

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 screenshot shows the 'Customers' list in a CRM system. The interface includes a search bar labeled 'Search Customers', an 'Add Customer' button, and an 'Export to Excel' button. There are also radio buttons for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. The table below lists customer records with columns for Customer #, Name, Address, City, State, Balance Due, and Total RMR. The first row is highlighted.

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

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.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

Address: 45722 Chandler, Plymouth, MI 48170
Phone: (734) 258-4646
Cell: (734) 258-3311
Email: emilyLwood@gmail.com

Salesperson: Dan Brown
Last Statement
Default Term
Delivery Method: Print
Delivery RMR Inv: YES

Comments

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

+ Add Site Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
3719-01	Emily Wood	45722 Chandler	Plymouth	MI

1 - 1 of 1 items Refresh

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.

3719-01 - Emily Wood
Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170 RMR **\$1.00**
(734) 258-4646
emilyLwood@gmail.com

Warranty Start: 03/04/2022 Sales Tax: Michigan
Warranty Labor: Labor - 1 Year Tax Rate: 6%
Warranty Part: Parts - 1 Year Tax Exempt: -
Service Level: SVC T&M RES Site Since: 03/04/2022
Inactive Date: -

Notes: 0 **Systems: 1** RMR: 1 Work Orders: 0 Site Parts: 0 Contacts: 0 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
9173-01	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

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

9173-01 - Burglar Alarm
Active • Emily Wood • Emily Wood

Panel Type: Vista20P
Panel Location: Entry closet
Comments: -

Warranty Labor: Labor - 1 Year
Warranty Part: Parts - 1 Year
Warranty Start: 03/07/2022
Service Level: SVC T&M RES
Central Station: -
Account Number: 23-9173-01
Inactive Date: -

Notes: 0 | RMR: 1 | Work Orders: 1 | **System Parts: 4** | Call List: 0 | Zones: 2 | Documents | Archive | Custom Fields | eForms | Emails

+ Add Parts | Export to Excel

Part Code	Part Description	Location	Zone #	Install Date	Removal Date	Serial Number	Docs	Trash
5800PIR	Wireless Motion Detector	Hallway	2	3/7/22			Docs	Trash
5816	Door/Window Transmitter	Front Door	1	3/7/22			Docs	Trash
6160	Keypad	Left of entry door		3/7/22			Docs	Trash
Vista20P	8-zone control panel	Entry Closet		3/7/22			Docs	Trash

1 - 1 of 1 items | Refresh

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.

Add Parts

Search Parts Parts Selected: 4 **+ Create Part**

	Part Code ↑	Description	Rate	Cost	Labor Units	GL	Pri	Qty
<input type="checkbox"/>	0300-004	AXIS SMALL INDOOR NETWORK CAMERA	\$504.00	\$152.00	0	42001 - Service - P...	NO	0
<input checked="" type="checkbox"/>	5800PIR	Wireless Motion Detector	\$125.00	\$6210	0	42001 - Service - P...	NO	0
<input checked="" type="checkbox"/>	5816	Door/Window Transmitter	\$50.00	\$30.00	0	42001 - Service - P...	NO	0
<input checked="" type="checkbox"/>	5834	4-Button Wireless Keyfob	\$45.00	\$16.16	0	42001 - Service - P...	NO	0
<input checked="" type="checkbox"/>	6160	Keypad	\$125.00	\$45.00	0	42001 - Service - P...	NO	0
<input type="checkbox"/>	AC-RP26	Alarm Control Remote Plate	\$15.00	\$5.00	0	42001 - Service - P...	NO	0
<input type="checkbox"/>	AXS209MFD	AXS209MFD FIXED VANDAL DOME CAMERA	\$1,200.00	\$510.00	0	42001 - Service - P...	NO	0
<input type="checkbox"/>	AXS216MFDV	AXIS 216MFD-V IP CAMERA	\$1,500.00	\$750.00	0	42001 - Service - P...	NO	0

1 - 54 of 54 items | Refresh

+ Add Parts | Cancel

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.

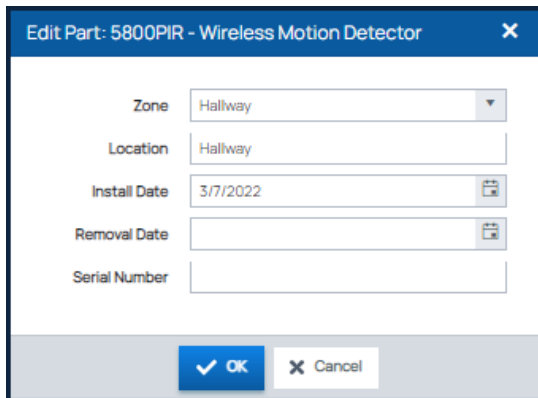
The Edit Part form is displayed. Each data entry field is described below.

- **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.



The image shows a dialog box titled "Edit Part: 5800PIR - Wireless Motion Detector". It contains the following fields:

- Zone:** A dropdown menu with "Hallway" selected.
- Location:** A text input field containing "Hallway".
- Install Date:** A date picker field showing "3/7/2022".
- Removal Date:** An empty date picker field.
- Serial Number:** An empty text input field.

At the bottom of the dialog box, there are two buttons: "OK" (with a checkmark icon) and "Cancel" (with an 'X' icon).