Add System Call List

Last Modified on 12/20/2024 9:50 am EST

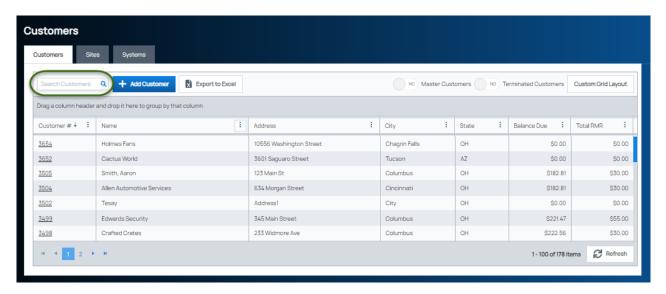
This option is used to create a list of individuals who should be called when an alarm signal is received at the central station for a System.

Individuals entered on a Call List should not be confused with Site or Customer contacts. A call list is independent of customer or site contacts. If someone is a Site or Customer contact, you might need to add them to the Call List.

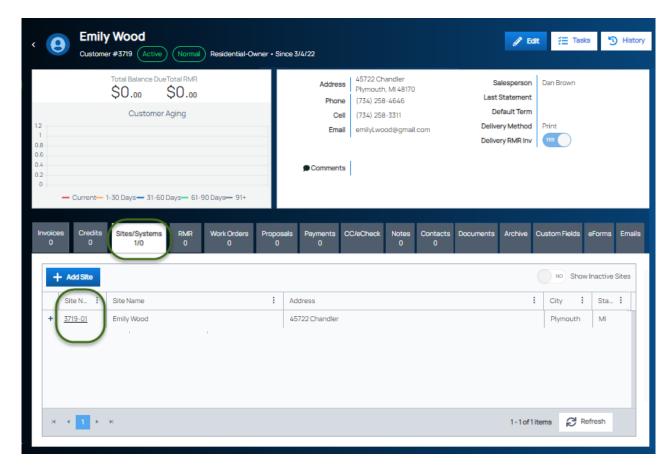
To add a Call List to an existing System, you must begin by accessing a Customer record.

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

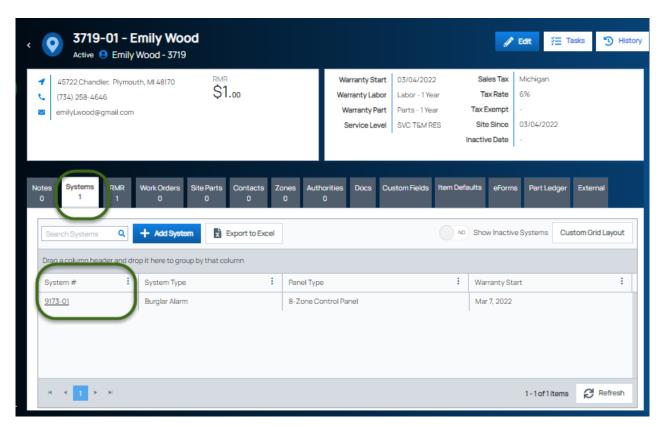
The Customers list opens. Locate the Customer, and then click the hyperlink in the Customer # column to open the customer record.



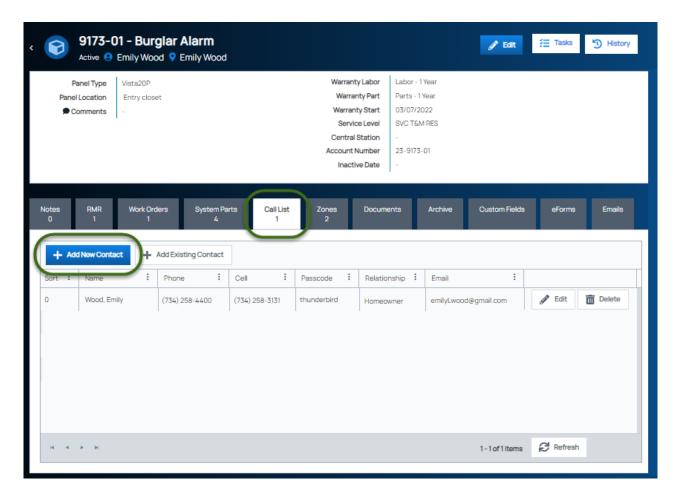
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the desired Site.



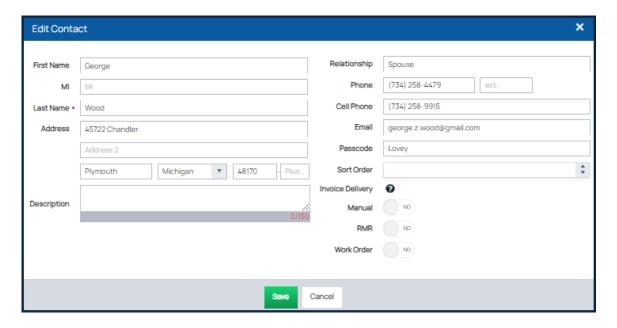
The Site record opens. Click the Systems tab. A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the desired System.



The System record opens. Click the Call List tab, and then click the Add New Contact button.



The Edit Contact opens. Data entry fields with a red bullet next to the field name are required. Each field is explained below.



Data Entry Fields

- First Name: Enter the first name.
- $\bullet \quad MI: \mbox{Enter the middle initial (optional)}. \mbox{ Maximum of 1 character allowed}.$
- Last Name: Enter the last name.
- Address: Enter the person's address.

- Description: This is a free-form text field. Maximum of 150 characters allowed.
- Relationship: Enter the relationship to the customer, such as child, neighbor, etc.
- Phone: Enter the telephone number.
- **Cell Phone**: Enter the cell phone number.
- Email: Enter the email address.
- **Passcode**: Enter a passcode. If the person on the call list was called, to confirm their identity, they would provide their passcode.
- Sort Order: Select the order in which the person is to be called in the event of an alarm.

When finished, click the Save button at the bottom of the form.