

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.

Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

Master Customers Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10566 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

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.

Cactus World
Customer #3652 Active Normal Commercial Since 12/5/21

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address: 3601 Saguario Street, Tucson, AZ 85773
Phone: (888) 234-8765
Cell:
Email: theresa@boldgroup.com

Salesperson: Theresa Scalia
Last Statement
Default Term
Delivery Method
Delivery RMR Inv: YES

Comments: Stages Integration test

Invoices 0 Credits 0 **Sites/Systems 1/1** RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 1 Documents Archive Custom Fields eForms Email

Site N.	Site Name	Address	City	Sta.
1	Cactus World-Corporate	3601 Saguario Street	Tucson	AZ

1 - 1 of 1 items Refresh

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

1 - Cactus World-corporate
Active Cactus World - 3652

3601 Saguaro Street, Suite 550 Tucson, AZ 85773
(888) 234-8765
theresa@boldgroup.com

RMR \$0.00

Warranty Start: 12/05/2021
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: Ceauga
Tax Rate: 10.555%
Tax Exempt: -
Site Since: 12/05/2021
Inactive Date: -

Notes: 0 | Systems: 1 | RMR: 0 | Work Orders: 0 | Site Parts: 0 | Contacts: 0 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 items Refresh

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

1 - Cactus World-corporate
Active Cactus World - 3652

Save Cancel

Use Customer Address: OFF

Site Name: Cactus World-Corporate

Address: 3601 Saguaro Street
Suite 550
Tucson
Arizona
85773 Plus4

Phone: (888) 234-8765 ext.

Email: theresa@boldgroup.com

Site Number: 1

Sales Tax: GC - 8.555%

Tax Exempt: TaxExempt Number

Site Since: 12/05/2021

Inactive: OFF

Inactive Date: month/day/year

Warranty Start Date: 12/05/2021

Warranty Labor: 1 Year Parts & Labor

Warranty Part: 1 Year Parts & Labor

Service Level: SVC T&M RES

Branch: Please Select

Comments: