

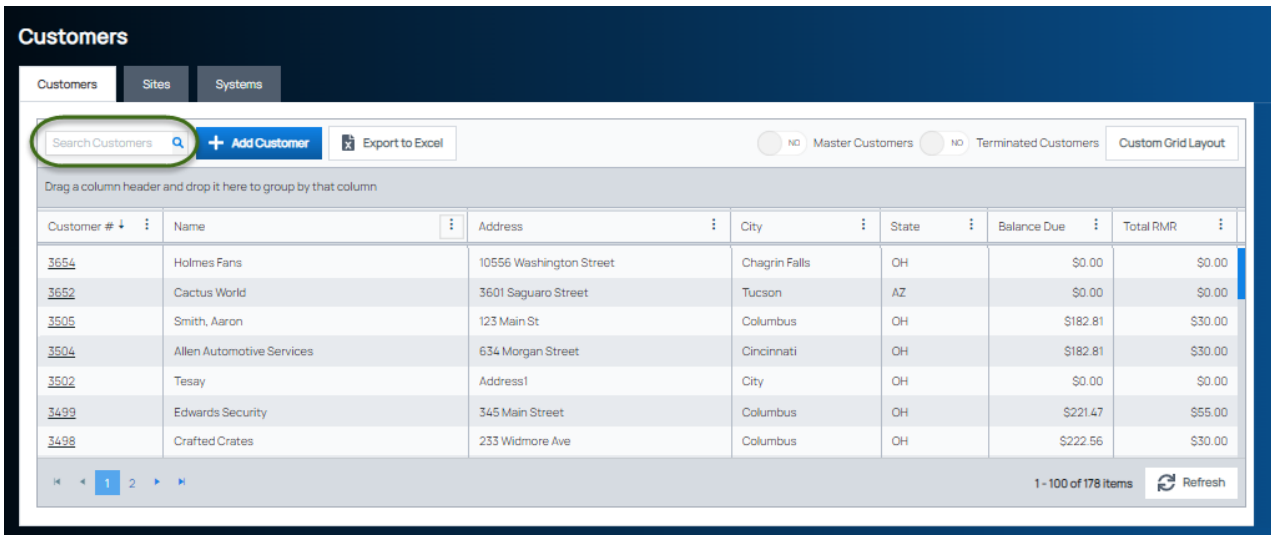
Delete System Notes

Last Modified on 12/16/2024 4:53 pm EST

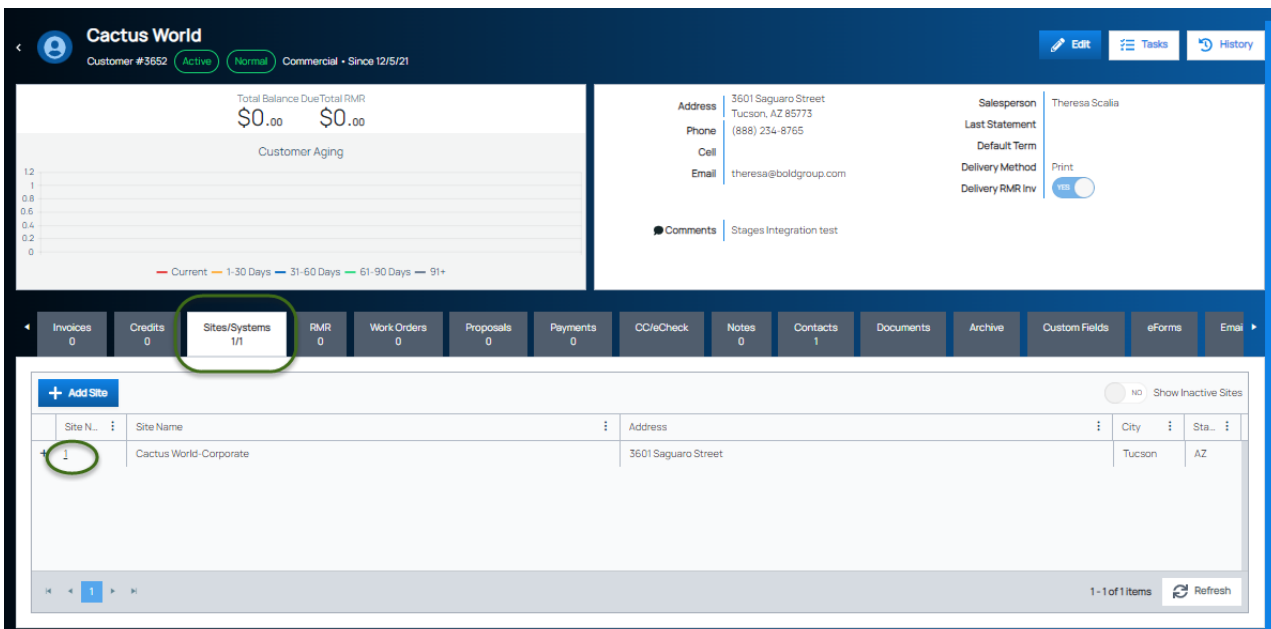
To delete a System Note, you must first access the customer record.

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 delete 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		Edit Delete

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 delete a Note.

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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
3703-01	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 delete, and then click the Delete button (trashcan 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

+ Add Note

Note	Type	Expiration	Edit	Delete
Critical Note on the System record.	Critical		Edit	Delete
Older system installed by ADT. Try to have the customer upgrade to a newer system.	Standard		Edit	Delete

Please confirm
Are you sure you want to delete the note?
No Yes

A confirmation message opens. Click Yes to delete the record.