

# Edit System Parts

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To edit the System Parts List, 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.

**Customers**

Customers Sites Systems

Search Customers  + Add Customer Export to Excel

Master Customers 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
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 Items Refresh

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.

**Emily Wood**

Customer #3719 Active Normal Residential-Owner • Since 3/14/22

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 emily.wood@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 Show Inactive Sites

Site N.	Site Name	Address	City	Sta...
<a href="#">+ 3719-01</a>	Emily Wood	45722 Chandler	Plymouth	MI

1 - 1 of 1 Items Refresh

The Site record opens. 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  
emilywood@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: Custom Fields: Item Defaults: eForms: Part Ledger: External

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="#">9173-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

The System record opens. Click the System Parts tab. Within the grid area, double-click 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: 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				
5816	Door/Window Transmitter	Front Door	1	3/7/22				
6160	Keypad	Left of entry door		3/7/22				
Vista20P	8-zone control panel	Entry Closet		3/7/22				

1 - 1 of 1 items Refresh

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

The image shows a dialog box titled "Edit Part: 5800PIR - Wireless Motion Detector". The dialog 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, there are two buttons: "OK" (with a checkmark icon) and "Cancel" (with an 'X' icon).