Edit a System

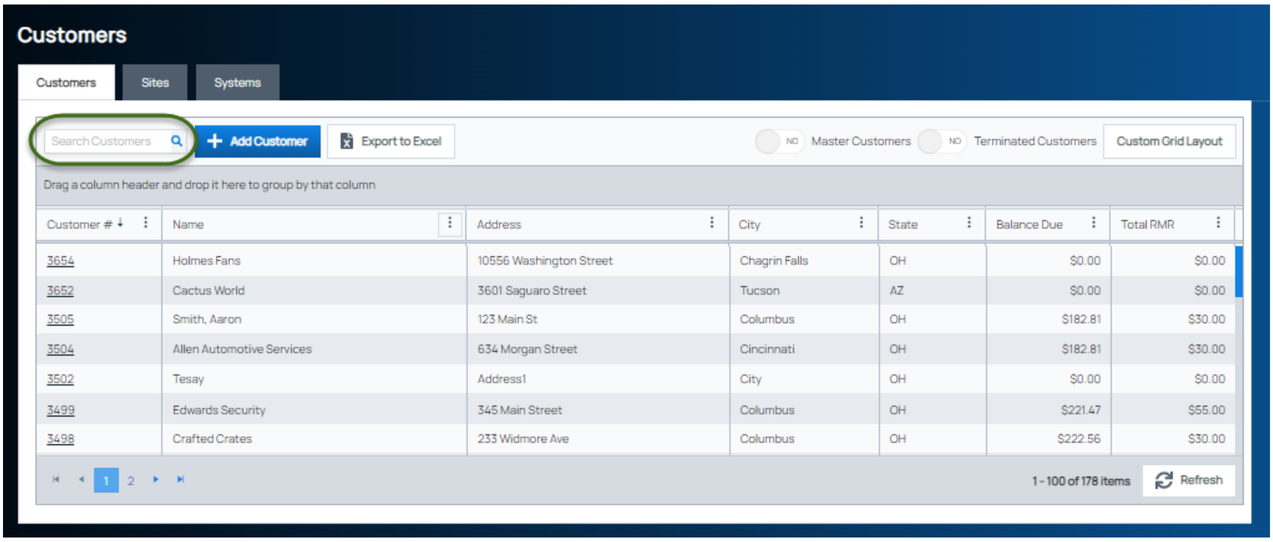
Last Modified on 12/16/2024 4:20 pm EST

Systems are attached to Site records. To edit a System, you must first access the customer record.

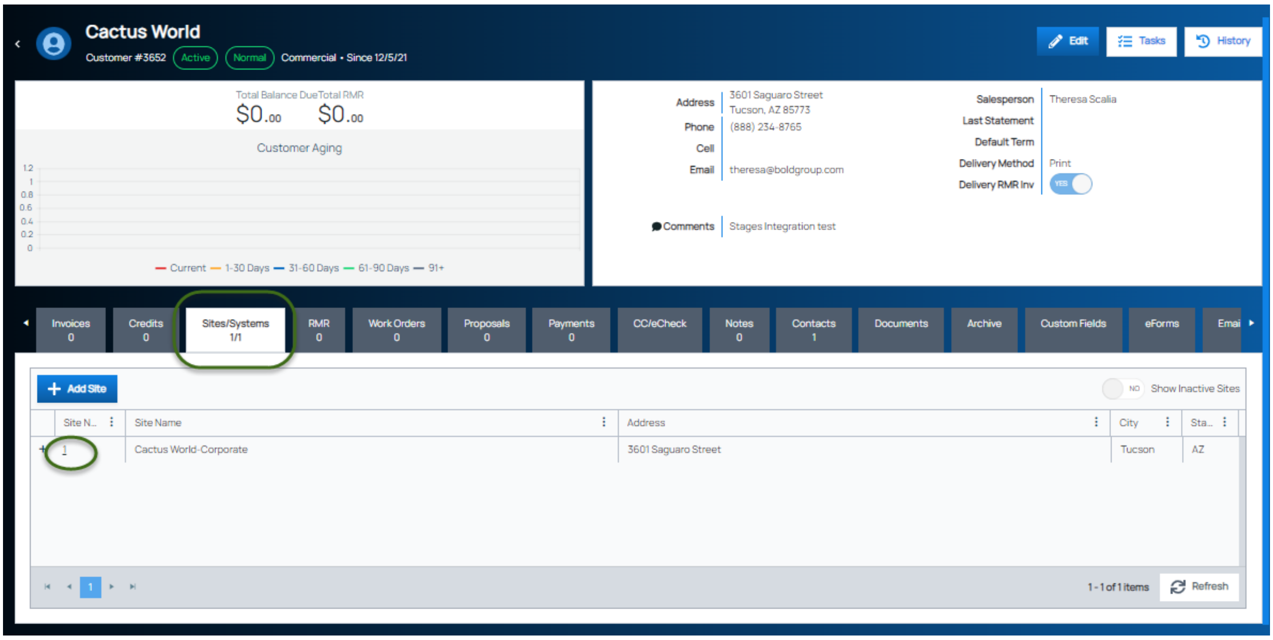
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.

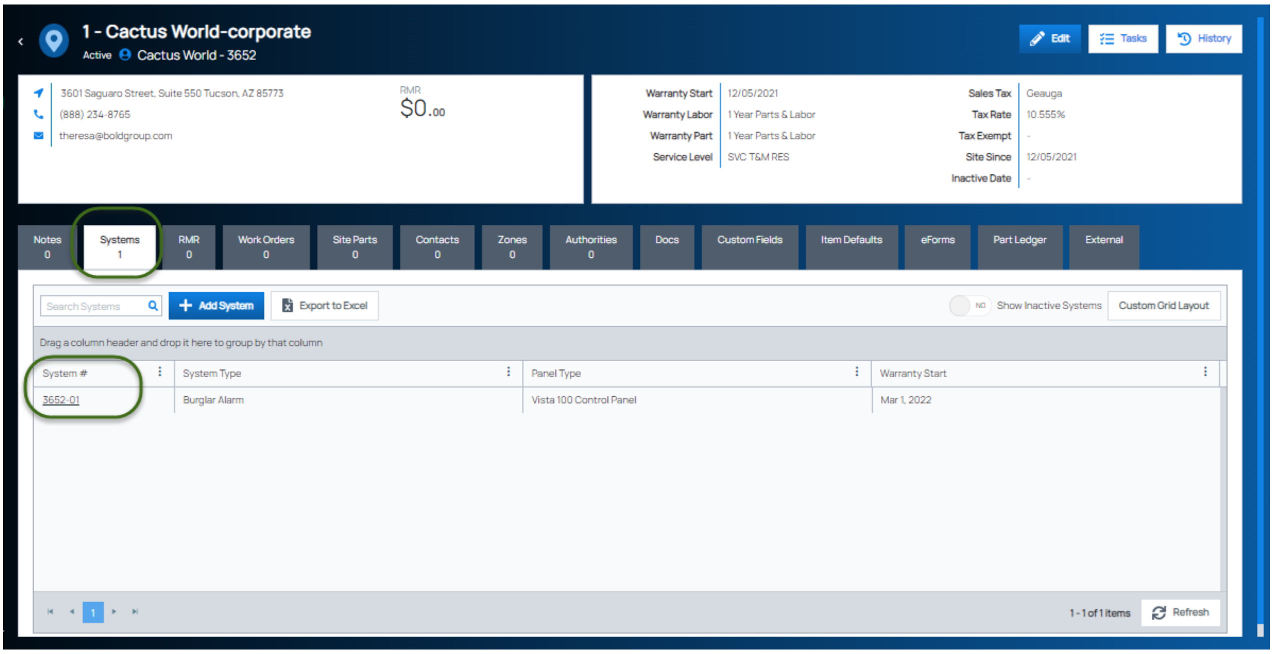
If you do not know the customer number or customer name to which the Site is attached, however you do know the Site Name, click the Sites tab to search for the customer by Site Name.



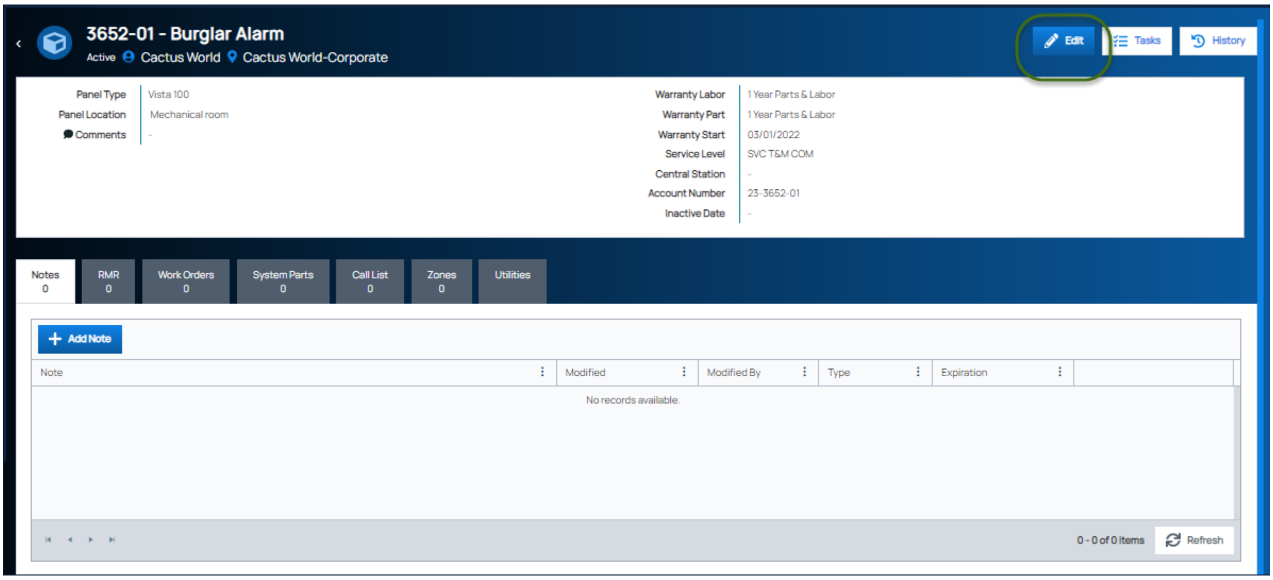
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site to which System is attached that you want to edit.



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.



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



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