

Edit System Parts

Last Modified on 05/01/2022 6:20 am EDT

To edit the System Parts List, you must begin by accessing a 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, 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 | 10566 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.

Emily Wood

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

Edit Tasks History

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address 45722 Chandler Plymouth, MI 48170 Salesperson Dan Brown
Phone (734) 258-4646 Last Statement
Cell (734) 258-3311 Default Term
Email emilylwood@gmail.com 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 Archive Custom Fields eForms Emails

+ Add Site NO 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 will be displayed. Click on the Systems tab. 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 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: NO Custom Grid Layout

| 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 will be displayed. Click on the System Parts tab. Within the grid area, double-click on the part to be edited.

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: 0 Archive: 0 Custom Fields: 0 eForms: 0 Emails: 0

+ 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

A dialog box will be displayed. In the banner, the part selected is displayed. Make the necessary changes, and then click on the OK button when finished.

Edit Part: 5800PIR - Wireless Motion Detector [X]

Zone: Hallway [v]

Location: Hallway

Install Date: 3/7/2022 [calendar icon]

Removal Date: [calendar icon]

Serial Number: [text box]

[OK] [Cancel]