

New Customer: Site Tab

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Customer Site

A customer site is the address of the physical location of your customer. Normally, this is where the security system is as well.

Fill out the fields on the Customer Site page. This address may or may not be the same as the bill to address on the Customer tab you just completed. Additional sites can be added once you finish creating the customer.

New Customer: 1166 Next ►► Submit

Customer **Customer Site** Customer System Customer Recurring

Use Customer Address:

Site Number: 1

Site Name: Site Name: _____

Address: Address 1: _____
: Address 2: _____

: City: _____ Please Select: ▼ Zip _____ Plus 4 _____

Phone: _____ ext. _____

Email: _____

Sales Tax: None ▼

Tax Exempt: _____

Site Since: 5/20/2016

Warranty Labor: Please Select: ▼

Warranty Parts: Please Select: ▼

Warranty Start Date: 5/20/2016

Service Level: Please Select: ▼

Comments: _____

Use Customer Address

Select this checkbox if the site address (the physical location of the system) is the same as the bill to address you entered. Selecting this box duplicates the information from the Name and Address fields from the previous tab to the Site Name and Address fields on this page.

Site Number

Assign a site number to the site. What you choose to enter in the site number field is up to you.

Site Name/Address

If you did not check the "Use Customer Address" box, input the site name and address.

Phone/Email

Input the phone number and email address associated with the site if applicable.

Sales Tax

Sales tax is linked to the site address. Select your tax rate from the dropdown box. You can set [upsales tax](#) in the setup.

Tax Exempt

If this is a tax-exempt customer, enter the customer's tax-exempt number in this field.

Note: If any text is entered in this field including a "space", the site will never be charged tax on any services or items.

Site Since

Site since date is how long the site has been in place.

Warranty Labor/Parts

If you are an alarm dealer who sells systems, you will not necessarily enter a warranty at the site level, as this will be more applicable to the system rather than the site. Leave this section blank if it is not applicable. You can enter a warranty linked to the system on the next tab.

Warranty Start Date

If you have a warranty at the site level, input the warranty start date here.

Service Level

If you are an alarm dealer who sells systems, you will not necessarily link a service level to a site, this will also be more applicable to a system. Leave this field blank if it is not applicable.

Comments

If you have any notes you would like to add about this customer site type them here. These notes are kept internal.

Next

Click Next to begin entering system information for this customer. This does not apply to master customers.

Submit

If you wish to finish this customer without putting any system information or Recurring Monthly Revenue information, click Submit. (You can add these later.)