

# Systems List

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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.

The screenshot shows the 'Customers' tab with the 'Systems' sub-tab selected. The interface includes a search bar, an 'Export to Excel' button, and a 'Show Inactive Systems' toggle. Below the grid, there is a pagination control showing '1 - 100 of 263 items' and a 'Refresh' button.

System #	Site Name	System Type	Panel Type	Address	City	State
1	<a href="#">Bucky Barns</a>	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	1	223 Fate Street	Chagrin Falls	OH
2	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
<a href="#">XBC1234</a>	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
<a href="#">XBC1234</a>	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	<a href="#">Commercial Test</a>	Burglar Alarm	Vista 100 Control Panel	77 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	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.

**Customers**

Customers Sites **Systems**

Search Systems  Export to Excel  MD Show Inactive Systems Custom Grid Layout

Drag a column header and drop it here to group by that column

System #	Site Name	System Type	Panel Type	Address	City	State
1	<a href="#">Bucky Barns</a>	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
2	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
XBC1234	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
XBC1234	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	<a href="#">Commercial Test</a>	Burglar Alarm	Vista 100 Control Panel	77 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA
1	<a href="#">CommTest2</a>	Burglar Alarm	Vista 100 Control Panel	777 Seventh St	Orange	CA

1 - 100 of 263 items Refresh

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 Name
- Customer #
- 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
- RMR \$

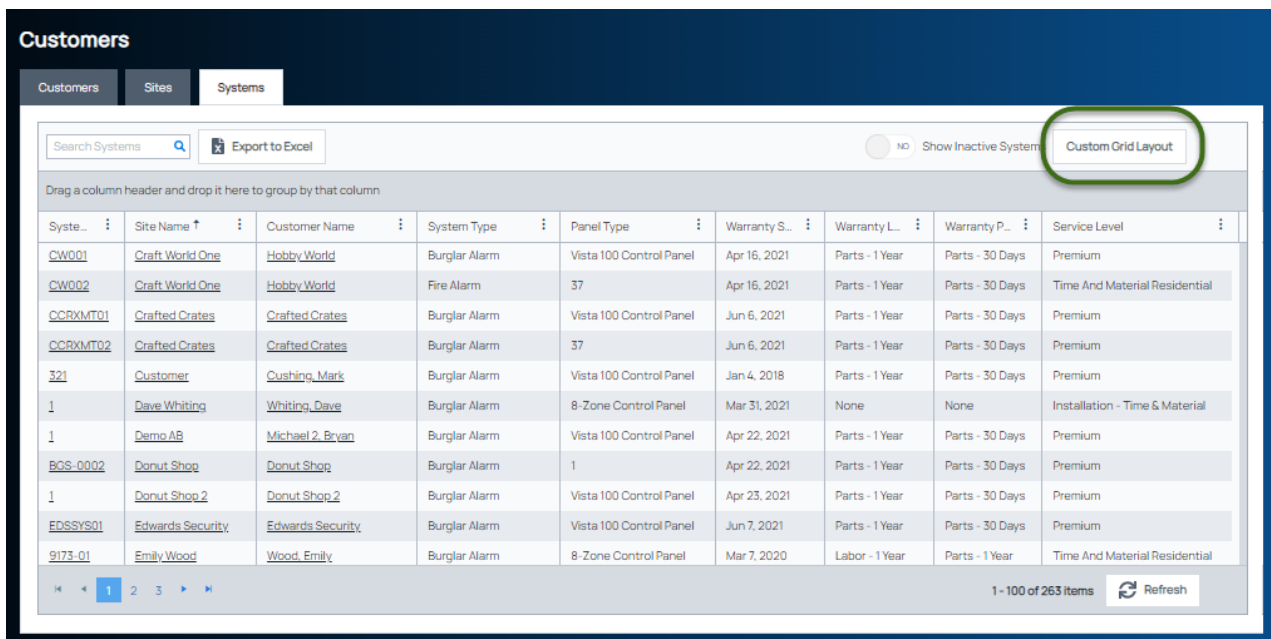
Reset Apply

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.

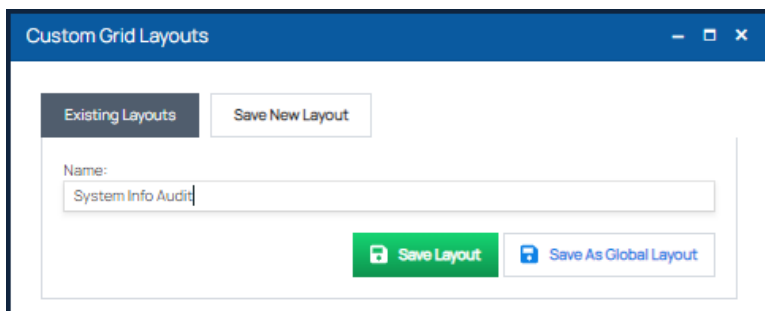
In the example below, we want a view of the Systems List that includes fields on the System setup for auditing purposes, and want to save this layout for future use.

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



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

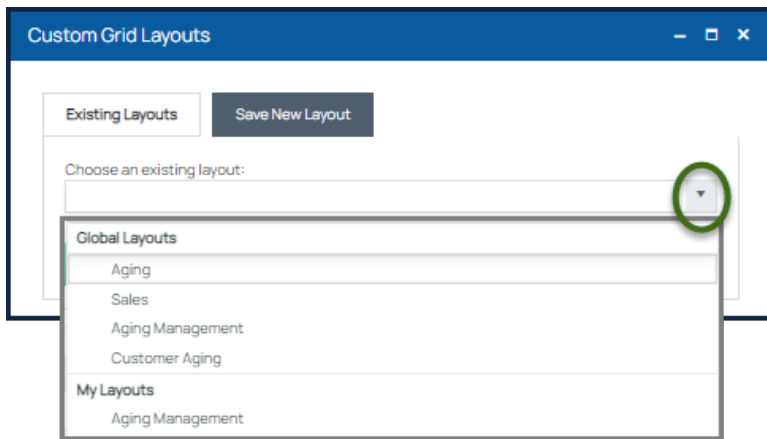
- Save Layout — If this option is selected, the custom layout is only available to the logged in user that created the layout.
- Save As Global Layout — Selecting this option makes the layout available to all users. Keep in mind, if other users have access to this layout, they can to make changes to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



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.

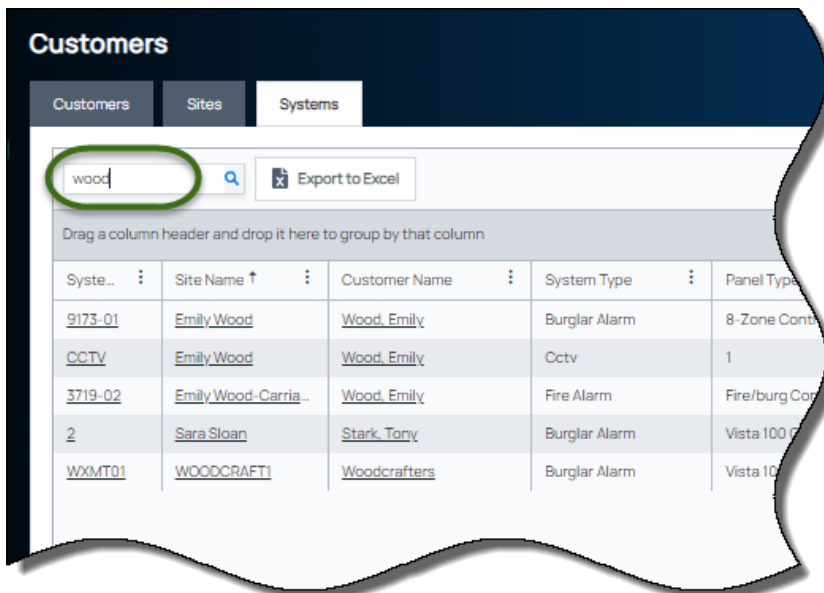


## System Search

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.



## 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.

The screenshot shows the 'Customers' application interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Systems' and an 'Export to Excel' button. To the right of the search bar is a toggle switch for 'Show Inactive Systems' and a 'Custom Grid Layout' button. Below these elements is a table with the following columns: System #, Site Name, System Type, Panel Type, Address, City, and State. The table contains four rows of data. At the bottom of the table, there is a pagination control showing '1' of 2 items and a 'Refresh' button.

System #	Site Name	System Type	Panel Type	Address	City	State
1	<a href="#">Bucky Barns</a>	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	<a href="#">Castle Park</a>	Burglar Alarm	1	223 Fate Street	Chagrin Falls	OH
2	<a href="#">Castle Park</a>	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH