# Systems List

Last Modified on 12/20/2024 2:17 pm EST

The Systems List is a tab available when navigating to CRM > 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.

ustomers	Sites Systems					
Search Systems	s Q Export to Ex	cel		NO SI	now Inactive Systems	Custom Grid Layout
Drag a column hea	ader and drop it here to group	by that column				
System #	Site Name :	System Type :	Panel Type	Address :	City :	State :
1	Bucky Barns	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	ОН
1	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	Castle Park	Burglar Alarm	1	223 Fate Street	Chagrin Falls	ОН
2	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
XBC1234	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	ОН
XBC1234	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	Commercial Test	Burglar Alarm	Vista 100 Control Panel	77 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA

#### **Custom Grid Layout**

You can customize the grid layout. Clicking the ellipse button on any of the column headers displays a list of options.

	Sites Systems					
Search Systems	s 🔍 🖹 Export to E	kcel		ND S	how Inactive Systems	Custom Grid Layout
Drag a column he	ader and drop it here to group	by that column				
System #	Site Name :	System Type	anel Type 🕴	Address :	City :	State :
1	Bucky Barns	Burglar Alarm	Nicto 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	ОН
1	Castle Park	Burgla + Sort Ascending	trol Panel	223 Fate Street	Chagrin Falls	ОН
1	Castle Park	Burgla III Columns	9	223 Fate Street	Chagrin Falls	ОН
2	Castle Park	Burgla 🝸 Filter	trol Panel	223 Fate Street	Chagrin Falls	ОН
XBC1234	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	ОН
XBC1234	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	Commercial Test	Burglar Alarm	Vista 100 Control Panel	77 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	CommTest2	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
H 4 1 2	ж	· · · · · ·		1 - 100 of 2	53 items C Refre	sh

On the Systems List, the options are Sort Ascending, Sort Descending, Columns, and Filter. Clicking the Columns option shows all the available columns to display in the grid.

Columns Site # Site # Site Name Customer # Customer Mame System Type Panel Type Address Address 2 City State Discode Plus4 Phone Phone Ext. Email Central Station Panel Location Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date RMR \$
<ul> <li>Site Name</li> <li>Customer #</li> <li>Customer Name</li> <li>System Type</li> <li>Panel Type</li> <li>Address</li> <li>Address 2</li> <li>City</li> <li>State</li> <li>Zipcode</li> <li>Plus4</li> <li>Phone Ext.</li> <li>Email</li> <li>Central Station</li> <li>Panel Location</li> <li>Warranty Labor</li> <li>Warranty Labor</li> <li>Warranty Part</li> <li>Service Level</li> <li>Account #</li> <li>Inactive Date</li> </ul>
Customer # Customer Name System Type Address Address 2 City State Zipcode Plus4 Phone Ext. Email Central Station Panel Location Warranty Start Service Level Account # Inactive Date
Customer Name System Type Panel Type Address Address 2 City State Zipcode Plus4 Phone Phone Ext. Email Central Station Panel Location Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date
System Type Panel Type Address Address Address 2 City State Zipcode Plus4 Phone Phone Ext. Email Central Station Panel Location Warranty Start Warranty Labor Warranty Labor Account # Inactive Date
Panel Type     Address     Address     Address 2     City     State     Zipcode     Plus4     Phone     Phone Ext.     Email     Central Station     Panel Location     Warranty Start     Warranty Labor     Warranty Part     Service Level     Account #     Inactive Date
Address     Address     Address     Address     Zipcode     Plus4     Phone     Phone Ext.     Email     Central Station     Panel Location     Warranty Start     Warranty Part     Service Level     Account #     Inactive Date
<ul> <li>Address 2</li> <li>✓ City</li> <li>✓ State</li> <li>Zipcode</li> <li>Plus4</li> <li>Phone</li> <li>Phone Ext.</li> <li>Email</li> <li>Central Station</li> <li>Panel Location</li> <li>Warranty Start</li> <li>Warranty Labor</li> <li>Warranty Part</li> <li>Service Level</li> <li>Account #</li> <li>Inactive Date</li> </ul>
City City City City City City City City
State Jipcode Plus4 Phone Phone Ext. Email Central Station Panel Location Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date
Zipcode     Plus4     Phone     Phone Ext.     Email     Central Station     Panel Location     Warranty Start     Warranty Labor     Warranty Part     Service Level     Account #     Inactive Date
<ul> <li>Plus4</li> <li>Phone</li> <li>Phone Ext.</li> <li>Email</li> <li>Central Station</li> <li>Panel Location</li> <li>Warranty Start</li> <li>Warranty Labor</li> <li>Warranty Part</li> <li>Service Level</li> <li>Account #</li> <li>Inactive Date</li> </ul>
Phone     Phone Ext.     Email     Central Station     Panel Location     Warranty Start     Warranty Labor     Warranty Part     Service Level     Account #     Inactive Date
Phone Ext.     Email     Central Station     Panel Location     Warranty Start     Warranty Labor     Warranty Part     Service Level     Account #     Inactive Date
Email     Central Station     Panel Location     Warranty Start     Warranty Labor     Warranty Part     Service Level     Account #     Inactive Date
Central Station Panel Location Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date
Panel Location Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date
Warranty Start Warranty Labor Warranty Part Service Level Account # Inactive Date
Warranty Labor Warranty Part Service Level Account #
Warranty Part Service Level Account # Inactive Date
Service Level Account # Inactive Date
Account #
Inactive Date
_
RMR \$
Reset Apply
▼ Filter

Once you have made selections, 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 the Custom Grid Layout button at the upper right of the page.

ustomers	Sites System	ns						
Search Syste	ms Q 🖹 Exp	ort to Excel				N0 St	iow Inactive System	Custom Grid Layout
Drag a column	header and drop it here	to group by that column						
Syste	Site Name † 🚦	Customer Name :	System Type :	Panel Type	Warranty S	Warranty L	Warranty P	Service Level
CW001	Craft World One	Hobby World	Burglar Alarm	Vista 100 Control Panel	Apr 16, 2021	Parts - 1 Year	Parts - 30 Days	Premium
CW002	Craft World One	Hobby World	Fire Alarm	37	Apr 16, 2021	Parts - 1 Year	Parts - 30 Days	Time And Material Residential
CCRXMT01	Crafted Crates	Crafted Crates	Burglar Alarm	Vista 100 Control Panel	Jun 6, 2021	Parts - 1 Year	Parts - 30 Days	Premium
CCRXMT02	Crafted Crates	Crafted Crates	Burglar Alarm	37	Jun 6, 2021	Parts - 1 Year	Parts - 30 Days	Premium
321	Customer	Cushing, Mark	Burglar Alarm	Vista 100 Control Panel	Jan 4, 2018	Parts - 1 Year	Parts - 30 Days	Premium
1	Dave Whiting	Whiting, Dave	Burglar Alarm	8-Zone Control Panel	Mar 31, 2021	None	None	Installation - Time & Material
1	Demo AB	Michael 2, Bryan	Burglar Alarm	Vista 100 Control Panel	Apr 22, 2021	Parts - 1 Year	Parts - 30 Days	Premium
BGS-0002	Donut Shop	Donut Shop	Burglar Alarm	1	Apr 22, 2021	Parts - 1 Year	Parts - 30 Days	Premium
1	Donut Shop 2	Donut Shop 2	Burglar Alarm	Vista 100 Control Panel	Apr 23, 2021	Parts - 1 Year	Parts - 30 Days	Premium
EDSSYS01	Edwards Security	Edwards Security	Burglar Alarm	Vista 100 Control Panel	Jun 7, 2021	Parts - 1 Year	Parts - 30 Days	Premium
9173-01	Emily Wood	Wood, Emily	Burglar Alarm	8-Zone Control Panel	Mar 7, 2020	Labor - 1 Year	Parts - 1 Year	Time And Material Residential

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

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

Custom Grid Layouts		- <b>-</b> ×
Existing Layouts	Save New Layout	
Name:		
System Info Audit		
	Save Layout	Save As Global Layout

If you leave the page displaying the Custom Grid Layout and then return, the default grid view is displayed. To open a Custom Grid Layout, click the Custom Grid Layout button at the upper right of the page.

The Custom Grid Layouts dialog box opens. Click 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 the Refresh button at the lower right of the page to refresh the data within the grid.

Custom Grid Layouts	– 🗆 ×
Existing Layouts Save New Layout	
Choose an existing layout:	$\overline{\mathbf{O}}$
Global Layouts	~
Aging	
Sales	
Aging Management	
Customer Aging	
My Layouts	
Aging Management	

## System Search

At the upper left of the Systems List is a search field. Use this to search by any criteria available. Type in your criteria for the search into the search box. Enter at least four characters to trigger the search. The search looks 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 the hyperlink in the System # column. If you want to open the customer record, click the hyperlink in the Customer Name column. If you want to open the site to which the system is linked, click the hyperlink in the Site Name column.

Customers	Sites Syst	tems				
wood	۹ 🕅 ۱	xport to Excel				
Drag a column	header and drop it he	re to group by that colum	n			- (
Syste	Site Name †	Customer Name	÷	System Type	:	Panel Typ
<u>9173-01</u>	Emily Wood	Wood, Emily		Burglar Alarm		8-Zone C
CCTV	Emily Wood	Wood, Emily		Cctv		1
	Emily Wood-Carria	Wood, Emily		Fire Alarm		Fire/burg
3719-02				Burglar Alarm		Vista 100
<u>3719-02</u>	Sara Sloan	Stark, Tony				

## 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 exports the current page of data displayed in the grid area. An Excel file icon is displayed on your task bar to open the file for viewing.
- Show Inactive Systems: Setting this toggle to Yes displays a list of all systems where an inactive date was

entered on the System record.

• Custom Grid Layout: Allows you to create, update, and retrieve custom grid layouts.

ustomers	Sites Systems					
Search Systems	e Export to E			NO S	how Inactive Systems	Custom Grid Layout
System #	Site Name :	System Type	Panel Type	Address :	City :	State :
1	Bucky Barns	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	ОН
1	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	Castle Park	Burglar Alarm	1	223 Fate Street	Chagrin Falls	ОН
2	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	ОН