

# Add a System

Last Modified on 12/16/2024 4:16 pm EST

A System is a group of equipment installed and serviced by the company or an outside service company. A Site may have an unlimited number of Systems.

Systems are attached to Site records. To add additional Systems, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. If you know the name of the customer to which the Site is attached, locate the Customer, and then click the hyperlink in the Customer # column to open the customer record.

If you do not know the customer number or customer name to which the Site is attached, however you do know the Site Name, click the Sites tab to search for the customer by Site Name.

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3506</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Teslay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site to which you want to add a new System.

**Cactus World**  
Customer #3652 Active Normal Commercial - Since 12/5/21

Total Balance Due/Total RMR  
\$0.00 \$0.00

Customer Aging

Address: 3601 Saguaro Street, Tucson, AZ 85733  
Phone: (888) 234-8765  
Cell:  
Email: theresa@boldgroup.com

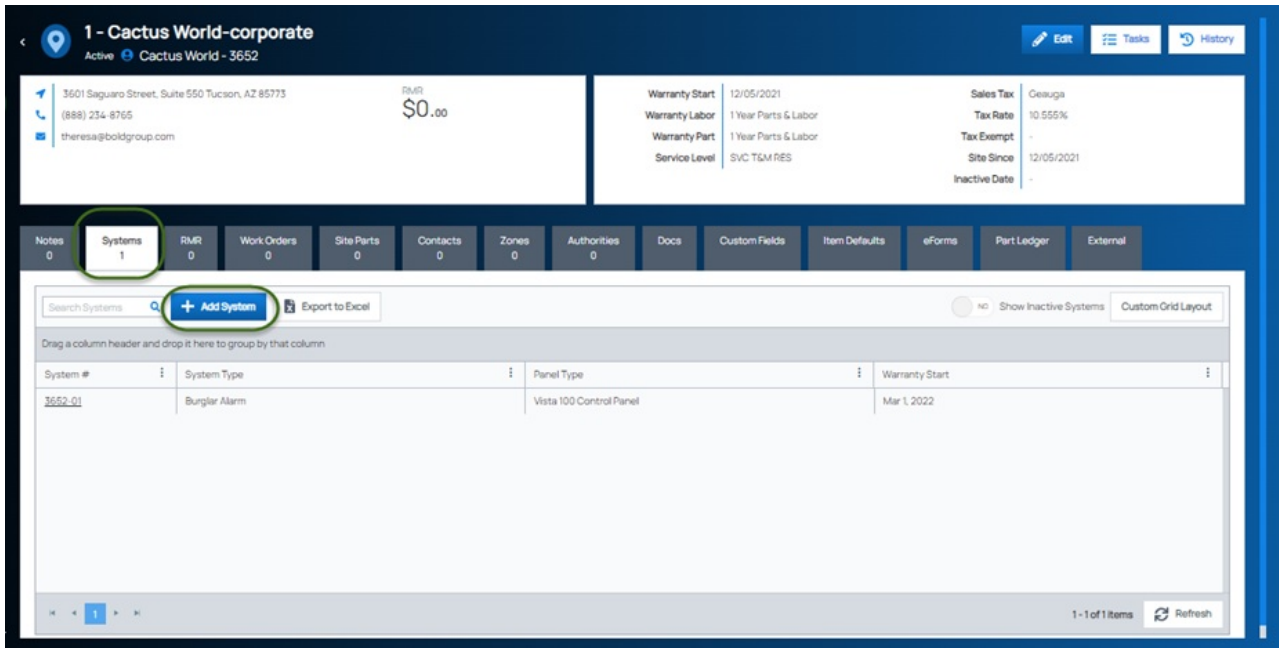
Salesperson: Theresa Scalla  
Last Statement:  
Default Term:  
Delivery Method: Print  
Delivery RMR Inv:

Comments: Stages Integration test

Invoices: 0 Credits: 0 **Sites/Systems: 1/1** RMR: 0 Work Orders: 0 Proposals: 0 Payments: 0 OC/Check: 0 Notes: 0 Contacts: 1 Documents: Archive: Custom Fields: eForms: Email

Site N.	Site Name	Address	City	Sta.
<a href="#">1</a>	Cactus World- Corporate	3601 Saguaro Street	Tucson	AZ

The Site record opens. Click the Systems tab, and then click the Add System button.



The Add System form opens. Fill in the form, and then click the Save button at the bottom of the form when finished.

Data entry fields with a red bullet next to the field name are required.

