

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.

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

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.

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
Delivery RMR Inv: YES

Sites/Systems 2/3

| Site N... | Site Name | Address | City | Sta... |
|-------------------------|---------------------------|----------------|----------|--------|
| 3719-01 | Emily Wood | 45722 Chandler | Plymouth | MI |
| 3719-02 | Emily Wood-Carriage House | 45722 Chandler | Plymouth | MI |
| 3719-03 | Emily's Tea Shoppe | 417 Forest | Plymouth | MI |

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

3719-01 - Emily Wood
Active • Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170
(734) 258-4646
emilyLwood@gmail.com

RMR \$1.00

Warranty Start: 03/04/2022
Warranty Labor: Labor - 1 Year
Warranty Part: Parts - 1 Year
Service Level: SVC T&M RES

Sales Tax: Michigan
Tax Rate: 6%
Tax Exempt: -
Site Since: 03/04/2022
Inactive Date: -

Systems 1

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 |
|-------------------------|---------------|----------------------|----------------|
| 9173-01 | Burglar Alarm | 8-Zone Control Panel | Mar 7, 2022 |

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.

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 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.

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 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 | | Edit Delete |

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

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.

9173-01 - Burglar Alarm
 Active Emily Wood Emily Wood

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 | 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 | | | | | | | |
| 11132 | Monitoring | Monitoring Services | Monthly | 5/1/22, 1:00 PM | | \$35.00 | \$35.00 |
| 11135 | Maint Agr... | Maintenance Agreement | Monthly | 5/1/22, 1:00 PM | | \$21.00 | \$21.00 |
| 11136 | Maint Agr... | Maintenance Agreement | Monthly | 5/1/22, 9:00 AM | | \$14.00 | \$14.00 |
| 11137 | 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 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 Order 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.

9173-01 - Burglar Alarm Active Emily Wood Emily Wood

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 |
|------|------------|-------------------------|--------------|--------|---------------|--------------------------|
| 2594 | Emily Wood | Burglar Alarm - 9173-01 | Inspection | + New | Apr 21, 2022 | Apr 21, 2022, 1:37:04 AM |
| 2569 | 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. 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.

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

| 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 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.

9173-01 - Burglar Alarm Edit Tasks History

Active Emily Wood Emily Wood

| | | | |
|----------------|--------------|-----------------|----------------|
| 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 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 | Edit Delete |
| 0 | Wood, George | | (734) 313-7123 | | | | Edit Delete |

1 - 1 of 1 items Refresh

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.

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

| Zone # | Signal Type | Authority | Description | Edit | Delete |
|--------|---------------|-----------------------|-----------------------|------|--------|
| 1 | Burglar Alarm | MI - Plymouth City PD | Front Door | | |
| 2 | Burglar Alarm | MI - Plymouth City PD | Hallway | | |
| 3 | Burglar Alarm | MI - Plymouth City PD | Master Bedroom Window | | |
| 4 | Burglar Alarm | MI - Plymouth City PD | Office | | |
| 5 | Burglar Alarm | | Garage | | |
| 6 | Fire Alarm | | Kitchen | | |

1 - 6 of 6 items Refresh

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.

9173-01 - Burglar Alarm
Active Emily Wood Emily Wood

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 Document Show deleted documents

| File Name | Type | Security | Modified Date | |
|----------------|-----------------|----------|---------------------------|-------------------------|
| Floor plan.pdf | Site Floor Plan | Customer | Apr 22, 2022, 12:37:04 AM | Replace Download Delete |

0 - 0 of 0 items Refresh

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.

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 3/1/2024

SignageVerified ON

eForms Tab

This tab is for future development.

Emails Tab

This tab is for future development.