Edit a Site

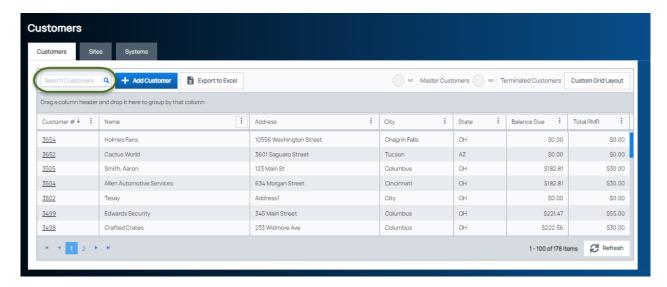
Last Modified on 05/01/2022 6:24 am EDT

Sites are attached to customer records. To edit a Site, you must first access the customer record.

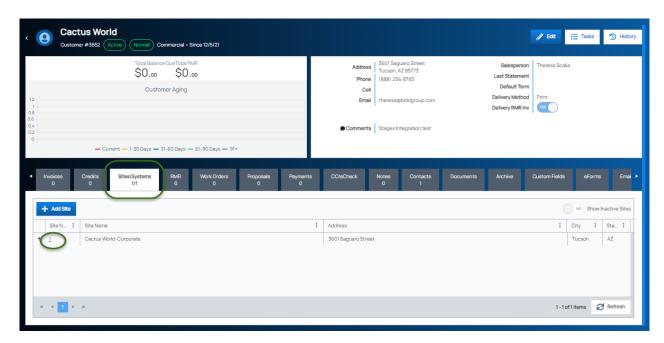
From the main menu, arrive at the Customers list with this path: Accounts Receivable > Customers.

The Customers list will be displayed. 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.

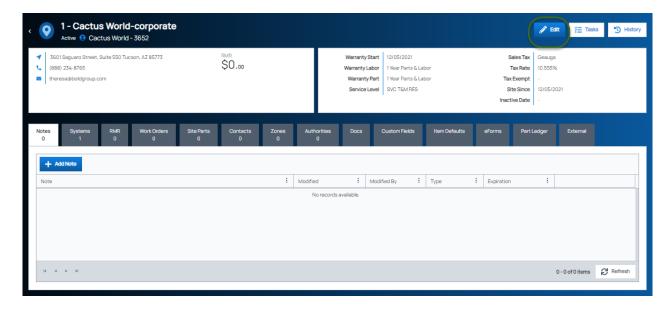
If you do not know the customer number or customer name to which the Site is attached, however you do know the Site Name, click on the Sites tab to search for the customer by Site Name.



The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site you want to edit.



The Site record will be displayed. Click on the Edit button located at the upper right of the page.



The Site record will open in edit mode. Make the necessary changes, and then click the Save button when finished.

