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 physcial location of the system. The site may or may not be the same as the Bill To address.

voices	Credits 4 Site	s/Sys RMR Work Order	rs Propo	osals 4 Payments CC/eChe	eck No	otes Contacts Docs 5	Archive 0
Sites/	Systems						New Site
						Show	Inactive Sites
	Site # 🔫	Site Name 🔺	Т	Address	т	City T	State 🔻
Þ	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.

voices 24	Credits Site	es/Sys R	MR Work Orders	Propo	osals ₄	Payments 110	CC/eCheck 88	Not	es ₆ (Contacts 7	Docs 5	Archiv	e o
Sites/S	Systems										C	New S	Sit
										(Show In	active S	Site
	Site # 🔻	Site Nam	e *	T	Addre	SS		T	City		Ŧ	State	
\mathbf{O}	9	Apple Lan	9		137 Sch	nofield Avenue	9	Du	ıdley		Н		
	System Nu	mber y	System Type		Ŧ	Panel			T	Warranty S	Start Date	• •	
	56546518		Burglar Alarm			Vista 100 Co	ontrol Panel			11/19/2014	1		
	()									1 - 1 of 1	items	Ċ	

Show Inactive Sites

To view inactive sites, check this box.

nvoices 24	Credits Site	es/Sys RMR Work Orde	ers Proposal	Payments	CC/eCheck 88	Notes 6	Contacts 7	Docs 5	Archive 0
Sites/	Systems								New Site
								Show Ir	nactive Sites
	Site # 🔻	Site Name *	T A	ldress		▼ City	1	T	State 🔻
•	9	Apple Lane	13	7 Schofield Aven	ue	Dud	ley		HI
+	3	Brian Lattman	4 (ypress Drive		Mon	roe Township		AL

Adding a New Site

1. New Site

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

Invoices 24	Credits 4	Sites/Sys	RMR 19	Work Orders 24	Propo	osals 4	Payments 110	CC/eCheck	Notes	6 Contacts 7	Docs 5	Archive	0
Sites/	System	S									G	New Si	ite
										(Show I	nactive Si	tes
	Site #	▼ Site N	lame 🔺		T	Addre	ess		y Ci	ty	T	State	T
4	9	Apple	ane			137 Scl	hofield Avenue	e	Dudl	ey	Н	I	*

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.

Site Info:			Site Info:		
Site Name			SiteNumber:		
Address 1			Sales Tax:	None - 0.000%	•
Address 2			Tax Exempt:		
City	Please Select: • Zip	- Plus 4	Site Since:	(
			Inactive:		
Phone:	ext.		Inactive Date:		
Email:					
Service Info:			Comments		
Warranty Start Date:	Ē				
Warranty Labor:	Please Select:	·]			
	Disease Calcate				
Warranty Part:	Please Select:				

3. Save

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

	🕷 Customer 🖺 Save
Site Info:	
SiteNumber:	

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.

nvoices 24	Credits 4	Sites/Sys	RMR 19	Work Orders	Prop	osals ₄	Payments 110	CC/eCheck	Notes	6 Contacts 7	Docs 5	Archive	e
Sites/	Systems	;									C	New Si	ite
											Show I	nactive Si	ites
	Site #	▼ Site N	ame 🔺		T	Addr	ess		Ţ C	ty	T	State	T
•	9	Apple	Lane			137 S	chofield Aven	iue	Du	dley		HI	
+	3	Brian L	attman			4 Сур	ress Drive		M	onroe Townshi	р	AL	

A dashboard of information about the site will appear.

Site: Apple Lane - 9	A Customer	🗷 Edit
Customer: Matt Grossman - 1028Site Number: 9Site: Apple LaneSales Tax: No Tax137 Schofield AvenueTax Rate: 0.000%Dudley, HI 01571Tax Exempt:(555) 555-5555Site Since: 11/19/2014Inactive Date:Inactive Date:		
Warranty Start: Comments: Warranty Labor: Service Level:		
Notes Systems RMR Work Orders Site Parts Contacts Zones Authorities Docs 0		

Edit

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

Site: Apple Lane - 9		希 Customer 🕼	Edit
Customer: Matt Grossman - 1028	Site Number: 9		
Site: Apple Lane	Sales Tax: No Tax		

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).

Natas Custama DMD Work Orders Cita Darta Contasta Zanas		
Notes Systems RMR Work Orders Site Parts Contacts Zones	Authorities	Docs 0

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.

24	4	7	19 24		4	110	88		6 7	5	
Sites/	Systems									C	New S
										Show Ir	active S
	Site # 🔻	Site Nam	e *	Ţ	Addre	SS		T Ci	ty	т	State
4	9	Apple Lan	2		137 Sch	nofield Avenu	е	Dudle	ey	Н	
	System Nu	mber 🔻	System Type		T	Panel			▼ Warranty St	art Date	• •
	56546518)	Burglar Alarm			Vista 100 Co	ontrol Panel		11/19/2014		

A dashboard of information about the system will appear.

Customer:	Matt Grossman - 1028	Warranty Labo	r: No Warranty	
stem Number:	56546518	Warranty Par	t: One Year Warranty	
System Type:	Burglar Alarm	Warranty Star	t: 11/19/2014	
Panel Type:	Vista 100	Service Leve	I: T&M	
Panel Location:	front door	Central Station	n: Affiliated	
		Account Numbe	r:	
		Account Numbe		
Comments:				

Edit

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

🧿 System: Bi	A Customer G Back to Site C Edit		
Customer:	Matt Grossman - 1028	Warranty Labor:	No Warranty
System Number:	56546518	Warranty Part:	One Year Warranty
System Type:	Burglar Alarm	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).

	Notes	RMR	Work Orders	System Parts	Call List	Zones	Docs 0
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