## Add a System

Last Modified on 06/23/2025 8:04 pm EDT

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.

stomers ustomers Site	s Systems							
Search Customers	Add Customer	Export to Excel			Master Cus	tomers NO T	erminated Customers	Custom Grid Layout
irag a column header a	and drop it here to group by tha	t column						
Dustomer # 4 1	Name	1	Address	:	City I	State :	Balance Due	Total RMR
654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.0
652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.0
1505	Smith, Aaron		123 Main St		Columbus	OH	\$182.81	\$30.0
504	Allen Automotive Services		634 Morgan Street		Cincinnati	OH	\$182.81	\$30.0
502	Tesay		Address1		City	ОН	\$0.00	\$0.0
499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.0
1498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.0
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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 Outomer #3652 (Active) (Normal) Commercial - Since 12/5/21	🖍 Eart 🛛 🚝 Tasks 🏷 History
Total Balance Due Total BAR \$0.00 \$0.00 Customer Aging	Address     3601 Saguaro Street     Salespenson     Theresa Scalia       Phone     (888) 234-8765     Last Statement     Parent       Oel     Defuel Terma     Defuery RMR Inv     Parent       Email     theresa@boldgroup.com     Delivery RMR Inv     Parent       Comments     Stages Integration test
Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+     Invoices Credits Sites/Systems 0 0 0 0     Proposals Payments     0 0 0 0	OC/eCheck Notes Contacts Documents Archive Custom Fields eForms Email • 0 1 Show Inactive Sites
Site N_ I Site Name I Cactus World-Corporate	Address I City I Sta. I 3601 Saguaro Street Tucson AZ
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The Site record opens. Click the Systems tab, and then click the Add System button.

Systems       Burk       Work Orders       Site Plarts       Contacts       Zones       Authorities       Docs       Custom Fields       Item Defaults       eForms       Plart Ledger       External         Search Systems	Active Cacture 3601 Saguaro Street, Su (888) 224-8755 theresa@boldgroup.com	World-corporate us World - 3652 vite 550 Tucson, AZ 85773	\$0.00	Warranty Start Werranty Labor Warranty Part Service Level	12/05/2021 1 Year Parts & Labor 1 Year Parts & Labor SVC T&M RES	Sales Tax TaxRate TaxExempt Site Since Inactive Date	✓ Edit         ∰ Tasks         ∰ History           Gesuga         10.555 %         -           12/05/2021         -         -
System #     i     System Type     i     Mannaty Start     i       System #     i     System Type     i     Marnaty Start     i       Star2 01     Burglar Alarm     Vista 100 Control Panel     Mar 1, 202	stes Systems 1 Search Systems Q	RMR Work Orders Ste Parts	Contacts Zones 0 0	Authorities Docs 0	Custom Fields Item Defex	ults eforms Part	Ledger External w Inactive Systems Custom Orid Layout
3652_01 Burglar Alarm Vista 100 Control Panel Mar 1,2022	itag a column header and dr System #	op it here to group by that column System Type	I P	anel Type	I	Warranty Start	1
	3652-01	Burgliar Alarm	V	ista 100 Control Panel		Mar 1, 2022	

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