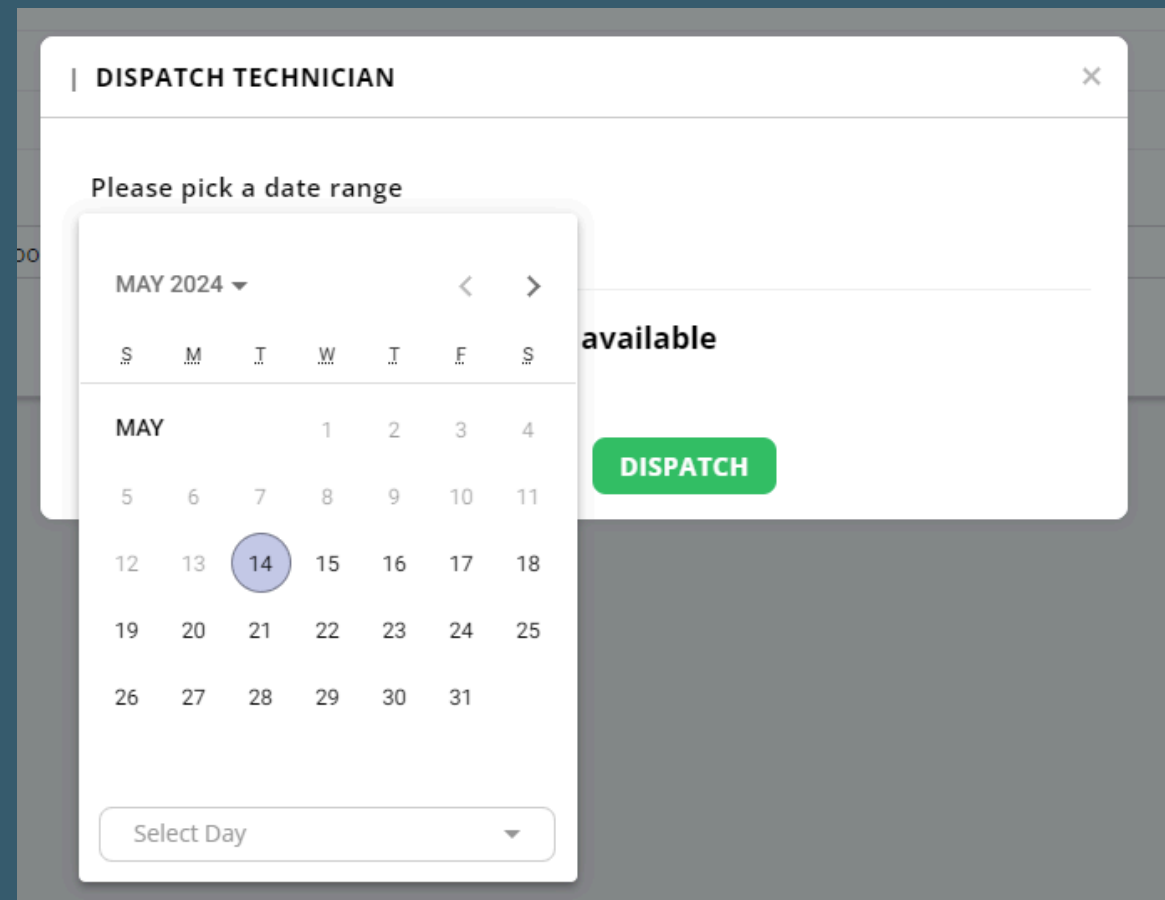
ADT MMR	\$63.99
Neste Aware+	\$6
Activation MMR	\$0
Financed Equipment MMR	\$0
Financed Taxes MMR	\$0.05
Total Financed MMR	\$0
Grand Total MMR	\$70.04

BACKNEXT

Here you will add the customer's billing to their account. Billing is needed in order to schedule the installation.

You are able to select if the customer would like their billing method used for both MMR and activation fee or just one and the other. You may also add a second form of billing from this screen.

Scheduling



DISPATCH TECHNICIAN

Please pick a date range

MAY 2024

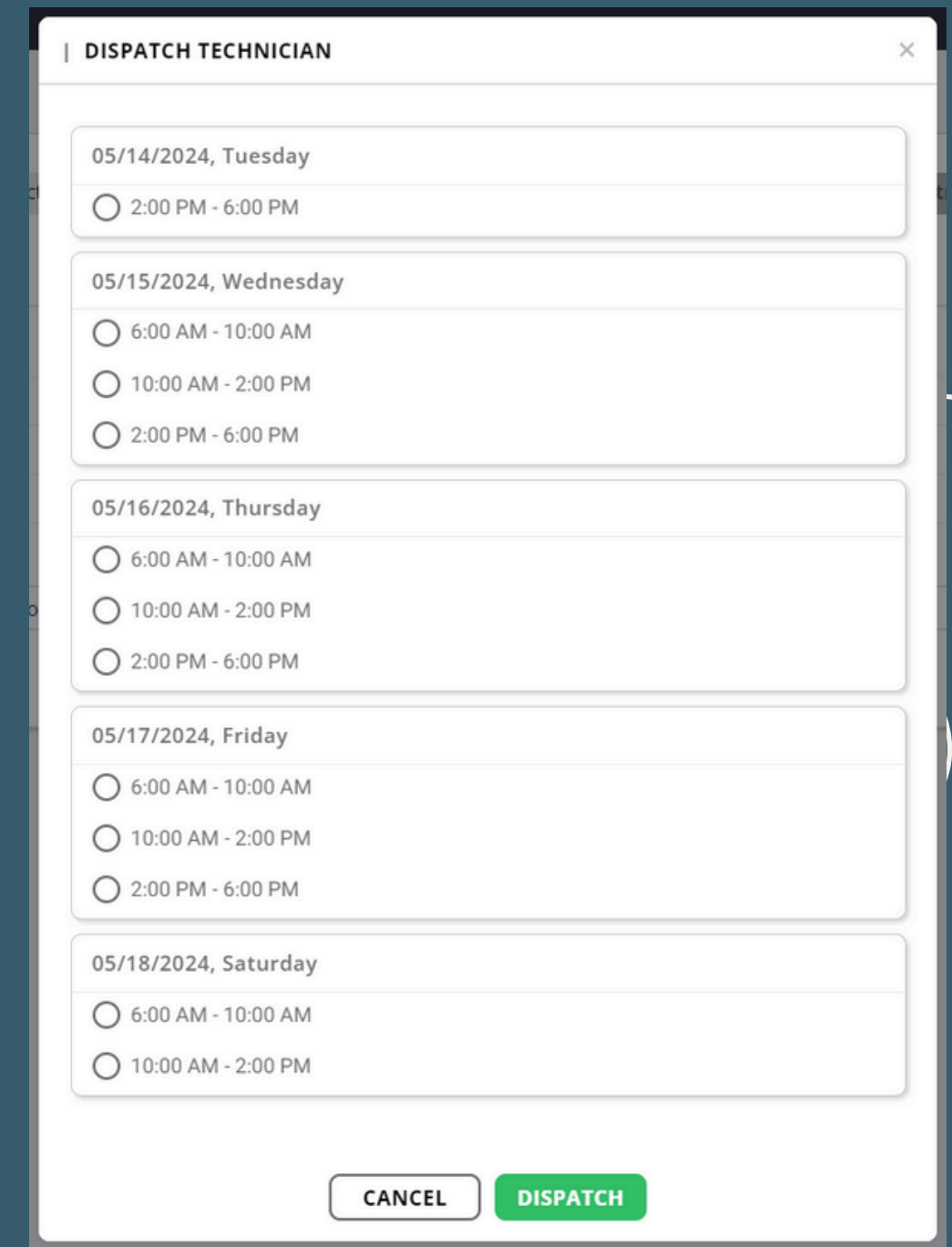
available

DISPATCH

Select Day

While this section is titled Contract, this is the page where you will schedule the customer. You are unable to send the contract from this page as it will be sent to the customer by the technician at installation.

Click Dispatch Technician and select the date range that you would like to check for availability. The system will check for availability and show you the dates and times that are currently available.



DISPATCH TECHNICIAN

05/14/2024, Tuesday

☐ 2:00 PM - 6:00 PM

05/15/2024, Wednesday

☐ 6:00 AM - 10:00 AM

☐ 10:00 AM - 2:00 PM

☐ 2:00 PM - 6:00 PM

05/16/2024, Thursday

☐ 6:00 AM - 10:00 AM

☐ 10:00 AM - 2:00 PM

☐ 2:00 PM - 6:00 PM

05/17/2024, Friday

☐ 6:00 AM - 10:00 AM

☐ 10:00 AM - 2:00 PM

☐ 2:00 PM - 6:00 PM

05/18/2024, Saturday

☐ 6:00 AM - 10:00 AM

☐ 10:00 AM - 2:00 PM

CANCEL DISPATCH



Questions?

If you have any questions or need help with CoPilot or a specific account please reach out to our support teams:

Dealer Support
P: (919) 661-3243
Cases

Sales Support
P: (804) 412-0430

