



Alarm Portal User Guide

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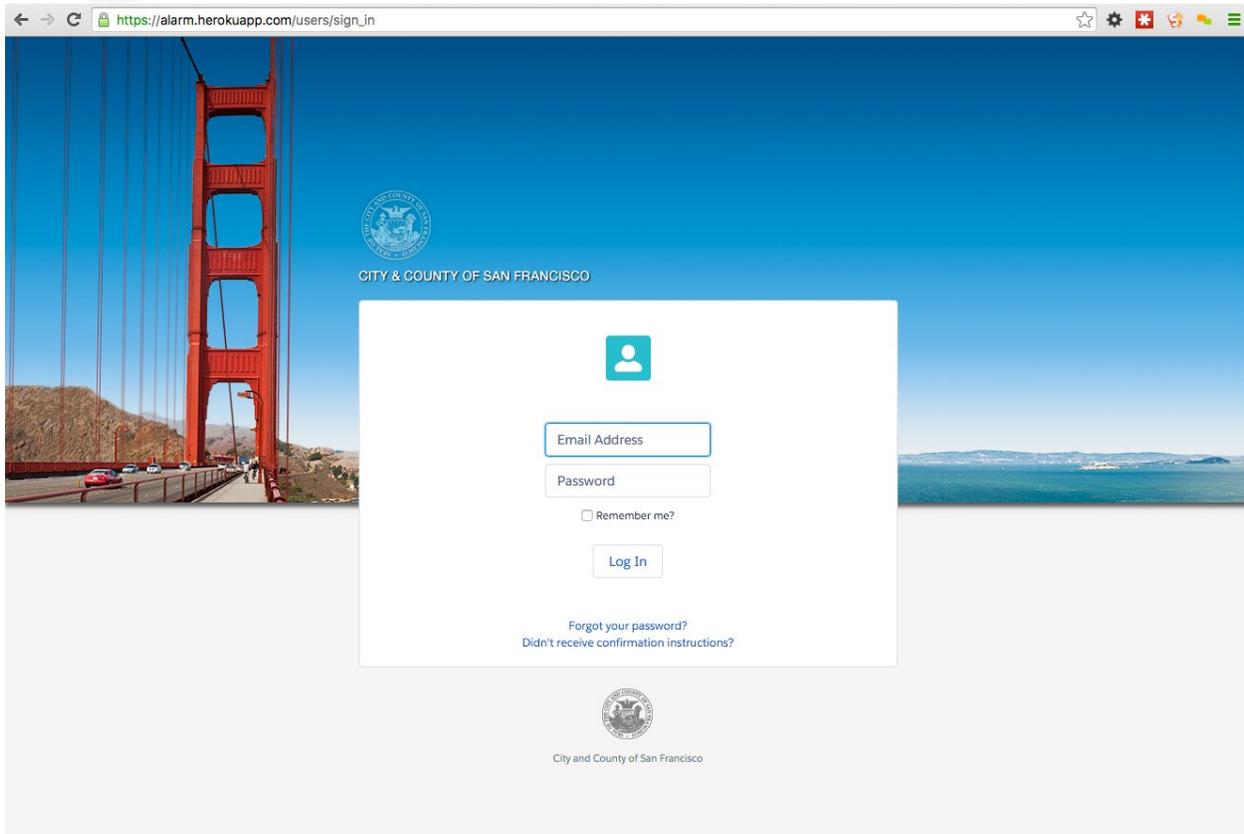
General Portal Information

For general information regarding the Alarm License Process and Portal, go to <http://www.sftreasurer.org/business/taxes-fees/emergency-alarm-and-false-alarm-information>

Logging In and General Navigation

To login to the portal:

1. Go to <http://www.sftreasurer.org/business/taxes-fees/emergency-alarm-and-false-alarm-information> and select the “Alarm Company Self Service Portal” link.
2. Enter the email and password associated with your account. You should have previously received this information at the email address we have on file for your alarm user contact. Please contact alarm.program@sfgov.org if you do not know the email which this was sent to.



3. Click Log In
4. Once logged in you will be taken to the Dashboard page which has summary information regarding your alarm account, licenses, and most recent transactions.



The screenshot shows a user's account dashboard. On the left is a dark blue navigation sidebar with icons and labels for Dashboard, Account, Licenses, Statements, Portal Instruction's and FAQ's, Admin, and Log Out. At the bottom of the sidebar, it says 'Powered By APS'. The main content area has a header with the 'ACCOUNT Dashboard' and a lock icon. Below the header are three summary cards: 'Total Balance Owed \$233,709', 'Residential Licenses 2530', and 'Business Licenses 2275'. To the right of these cards is a user profile section with fields for Email and Phone. The main content area is divided into two sections: 'Recent Statements' and 'Recent Licenses'. 'Recent Statements' is a table with columns for Statement #, Year, Status, Type, and Balance. 'Recent Licenses' is a table with columns for LICENSE #, TYPE, BUSINESS NAME, CUSTOMER, LOCATION, and CREATED. On the right side of the dashboard, there are two action boxes: 'Create Statement Request' with buttons for '+ 2015' and '+ 2016', and 'Add a License' with a '+ Add new License' button.

ACCOUNT Dashboard

Total Balance Owed: \$233,709

Residential Licenses: 2530

Business Licenses: 2275

Recent Statements

Statement #	Year	Status	Type	Balance
S-150147077	2016	Ready for Download	Permit-Alarm Companies	\$160
S-150147076	2016	Payment Due	Permit-Alarm Companies	\$232,980
S-150147074	2015	Ready for Download	Permit-Alarm Companies	\$569

Viewing 3 of 3 - View All

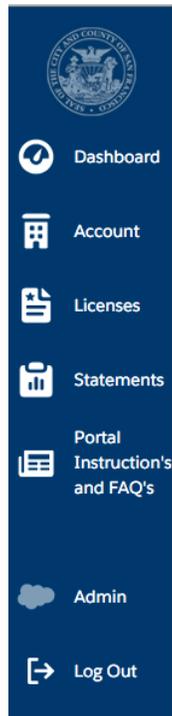
Recent Licenses

LICENSE #	TYPE	BUSINESS NAME	CUSTOMER	LOCATION	CREATED
A15-146088	Home		MOUSE, MICKEY	1255 MISSION ST, SAN FRANCISCO, CA ...	11/20/15
A15-146084	Home		MOUSE, MINNIE	1255 MISSION ST, SAN FRANCISCO, CA ...	11/20/15
A15-146085	Business	WALT DISNEY GIFT SHOP	MOUSE, MICKEY	1800 MISSION ST, SAN FRANCISCO, CA ...	11/20/15
A15-146083	Home		MOUSE, MICKEY	1287 MISSION ST, SAN FRANCISCO, CA ...	11/20/15

Create Statement Request
Select the year you want to create a statement for.
+ 2015 + 2016

Add a License
To create a new License, select "Add new License."
+ Add new License

5. Use the General Navigation tabs on the left side of the screen to navigate the portal.



Creating a New License

1. Navigate to 1 of the 3 places where you can "Add New License". Click "Add new License".



- Dashboard Tab

ACCOUNT: [blurred] Dashboard 🔒

Total Balance Owed: \$1,770

Residential Licenses: 906

Business Licenses: 616

Email: [blurred]@jo.com
Phone: [blurred]

Recent Statements

Statement #	Year	Status	Type	Balance
S-150147058	2015	Paid	Permit-Alarm Companies	\$0
S-150147057	2015	Payment Due	Permit-Alarm Companies	\$45
S-150147054	2015	Payment Due	Permit-Alarm Companies	\$1,725

Viewing 3 of 3 • [View All](#)

Recent Licenses

LICENSE #	TYPE	BUSINESS NAME	CUSTOMER	LOCATION	CREATED
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[+ Add new License](#)

Create Statement Request
Select the year you want to create a statement for.
[+ 2015](#) [+ 2016](#)

Add a License
To create a new License, select "Add new License."
[+ Add new License](#)

- Account Tab

ACCOUNT GENERATOR

Licenses

[+ New License](#)

LICENSE #	STATUS	TYPE	BUSINESS NAME	CUSTOMER	LOCATION	CREATED
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- License Tab

Licenses

1525 Total Licenses

[Export Licenses to Excel](#) [+ New License](#)

search [go](#)



2. Enter all license fields as seen below.

 [LICENSES](#) > **New License**

General Information

* Type of License Business	* Customer Name Bob Jones
* Name of Business Test Company Name	Care of Name Office Admin
Email test@test.com	* Activation Date 11/20/2015
Business Phone 555-555-1212	

License Address

Location Address		Mailing Address		Same as Location Address? <input checked="" type="checkbox"/>	
* Street Number 1	Street Number Suffix A	Street Address	Suite		
* Street Name Market	Street Type ST	City			
Room # 500	Room Suffix B	State	Zip		
* City SAN FRANCISCO					
* State CA	* Zip 94102				

or [cancel](#)

Tip: Understanding Location Specific Fields

Street Number: Only enter numeric characters. Example enter “1” if address is 1 Market ST.

Street Number Suffix: If address is 1A Market St, enter “A” in this box. If there is no street number suffix do not enter a value in this field.

Street Name: Enter just the name of the street for example enter “Market”.

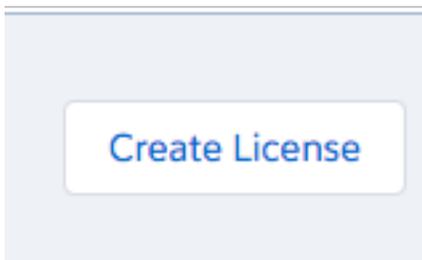


Street Type: Enter just the street type such as ST, AV, etc. A list of available options will appear when you start typing.

Room #: Use this field to enter a room #, apartment #, suite # etc.

Room Suffix: Use this field to enter a room suffix. An example would be if the address is APT 3A you would enter “A” in this field.

3. Click the “Create License” button.



4. Optional - If an existing license is found in the database with the same name and address you will see a screen with the potential match. If you see a license with an exact address match including room #, suffix, etc. choose this address to transfer the license to your account. If you do not see an exact address match choose the option “Use Entered Information” to create a brand new license.

CRIMEWATCH > LICENSES
Location Matches
1 Possible Match

Select an Address Match

1 A MARKET ST, 500 A
SAN FRANCISCO, CA 94101

Requested License Info

Type:	Business
Business Name:	TEST BUSINESS
Customer:	TEST TEST
Location:	1 MARKET ST SAN FRANCISCO, CA 94102
Mailing:	None Supplied

Use Entered Information



- Next you will see a confirmation page where you can choose to create another new license or finish creating licenses. Choosing the “I am done creating new Licenses” option will take you back to the main dashboard. Here you can see recently created licenses, create a new statement , Log Out of the portal, etc.

Pending: TEST BUSINESS

STATUS	TYPE	CREATED DATE	ACTIVATION DATE	CANCELLED DATE
	Business	Not Provided	11/20/2015	Still Active

License was successfully created

+ Would you like to create a new license?

< I am done creating new Licenses.

BOB JONES
Email: test@test.com
Phone: N/A

Location Address
1 A MARKET ST, 500 A
SAN FRANCISCO, CA 94101

Mailing Address

- If you'd like to see a comprehensive list of all licenses created today, navigate to the licenses tab which will show you a list of licenses sorted by created date with newest licenses at top.

LICENSE #	STATUS	TYPE	BUSINESS NAME	CUSTOMER	LOCATION	CREATED
A15-146090	Unregistered	TES BUSINESS	TEST, TEST	TEST, TEST	1 MARKET ST, SAN FRANCISCO, CA 94101	11/21/15
A15-146089	Unregistered	TEST BUSINESS	JONES, BOB	JONES, BOB	1 A MARKET ST, SAN FRANCISCO, CA 94...	11/20/15



Deactivating a License

You can deactivate a license from two places. The first place is from the Licenses list.

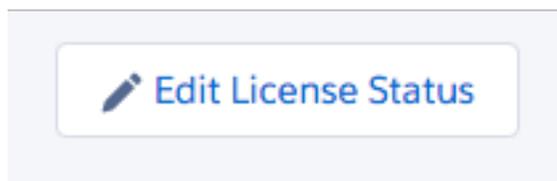
1. Navigate to the license tab
2. Use the search and sort options at the top of the page to find the licenses you would like to deactivate.
3. Choose the status drop down and select "Inactivated", then enter the inactivation/cancelled date and press Save.

A screenshot of a license deactivation form. It contains a text input field with the license number "A15-146071", a dropdown menu currently set to "Inactivated", a date input field with "11/20/2015", a blue "save" button, and a "cancel" button.

4. You will see a lock icon in place of the status which indicates a change is being processed. Refreshing the page after a few seconds will remove the lock icon indicating the change has been processed.

The second place a license can be deactivate is from a license detail page.

1. Click on the license number of the license you would like to deactivate.
2. Click the "Edit License Status" button





3. Select status of Inactivated, enter the Cancelled Date, and press the “Update License” button.

Edit License Status Information

Status
Inactivated

Cancelled date

Update License or cancel

Prev	November 2015						Next
Su	Mo	Tu	We	Th	Fr	Sa	
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30						

Downloading a List of all of my Licenses

1. Navigate to the License tab
2. Click the “Export Licenses to Excel” button.



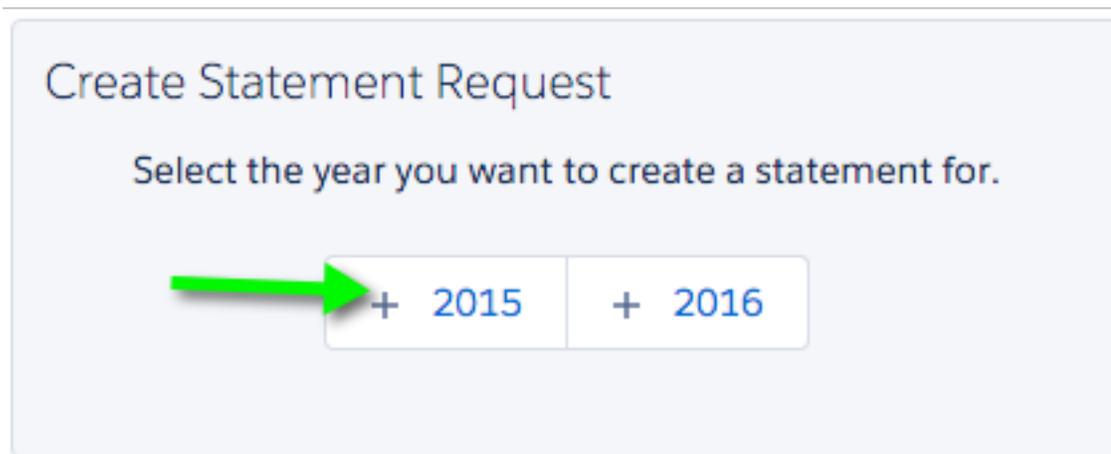
3. Wait a few seconds for the excel file to be downloaded to your computer.

Creating Statements

You can create statements from either the Statement page or Dashboard page by clicking an available registration year for which you’d like to create a statement. Clicking the current year will allow you to generate statements for licenses that have not been billed for that year. Selecting the next year option will allow you to generate a full annual renewal statement for all current licenses on your account.



1. Click the year for which you'd like to create a statement.



2. By default, all licenses that have not been billed for that year will appear as selected to be included on the statement.

<input checked="" type="checkbox"/>	LICENSE #	STATUS	TYPE	BUSINESS NAME	CUSTOMER	LOCATION
<input checked="" type="checkbox"/>	A15-146090	Unregistered		TES BUSINESS	TEST, TEST	1 MARKET ST, SAN FRANCISCO, CA 94101
<input checked="" type="checkbox"/>	A15-146089	Unregistered		TEST BUSINESS	JONES, BOB	1 A MARKET ST, SAN FRANCISCO, CA 94...

Search Licenses
-- Filter Status --
search
[Apply Search](#)

Total Licenses
2

Submit Statement Request
By clicking "Submit Statement Request" you are authorizing the San Francisco Tax Collector to bill and collect on all Licenses submitted.
[Submit Statement Request](#)

Note the statement is currently in a status of "Open Request". Additional licenses can be added/removed by adding a new license in the system or by deactivating existing license.



3. If you want to pay for a license, but just don't want to pay at this time you can uncheck the license, which will remove it from the statement for this one time. Next time you go to create a statement the unselected license will re-appear as an option to select.
4. Once you are comfortable with the licenses selected for inclusion on the statement, press the "Submit Statement Request" button. Note, that once this button is pressed no changes can be made to the statement.

Submit Statement Request

By clicking "Submit Statement Request" you are authorizing the San Francisco Tax Collector to bill and collect on all Licenses submitted.

[Submit Statement Request](#)

5. You will now see a screen showing the statement request is being processed. For small requests up to 100 licenses, this process will normally finalize in 1 -2 minutes.



STATEMENTS
Pending Processing

Statement is Pending in Salesforce

The statement creation process can take several minutes to complete processing. When completed this page will show the completed statement with a link to download a printable PDF version to send in with payment. If you logout or navigate away from this page, you can find the completed statement ready for download by clicking on the Statements tab or Dashboard tab.

- When the statement is finished processing you will see the statement appear with a status of Ready for Download. If you have navigated away from the screen while processing was taking place you can find the statement ready for download on the Dashboard or Statement Page.

STATEMENTS
S-150147079

STATUS: Ready for Download

DUE DATE: 2015-12-25

STATEMENT TYPE: Permit-Alarm Companies

RESIDENTIAL: 0

BUSINESS: 2

LICENSE	YEAR	TOTAL	PAID	DUE
A15-146089	2015	\$17	\$0	\$17
A15-146090	2015	\$17	\$0	\$17

Statement PDF
Download Statement PDF

Financial Information

TYPE	COST
Total Due	\$34
Fees	\$0
Payments	\$0
Balance	\$34



Downloading Statements

7. Click the “Download Statement PDF” link to download a printable copy of the statement which can be mailed in with payment.



8. After downloading the statement, you can see the statement with a status of “Payment Due” on the Dashboard or Statement page. Once payment is received and processed this status will update to “Paid” and all licenses associated will be moved to a “Registered” status.

Recent Statements					
Statement #	Year	Status	Type	Balance	
S-150147079	2015	Payment Due	Permit-Alarm Companies	\$34	
S-150147071	2015	Payment Due	Permit-Alarm Companies	\$769	