

Edit System Zones

Last Modified on 05/01/2022 6:21 am EDT

To edit a Zone List to an existing System, you must begin by accessing a Customer record. If you are entering zones at the Site level, then follow the instructions below and on the following pages.

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 Saguario 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 2

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
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

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. If you are entering zones at the Site level, click on the Zones tab. Follow the instructions for adding zones at the system level.

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
(734) 258-4646
emilyLwood@gmail.com

RMR: \$1.00

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
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
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 Zones tab. Locate the zone to edit, and then click on the Edit button (pencil icon).

The screenshot shows the system record for '9173-01 - Burglar Alarm'. The header includes the system name, status (Active), and user (Emily Wood). Below the header are two columns of details: 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), and Inactive Date (-). A navigation bar contains tabs for Notes (0), RMR (1), Work Orders (1), System Parts (4), Call List (1), Zones (2), Documents, Archive, Custom Fields, eForms, and Emails. The 'Zones' tab is active, displaying a table with two zones. Each zone has an 'Edit' button (pencil icon) and a 'Delete' button (trash icon). The table has columns for Zone #, Signal Type, Authority, and Description. The footer shows '1 - 2 of 2 items' and a 'Refresh' button.

Zone #	Signal Type	Authority	Description	
1	Burglar Alarm	MI - Plymouth City PD	Front Door	Edit Delete
2	Burglar Alarm	MI - Plymouth City PD	Hallway	Edit Delete

The edit form will be displayed. Make the necessary changes, and then click on the Save button at the bottom of the form.

The screenshot shows the 'Edit 1 - Front Door' form. It contains four fields: Zone # (text input with value 1), Signal Type (dropdown menu with value Burglar Alarm), Authority (dropdown menu with value MI - Plymouth City PD), and Description (text input with value Front Door). At the bottom of the form are two buttons: a green 'Save' button with a checkmark icon and a white 'Cancel' button with an 'X' icon.