

# Inactivate a System

Last Modified on 12/16/2024 4:23 pm EST

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: 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**

Customers Sites Systems

Search Customers  + Add Customer Export to Excel

Master Customers Terminated Customers Custom Grid Layout

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

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 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</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

1 - 100 of 178 Items Refresh

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**  
Customer #3652 Active Normal Commercial • Since 12/5/21

Total Balance Due Total RMR  
\$0.00 \$0.00

Customer Aging

Address: 3601 Saguaro Street, Tucson, AZ 85773  
Phone: (888) 234-8765  
Cell:  
Email: theresa@boldgroup.com

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

Comments: Stages Integration test

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

+ Add Site Show Inactive Sites

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

1 - 1 of 1 Items Refresh

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.

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 Custom Fields Item Defaults eForms Part Ledger External

Search Systems + Add System Export to Excel Show Inactive Systems Custom Grid Layout

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 opens. Click 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 TSM 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

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 Items Refresh

The System record opens in edit mode.

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

### 3652-01 - Burglar Alarm

Active Cactus World Cactus World-Corporate

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

