Quick Start Guide

Setting up your first fire alarm inspection, start to finish.

Thank you for taking the free trial.

CodeGreen ITM was built out of real fieldwork rather than from a whiteboard. Every screen in this guide exists because we needed it on a job, and the time it saves compounds as you go. An AHJ entered once is there on every property afterwards. A panel configured once is waiting for you next year. What feels like setup today is work you never repeat.

Work through the steps below and you will see it for yourself. If anything does not make sense, ask us. We are always here to help.

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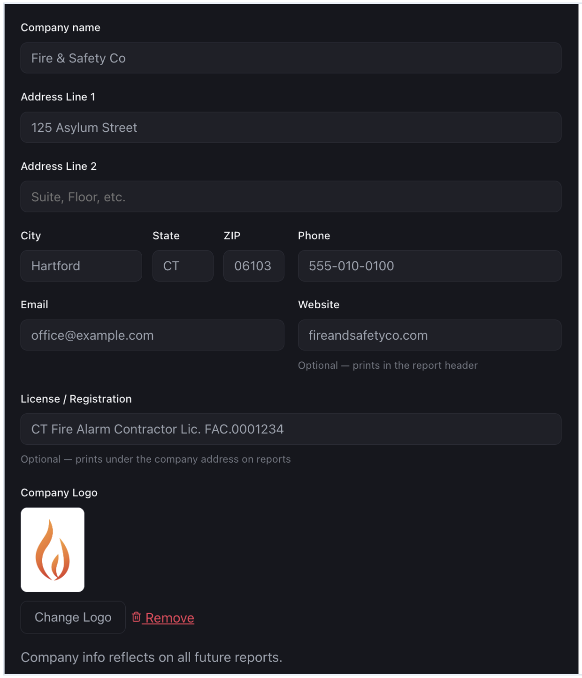
Start in the office, not on the phone.

The mobile app only shows what the office has set up: properties, fire alarm systems, devices and scheduled inspections. If your technicians open the app before steps 1 to 7 are done, there is nothing there for them to inspect. Do the setup below on a computer first, in this order. Each step feeds the next.

1. Your company information, logo and services

Go to **Settings > General**. Everything at the top of this page prints on every report you send, so get it right before your first inspection.

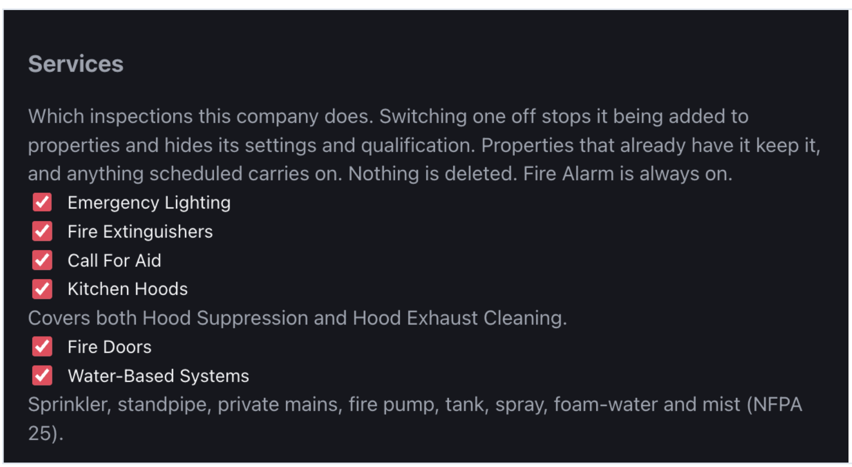
1. Enter your **Company name**, **address**, **Phone**, **Email** and **Website**.
2. Enter your **License / Registration** number. It prints under your company address on reports.
3. Under **Company Logo**, click **Click to upload logo** and choose your logo (PNG, JPG or SVG, up to 2 MB). It appears at the top of every report.



Settings > General: company information and logo.

Then scroll all the way to the bottom of the same page, to **Services**:

4. **Tick** every inspection service your company offers. Fire Alarm is always on.
5. **Untick** every service you do not offer. It can no longer be added to a property, and its settings pages and its qualification checkbox disappear, so nobody has to work around services you never perform.
6. Click **Save**.



Settings > General, bottom of the page: tick what you offer.

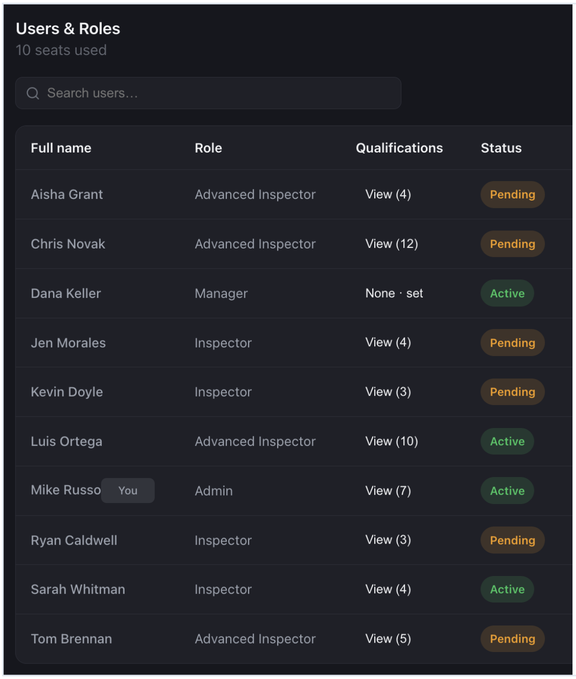
> Unticking a service deletes nothing, and you can tick it again at any time.

2. Add your people and set their qualifications

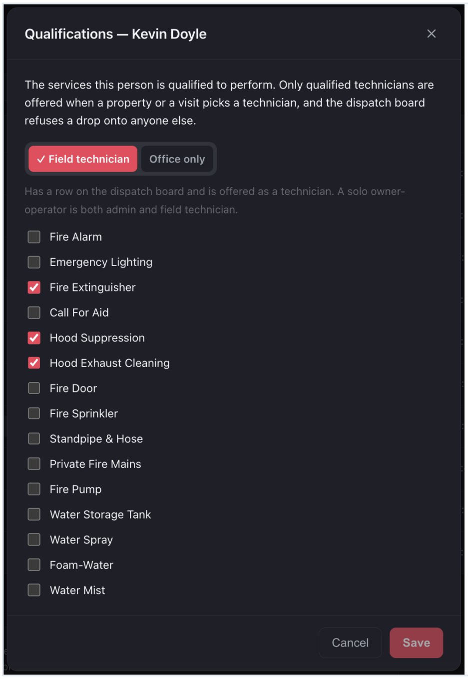
Go to **Settings > Users & Roles**.

1. Click **Invite new user**, enter their name and email, pick a role and click **Send invite**. **Inspector** and **Advanced Inspector** work in the mobile app; **Admin** and **Manager** also use the office. Each person gets an email to set their password.

2. In the **Qualifications** column, click each person and tick **only the services that person is certified to do**. Include yourself if you inspect.



Settings > Users & Roles: the Qualifications column.



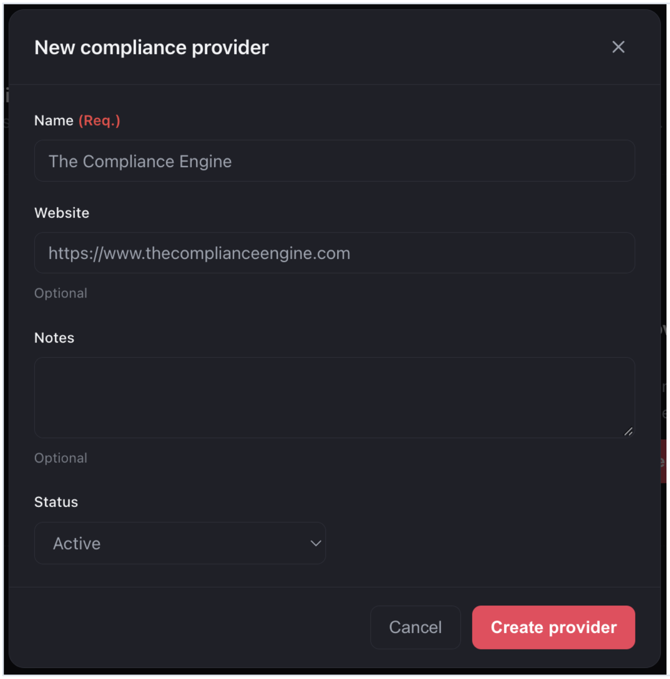
A technician qualified for fire extinguishers and hoods, but not fire alarms.

> **Why qualifications matter.** A technician certified to service fire extinguishers is not necessarily certified to inspect fire alarms. Qualifications are how the system knows the difference. When you schedule a fire alarm inspection, only people qualified for Fire Alarm are offered, and on the phone a technician can only book services they are qualified for. Nobody is accidentally given an inspection they are not certified to perform.
>
> **During your free trial you can add up to 5 users in total.** A paid plan from **Settings > Billing** has no user limit.

3. Add your third-party compliance provider (only if you use one)

Some jurisdictions require inspection reports to be filed through a service such as **The Compliance Engine**. If any of yours do, add that provider now, because the AHJ in the next step has to point at it.

1. Go to **Settings > Third-Party Compliance** and click **Add provider**.
2. Enter the provider's **Name** (and **Website** if you like), then click **Create provider**.



Settings > Third-Party Compliance > Add provider.

> No third-party filing in your area? Skip this step.

4. Add your AHJ

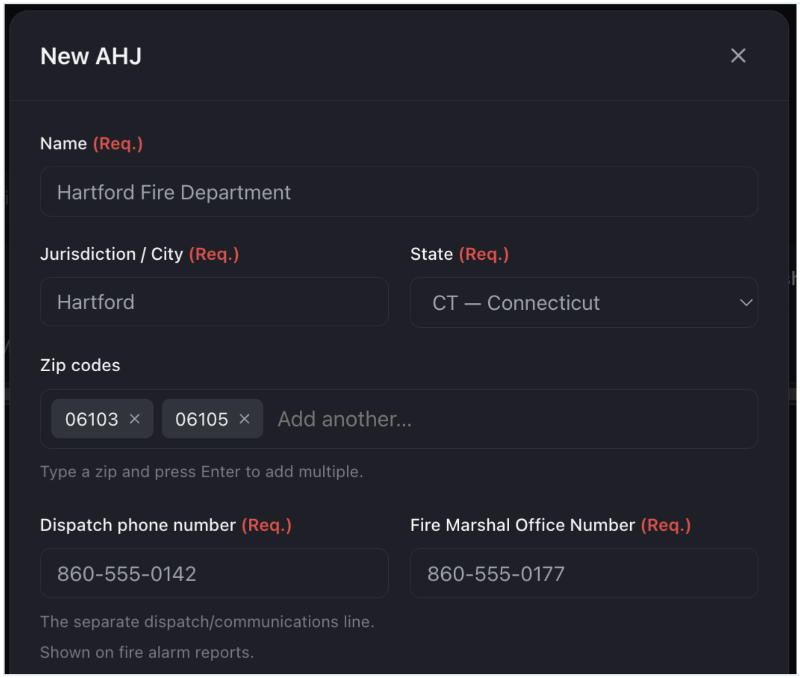
The Authority Having Jurisdiction is the fire department or fire marshal's office for the area. Go to **Settings > AHJs** and click **Add New AHJ**.

1. Enter the **Name**, the **Jurisdiction / City**, the **State** and its **ZIP codes** (type a ZIP and press Enter to add each one).

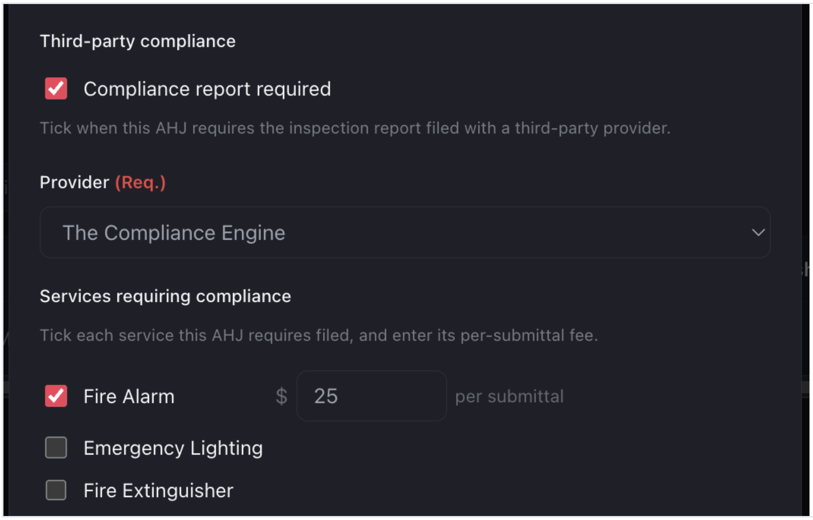
2. Enter the **Dispatch phone number** (the line a technician calls to put a system on test) and the **Fire Marshal Office Number**.

3. **If you added a compliance provider in step 3** and this jurisdiction requires it: tick **Compliance report required**, choose the **Provider**, then tick each service the AHJ requires filed and enter the **per-submittal fee** the provider charges for it.

4. Click **Create AHJ**.



Add New AHJ: name, city, state, ZIP codes and phone numbers.



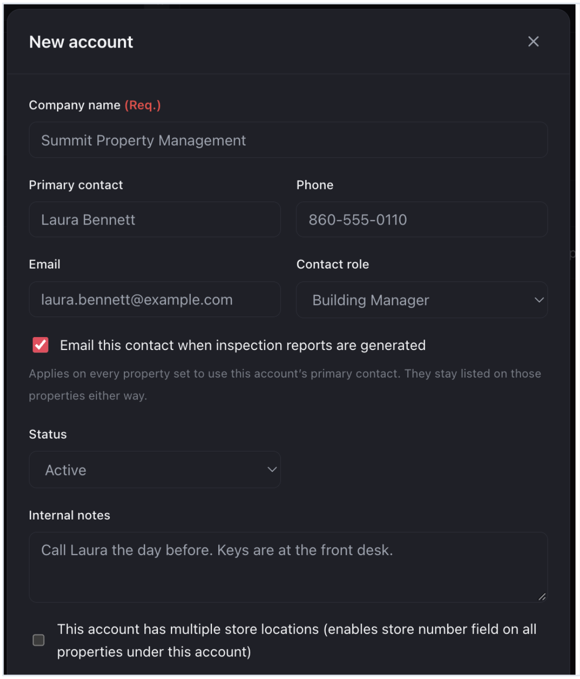
The compliance section of the same form: provider, service and fee.

> **Be exact with the city, state and ZIP codes.** When you add a property, CodeGreen offers the right AHJ automatically by matching the property's address: the state first, then the ZIP code and city. A misspelled city or a missing ZIP code means the AHJ is not offered for that property.
>
> **Compliance fees are entered once, here.** They flow onto every property under this AHJ, and if the provider changes a fee, updating it here updates every property.

5. Create the customer account

An account is your customer: the company or owner you do the work for. Every property belongs to an account. Open **Accounts** in the sidebar and click **New account**.

1. **Company name** (required): the customer as it should appear on reports.
2. **Primary contact**, **Phone**, **Email** and **Contact role**: your main person at the customer. Leave **Email this contact when inspection reports are generated** ticked if they should receive every report.
3. **This account has multiple store locations**: tick it for a chain. Every property under the account then gets a store number.
4. **Internal notes**: anything the office should know. Customers never see it.
5. Click **Create account**.



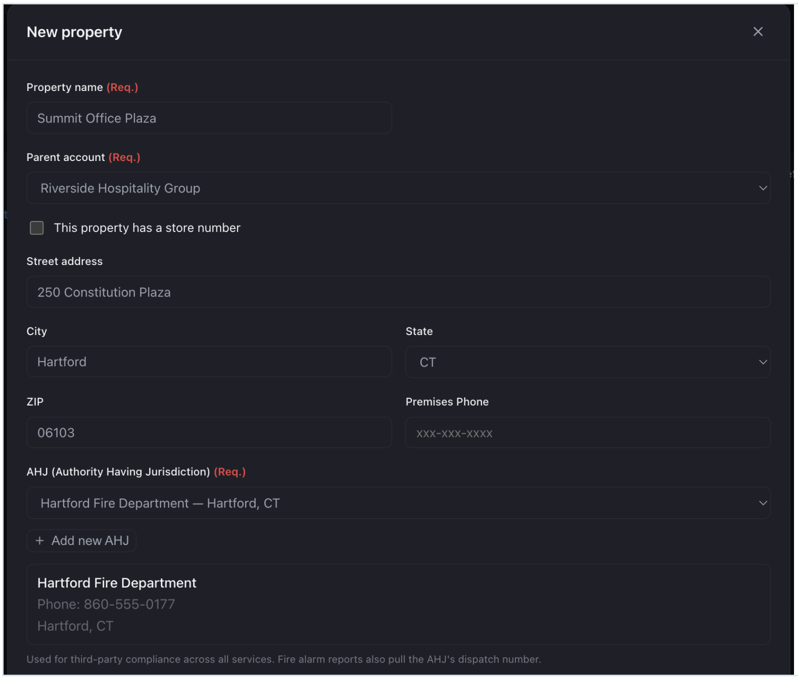
Accounts > New account.

> **One billing contact for twelve buildings?** Add them once under **Contacts** on the account page. They appear on every property under that account, instead of being typed twelve times.

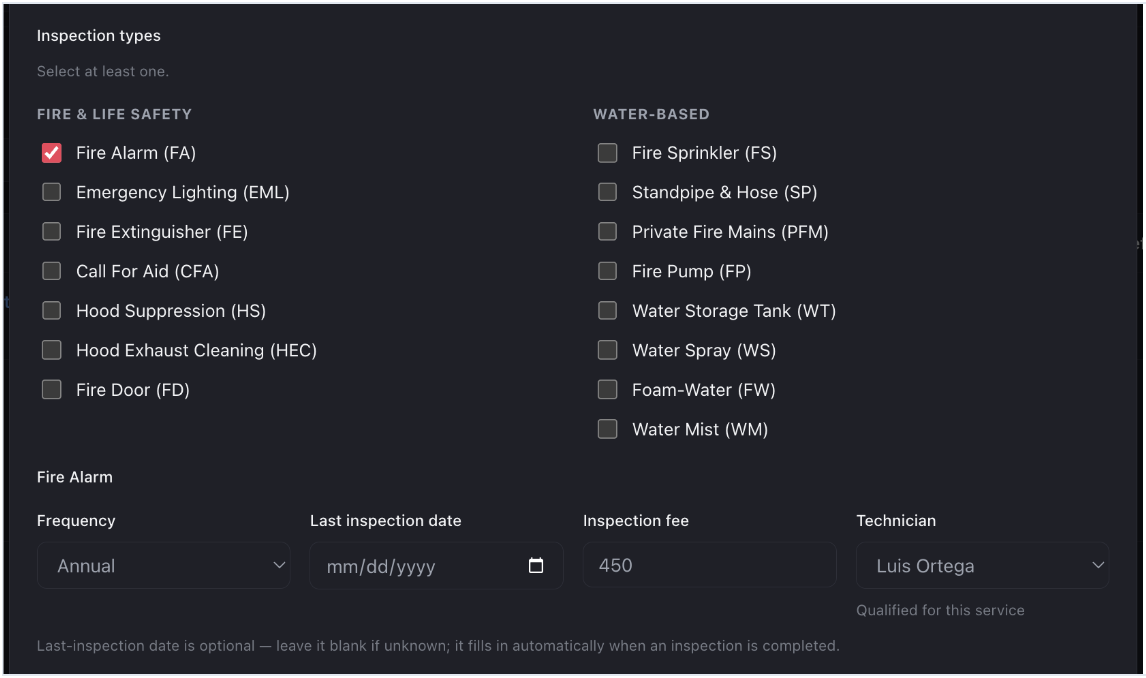
6. Add the property

This is the building you will inspect. Open **Properties** and click **New property**.

1. Enter the **property name** and **address**, and choose the **account** from step 5.
2. Choose the **AHJ**. The one you added in step 4 is offered because it matches the address. It is required.
3. Under **Inspection types**, tick **Fire Alarm**, then set its **Frequency**, **Inspection fee** and **Technician**. Only people qualified for Fire Alarm are offered.
4. Tick **This property has multiple floors** if it does. Every device then asks for a floor, and the reports show it.



New property: the AHJ is offered because it matches the city and ZIP.

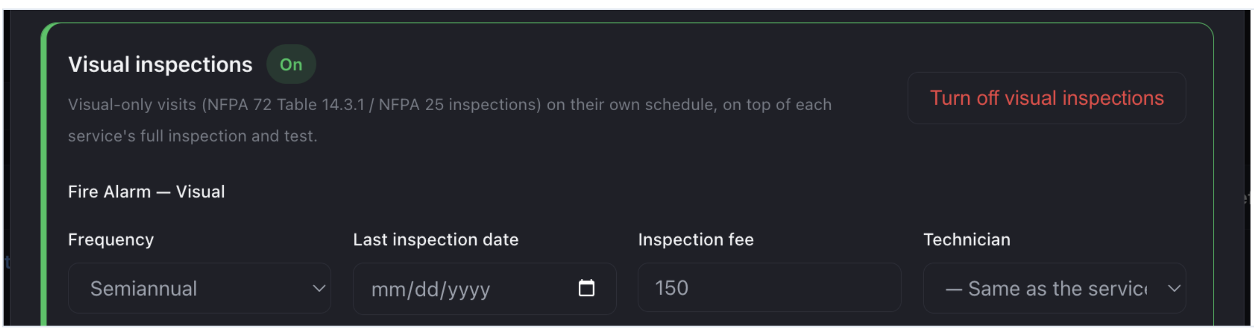


Tick Fire Alarm, then set its frequency, fee and technician.

Visual inspections (if you perform them)

Some customers pay for visual inspections between the annual inspection and test: the look-don't-test visits in NFPA 72 Table 14.3.1. If you do these at this property, click **Add visual inspections** on the same form and set:

1. **Frequency**: how often the visual visit happens.
2. **Inspection fee**: what you charge for each visual visit. It is kept for your reference.
3. **Technician**: who normally does it. Leave **Same as the service** to use the Fire Alarm technician.



Add visual inspections: frequency, fee and technician.

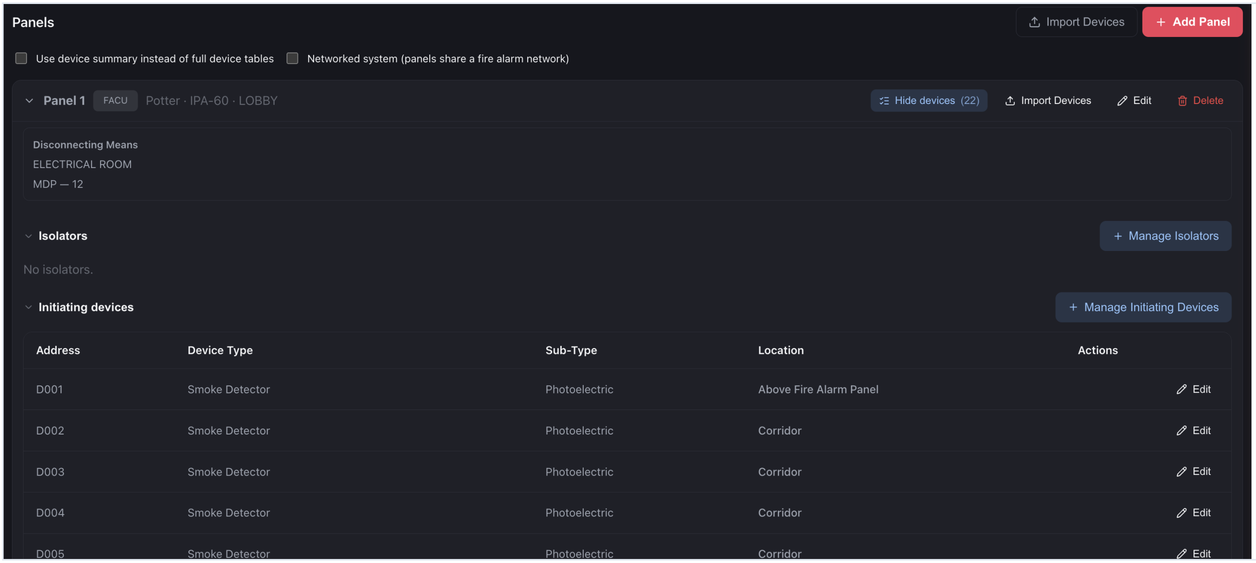
Click **Create property**.

7. Build the fire alarm system: panel and devices

If the system is monitored, add its monitoring company first: **Settings > Fire Alarm > Central Stations > Add central station**, with its name and phone number. The technician calls that number from the app to put the system on test.

Then open the property, go to its **Fire Alarm** tab and click **Configure Fire Alarm System**.

1. Choose the **system type**. **Protected Premises (Local Only)** reports to nobody, so no monitoring questions are asked. Every other type is monitored: choose the central station and the means of transmission.
2. Choose the **NFPA 72 edition** the system is inspected to, answer the **System Control Functions** (HVAC shutdown, elevator recall, door release and so on) and click **Save system**.
3. Under **Panels**, click **Add Panel**: enter the **Panel number** and **Location description**, pick the **Manufacturer** and **Model number**, and fill in the circuits. Click **Add panel**.



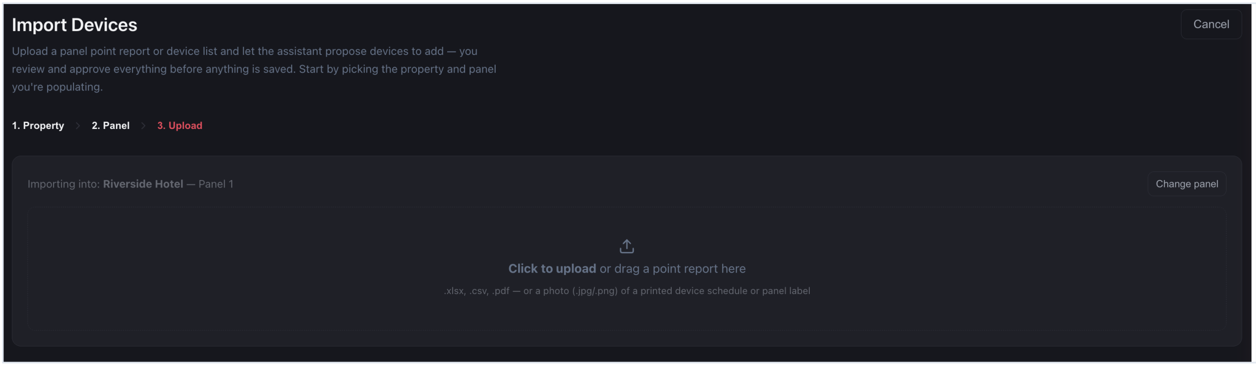
Fire Alarm tab: a panel with its devices, and the Import Devices and Add Panel buttons.

Add the devices with Import Devices

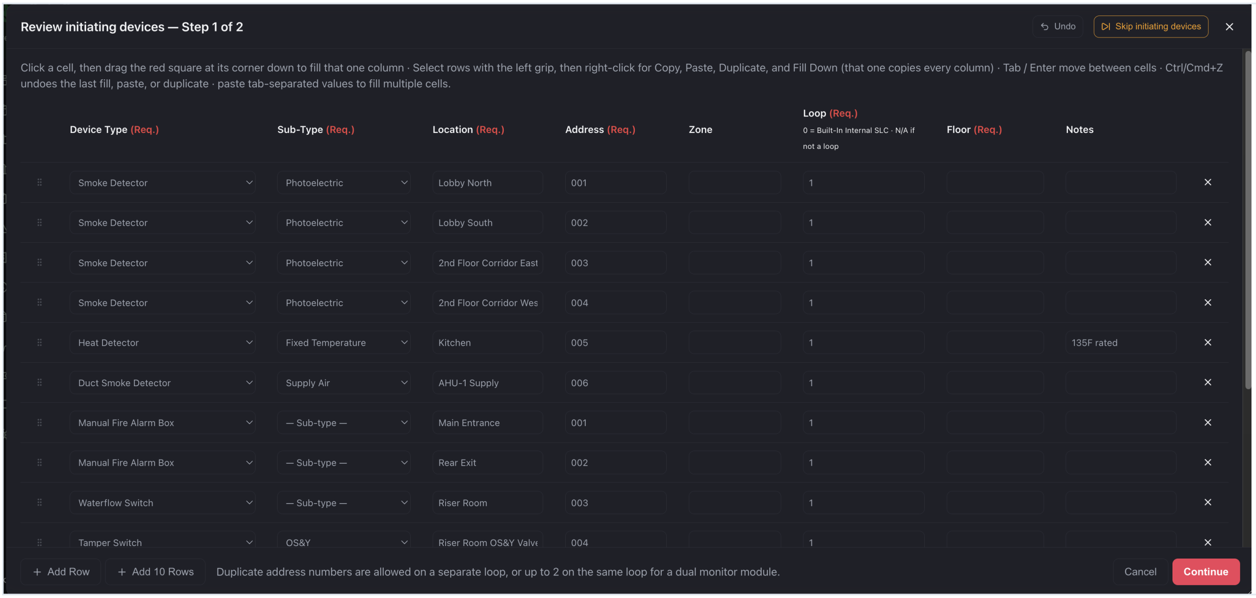
You do not have to type a device list. On the panel, click **Import Devices** and upload what you already have:

1. A **panel point report** or device list exported from the panel software.
2. A **spreadsheet** (.xlsx or .csv) or a **PDF**.
3. A **photo** of a printed device schedule.

CodeGreen reads the file and lays out every device it found: type, address and location. **Nothing is saved until you review it.** Check each row, fix anything it read wrong or skip what you do not want, then confirm you have checked the list against the panel's actual programming and import. Devices already on the panel are shown separately, so nothing is added twice.



Import Devices: upload the file for the panel.



The review grid: every device read from the file, ready to check and fix.

> Import Devices is available to **Admins** and **Managers**. No file for this system? Add devices by hand with **Manage devices** on the panel, or let an Admin or Advanced Inspector build the list on site with **Manage Fire Alarm System** in the mobile app.

8. You are ready to inspect

The devices are in the system, so the property is ready for its first inspection. This is the point where the mobile app has something to work on.

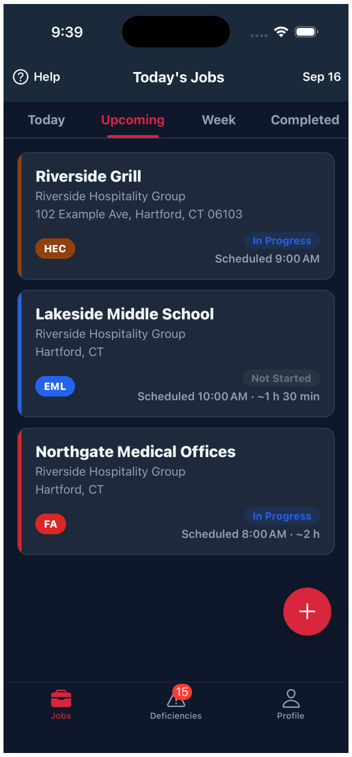
1. **Schedule it:** from the property's **Inspections** tab (**Schedule inspection**), from **Inspections > New Inspection**, or by dragging it onto a technician's day on **Dispatch**.
2. **Inspect it:** the technician opens the job from **Today's Jobs** in the app and works through it. The app works with no signal and syncs when it reconnects. Anything that fails becomes a deficiency on the spot. They tap **Review & Submit** and sign.
3. **Review and send it:** in the office the visit shows **Needs Review**. Click **Review**, then **Mark as Reviewed**, choose **Generate report**, and click **Send Report**.

Get the mobile app

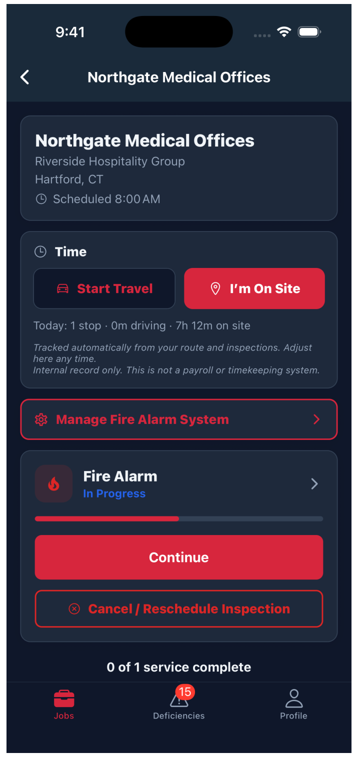
Your technicians scan the code for their phone with its camera, install **CodeGreen ITM**, and sign in with the email and password from their invite.

iPhone
apps.apple.com

Android
play.google.com



Today's Jobs in the app, with the Upcoming tab open.



A job: Manage Fire Alarm System, then Continue into the inspection.

Where to get help. The full **Guide** is built into the app. It is the last item in the sidebar, it is searchable, and it covers every screen in far more detail than this page, including sending several reports as one file and deficiency-only reports. Start here, then go there when you need the specifics.

Still stuck, or think something should work differently? Email us at **admin@codegreenitm.com**. A real person reads it.

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