



DICE Products & Technical Documentation

Notes



DICE Corporation
Technology Park
1410 South Valley Center Drive
Bay City, MI 48706

1-800-RUN DICE
989-891-2800 | International
989-891-2801 | FAX

info@dicecorp.com

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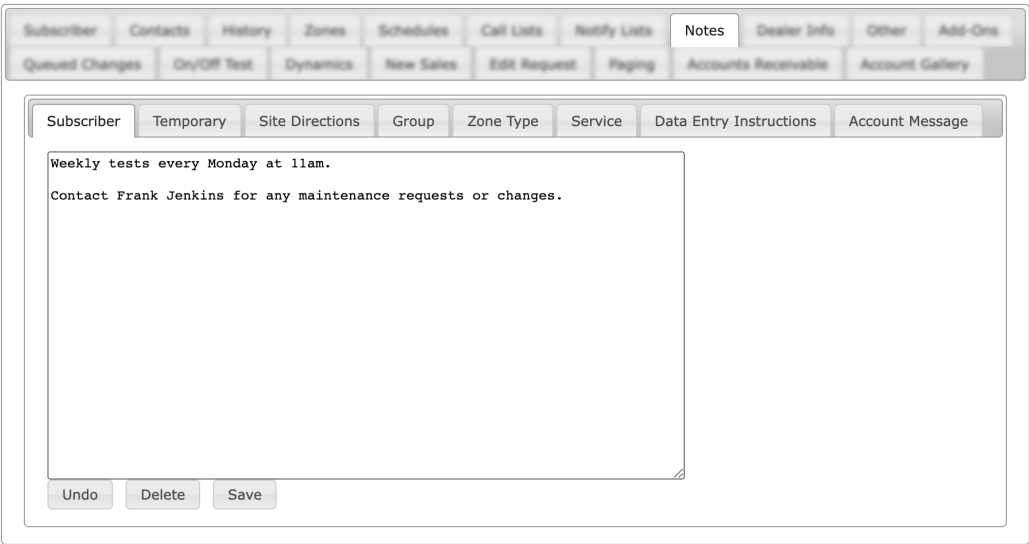
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Notes

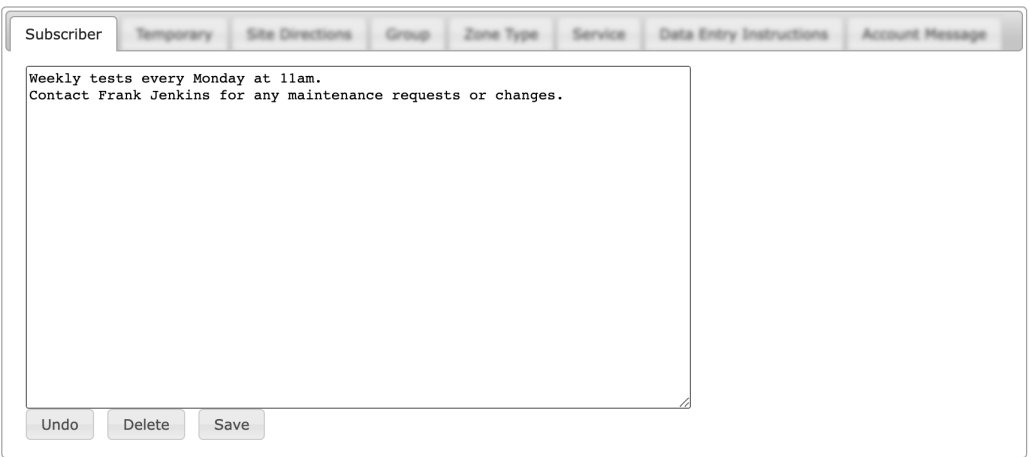
The **Notes** tab is where users assign miscellaneous information to the account (Figure 1). The information added here is organized into specific categories depending on the type of notes being added. The following documentation instructs users on how to add different types of notes to the account.



(Figure 1)

Subscriber

The **Subscriber** tab is where users manage general notes and information on the account (Figure 2). These notes appear on service tickets, alarm tickets, and in Monitoring.



(Figure 2)

Users can interact with the displayed Subscriber notes via the available button options. These options are defined below.

Option	Function
Undo	Removes any previously written text that has not yet been saved from the note field.
Delete	Removes <i>all</i> text currently written within the note field.
Save	Preserves any changes made to the note field.

Perform the following steps to add subscriber notes.

- 1. Input all desired information into the available text field.
- 2. Select **Save** to complete assigning the note.

Repeat the above steps to add additional information as necessary.

Temporary

The **Temporary** tab is where users manage temporary notes on the account (Figure 3). Temporary notes are those that exist on the account for a defined period of time. Typically, temporary notes are used to notify users of a particular event or schedule change on the account that only lasts for a predefined period.



(Figure 3)

Users can interact with the Temporary table via the available options. These options are defined below.

Option	Function
Add	Allows users to create a new temporary note. More information on adding temporary notes can be found below.
Edit	Allows users to update existing temporary notes.
Delete	Removes the selected note from the account.
Reload	Refreshes the table to display up-to-date information.

Add

Selecting Add from the toolbar displays the **Edit Note** dialog box (Figure 4).

(Figure 4)

Perform the following steps to add temporary notes.

1. Select the date the note should *begin* displaying from the **Start Date** calendar tool.
2. Input the time on the start date the note should *begin* displaying into the **Start Time** field.
 - For example: if **0700** is input into this field, the note will begin displaying at 7am on the selected start date.
3. If applicable, select the date the system should notify contacts to review the note from the **Follow Up Date** calendar tool.
 - Contacts will be defined within step 8.
4. If applicable, input the time on the follow up date the system should notify contacts into the **Follow Up Time** field.
5. Select the date the note should *cease* displaying from the **End Date** calendar tool.
6. Input the time on the end date the note should *cease* displaying into the **End Time** field.
 - For example: if **0700** is input into this field, the note will stop displaying in applicable views at 7am on the end date.
7. If applicable, select the date the system should email contacts to review the note from the **Email Date** calendar tool.
8. If applicable, input the desired contact list ID the system should email on the Email Date into the **Notify List** field.
 - Users can also select the magnifying glass icon to search for and select a Notify List.
 - For more information on creating and managing Notify Lists within Data Entry, see the documentation available [here](#).
9. If applicable, select the **Send Daily** option.
 - If selected, the follow-up email will be sent each day *after* the Email Date until the defined end date and time elapses.
10. If applicable, select the **Include Note** option.
 - If selected, the note text defined in the next step is included within the follow-up email.
11. Input a brief explanation or description of the purpose of the temporary note into the **Note Text** field.
12. Select **Save** to complete creating a temporary note on the subscriber.

Repeat the above steps as necessary to create additional temporary notes. Once saved, the note will appear on applicable screens throughout Matrix until its end date and time elapses.

Site Directions

The **Site Directions** tab is where users manage notes relating to special instructions technicians should follow when servicing the site (Figure 5).

Subscriber Temporary **Site Directions** Group Zone Type Service Data Entry Instructions Account Message

Panel located in the kitchen. Serial Number: 134dfq23sct345

Undo Delete Save

(Figure 5)

Users can interact with the Site Directions notes via the available button options. These options are defined below.

Option	Function
Undo	Removes any previously written text that has not yet been saved from the note field.
Delete	Removes <i>all</i> text currently written within the note field.
Save	Preserves any changes made to the note field.

Perform the following steps to add site direction notes.

1. Input all desired information into the available text field.
2. Select **Save** to complete assigning the directions.

Repeat the above steps to add additional information as necessary.

Group

The **Group** tab displays read-only notes assigned to the subscriber's group (Figure 6). Groups are created and managed on the Dealer level within Matrix. For more information on managing groups, see the documentation available [here](#).

Subscriber Temporary Site Directions **Group** Zone Type Service Data Entry Instructions Account Message

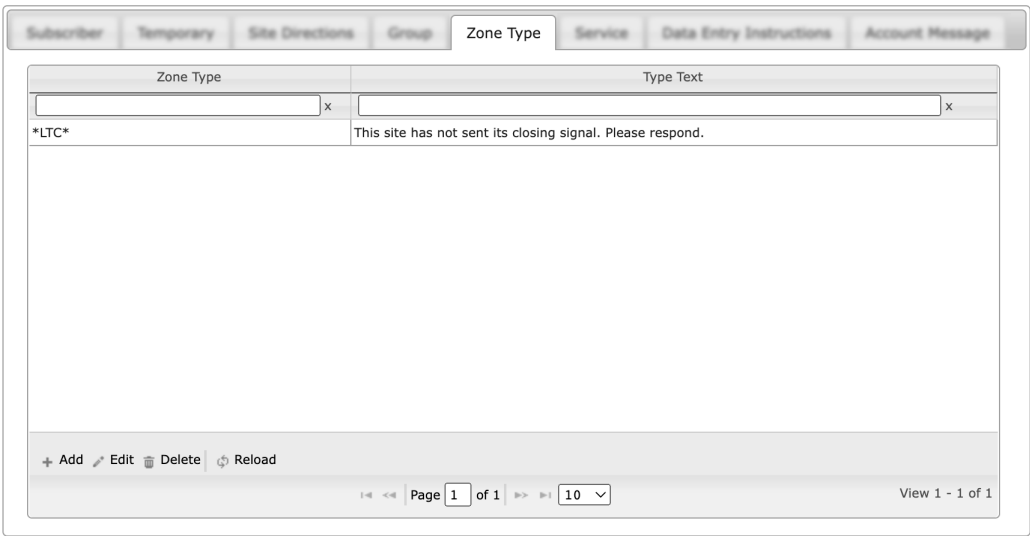
Group Permanent Notes

Group Temporary Notes

(Figure 6)

Zone Type

The **Zone Type** tab is where users manage notes assigned to predefined event types within the system (Figure 7). These notes will display within Monitoring when operators are handling the applicable event received from the subscriber's account.



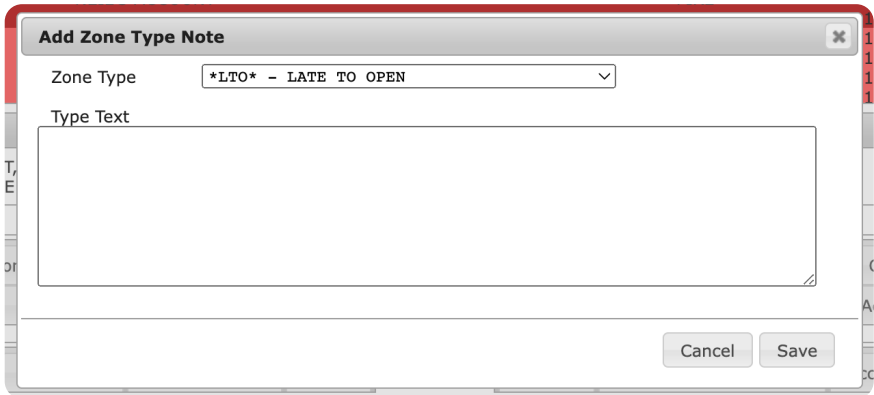
(Figure 7)

Users can interact with the Zone Type table via the available toolbar options. These options are defined below.

Option	Function
Add	Allows users to create new zone type notes. More information on adding zone type notes can be found below.
Edit	Allows users to update existing notes.
Delete	Removes the selected note from the account.
Reload	Refreshes the table to display up-to-date information.

Add

Selecting Add from the toolbar will display the **Add Zone Type Note** dialog box (Figure 8).



(Figure 8)

Perform the following steps to add zone type notes.

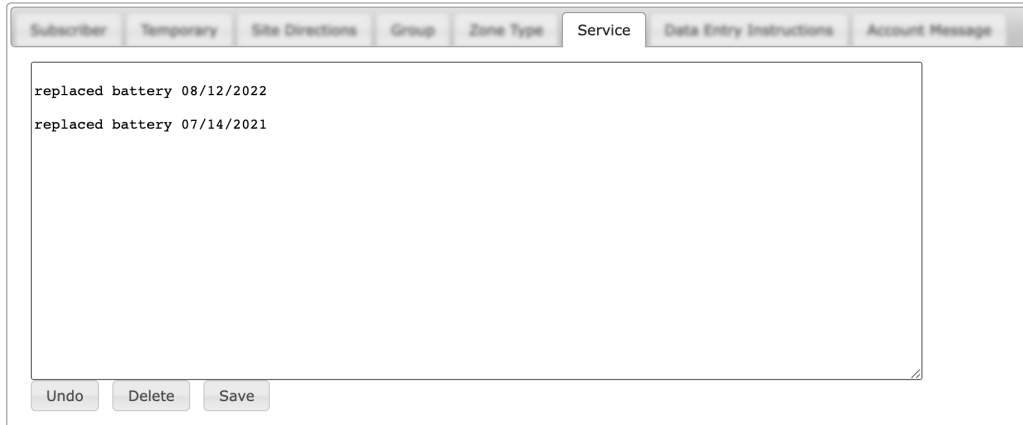
1. Select the desired alarm signal event type from the **Zone Type** dropdown.
 - This is the event operators will be handling when the note displays.
2. Input any information that operators should be aware of when handling the selected event type into the **Type Text** field.

3. Select **Save** to complete adding the Zone Type note to the subscriber.

Repeat the above steps to add additional zone type notes to the account.

Service

The **Service** tab is where users manage notes relating to services performed on the subscriber's equipment (Figure 9).



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Subscriber, Temporary, Site Directions, Group, Zone Type, Service (which is the active tab), Data Entry Instructions, and Account Message. The main area of the 'Service' tab contains a large text input field. Inside this field, there are two lines of text: 'replaced battery 08/12/2022' and 'replaced battery 07/14/2021'. Below the text field, there are three buttons: 'Undo', 'Delete', and 'Save'.

(Figure 9)

Users can interact with the Service notes via the available button options. These options are defined below.

Option	Function
Undo	Removes any previously written text that has not yet been saved from the note field.
Delete	Removes <i>all</i> text currently written within the note field.
Save	Preserves any changes made to the note field.

Perform the following steps to add service notes.

1. Input all desired information into the available text field.
2. Select **Save** to complete assigning the notes.

Repeat the above steps to add additional information as necessary.

Data Entry Instructions

The **Data Entry Instructions** tab is where users manage notes relating to how information should be updated or added to the account within Matrix Data Entry (Figure 10).

(Figure 10)

Users can interact with the Data Entry Instructions notes via the available button options. These options are defined below.

Option	Function
Undo	Removes any previously written text that has not yet been saved from the note field.
Delete	Removes <i>all</i> text currently written within the note field.
Save	Preserves any changes made to the note field.

Perform the following steps to add data entry instructions.

1. Input all desired information into the available text field.
2. Select **Save** to complete assigning the notes.

Repeat the above steps to add additional information as necessary.

Account Message

The **Account Message** tab is where users manage note text that automatically displays when viewing the subscriber within Data Entry or Caller Assistance (Figure 11).

(Figure 11)

Users can interact with the Account Message notes via the available button options. These options are defined below.

Option	Function
Delete	Removes <i>all</i> text currently written within the note field.
Save	Preserves any changes made to the note field.

Once saved, the applied message will display on the account under the **Messages** header (Figure 12).

Select Subscriber

Account Number

KATE01

13

Store Number

001234

Company Name
Testing Stuff Please

Dealer
ERIK

ERIKS DEALER NAME

Address

1699

Midland Rd

Account History

2022-01-18 09:49:50

AUDIT

2022-01-18 09:49:50

AUDIT

2022-01-18 09:49:50

TMPNOT

2022-01-18 08:00:06

AUDIT

2022-01-17 08:00:00

AUDIT

2022-01-14 08:00:05

AUDIT

2022-01-13 14:08:51

SERVIC

Pending Alarms(8 of 9)

WARNING

OPR - DJC NOT RESPONDING

!!!!

16:25:35

WARNING

OPR - JT NOT RESPONDING

!!!!

14:43:55

WARNING

OPR - JT NOT RESPONDING

!!!!

12:39:03

RSI9201

JT RSI VIDEO TEST 1

BURG

15:13:17

JTTEST01

JT TEST ACCOUNT 1

BURG

15:35:58

KATE01

Testing Stuff Please

BURG

10:23:08

WARNING

OPR - DJC NOT RESPONDING

!!!!

16:25:35

Messages

ACCT HAS D/E INST, SITE DIR, SUB & TEMP NOTES
ACCOUNT MESSAGE: Remember to confirm with Jerry prior to calling.

(Figure 12)