

Edit System Call List

Last Modified on 12/20/2024 9:57 am EST

To edit 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

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
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 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 3/14/22

Edit Tasks History

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 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...
+ 3719-01	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.

The screenshot displays a software interface for a site record. At the top, the site is identified as "3719-01 - Emily Wood" with a location pin icon and the status "Active". To the right are buttons for "Edit", "Tasks", and "History". Below this, contact information is shown: "45722 Chandler, Plymouth, MI 48170", "(734) 258-4646", and "emilylwood@gmail.com". A "RMR" value of "\$1.00" is also displayed. To the right, warranty and tax details are listed: "Warranty Start: 03/04/2022", "Warranty Labor: Labor - 1 Year", "Warranty Part: Parts - 1 Year", "Service Level: SVC T&M RES", "Sales Tax: Michigan", "Tax Rate: 6%", "Tax Exempt: -", "Site Since: 03/04/2022", and "Inactive Date: -".

A horizontal menu below the site details contains several tabs: "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", and "External". The "Systems" tab is highlighted with a green circle.

Below the menu is a grid area for systems. It includes a search bar "Search Systems", a "+ Add System" button, and an "Export to Excel" button. A toggle switch for "Show Inactive Systems" is set to "NO", and there is a "Custom Grid Layout" button. The grid header contains the instruction "Drag a column header and drop it here to group by that column". The grid has four columns: "System #", "System Type", "Panel Type", and "Warranty Start". The first row of data shows "9173-01" under "System #", "Burglar Alarm" under "System Type", "8-Zone Control Panel" under "Panel Type", and "Mar 7, 2022" under "Warranty Start". The "System #" cell is highlighted with a green circle.

At the bottom of the grid, there is a pagination control showing "1" and a "Refresh" button.

The System record opens. Click the Call List tab. In the grid area, locate the call list contact to edit, and then click the Edit button (pencil icon).

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

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 opens. Make the necessary changes, and then click the **Save** button when finished.

Edit Contact ✕

First Name	Emily	Relationship	Homeowner
MI	Mi	Phone	(734) 258-4400 <input type="text"/> ext. <input type="text"/>
Last Name	Wood	Cell Phone	(734) 258-3131
Address	45722 Chandler	Email	emilyLwood@gmail.com
	Address 2	Passcode	thunderbird
	Plymouth Michigan 48170 Plus...	Sort Order	<input type="text"/> 0 <input type="button" value="↑"/> <input type="button" value="↓"/>
Description	<input type="text"/>	Invoice Delivery ?	
		Manual	<input type="radio"/> NO
		RMR	<input type="radio"/> NO
		Work Order	<input type="radio"/> NO

[Save](#) [Cancel](#)