

Sedona offers the functionality to move a System record to a different Site within the same Customer account. The need to move a System may be due to a customer moving to a new address or to correct a data entry error. It is important to remember that the active recurring lines will be carried forward to the new site; if this information is not valid for new site, you will need to cancel the existing recurring lines and create new ones. The same applies to all other information that is moved to the new site.

When a System is moved, all information related to that system is moved to the new site. Information moved to the new Site includes the following:

- Service tickets; both open\* and closed
- Recurring lines; both active and inactive
- Equipment list
- Inspections
- Monitoring services
- Zones
- Call Lists
- Dispatch Instructions; both permanent and temporary
- Open/Close Schedules
- Test information
- Access cards

## Definitions

Source Site: The site from which you will be moving a System record.

Destination Site: The site to which you will be moving a System record.

### **Considerations for Moving a System \***

Since the System Account number is tied to both Service Tickets and Installation Jobs it is extremely important that you confirm the following prior to proceeding with the System Move process.

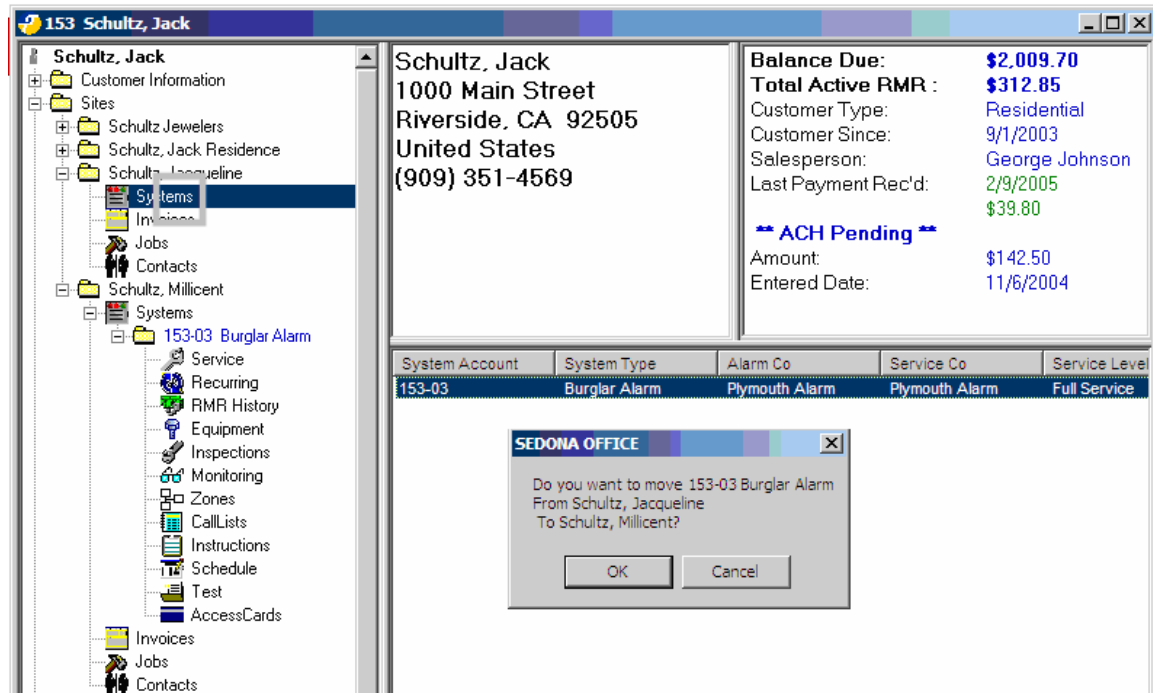
1. Make certain that all open Service Tickets have been completed *and Closed* prior to moving a System record.
2. All open Jobs *must* be **Closed** prior to moving a System.

**If you fail to confirm the above two items, this could cause serious data issues with your system.**

## The Process

1. Open the customer record from the Customer Explorer tool.
2. Once the Customer Menu Tree is displayed, click on the "+" sign to the left of the Source site and Destination Site.
3. On the Source site, click on the *Systems* menu item. This will display all Systems connected to the Source site in the active pane on the right.
4. In the Active pane, highlight the System that you want to move. Hold down the left mouse button and drag the System to the *Systems* menu item of the Destination site. A gray box will appear as you move the system to the new Site. Once you are on the correct system line, release the mouse button.
5. A message box will be displayed confirming the move of the System. Press OK to accept. The System record is now linked to the new Site.

Illustration 1.



If you have any questions regarding the content of this document, please contact us by emailing your questions or comments to [www.support@sedonaoffice.com](mailto:www.support@sedonaoffice.com), or you may contact the Sedona Office Helpdesk at (734) 414-0760.