

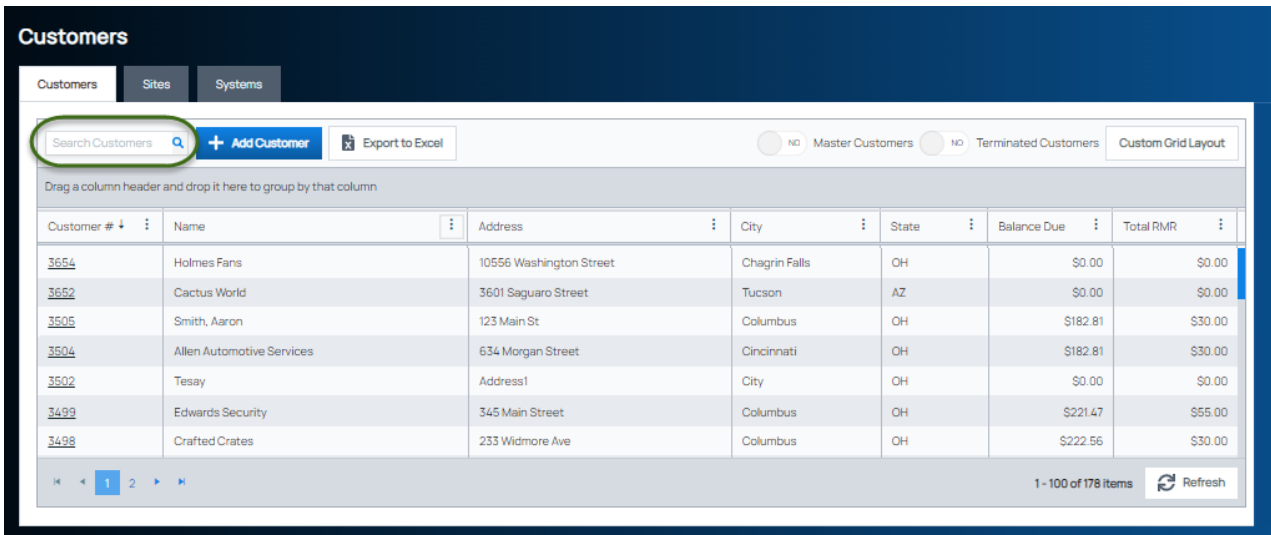
# Edit System Notes

Last Modified on 12/16/2024 4:56 pm EST

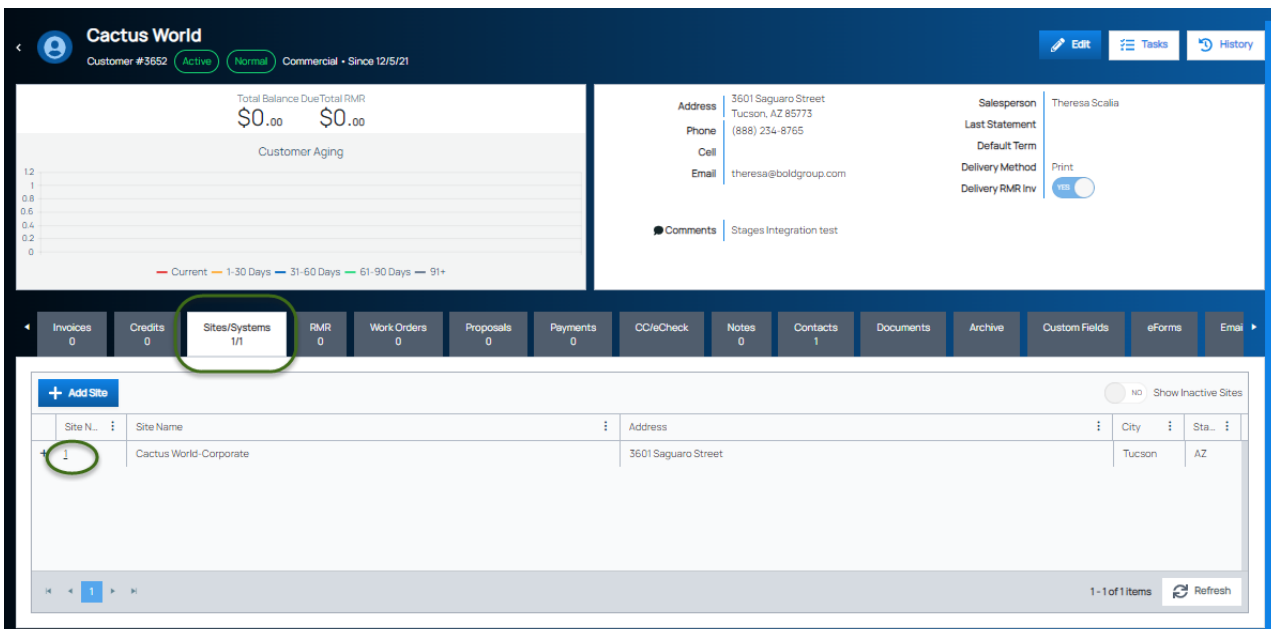
To edit a System Note, you must first access the customer record.

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

The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site to which the System is linked to edit a note.



The Site record opens. Click 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: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

+ Add New Contact + Add Existing Contact

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

1 - 1 of 1 items Refresh

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 for which you want to edit a Note.

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Active Emily Wood - 3703

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emilylwood@gmail.com

RMR \$2.00

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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: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

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
<a href="#">3703-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

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

**3703-01 - Burglar Alarm**  
Active Emily Wood Emily Wood

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 T&M 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 opens. Make the necessary changes, and then click the Save button when finished.

**Note Edit** [X]

Note • Older system installed by ADT. Try to have the customer upgrade to a  
83/500

Type • Standard

Expiration Date [Expiration Date]

Save Cancel