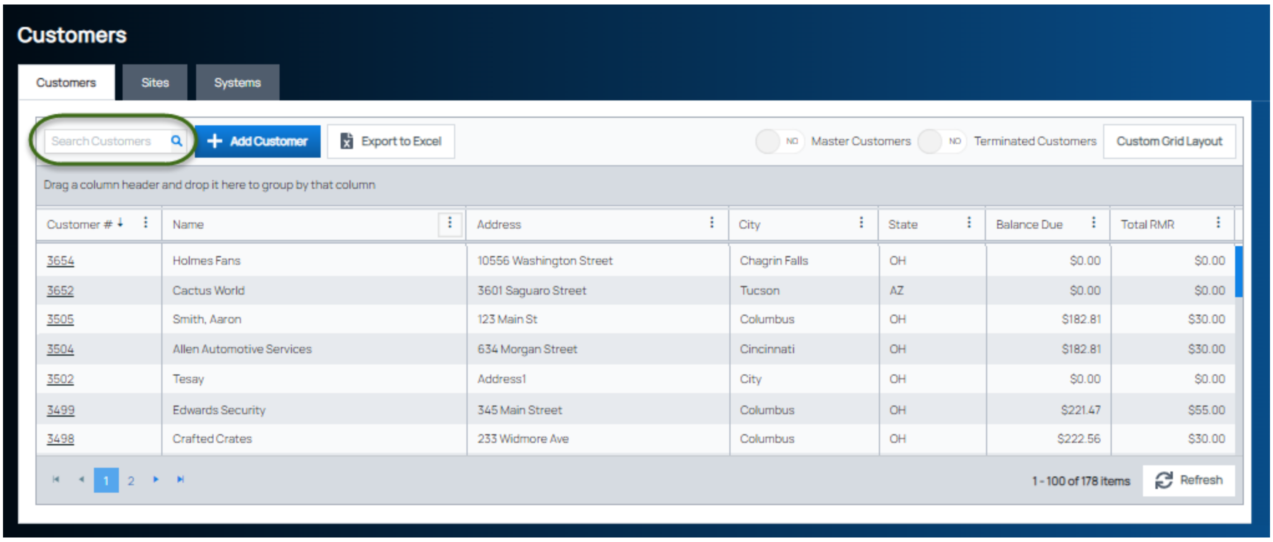
System Custom Fields

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

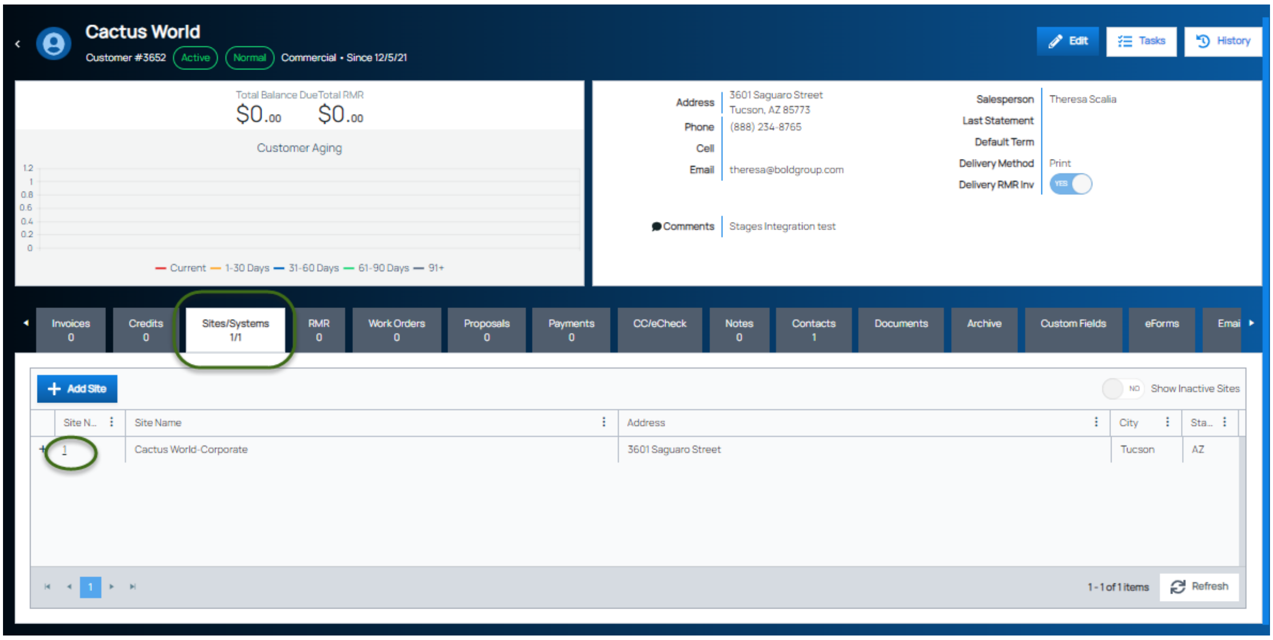
To access the System Custom Fields, you must first open a customer record.

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

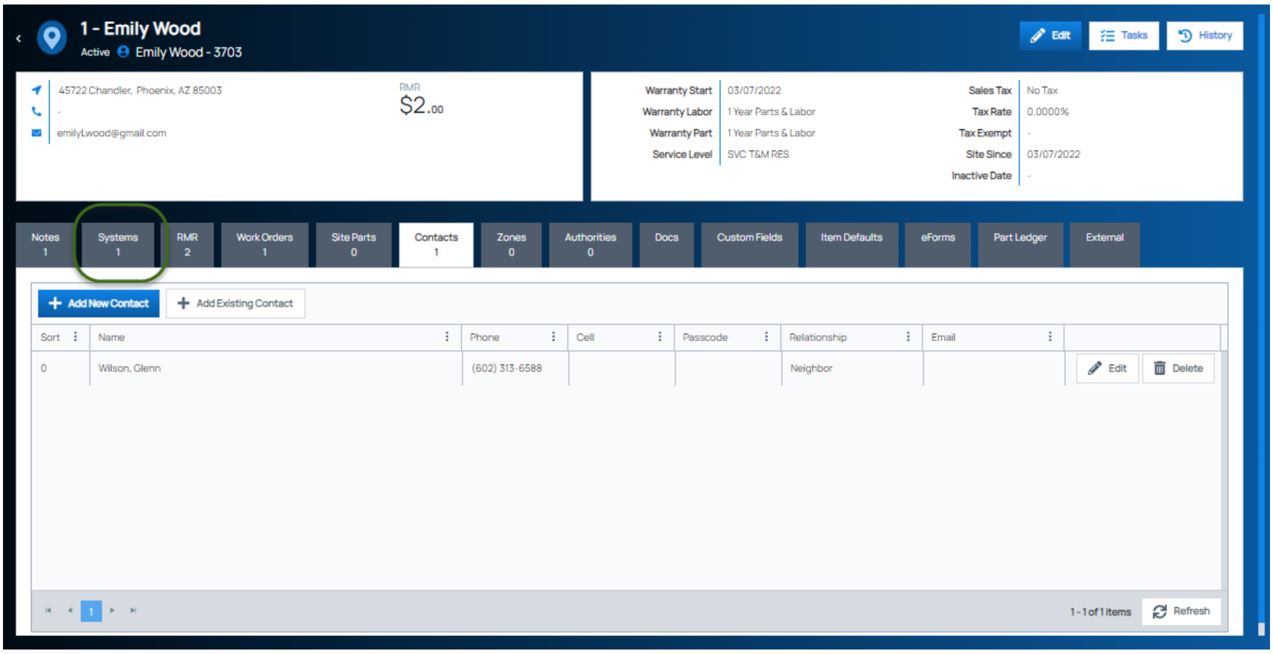
The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



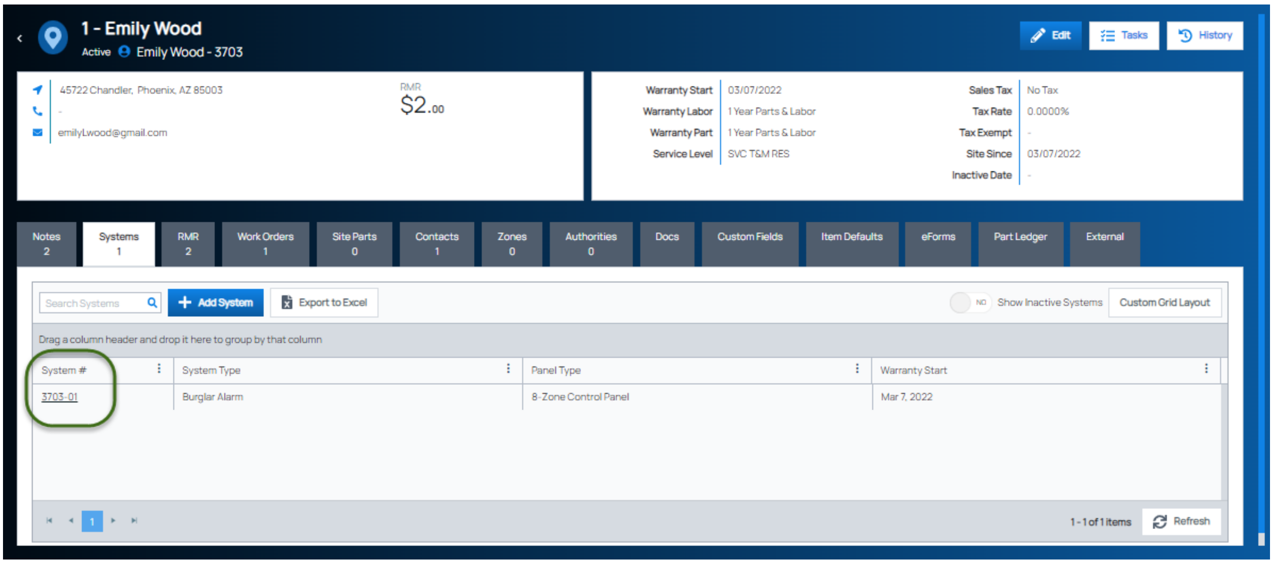
The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site (to which the System is linked) for which you want to access the Custom Fields.



The Site record opens. Click on the Systems tab.



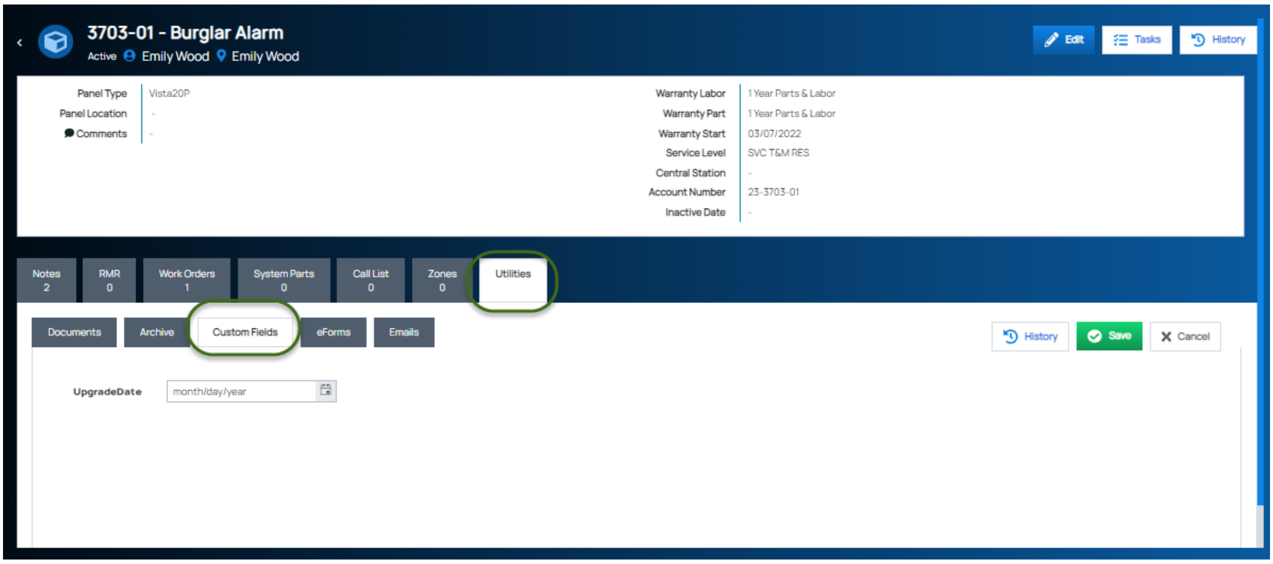
A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System for which you want to access the custom fields.



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
Edit
Tasks
History
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 23-3703-01
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
month/day/year


Documents
Archive
Custom Fields
eForms
Emails
History
Save
Cancel
UpgradeDate
month/day/year