## Edit a System

Last Modified on 12/16/2024 4:20 pm EST

Systems are attached to Site records. To edit a System, 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.

Customers Site	es Systems							
Search Customers	Add Customer	Export to Excel			NO Master Cu	stomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header	r and drop it here to group by th	at column						
Customer # 🕴 🚦	Name	÷	Address	1	City :	State :	Balance Due	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	ОН	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	OH	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$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 System is attached that you want to edit.

Cactus World Oustomer #3552 (Active) (Normal) Commercial - Since 12/5/21	🖍 Edit 🚝 Tasks 🎲 History
Total Balance DueTotal RMR \$0.00 \$0.00 Customer Aging	Address     3601 Saguaro Street     Salesperson     Theresa Scalia       Phone     (888) 234-8765     Last Statement       Cel     Default Term       Email     theresa@boldgroup.com       Delivery RMR Inv     Print       Comments     Stages Integration test
0.2 - Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+ - Invoices Credits Sites/Systems PMR Work Orders Proposals Payment 0 0 1/1 0 0 0	
+ Add Site	No Show Inactive Sites
Site N. : Site Name	i         Address         i         City         i         Sta_i           3601 Saguaro Street         Tucson         AZ
	1-1of1tems Z Refresh
	, la num

The Site record opens. Click the Systems tab. A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System you want to edit.

Contemporate Active  Contemporate  Contempor					🖋 Edit 🗄 Tasks 🕥 History			
4         3601 Saguaro Street, Suite 550 Tucson, AZ 85773           C         (888) 234-8765           E         theresa@boldgroup.com	RMR \$0.00	Warranty Part 1 Year	/2021 Parts & Labor Parts & Labor &M RES	Sales Tax Tax Rate Tax Exempt Site Since Inactive Date	Geauga 10.555% - 12/05/2021 -			
Notes Systems RMR Work-Ordens SiteParts 0 0 0	Contacts Zones Aut 0 0	horities Docs Custom 0	Fields Item Defaults	s eForms Part L	edger External			
Search Systems Q + Add System Drag a column header and drop it here to group by that column								
System # i System Type 3652-01 Burglar Alarm	E Panel Type Vista 100 C	ontrol Panel		Warranty Start Mar 1, 2022	ĩ			
н 4 <mark>1</mark> х н					1-1of1items C Refresh			

The System record opens. Click the Edit button located at the upper right of the page.

< S     3652-01 - Burglar Alarm     Active      ⊖ Cactus World      Cactus World-Corporate							🖋 Edit	¥⊟ Tasks	B History
Panel Type Vista 100		Warranty	Labor	1 Year Parts & La	abor				
Panel Location Mechanical room		Warran	ty Part	1 Year Parts & La	abor				
Comments -		Warrant	Start	03/01/2022					
		Service		SVC T&M COM					
		Central S		-					
		Account N		23-3652-01					
		Inactiv	e Date	-					
Notes 0 RMR Work Orders System Parts Cali List Zones Ut 0 0 0 0 0	tilities								
Note	1	Modified	Modifie	ed By	Туре	Expiration	8		
		No records available.							
н к ж							0 -	0 of 0 items	C Refresh

The System record opens in edit mode. Make the necessary changes, and then click the Save button when finished.

	- Burglar Alarm ctus World 🛛 Cactus World-Corporate			Save X Cancel
System Number -	3652-01	Warranty Labor •	1 Year Parts & Labor	·
Account Number	23-3652-01	Warranty Part •	1 Year Parts & Labor	*
System Type •	Burglar Alarm	Warranty Start Date •	3/1/2022	
Panel Type -	Vista 100 💌	Service Level •	SVC TEM COM	¥
	Mechanical room	Inactive	OFF	
Panel Location	15/250	Inactive Date	month/day/year	
Central Station	1972a •			
Comments				0/250