

Add System Call List

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

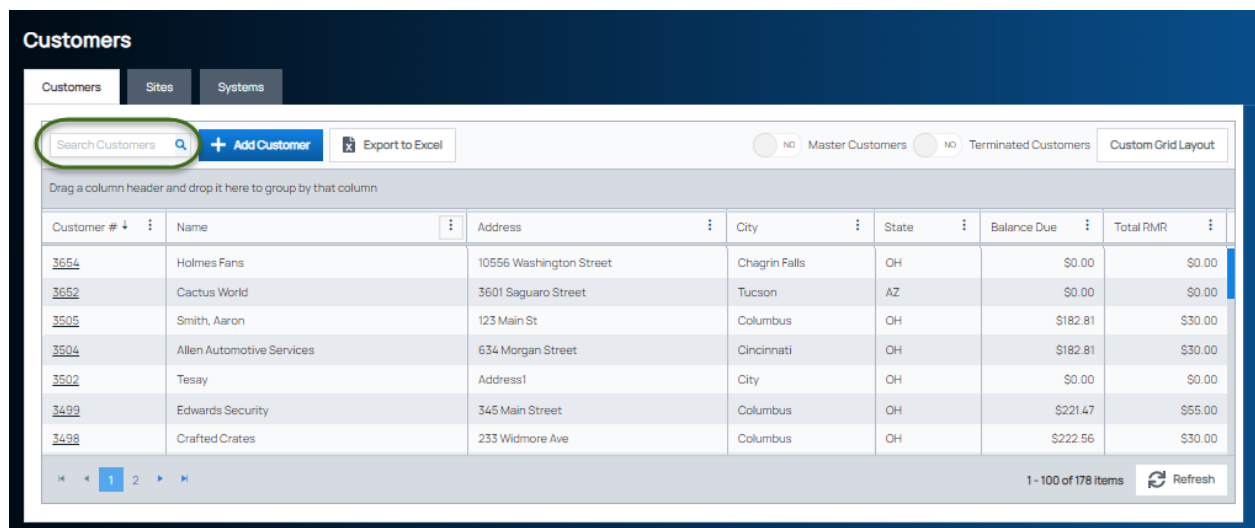
This option is used to create a list of individuals who should be called when an alarm signal is received at the central station for a System.

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, and should be a person on the Call List, you will need to enter the individual on 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: 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	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

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 desired Site.

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

Total Balance Due: \$0.00 Total RMR: \$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

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: Custom Fields Item Defaults eForms Part Ledger External

+ Add System NO Show Inactive Systems Custom Grid Layout

Search Systems Export to Excel

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 will be displayed. Click on the Call List tab, and then click on the Add New Contact button.

9173-01 - Burglar Alarm Edit Tasks History

Active Emily Wood Emily Wood

Panel Type	Vista20P	Warranty Labor	Labor - 1 Year
Panel Location	Entry closet	Warranty Part	Parts - 1 Year
Comments	-	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	Edit Delete

1 - 1 of 1 items Refresh

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

Edit Contact ✕

<p>First Name • <input type="text" value="George"/></p> <p>MI <input type="text" value="Mi"/></p> <p>Last Name • <input type="text" value="Wood"/></p> <p>Address <input type="text" value="45722 Chandler"/> <input type="text" value="Address 2"/> <input type="text" value="Plymouth"/> <input type="text" value="Michigan"/> <input type="text" value="48170"/> Plus...</p> <p>Description <input type="text" value=""/> 0/150</p>	<p>Relationship <input type="text" value="Spouse"/></p> <p>Phone <input type="text" value="(734) 258-4479"/> <input type="text" value="ext."/></p> <p>Cell Phone <input type="text" value="(734) 258-9915"/></p> <p>Email <input type="text" value="george.z.wood@gmail.com"/></p> <p>Passcode <input type="text" value="Lovey"/></p> <p>Sort Order <input type="text"/></p> <p>Invoice Delivery ?</p> <p>Manual <input type="radio"/> NO</p> <p>RMR <input type="radio"/> NO</p> <p>Work Order <input type="radio"/> NO</p>
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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.