

Add a Site

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Sites are attached to customer records. To add additional Sites, you must first access the customer record.

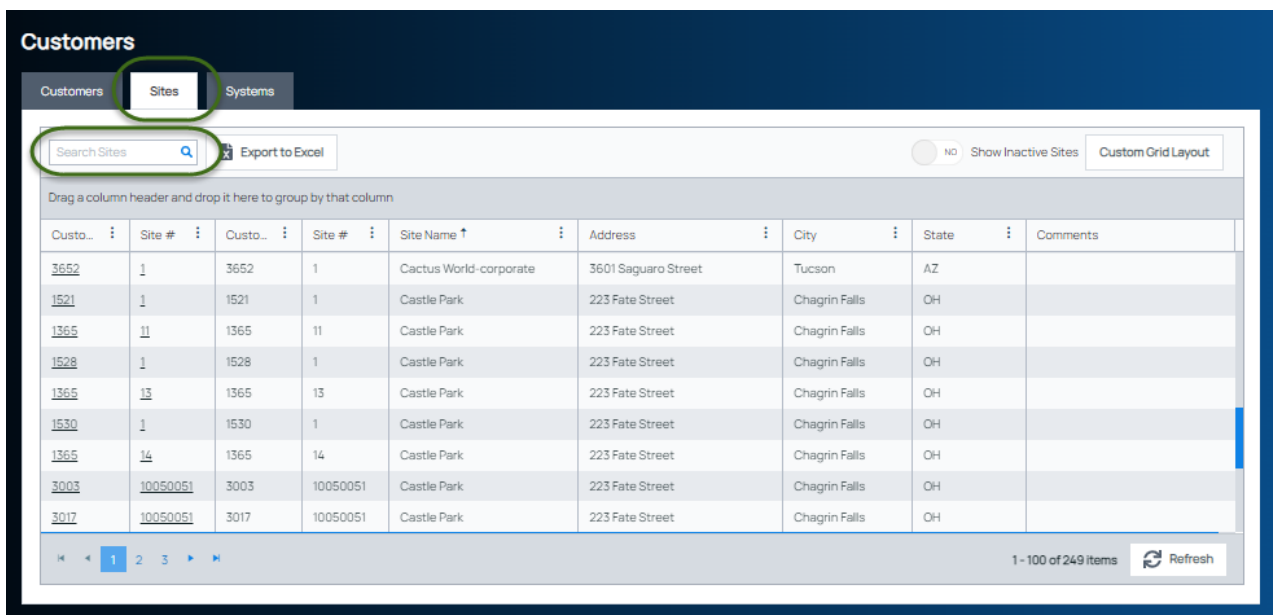
To add an additional site to an existing customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. If you know the name of the customer to which the Site is attached, locate the Customer, and then click on the hyperlink in the Customer # column to open the customer record.

If you do not know the customer number or customer name to which the Site is attached, however, you do know the Site Name, click on the Sites tab to search for the customer by Site Name.

Search by Site

At the upper left of the page is a search field. You can type in the first four characters of either the customer number or the Site Name to locate the record faster. Once you have located the Site within the list, click on the hyperlink in the Customer # column to open the customer record.



The screenshot shows the 'Customers' interface with a search field and a table of customer records. The search field is highlighted with a green circle, and the 'Sites' tab is also highlighted with a green circle. The table has columns for Customer #, Site #, Site Name, Address, City, State, and Comments. The first row shows a customer with Site # 1 and Site Name 'Cactus World -corporate'. The second row shows a customer with Site # 1 and Site Name 'Castle Park'. The third row shows a customer with Site # 11 and Site Name 'Castle Park'. The fourth row shows a customer with Site # 1 and Site Name 'Castle Park'. The fifth row shows a customer with Site # 13 and Site Name 'Castle Park'. The sixth row shows a customer with Site # 1 and Site Name 'Castle Park'. The seventh row shows a customer with Site # 14 and Site Name 'Castle Park'. The eighth row shows a customer with Site # 10050051 and Site Name 'Castle Park'. The ninth row shows a customer with Site # 10050051 and Site Name 'Castle Park'. The bottom of the interface shows a pagination bar with '1 - 100 of 249 items' and a 'Refresh' button.

Customer #	Site #	Customer #	Site #	Site Name	Address	City	State	Comments
3652	1	3652	1	Cactus World -corporate	3601 Saguaro Street	Tucson	AZ	
1521	1	1521	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	11	1365	11	Castle Park	223 Fate Street	Chagrin Falls	OH	
1528	1	1528	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	13	1365	13	Castle Park	223 Fate Street	Chagrin Falls	OH	
1530	1	1530	1	Castle Park	223 Fate Street	Chagrin Falls	OH	
1365	14	1365	14	Castle Park	223 Fate Street	Chagrin Falls	OH	
3003	10050051	3003	10050051	Castle Park	223 Fate Street	Chagrin Falls	OH	
3017	10050051	3017	10050051	Castle Park	223 Fate Street	Chagrin Falls	OH	

The Customer record opens. Click on the Sites/Systems tab, and then click on the **Add Site** button.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Edit Tasks History

Total Balance Due: \$822.71 Total RMR: \$120.00

Customer Aging

Address: 45722 Chandler, Plymouth, MI 48170
Phone: (734) 258-4646
Cell: (734) 258-3311
Email: emilyLwood@gmail.com

Salesperson: Dan Brown
Last Statement
Default Term
Delivery Method: Print
Delivery RMR Inv: YES

Comments

Invoices: 7 Credits: 2 **Sites/Systems: 2/3** RMR: 5 Work Orders: 2 Proposals: 0 Payments: 8 CC/eCheck Notes: 0 Contacts: 2 Documents Archive Custom Fields eForms Emails

+ Add Site Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
- 3719-01	Emily Wood	45722 Chandler	Plymouth	MI
	System	System Type	Panel Type	Warranty Start Date
	9173-01	Burglar Alarm	8-zone control panel	3/7/20, 12:00 AM
	CCTV	CCTV	1	3/4/22, 12:00 AM
+ 3719-02	Emily Wood-Carriage House	45722 Chandler	Plymouth	MI

1 - 2 of 2 items Refresh

The Add Site data entry form opens. Required fields are denoted with a red bullet next to the field name.

Each data entry field is described below.

Add Site ✕

Use Customer Address: OFF

Site Name:

Address:

Phone:

Phone:

Email:

Site Number:

Sales Tax:

Tax Exempt:

Site Since:

Inactive: OFF

Inactive Date:

Warranty Start Date:

Warranty Labor:

Warranty Part:

Service Level:

Branch:

Comments:

Save Cancel

Data Entry Fields

- **Use Customer Address:** If the Site address is the same as the customer address, set this toggle button to On,

and the address information will fill in with the customer address information.

- ***Site Name:** If the Use Customer Address toggle button was set to On, this field will auto-fill with what was entered for the Customer Name. You can change this if necessary.
- ***Site Number:** Enter a number for the site, typically 1.
- ***Address:** If you did not select to use the Customer Address, enter the Site address information.
- **Phone:** Enter the telephone number for the site.
- ***Email:** Enter the email address for the site.
- ***Sales Tax:** From the drop-down list, select the Sales Tax code that applies to this site. If this site is non-taxable, you still need to select a value in this field. Sales Tax codes are maintained in setup (Setup > Accounting > Sales Tax).
- **Tax Exempt:** If a value is entered into this field, no sales tax will be calculated on any invoice for this site.
- ***Site Since:** Enter the date the person or company became your customer. Typically the date on which the customer signed a contract with your company.
- **Warranty Start Date:** If there is already an installed system at the site, enter the start date of your warranty for the site.
- **Warranty Labor:** From the drop-down list, select the appropriate warranty code for labor charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Warranty Part:** From the drop-down list, select the appropriate warranty code for part charges on work orders. Warranty codes are maintained in setup (Setup > Operations > Warranty Types).
- **Service Level:** From the drop-down list, select the appropriate service level that will be used in calculating billable charges on work orders. Service Level codes are maintained in setup (Setup > Operations > Service Levels).
- ***Branch:** From the drop-down list, select the appropriate branch code for the site. Branch codes are maintained in setup (Setup > Accounting > Branches).
- **Comments:** This is a free-form text field to enter any important information related to the site. Many companies will type in directions to the site address. A maximum of 250 characters is allowed.

Fill in the form, and then click the **Save** button.
