

# Sites/Sys Tab

Last Modified on 11/07/2016 2:31 pm EST

This page shows you list of all this customer's active sites and systems. The site is the physical location of the system. The site may or may not be the same as the Bill To address.

**Sites/Systems** New Site

Show Inactive Sites

	Site #	Site Name	Address	City	State
▶	9	Apple Lane	137 Schofield Avenue	Dudley	HI
▶	3	Brian Lattman	4 Cypress Drive	Monroe Township	AL

To view active systems in a site, click the triangle to the left of the site.

**Sites/Systems** New Site

Show Inactive Sites

	Site #	Site Name	Address	City	State
◀	9	Apple Lane	137 Schofield Avenue	Dudley	HI

System Number	System Type	Panel	Warranty Start Date
56546518	Burglar Alarm	Vista 100 Control Panel	11/19/2014

1 - 1 of 1 items

## Show Inactive Sites

To view inactive sites, check this box.

**Sites/Systems** New Site

Show Inactive Sites

	Site #	Site Name	Address	City	State
▶	9	Apple Lane	137 Schofield Avenue	Dudley	HI
▶	3	Brian Lattman	4 Cypress Drive	Monroe Township	AL

## Adding a New Site

# 1. New Site

Click "New Site" on the right side of the page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	4	7	19	24	4	110	88	6	7	5	0

Sites/Systems							<a href="#">+ New Site</a>
							<input type="checkbox"/> Show Inactive Sites
Site #	Site Name	Address	City	State			
9	Apple Lane	137 Schofield Avenue	Dudley	HI			

# 2. Fill Out Fields

Fill out the fields in the "Site Info", "Service Info", and "Comments" sections. [See Hyperlink Customers Site Page for more info on these fields.](#)

<b>Site Info:</b> Site Name Address 1 Address 2 City Please Select: [v] Zip - Plus 4 Phone: [ ] ext. [ ] Email: [ ]	<b>Site Info:</b> SiteNumber: [ ] Sales Tax: None - 0.000% [v] Tax Exempt: [ ] Site Since: [ ] [calendar] Inactive: <input type="checkbox"/> Inactive Date: [ ]
<b>Service Info:</b> Warranty Start Date: [ ] [calendar] Warranty Labor: Please Select: [v] Warranty Part: Please Select: [v] Service Level: Please Select: [v]	<b>Comments</b> [ ]

# 3. Save

Click "Save" in the upper right corner to update.

**New Site: Matt Grossman - 1028** Customer [Save](#)

<b>Site Info:</b> Site Name	<b>Site Info:</b> SiteNumber:
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The Site Details Page will appear.

## Site Details Page

The "Site Details Page" is the homepage for each of your customer's individual sites. Access the Site Details Page from the Customer Manager Page by clicking the blue "Site #" hyperlink to the left of the site.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
24	4	7	19	24	4	110	88	6	7	5	0

Sites/Systems <span style="float: right;">+ New Site</span>						
<input type="checkbox"/> Show Inactive Sites						
	Site #	Site Name	Address	City	State	
▶	9	Apple Lane	137 Schofield Avenue	Dudley	HI	
▶	3	Brian Lattman	4 Cypress Drive	Monroe Township	AL	

A dashboard of information about the site will appear.

**Site: Apple Lane - 9** Customer Edit

<b>Customer:</b> Matt Grossman - 1028 <b>Site:</b> Apple Lane 137 Schofield Avenue Dudley, HI 01571 (555) 555-5555	<b>Site Number:</b> 9 <b>Sales Tax:</b> No Tax <b>Tax Rate:</b> 0.000% <b>Tax Exempt:</b> <b>Site Since:</b> 11/19/2014 <b>Inactive Date:</b>
<b>Warranty Start:</b> <b>Warranty Labor:</b> <b>Warranty Part:</b> <b>Service Level:</b>	<b>Comments:</b> <input type="text"/>

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## Edit

Click "Edit" in the upper right corner to edit dashboard information.

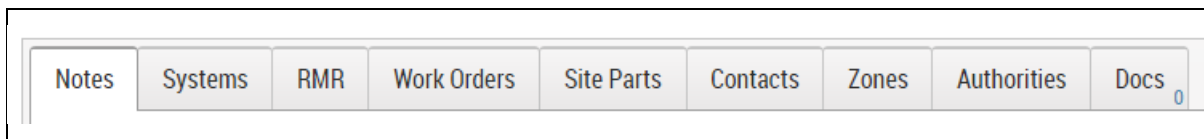
**Site: Apple Lane - 9** Customer **Edit**

<b>Customer:</b> Matt Grossman - 1028 <b>Site:</b> Apple Lane	<b>Site Number:</b> 9 <b>Sales Tax:</b> No Tax
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For more information on dashboard fields go to [\(hyperlink new customer site fields\)](#). Click save in the upper right corner to update.

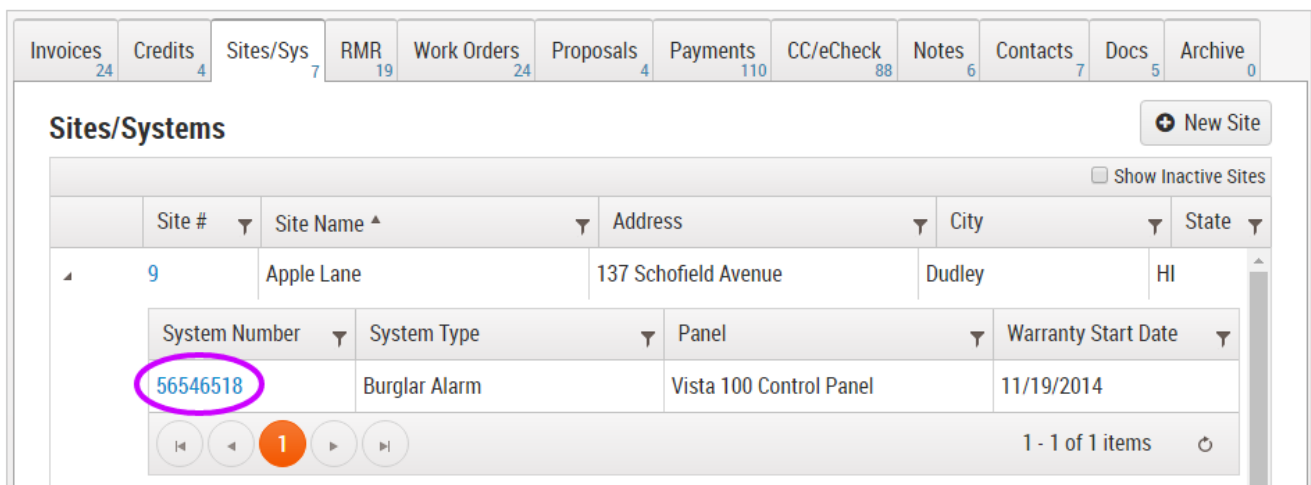
## Site Details Tabs

For information on editing the Site Details Tabs below the dashboard go to [\(hyperlink Site Details Tabs\)](#).



### System Details Page

The System Details Page is the homepage for each of your customer's individual systems. Access the System Details page by clicking the blue "System Number" hyperlink to the left of the system you would like to view.



A dashboard of information about the system will appear.

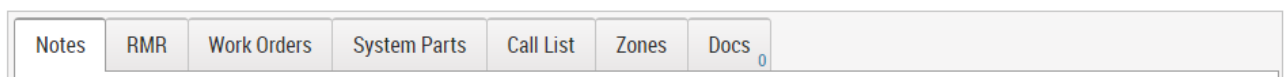
### System: Burglar Alarm - 56546518

[Customer](#) [Back to Site](#) [Edit](#)

**Customer:** Matt Grossman - 1028  
**System Number:** 56546518  
**System Type:** Burglar Alarm  
**Panel Type:** Vista 100  
**Panel Location:** front door

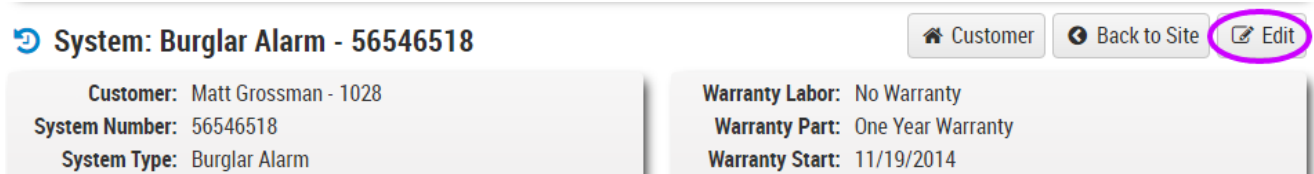
**Warranty Labor:** No Warranty  
**Warranty Part:** One Year Warranty  
**Warranty Start:** 11/19/2014  
**Service Level:** T&M  
**Central Station:** Affiliated  
**Account Number:**  
**Inactive Date:**

**Comments:**



# Edit

Click "Edit" in the upper right corner to edit dashboard information.



**System: Burglar Alarm - 56546518**

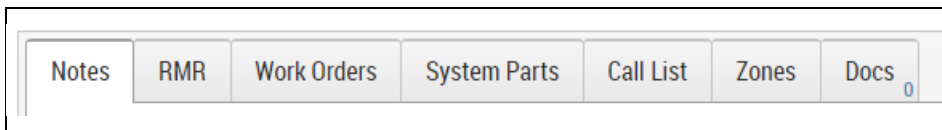
Customer: Matt Grossman - 1028  
System Number: 56546518  
System Type: Burglar Alarm

Warranty Labor: No Warranty  
Warranty Part: One Year Warranty  
Warranty Start: 11/19/2014

For information on dashboard fields go to [\(hyperlink new customer system field\)](#). Click save in the upper right corner to update.

## System Details Tabs

For information on editing the Systems Details Tabs below the dashboard go to [\(hyperlink system Details Tabs\)](#).



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