Add System Parts

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Companies can enter a list of installed parts for a system. The data entry and maintenance allows users to enter the location, zone number (if a monitored device), serial number (if available), installation date, and if the part is removed, enter the removal date.

You also can enter a parts list at the site level if necessary. Typically, parts are attached to a System record.

To add a list of parts to an existing System, you must begin by accessing a Customer record.

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

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

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

The Site record is displayed. 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 desired System.

The System record is displayed. Click the System Parts tab, and then click on the **Add Parts** button.

The Add Parts list is displayed. For each Part you want to include, select the checkbox to the left of the Part Code column. When finished, click the **Add Parts** button at the bottom of the list.

After the Parts fill into the grid, click the **Save** button at the upper right of the System Parts list.

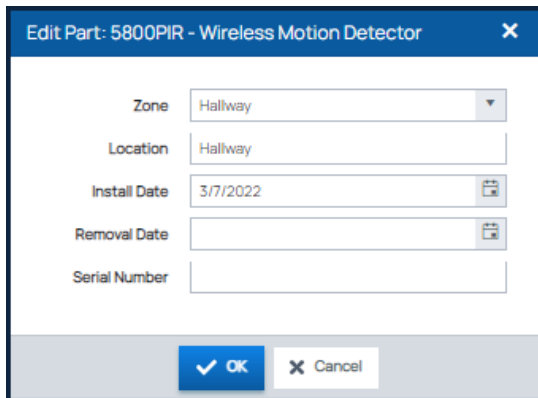To add details for the part, click on any column of a part row to edit.

The Edit Part form is displayed. Each data entry field is described below.

- **Zone**: If you have created a zone list for this system, and the part is monitored, click on the drop-down list to

select the zone.

- **Location**: Enter the physical location of where the part is installed.
- **Install Date**: Enter the date on which the part was installed.
- **Removal Date**: Unless you are entering historical information, skip this field.
- **Serial Number**: If there is an available serial number for the part, enter that value into this field.

When finished, click the **OK** button at the bottom of the form to save, and then click the **Save** button at the upper right of the System Parts list.