

# Inactivate a System

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

A System is attached to a Site, which is attached to Customer record. To inactivate a System, 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
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3506</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	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 System is attached that you want to edit.

Site N.	Site Name	Address	City	Sta.
<a href="#">1</a>	Cactus World-Corporate	3601 Saguario Street	Tucson	AZ

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

**1 - Cactus World-corporate**  
Active Cactus World - 3652

3601 Saguaro Street, Suite 550 Tucson, AZ 85773  
(888) 234-8765  
theresa@boldgroup.com

RMR \$0.00

Warranty Start: 12/05/2021  
Warranty Labor: 1 Year Parts & Labor  
Warranty Part: 1 Year Parts & Labor  
Service Level: SVC T&M RES

Sales Tax: Geauga  
Tax Rate: 10.555%  
Tax Exempt: -  
Site Since: 12/05/2021  
Inactive Date: -

Notes: 0 | **Systems: 1** | RMR: 0 | Work Orders: 0 | Site Parts: 0 | Contacts: 0 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

Search Systems: [ ] + Add System Export to Excel

Drag a column header and drop it here to group by that column

System #	System Type	Panel Type	Warranty Start
3652-01	Burglar Alarm	Vista 100 Control Panel	Mar 1, 2022

1-1 of 1 Items Refresh

The System record will be displayed. Click on the Edit button located at the upper right of the page.

**3652-01 - Burglar Alarm**  
Active Cactus World Cactus World-Corporate

Panel Type: Vista 100  
Panel Location: Mechanical room  
Comments: -

Warranty Labor: 1 Year Parts & Labor  
Warranty Part: 1 Year Parts & Labor  
Warranty Start: 03/01/2022  
Service Level: SVC T&M COM  
Central Station: -  
Account Number: 23-3652-01  
Inactive Date: -

Notes: 0 | RMR: 0 | Work Orders: 0 | System Parts: 0 | Call List: 0 | Zones: 0 | Utilities: 0

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 Items Refresh

The System record will open in edit mode.

Once the System record is in edit mode, set the Inactive toggle button to On. The Inactive Date will auto-fill with today's date and cannot be modified. Click the Save button when finished.

**3652-01 - Burglar Alarm** Active Cactus World Cactus World-Corporate Save 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 T&M COM
Panel Location	Mechanical room	Inactive	<input type="radio"/> OFF
Central Station		Inactive Date	month/day/year

Comments