

Systems List

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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.

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 search bar is a grid of system data with columns for System #, Site Name, System Type, Panel Type, Address, City, and State. The grid contains 12 rows of data. At the bottom, 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	Bucky Barns	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	OH
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	OH
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	OH
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

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.

Customers

Customers Sites Systems

Search Systems Export to Excel 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	Bucky Barns	Burglar Alarm	Vista 100 Control Panel	8401 Chagrin Rd	Chagrin Falls	OH
1	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
1	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH
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	OH
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

1 - 100 of 263 items Refresh

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.

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, 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.

Customers

Customers Sites Systems

Search Systems Export to Excel NO Show Inactive System **Custom Grid Layout**

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

System	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
BOS-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

1 - 100 of 263 items Refresh

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.

Custom Grid Layouts

Existing Layouts Save New Layout

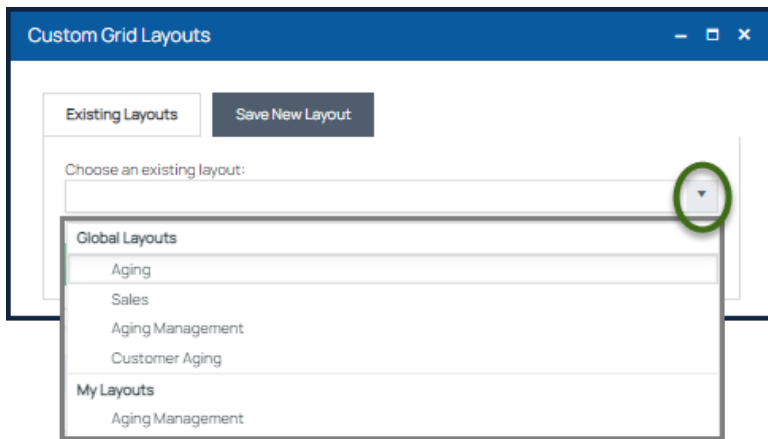
Name:
System Info Audit

Save Layout Save As Global 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.

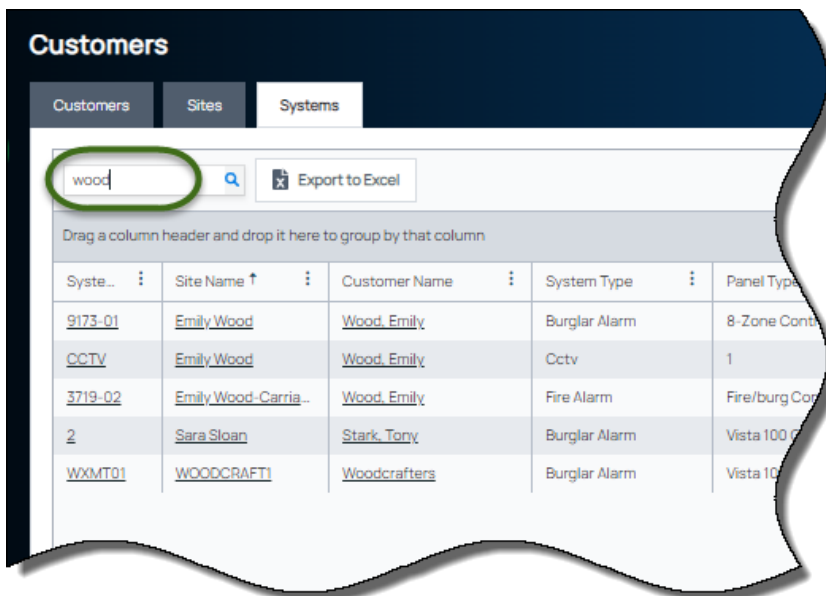


System Search

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.


Customers

Customers Sites Systems

Search Systems  Export to Excel 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
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1	Castle Park	Burglar Alarm	1	223 Fate Street	Chagrin Falls	OH
2	Castle Park	Burglar Alarm	Vista 100 Control Panel	223 Fate Street	Chagrin Falls	OH

1 - 100 of 263 items  Refresh