Add a System

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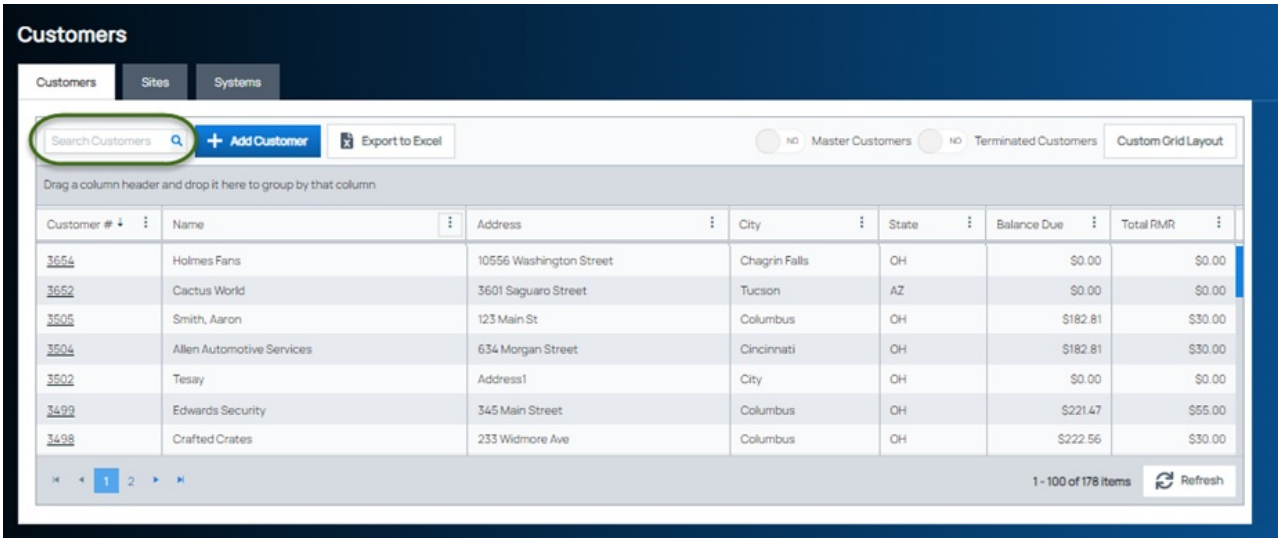
A System is a group of equipment installed and serviced by the company or an outside service company. A Site may have an unlimited number of Systems. Different sites on a customer can have the same system numbers. However, systems under the same site must have unique system numbers.

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

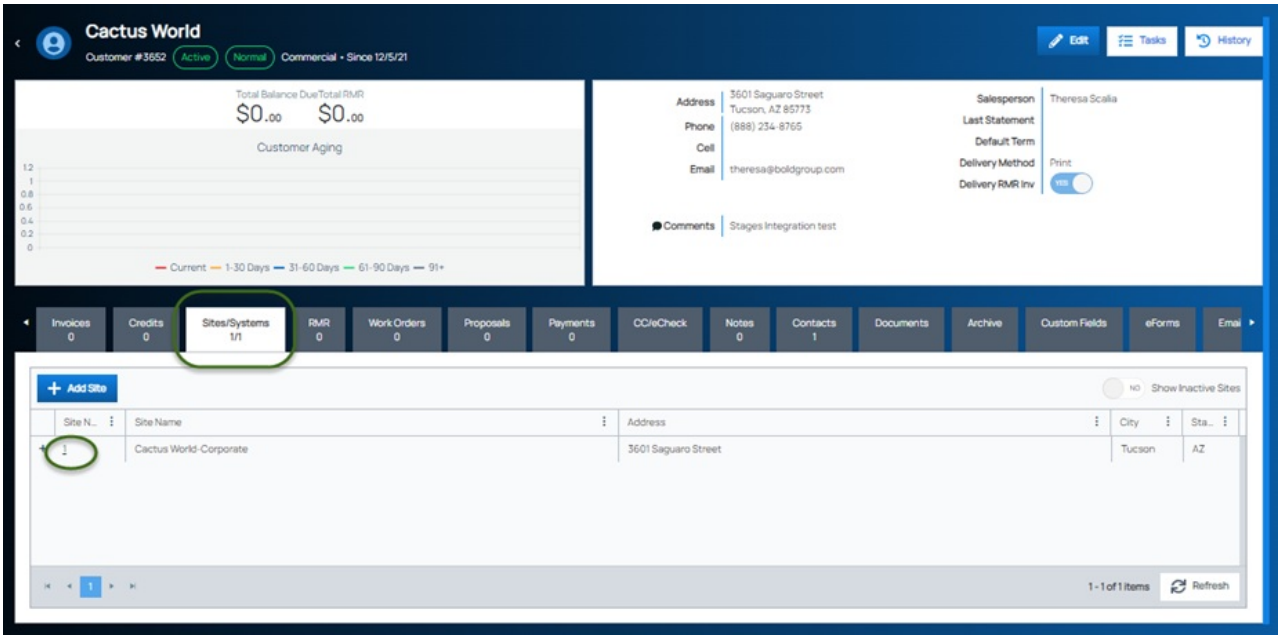
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.

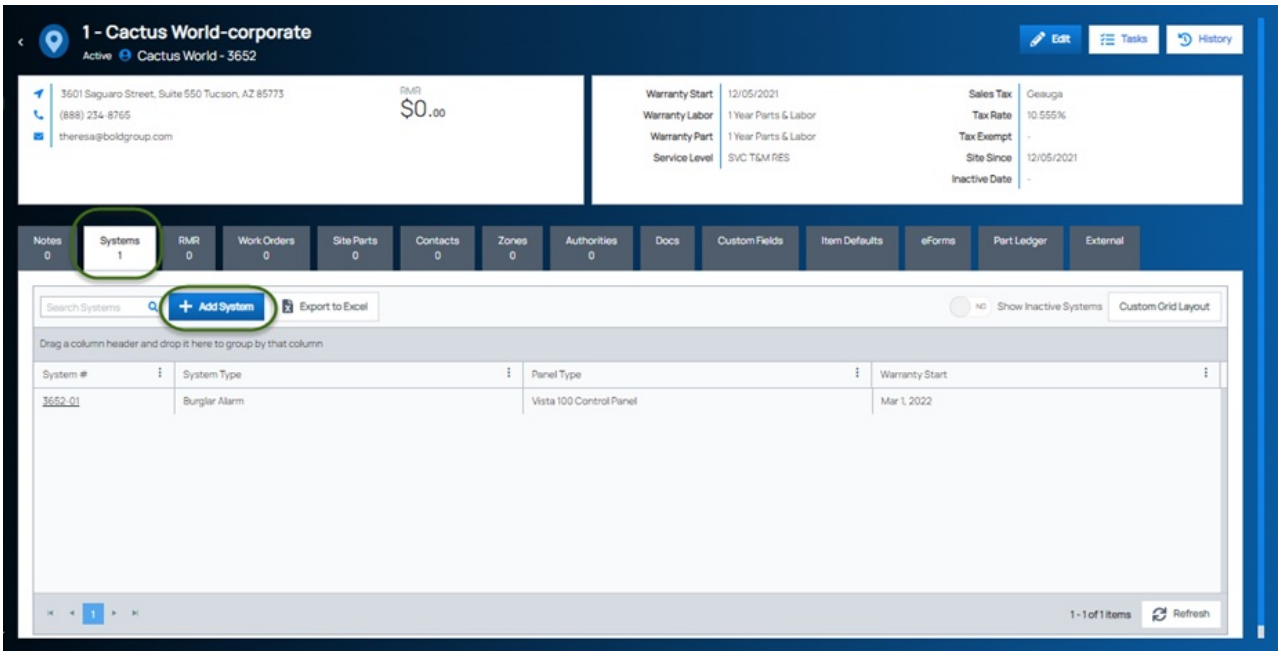
If you do not know the customer number or customer name to which the Site is attached, however you do know the Site Name, click the Sites tab to search for the customer by Site Name.



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 .

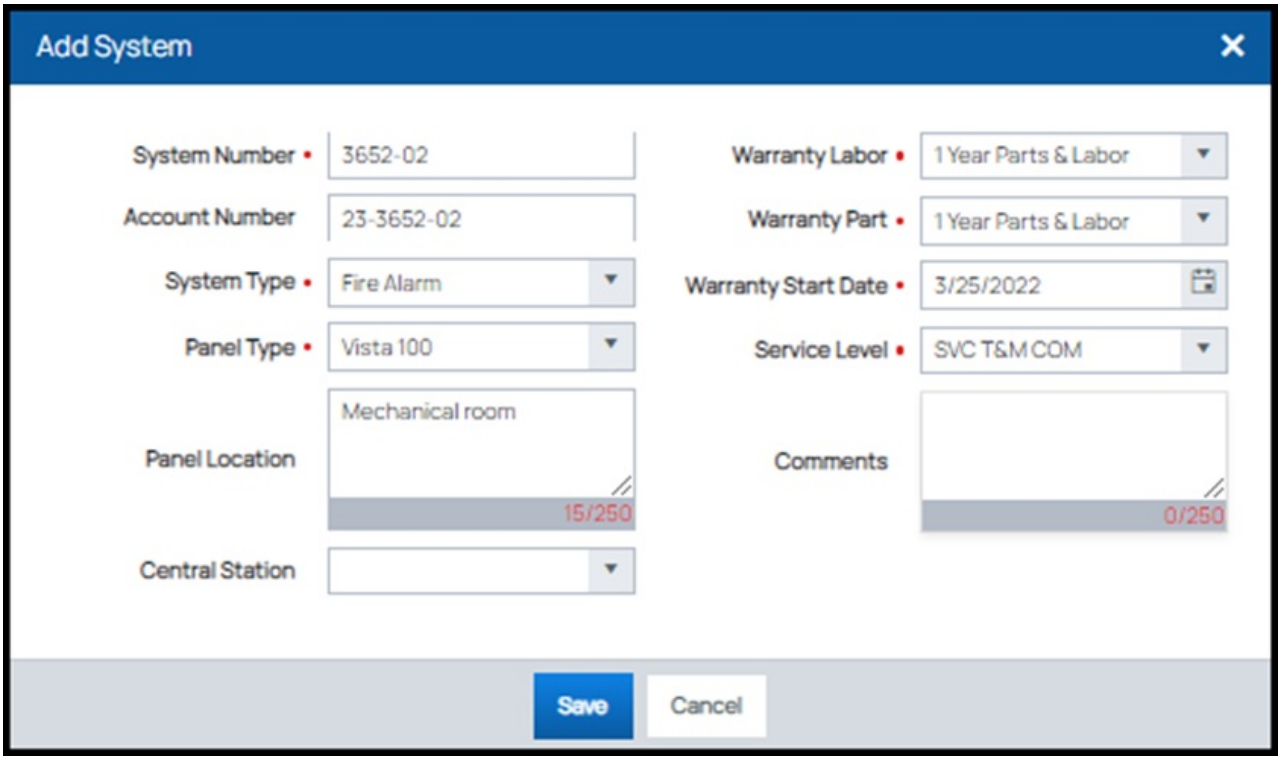


The Site record opens. Click the Systems tab, and then click the Add System button.



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.


Add System
System Number •
3652-02
Account Number
23-3652-02
System Type •
Fire Alarm
Panel Type •
Vista 100
Panel Location
Mechanical room
15/250
Central Station
Warranty Labor •
1 Year Parts & Labor
Warranty Part •
1 Year Parts & Labor
Warranty Start Date •
3/25/2022
Service Level •
SVC T&M COM
Comments
0/250
Save
Cancel