

# 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.

**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
<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 desired Site.

**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:

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.
<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  
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
<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 Call List tab, and then click the Add New Contact button.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

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: 1** | Zones: 2 | Documents | Archive | Custom Fields | eForms | Emails

**+ Add New Contact** + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wood, Emily	(734) 258-4400	(734) 258-3131	thunderbird	Homeowner	emilyLwood@gmail.com	<span>Edit</span> <span>Delete</span>

1 - 1 of 1 items Refresh

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

**Edit Contact** ✕

First Name:  Relationship:

MI:  Phone:

Last Name:  Cell Phone:

Address:  Email:

Address 2:

Plymouth Michigan 48170 Plus...

Passcode:

Description:  0/150

Sort Order:

Invoice Delivery ?

Manual:  NO

RMR:  NO

Work Order:  NO

Save Cancel

## Data Entry Fields

- **First Name:** Enter the first name.
- **MI:** Enter the middle initial (optional). 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.

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