

Edit System Notes

Last Modified on 05/01/2022 6:19 am EDT

To edit a System Note, 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. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

NO Master Customers NO 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
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro 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	Tesay	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

1 - 100 of 178 items Refresh

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 the System is linked to edit a note.

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) 254-8765
Cell
Email theresa@boldgroup.com

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

Comments Stages Integration test

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

+ Add Site

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

1 - 1 of 1 items Refresh

The Site record will be displayed. Click on the Systems tab.

1 - Emily Wood
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 1 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | Zones: 0 | Authorities: 0 | Docs | Custom Fields | Item Defaults | eForms | Part Ledger | External

+ Add New Contact | + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 313-6588			Neighbor		Edit Delete

1 - 1 of 1 Items Refresh

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 for which you want to edit a Note.

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Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 2 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | 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

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

System #	System Type	Panel Type	Warranty Start
3703-01	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 Items Refresh

The System record will be displayed. Locate the Note you want to edit, and then click on the Edit button (pencil icon).

3703-01 - Burglar Alarm Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P
 Panel Location: -
 Comments: -

Warranty Labor: 1 Year Parts & Labor
 Warranty Part: 1 Year Parts & Labor
 Warranty Start: 03/07/2022
 Service Level: SVC TSM RES
 Central Station: -
 Account Number: 23-3703-01
 Inactive Date: -

Notes: 2 RMR: 0 Work Orders: 1 System Parts: 0 Call List: 0 Zones: 0 Utilities: 0

Note	Modified	Modified By	Type	Expiration	
Critical Note on the System record.	Mar 20, 2022, 8:41:35 PM	Papay, Travis	Critical		Edit Delete
Older system installed by ADT. Try to have the customer upgrade to a newer system.	Mar 20, 2022, 5:15:22 PM	Papay, Travis	Standard		Edit Delete

The Note Edit form will be displayed. Make the necessary changes, and then click the Save button when finished.

Note Edit ✕

Note • 83/500

Type •

Expiration Date

Save Cancel