



SMB Day One 'Need to Know'

Before you start

Before you get started configuring a new site there are a few things to keep in mind:

- **Naming conventions** - the Site name, area, door and floor names are visible in the SMB customer app. Confirm the naming convention with the customer.
- **Key Account Holder (KAH)** - The key account holder should be the main point of contact at the customer's site and they will be the first person to receive access to the SMB security solution. An invitation is sent to this person once the site is activated. Make sure you have their name, email & phone before you get started.
- **Site Creation** - decide which avenue you are going to use to create a site e.g. site template, hardware template or demo site. You will also need to know the site's billing frequency option.
- **Internet Connection** - when the controller comes online for the first time it will perform a firmware update. This might take up to 10 mins. Ensure you have a stable wired internet connection.

Also make sure to check out our [SMB Installer Help](#).

Top tips

QR Codes

There are QR codes on all pieces of Gallagher Hardware that when scanned, bring up the associated installation note.

You can also assign a controller to a site by scanning the QR code on it in the [Gallagher SMB Installer Portal](#).

Publish to the Controller

It is recommended that you publish to the controller often throughout your configuration. This ensures that if you make a mistake you only need to dismiss a smaller number of pending changes.

Configuration Guide

While you can configure a site in any order, for your first configuration, we recommend you follow this order as it ensures everything is covered and there is no unnecessary retrospective configuration.

- | | | | |
|---|------------|----|---------------|
| 1 | Controller | 7 | Schedules |
| 2 | I/O Boards | 8 | Doors |
| 3 | Inputs | 9 | Floors |
| 4 | Outputs | 10 | Elevator Cars |
| 5 | Areas | 11 | Monitoring |
| 6 | Readers | | |

Pre-Site Activation Check

Before you activate a site, there are five things you need to check.

- **Test** - Put the site into Test mode and check that outputs are working via the hardware tree. You can also check that inputs are working by going to the input 'STATUS' tab to see if the input is 'open' or 'closed' when triggered.
- **Alarms** - Check the alarms viewer. If there are any active alarms something might be wrong and may need fixing or reconfiguring.
- **Publish** - Publish any pending changes to the controller.
- **Activate** - If everything is all good and your customer is ready, you can go ahead and activate the site.