

# The System Record

Last Modified on 12/16/2024 4:07 pm EST

The System record is accessed from a Customer record, and like the customer record, has several tabs of information related to the System. Users with the appropriate permissions can add, edit, or delete data related to the System.

To open a System record, navigate to CRM > Customers. The customer list opens. Locate the customer record containing the site associated with the System to which you want to work, and then click the hyperlink in the customer# column.

The screenshot shows the 'Customers' interface with three tabs: 'Customers', 'Sites', and 'Systems'. The 'Customers' tab is active. At the top, there is a search bar labeled 'Search Customers', a '+ Add Customer' button, and an 'Export to Excel' button. There are also two toggle switches for 'Master Customers' and 'Terminated Customers', both currently set to 'NO', and a 'Custom Grid Layout' button. Below this is a header for the grid with the instruction 'Drag a column header and drop it here to group by that column'. The grid itself has the following columns: 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The data rows are as follows:

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3803</a>	Best Security	514 E Washington	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3802</a>	Jake's Garage	24393 Sprague Rd	Columbia Station	OH	\$112.20	\$35.00
<a href="#">3726</a>	Most, Ben	4156 Hinsdale Rd.	South Euclid	OH	\$0.00	\$0.00
<a href="#">3720</a>	Watson, George	32551 Lexington	Plymouth	MI	\$333.48	\$0.00
<a href="#">3719</a>	Wood, Emily	45722 Chandler	Plymouth	MI	\$822.71	\$120.00
<a href="#">3709</a>	Plymouth Bakery #4	41225 Sheldon Rd	Plymouth	MI	\$0.00	\$0.00
<a href="#">3708</a>	Plymouth Bakery #3	20515 Ford Rd	Canton	MI	\$79.50	\$75.00
<a href="#">3707</a>	Plymouth Bakery #2	10447 Ann Arbor Rd	Plymouth	MI	\$112.84	\$75.00
<a href="#">3706</a>	Plymouth Bakery	408 N Main	Plymouth	MI	\$0.00	(\$1.00)
<a href="#">3699</a>	Steve's Snow Blowing	123 Main St.	Chatham	NJ	\$1,848.71	\$37.50

At the bottom of the grid, there is a pagination bar showing '1 - 100 of 195 items' and a 'Refresh' button.

The customer record opens. Click on the Sites/Systems tab.

A list of all active sites linked to the customer are displayed in the grid area. Click the hyperlink of the site number to be viewed.

**Emily Wood**  
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

**Total Balance Due** \$822.71 **Total RMR** \$120.00

**Customer Aging**

**Address** 45722 Chandler Plymouth, MI 48170  
**Phone** (734) 258-4646  
**Cell** (734) 258-3311  
**Email** emilyLwood@gmail.com

**Salesperson** Dan Brown  
**Last Statement**  
**Default Term**  
**Delivery Method** Print  
**Delivery RMR Inv** YES

**Comments**

**Invoices** 7 **Credits** 2 **Sites/Systems** 2/3 **RMR** 5 **Work Orders** 2 **Proposals** 0 **Payments** 8 **CC/eCheck** **Notes** 0 **Contacts** 2 **Documents** **Archive** **Custom Fields** **eForms** **Emails**

**+ Add Site**  Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
<a href="#">3719-01</a>	Emily Wood	45722 Chandler	Plymouth	MI
<a href="#">3719-02</a>	Emily Wood-Carriage House	45722 Chandler	Plymouth	MI
<a href="#">3719-03</a>	Emily's Tea Shoppe	417 Forest	Plymouth	MI

1 - 3 of 3 items **Refresh**

The Site record opens. Click the Systems tab, and then click the hyperlink of the System # to be viewed.

**3719-01 - Emily Wood**  
Active Emily Wood - 3719

**45722 Chandler, Plymouth, MI 48170** **RMR** \$1.00  
**(734) 258-4646**  
**emilyLwood@gmail.com**

**Warranty Start** 03/04/2022 **Sales Tax** Michigan  
**Warranty Labor** Labor - 1 Year **Tax Rate** 6%  
**Warranty Part** Parts - 1 Year **Tax Exempt** -  
**Service Level** SVC T&M RES **Site Since** 03/04/2022  
**Inactive Date** -

**Notes** 0 **Systems** 1 **RMR** 1 **Work Orders** 0 **Site Parts** 0 **Contacts** 0 **Zones** 0 **Authorities** 0 **Docs** **Custom Fields** **Item Defaults** **eForms** **Part Ledger** **External**

**Search Systems** **+ Add System** **Export to Excel**  Show Inactive Systems **Custom Grid Layout**

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

System #	System Type	Panel Type	Warranty Start
<a href="#">9173-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items **Refresh**

The System record opens. There are 11 tabs on the System record, some of which are the same as on the Site record. Each tab is explained below.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood

[Edit](#) [Tasks](#) [History](#)

Panel Type	Vista20P	Warranty Labor	Labor - 1 Year
Panel Location	Entry closet	Warranty Part	Parts - 1 Year
Comments	-	Warranty Start	03/07/2022
		Service Level	SVC T&M RES
		Central Station	-
		Account Number	23-9173-01
		Inactive Date	-

Notes 0 | RMR 1 | Work Orders 0 | System Parts 0 | Call List 0 | Zones 2 | Documents | Archive | Custom Fields | eForms | Emails

[+ Add Note](#)

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 items [Refresh](#)

## Notes Tab

The Notes tab displays all Notes on file for the system.

### Add Note Button

Clicking the Add Note button opens a form for entering a new note for the system.

### Edit Button

Clicking the Edit button opens the note for viewing or editing.

### Delete Button

Clicking the Delete button permanently delete sthe note.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 1 | RMR: 4 | Work Orders: 2 | System Parts: 8 | Call List: 2 | Zones: 6 | Documents | Archive | Custom Fields | eForms | Emails

**+ Add Note**

Note	Modified	Modified By	Type	Expiration	
This system was installed by an ADT dealer.	Apr 22, 2022, 10:50:02 A...	Papay, Travis	Standard		<span>Edit</span> <span>Delete</span>

0 - 0 of 0 items Refresh

## RMR Tab

The RMR tab displays all active RMR that was setup on System.

### Generate Recurring Invoice Button

Click this button to create a recurring invoice for this one customer.

### New RMR Button

Click the New RMR button to open a form for entering a new RMR for the system.

### Show Cancelled RMRs

Setting the toggle to Yes displays all previously cancelled RMR for the system.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes 1 | **RMR 4** | Work Orders 2 | System Parts 8 | Call List 2 | Zones 6 | Documents | Archive | Custom Fields | eForms | Emails

+ Generate Recurring Invoice + New RMR  NO Show Cancelled RMRs

RMR #	Item C...	Description	Billing Cycle	Next Invoice Date	Cancellation Date	Mo...	Cy...
Invoice: To Customer							
System: #9173-01 - Burglar Alarm							
Billing: In Advance							
<a href="#">11132</a>	Monitoring	Monitoring Services	Monthly	5/1/22, 1:00 PM		\$35.00	\$35.00
<a href="#">11135</a>	Maint Agr...	Maintenance Agreement	Monthly	5/1/22, 1:00 PM		\$21.00	\$21.00
<a href="#">11136</a>	Maint Agr...	Maintenance Agreement	Monthly	5/1/22, 9:00 AM		\$14.00	\$14.00
<a href="#">11137</a>	Radio Bac...	Radio Backup Monitoring	Monthly	5/1/22, 9:00 AM		\$25.00	\$25.00

1 - 1 of 1 items Refresh

## Work Orders Tab

The Work Orders tab displays all open work orders for the system.

### Show Closed Work Orders

Clicking the toggle labeled "Show Closed Work Orders" displays all open and closed work order records.

### Show Recurring Work Orders

Clicking the toggle labeled "Show Recurring Work Orders" displays all Recurring Work Order records.

### New Work Order Button

Clicking the New Work Order button opens the Work Order form to create a new work order for the system.

### Work Order Hyperlink

In the WO # column, clicking the hyperlink of a Work Order opens the work order for viewing and editing. Users with permissions can make changes to the work order and re-save, only if the work order has not been closed.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 1 | RMR: 4 | **Work Orders: 2** | System Parts: 8 | Call List: 2 | Zones: 6 | Documents | Archive | Custom Fields | eForms | Emails

[+ New Work Order](#)  Show Closed Work Orders  Show Recurring Work Orders

WO #	Site	System	Type	Status	Last Activity	Last Activity
<a href="#">2594</a>	Emily Wood	Burglar Alarm - 9173-01	Inspection	+ New	Apr 21, 2022	Apr 21, 2022, 1:37:04 AM
<a href="#">2569</a>	Emily Wood	Burglar Alarm - 9173-01	Service Call	+ New	Apr 3, 2022	Apr 3, 2022, 1:25:00 PM

1 - 2 of 2 items Refresh

## System Parts Tab

The System Parts tab displays all parts installed for the system. You can add new parts to the list, edit information on existing parts, or delete parts from the list.

### Add Parts Button

Clicking this button opens a form for adding an inventory part to the system parts list.

### Export to Excel

Clicking this button creates an Excel file with the current information displayed in the grid area.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 1 | RMR: 4 | Work Orders: 2 | **System Parts: 8** | Call List: 2 | Zones: 6 | Documents | Archive | Custom Fields | eForms | Emails

Part Code	Part Description	Location	Zone #	Install Date	Removal Date	Serial Number	Docs	Delete
5800PIR	Wireless Motion Detector	Hallway	2	3/7/22			Docs	Delete
5816	Door/Window Transmitter	Front Door	1	3/7/22			Docs	Delete
6160	Keypad	Left of entry door		3/7/22			Docs	Delete
Vista20P	8-zone control panel	Entry Closet		3/7/22			Docs	Delete
IM-1270	12V Battery	Panel		3/7/22	3/31/22		Docs	Delete
5800PIR	Wireless Motion Detector			3/31/22			Docs	Delete

1 - 8 of 8 items Refresh

## Call List Tab

The Call List tab displays all individuals who could be called when an alarm signal is received at the central station for the System.

### Add New Contact Button

Clicking the Add New Contact button opens a form for entering a new call list contact for the system.

### Add Existing Contact Button

Clicking the Add Existing Contact button opens a list of all contacts in the database for all customers and sites. Users can select one or more contacts from the list to save to the call list.

### Edit Button

Clicking the Edit button opens the call list contact record for viewing or editing.

### Delete Button

Clicking the Delete button permanently deletes the call list contact record.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 1 | RMR: 4 | Work Orders: 2 | System Parts: 8 | **Call List: 2** | Zones: 6 | Documents | Archive | Custom Fields | eForms | Emails

[+ Add New Contact](#) [+ Add Existing Contact](#)

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wood, Emily	(734) 258-4400	(734) 258-3131	thunderbird	Homeowner	emilyLwood@gmail.com	<a href="#">Edit</a> <a href="#">Delete</a>
0	Wood, George		(734) 313-7123				<a href="#">Edit</a> <a href="#">Delete</a>

1 - 1 of 1 items [Refresh](#)

## Zones Tab

The Zones tab displays all zones for the system. You can add new zones to the list, edit information on existing zones, or delete zones.

### Add Zone Button

Clicking the Add Zone button opens a form for entering a new zone for the system.

### Export to Excel

Clicking this button creates an Excel file with the current information displayed in the grid area.



**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type: Vista20P  
 Panel Location: Entry closet  
 Comments: -

Warranty Labor: Labor - 1 Year  
 Warranty Part: Parts - 1 Year  
 Warranty Start: 03/07/2022  
 Service Level: SVC T&M RES  
 Central Station: -  
 Account Number: 23-9173-01  
 Inactive Date: -

Notes: 1 | RMR: 4 | Work Orders: 2 | System Parts: 8 | Call List: 2 | **Zones: 6** | Documents | Archive | Custom Fields | eForms | Emails

[+ Add Zone](#) [Export to Excel](#)

Zone #	Signal Type	Authority	Description	
1	Burglar Alarm	MI - Plymouth City PD	Front Door	<a href="#">Edit</a> <a href="#">Delete</a>
2	Burglar Alarm	MI - Plymouth City PD	Hallway	<a href="#">Edit</a> <a href="#">Delete</a>
3	Burglar Alarm	MI - Plymouth City PD	Master Bedroom Window	<a href="#">Edit</a> <a href="#">Delete</a>
4	Burglar Alarm	MI - Plymouth City PD	Office	<a href="#">Edit</a> <a href="#">Delete</a>
5	Burglar Alarm		Garage	<a href="#">Edit</a> <a href="#">Delete</a>
6	Fire Alarm		Kitchen	<a href="#">Edit</a> <a href="#">Delete</a>

1 - 6 of 6 items [Refresh](#)

## Documents Tab

The Documents tab displays all documents uploaded to the system.

### Show Deleted Documents

Clicking the toggle button labeled “Show Deleted Documents” displays all documents that users deleted. When deleting a document, it is not permanently removed from the database, just inactivated.

### Add Document Button

Clicking the Add Document button opens a form for selecting one or more documents to attach to the system.

### Replace Button

Clicking the Replace button opens a form to select a file to replace the current document. This option is typically used if there is a newer revision of the document or if the incorrect document was uploaded.

### Download Button

Clicking the Download button opens the document for viewing.

### Delete Button

Clicking the Delete button makes the document inactive.

**9173-01 - Burglar Alarm** Active Emily Wood Emily Wood Edit Tasks History

Panel Type	Vista20P	Warranty Labor	Labor - 1 Year
Panel Location	Entry closet	Warranty Part	Parts - 1 Year
Comments	-	Warranty Start	03/07/2022
		Service Level	SVC T&M RES
		Central Station	-
		Account Number	23-9173-01
		Inactive Date	-

Notes 1 | RMR 4 | Work Orders 2 | System Parts 8 | Call List 2 | Zones 6 | **Documents** | Archive | Custom Fields | eForms | Emails

[+ Add Document](#) NO Show deleted documents

File Name	Type	Security	Modified Date	
Floor plan.pdf	Site Floor Plan	Customer	Apr 22, 2022, 12:37:04 AM	<a href="#">Replace</a> <a href="#">Download</a> <a href="#">Delete</a>

0 - 0 of 0 items Refresh

## Archive Tab

This tab is for future development.

## Custom Fields Tab

The Custom Fields tab displays the system level custom fields. The fields shown on this page are configured by your company in Setup > Operations > Custom Fields.

### History Button

Clicking the History button displays a list of all changes that have been made to any of the custom fields, and which user made the change and when.

The Save and Cancel buttons are only exposed when entering or updating data into the custom fields.

### 9173-01 - Burglar Alarm

Active Emily Wood Emily Wood

[Edit](#) [Tasks](#) [History](#)

Panel Type	Vista20P	Warranty Labor	Labor - 1 Year
Panel Location	Entry closet	Warranty Part	Parts - 1 Year
Comments	-	Warranty Start	03/07/2022
		Service Level	SVC T&M RES
		Central Station	-
		Account Number	23-9173-01
		Inactive Date	-

Notes 1 | RMR 4 | Work Orders 2 | System Parts 8 | Call List 2 | Zones 6 | Documents | Archive | Custom Fields | eForms | Emails

[History](#) [Save](#) [Cancel](#)

NextUpgrade

SignageVerified

## eForms Tab

This tab is for future development.

## Emails Tab

This tab is for future development.

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