Edit System Zones

Last Modified on 12/16/2024 4:46 pm EST

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: CRM > Customers.

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

Customers Site	es Systems							
Search Customers	Add Customer	Export to Excel			No Master Cus	tomers NO Te	erminated Customers	Custom Grid Layout
Drag a column header	and drop it here to group by the	it column						
Customer # 🕴 🚦	Name	÷	Address	1	City :	State :	Balance Due	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

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-Own	er • Sind	ce 3/4/22					Ø Edit	: ¥⊟ 1	asks	3	History
12 1 0.8 0.6 0.4 0.2 0 0 0 0 0 0 0 0	Total Balance Du \$0.00 Custome	\$0.00 r Aging	0 Days— 91+		Address Phone Cell Email	45722 Char Plymouth, N (734) 258-4 (734) 258-3 emilyLwood	/II 48170 4646	n	Last S De Deliver	lesperson Statement fault Term ry Method ry RMR Inv	Print			
Invoices 0 + Add	Credits 0 1/0	RMR 0	Work Orders 0	Proposa O	ils Payments C 0	C/eCheck	Notes Co 0	ontacts O	Documents	Archive C	Custom Field		orms I	Emails
+ <u>3719</u>	-			:	Address 45722 Chandler					:	City Plymout		Sta	
н ч	1									1-1of1it	ems 🕄	Refre	sh	

The Site record opens. If you are entering zones at the Site level, click 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 is listed in the grid area. In the System Number column, click the hyperlink of the desired System.

< 9 3719-01 - Emily Wood Active 9 Emily Wood - 3719	🖋 Edit 🔚 Tasks 🖑 History
 45722 Chandler, Plymouth, MI 48170 (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 Systems RMR Work Orders Site Parts Contacts Zones Aut 0 1 0 0 0 0 0 0 0 Search Systems Q + Add System X Export to Excel	Norities Docs Custom Fields Item Defaulta eForms Part Ledger External
Dran a column beader and drop it here to group by that column System # : System Type : Panel Type	e i Warranty Start i
9173-01 Burglar Alarm 8-Zone C	ontrol Panel Mar 7, 2022
н н 1 н н	1-1of1items C Refresh

The System record opens. Click the Zones tab. Locate the zone to edit, and then click the Edit button (pencil icon).

< 9173-01 - Bu Active 9 Emily W	Irglar Alarm lood 💡 Emily Wood				🧨 Edit	ž⊒ Tasks	3 History
Panel Type Vista200	p	Warrar	nty Labor Lab	or - 1 Year			
Panel Location Entry cl	oset	Warra	ranty Part Part	ts - 1 Year			
Comments -			,	07/2022			
				T&M RES			
			al Station - nt Number 23-	9173-01			
			ctive Date -	31/3-01			
Notes RMR Work 0 1 + Add Zone Expor	1 4	Call List Zones 1 2	Documents	Archive	Custom Fields	eForms	Emails
Zone # : Signal Type	: Authority	: De	escription		:		
1 Burglar Alarm	MI - Plymouth City	PD Fro	ront Door			d Edit	Delete
2 Burglar Alarm	MI - Plymouth City	PD Ha	allway			d Edit	Delete
н к р					1 - 2 of 2 items	Refresh	

The edit form opens. Make the necessary changes, and then click the Save button at the bottom of the form.

Edit 1 - Front Door					
Zone # •	1				
Signal Type •	Burglar Alarm	•			
Authority •	MI - Plymouth City PD	•			
Description	Front Door				
~	Save X Cancel				