Company and Customer Structure

Company / Customer Structure

Company

A Company in Managely is your business. Think of a company as an entity with a Federal Tax ID Number. Managely does not support multiple companies within one database at this time.

The Structure of a Customer

Customer

The Customer record contains the basic information on the customer. This includes the billing information, contacts and custom fields.

Sites

A Customer will have one or more Site records. A site is the physical location of the premise owned by the Customer. All Invoices and Work Orders are linked to a Site Record. A Customer may have multiple sites.

Systems

Systems are the actual type of protection or service that you provide for the Customer at each Site.   The System contains all the Recurring Revenues, Equipment and Work Order History. A Site may have multiple Systems.