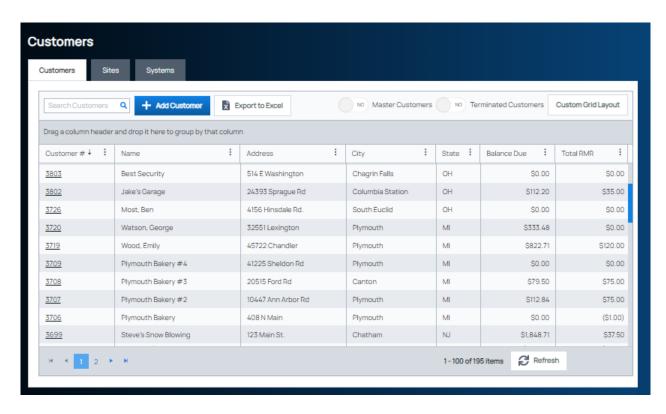
The System Record

Last Modified on 05/01/2022 6:18 am EDT

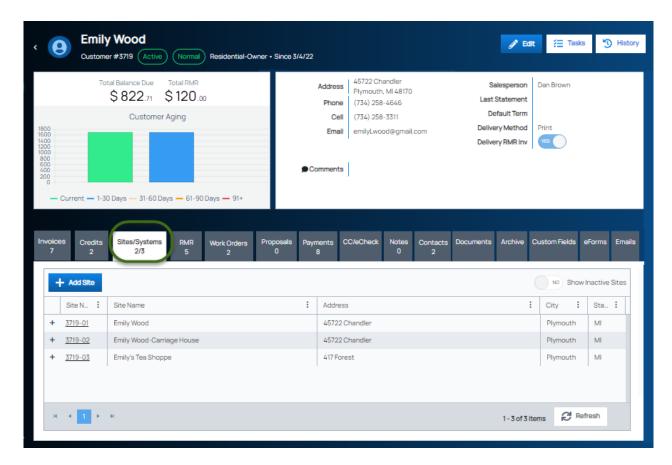
The System record is accessed from a Customer record, and like the customer record, has several tabs of information related to the System. Users with the appropriate permissions may add, edit, or delete data related to the System.

To open a System record, navigate to Accounts Receivable > Customers. The customer list will be displayed. Locate the customer record containing the site associated with the System to which you want to work, and then click on the hyperlink in the customer# column.

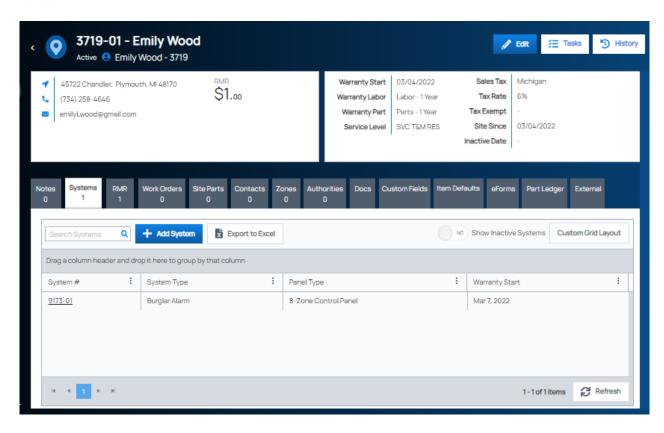


The customer record will be displayed. Click on the Sites/Systems tab.

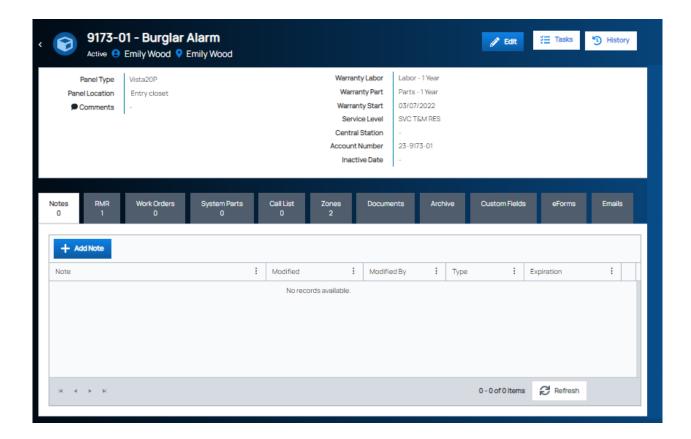
A list of all active sites linked to the customer are displayed in the grid area. Click on the hyperlink of the site number to be viewed.



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



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



Notes Tab

The Notes tab will display all Notes on file for the system.

Add Note Button

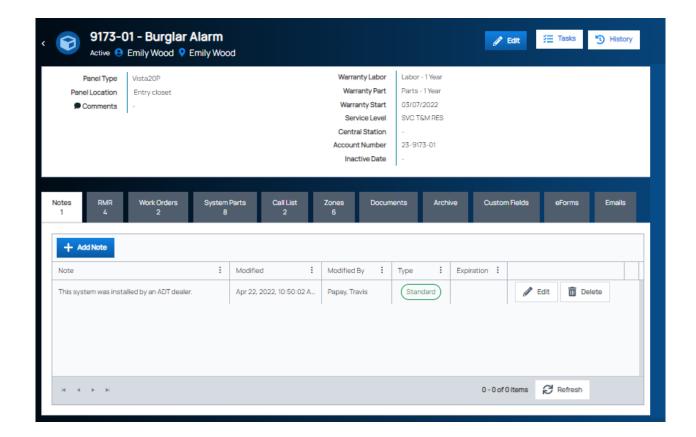
Clicking on the Add Note button will open a form for entering a new note for the system.

Edit Button

Clicking on the Edit button will open the note for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the note.



RMR Tab

The RMR tab will display all active RMR that was setup on System.

Generate Recurring Invoice Button

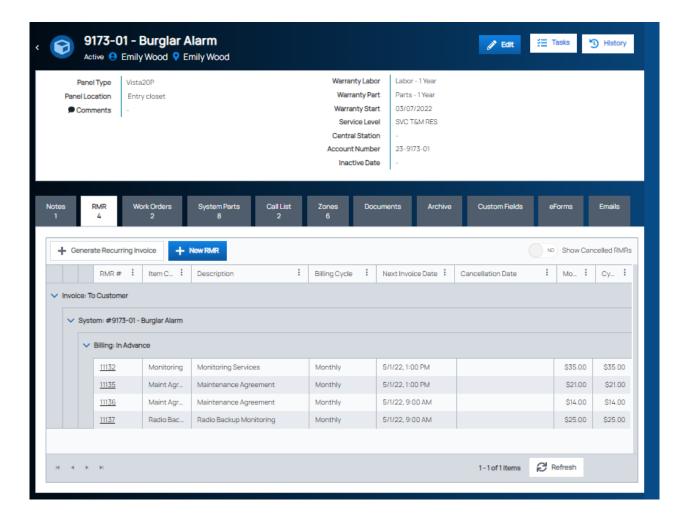
Clicking on this button will allow users to create a recurring invoice for this one customer.

New RMR Button

Clicking on the New RMR button will open a form for entering a new RMR for the system.

Show Cancelled RMRs

Setting the toggle button to Yes, will display all previously cancelled RMR for the system.



Work Orders Tab

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

Show Closed Work Orders

Clicking on the toggle button labeled "Show Closed Work Orders", will display all open and closed work order records.

Show Recurring Work Orders

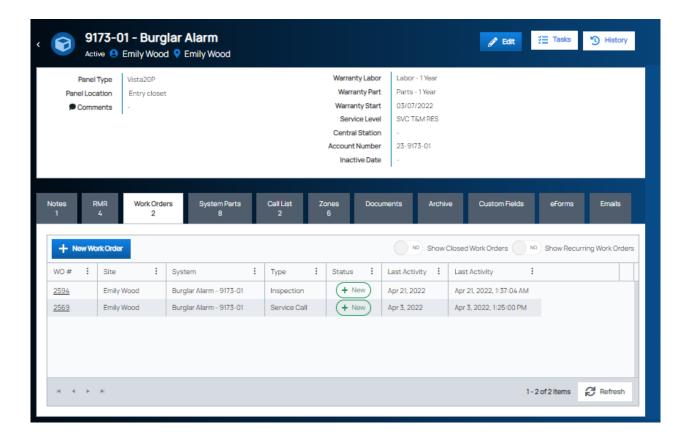
Clicking on the toggle button labeled "Show Recurring Work Orders", will display all Recurring Work Oder records.

New Work Order Button

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

Work Order Hyperlink

In the WO # column, clicking on the hyperlink of a Work Order will open the work order for viewing and/or editing. Users with permissions are able to make changes to the work order and re-save, only if the work order has not been closed.



System Parts Tab

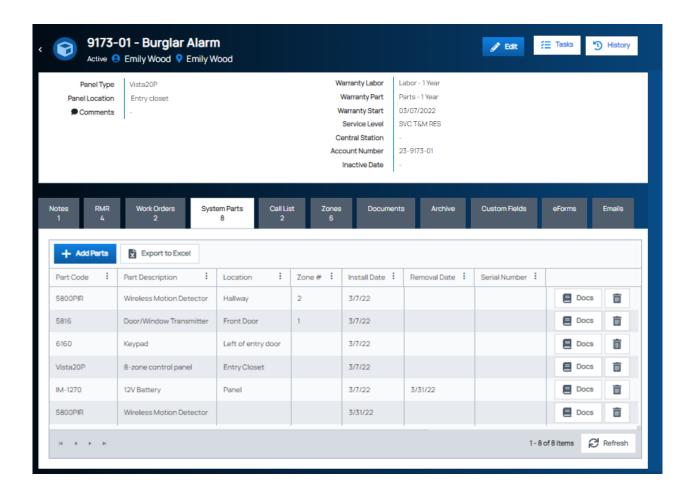
The System Parts tab displays all parts installed for the system. Users are able to add new parts to the list, edit information on existing parts, or delete parts from the list.

Add Parts Button

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

Export to Excel

Clicking on this button will create an Excel file with the current information displayed in the grid area.



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 on the Add New Contact button will open a form for entering a new call list contact for the system.

Add Existing Contact Button

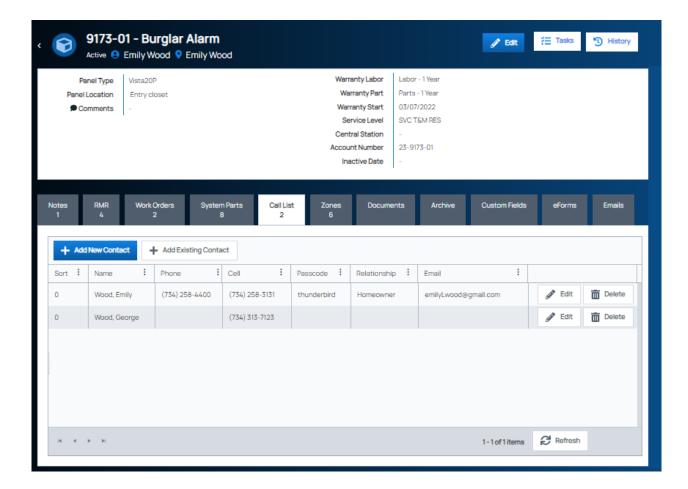
Clicking on the Add Existing Contact button will open a list of all contacts in the database for all customers and sites. Users may select one or more contacts from the list to save to the call list.

Edit Button

Clicking on the Edit button will open the call list contact record for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the call list contact record.



Zones Tab

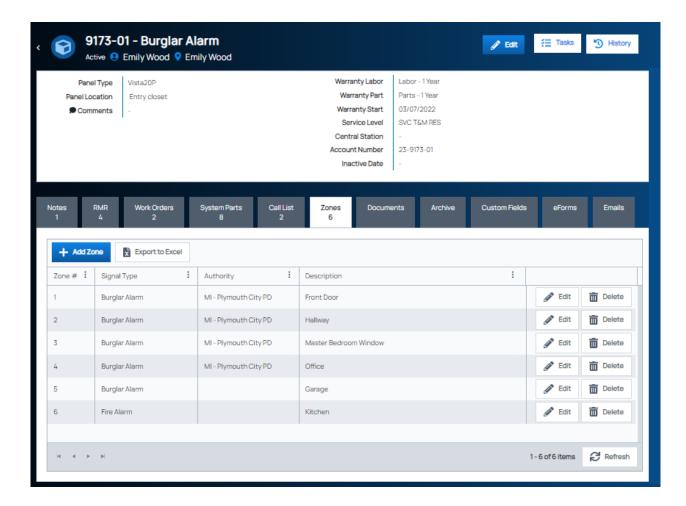
The Zones tab displays all zones for the system. Users are able to add new zones to the list, edit information on existing zones or delete zones.

Add Zone Button

Clicking on the Add Zone button will open a form for entering a new zone for the system.

Export to Excel

Clicking on this button will create an Excel file with the current information displayed in the grid area.



Documents Tab

The Documents tab will display all documents uploaded to the system.

Show Deleted Documents

Clicking on the toggle button labeled "Show Deleted Documents", will display all documents which users deleted. When deleting a document, it is not permanently removed from the database, just inactivated.

Add Document Button

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

Replace Button

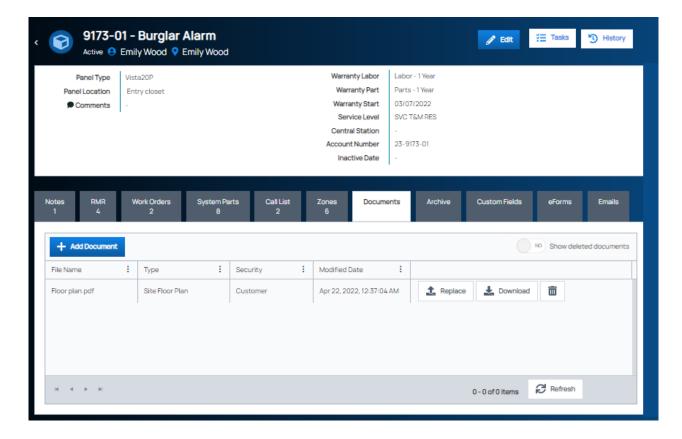
Clicking on the Replace button will open a form to select a file to replace the current document. This option is typically used if there is a newer revision of the document or if the incorrect document was uploaded.

Download Button

Clicking on the Download button will open the document for viewing.

Delete Button

Clicking on the Delete button will make the document inactive.



Archive Tab

This tab is for future development.

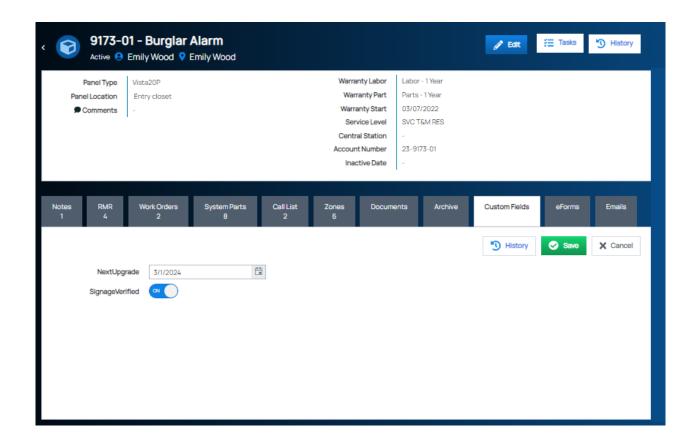
Custom Fields Tab

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

History Button

Clicking on the History button will display 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 a user is entering or updating data into the custom fields.



eForms Tab

This tab is for future development.

Emails Tab

This tab is for future development.