

Add a System

Last Modified on 05/01/2022 6:18 am 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.

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: Accounts Receivable > Customers.

The Customers list will be displayed. If you know the name of the customer to which the Site is attached, locate the Customer, and then click on 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 on the Sites tab to search for the customer by Site Name.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Teslay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on 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 Saguario Street, Tucson, AZ 85773
Phone: (888) 234-8765
Cell:
Email: theresa@boldgroup.com

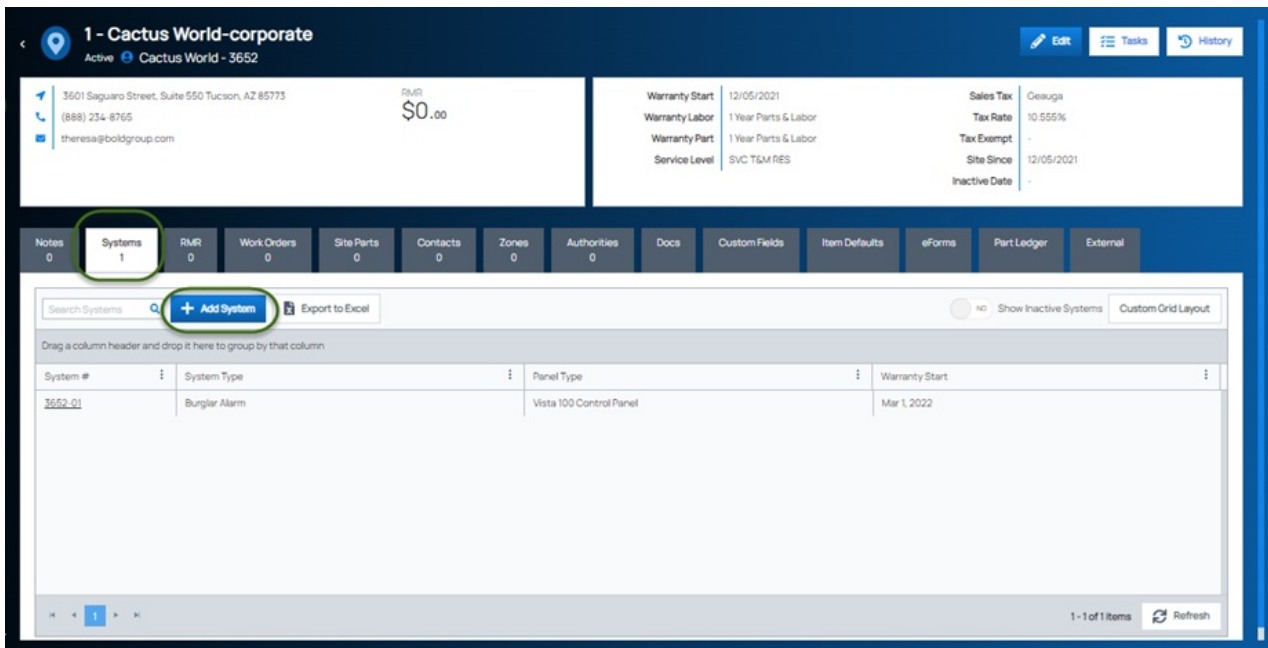
Salesperson: Theresa Scalia
Last Statement:
Default Term:
Delivery Method: Print
Delivery RMR Inv: 100

Comments: Stages Integration test

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

Site N.	Site Name	Address	City	Sta.
1	Cactus World-Corporate	3601 Saguario Street	Tucson	AZ

The Site record will be displayed. Click on the Systems tab, and then click on the Add System button.



The Add System form will be displayed. Fill in the form, and then click on 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.

