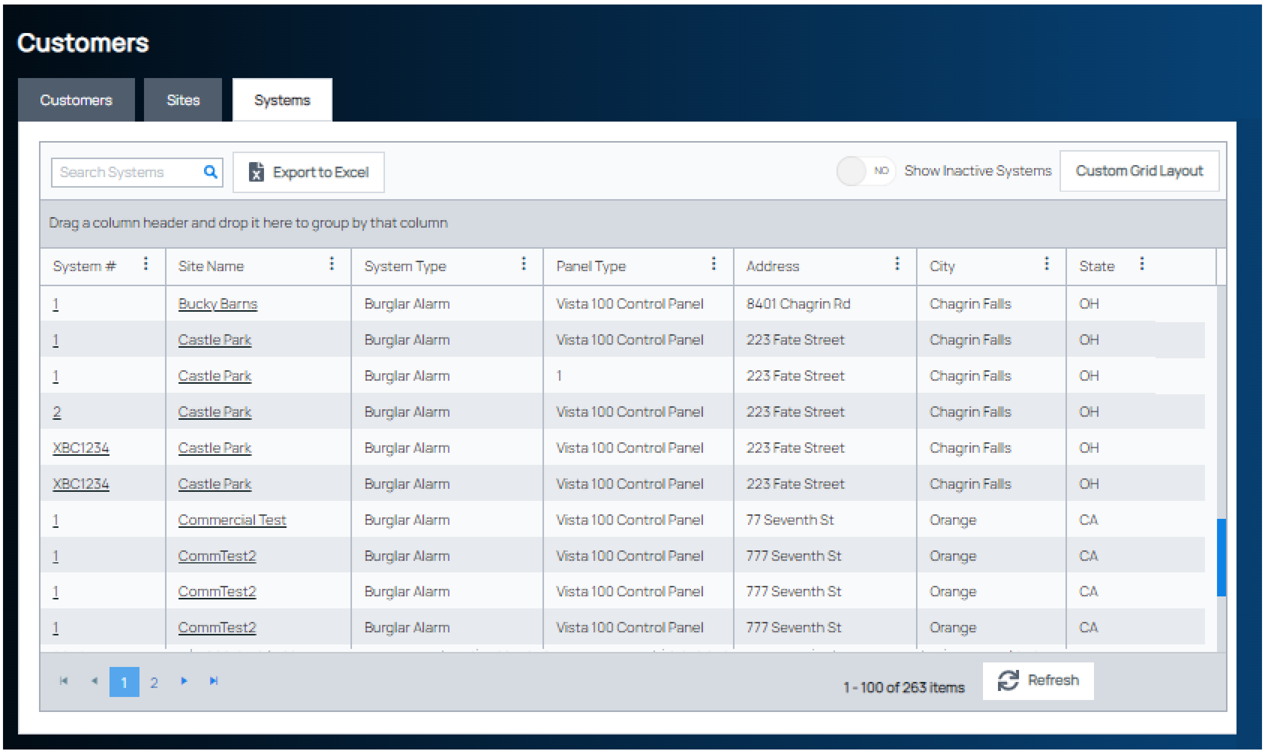
Systems List

Last Modified on 05/01/2022 6:17 am EDT

The Systems List is a tab available when navigating to Accounts Receivable > Customers.

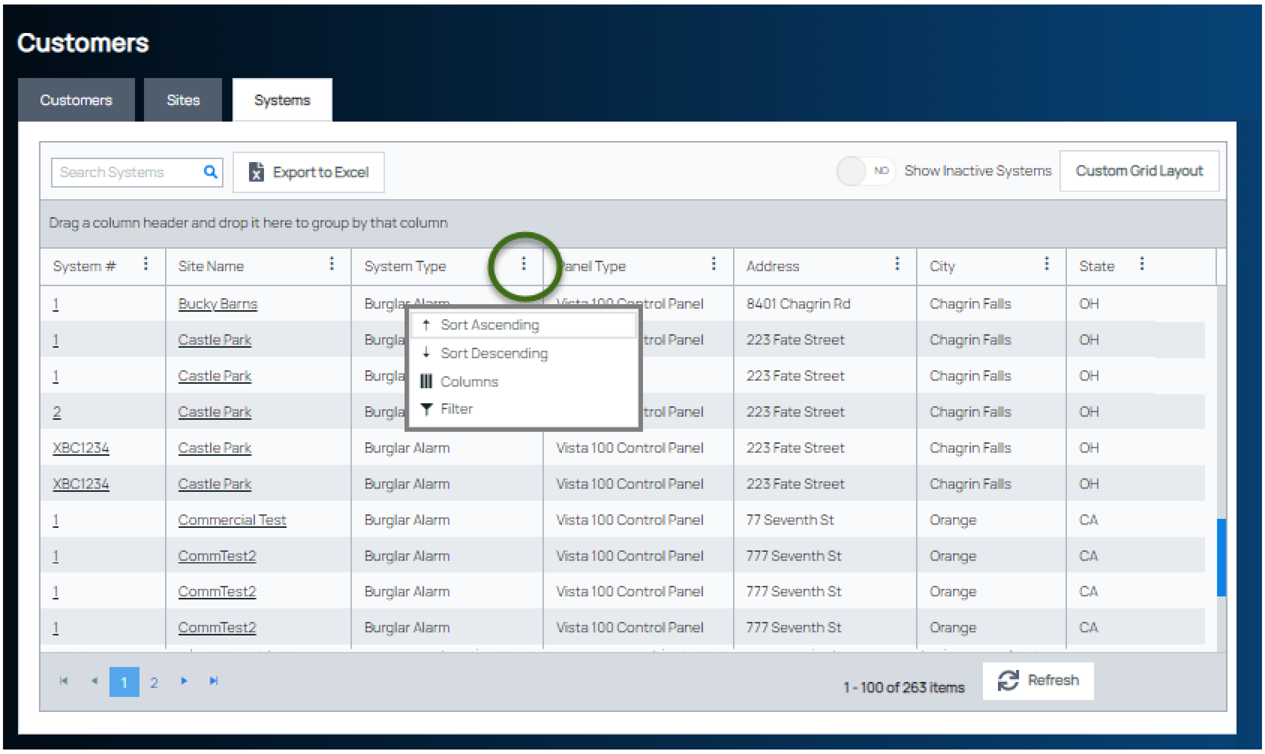
Systems Tab

The default view in the grid area of the Systems tab displays system number, site name, system type, panel type, and the site address. There are many other columns available to include in the grid area.

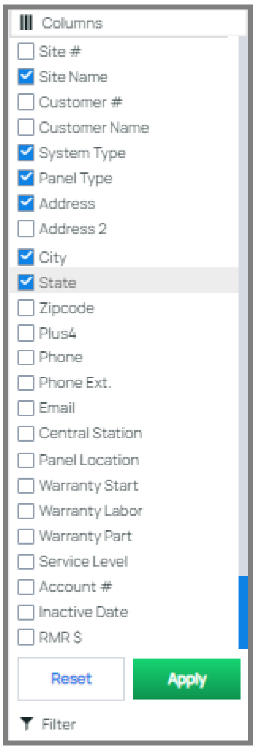


Custom Grid Layout

Users have the ability to customize the grid layout. Clicking on the ellipse button on any of the column headers will display a list of options.



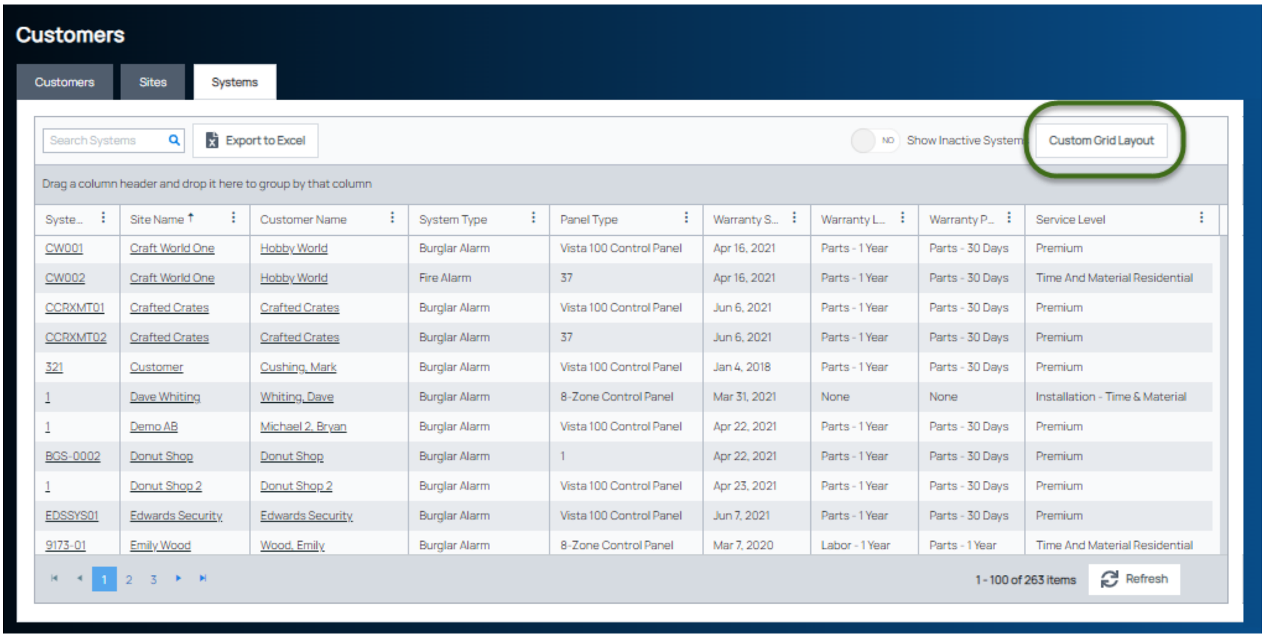
On the Systems List, the options are Sort Ascending, Sort Descending, Columns, and Filter. Clicking on the Columns option will display a list of all the available columns to display in the grid.



Once you have made selections, you may save the layout so that you do not have to repeat this process every time you open the Systems List.

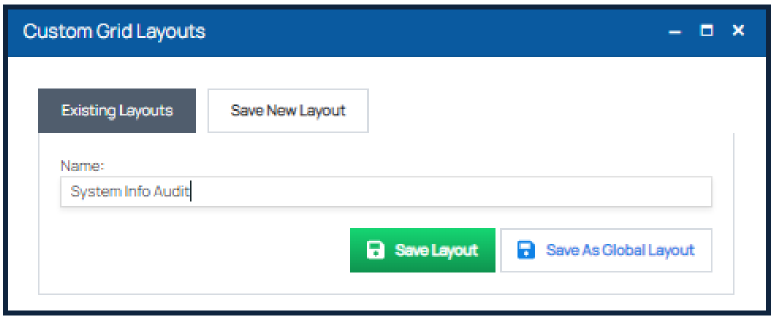
In the example below, we want a view of the Systems List that includes fields on the System setup for auditing purposes, and want to save this layout for future use.

To save this layout, click on the Custom Grid Layout button at the upper right of the page.



A dialog box will be displayed to enter the Name of the layout. There are two options for saving:

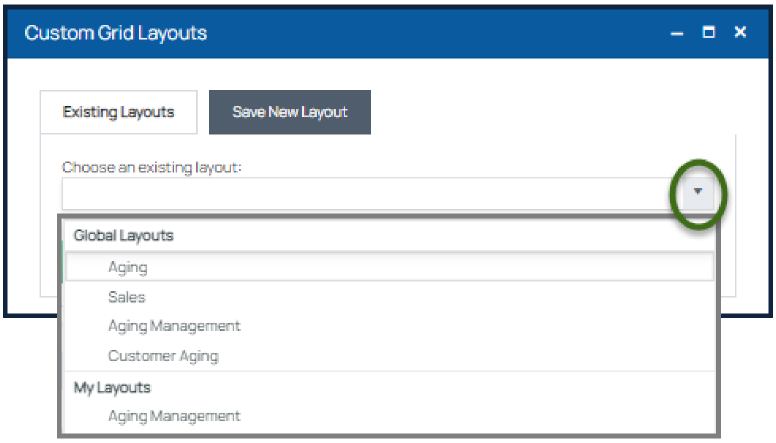
- Save Layout – If this option is selected, the custom layout will only be available to the logged in user that created the layout.
- Save As Global Layout – Selecting this option will make the layout available to all users. Keep in mind, if other users have access to this layout, they are able to make changes to the original layout.



If the user leaves the page displaying the Custom Grid Layout, and then returns, the default grid view will be displayed. To open a Custom Grid Layout, click on the Custom Grid Layout button at the upper right of the page.

The Custom Grid Layouts dialog box will be displayed. Click on the drop-down arrow in the "Choose an existing layout" field to locate the desired layout for viewing, and then click the Apply Layout button.

Once the grid is loaded, click on the Refresh button at the lower right of the page to refresh the data within the grid.

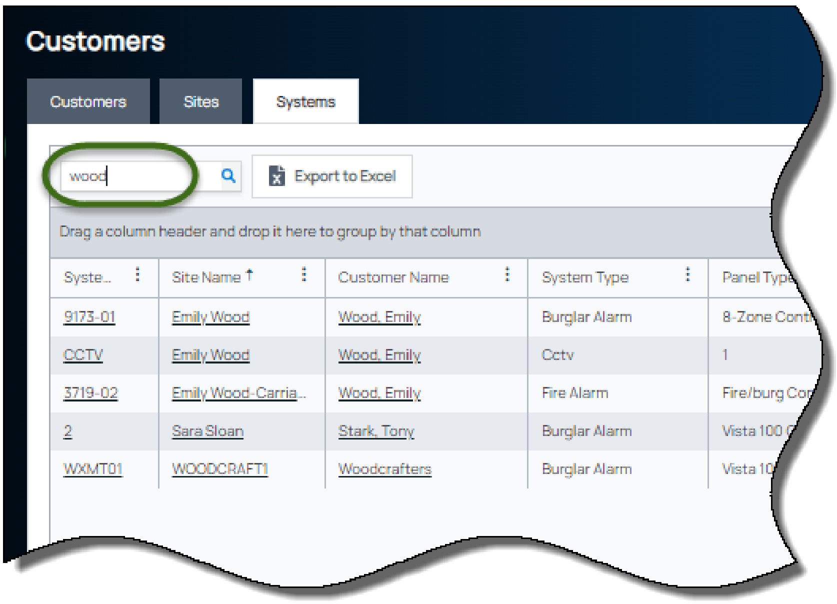


System Search

At the upper left of the Systems List is a search field. Users can search by any criteria available. Type in your criteria for the search into the search box. You must enter at least four characters to trigger the search engine. The search engine will look for the criteria entered in any of the columns displayed in the grid.

In our example below, we typed the word "wood" into the Search Sites box. The software found five systems containing that string of characters. In the search results, the software found four systems where the customer or site name contained "wood", and one system where "wood" is part of the city name.

If you want to go directly to the System record, click on the hyperlink in the System # column. If you want to open the customer record, click on the hyperlink in the Customer Name column. If you want to open the site to which the system is linked, click on the hyperlink in the Site Name column.



Systems List Function Buttons

At the top of the Systems List are three function buttons, each of which is described below.

- Export to Excel – Clicking on this button will export the current page of data displayed in the grid area. An Excel file icon will be displayed on your task bar to open the file for viewing.

- Show Inactive Systems – Setting this toggle button to Yes will display a list of all systems where an inactive date was entered on the System record.
- Custom Grid Layout – Allows users to create, update, and retrieve custom grid layouts. See the topic on this feature earlier in this article.