

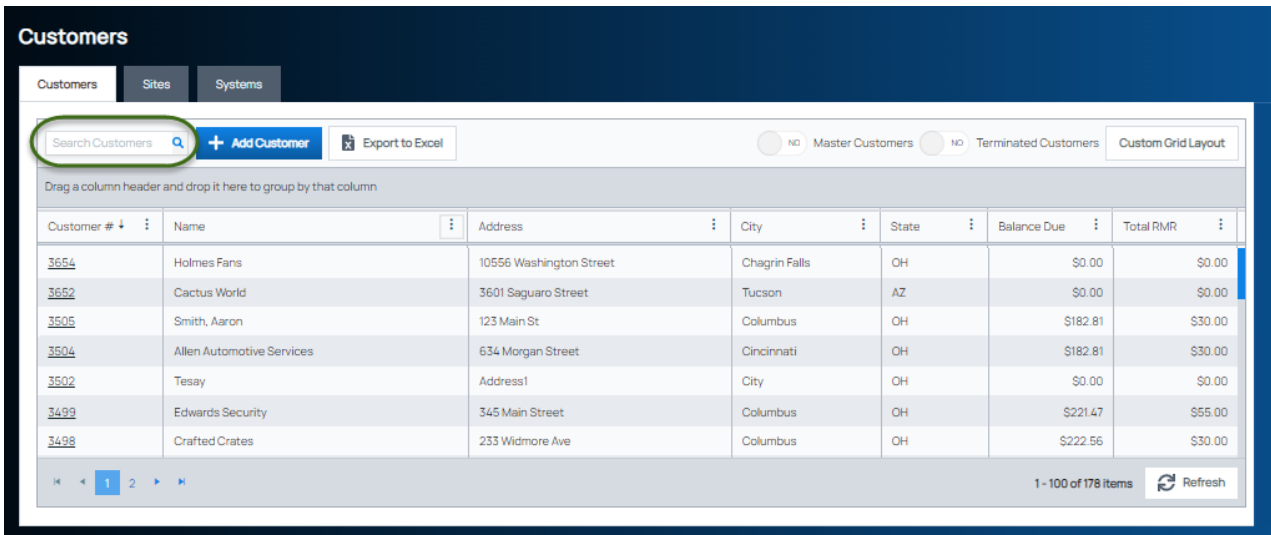
System Custom Fields

Last Modified on 12/16/2024 4:26 pm EST

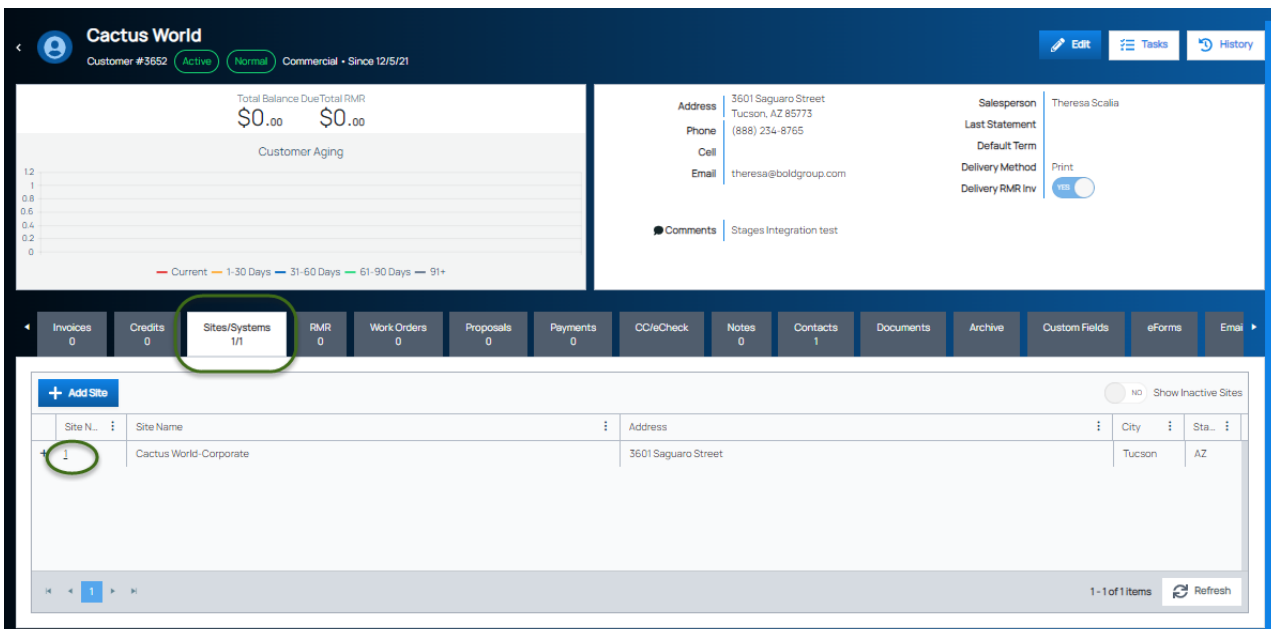
To access the System Custom Fields, you must first open a customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

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



The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site (to which the System is linked) for which you want to access the Custom Fields.



The Site record opens. Click on the Systems tab.

1 - Emily Wood
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 1 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | Zones: 0 | Authorities: 0 | Docs | Custom Fields | Item Defaults | eForms | Part Ledger | External

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 313-6588			Neighbor		Edit Delete

1 - 1 of 1 items Refresh

A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System for which you want to access the custom fields.

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Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 2 | **Systems: 1** | RMR: 2 | Work Orders: 1 | Site Parts: 0 | Contacts: 1 | 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
3703-01	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

The System record opens. Click the Utilities tab, and then click the Custom Fields tab.

In the bottom panel of the page, the custom fields are displayed. Enter information according to your company's policies and procedures.

When finished entering information, click the Save button.

3703-01 - Burglar Alarm
Active Emily Wood Emily Wood

Panel Type: Vista20P
Panel Location: -
Comments: -

Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Warranty Start: 03/07/2022
Service Level: SVC T&M RES
Central Station: -
Account Number: 25-3703-01
Inactive Date: -

Notes: 2 | RMR: 0 | Work Orders: 1 | System Parts: 0 | Call List: 0 | Zones: 0 | **Utilities**

Documents | Archive | **Custom Fields** | eForms | Emails

History Save Cancel

UpgradeDate:

Documents | Archive | **Custom Fields** | eForms | Emails

History Save Cancel

UpgradeDate: