

# Edit a Site

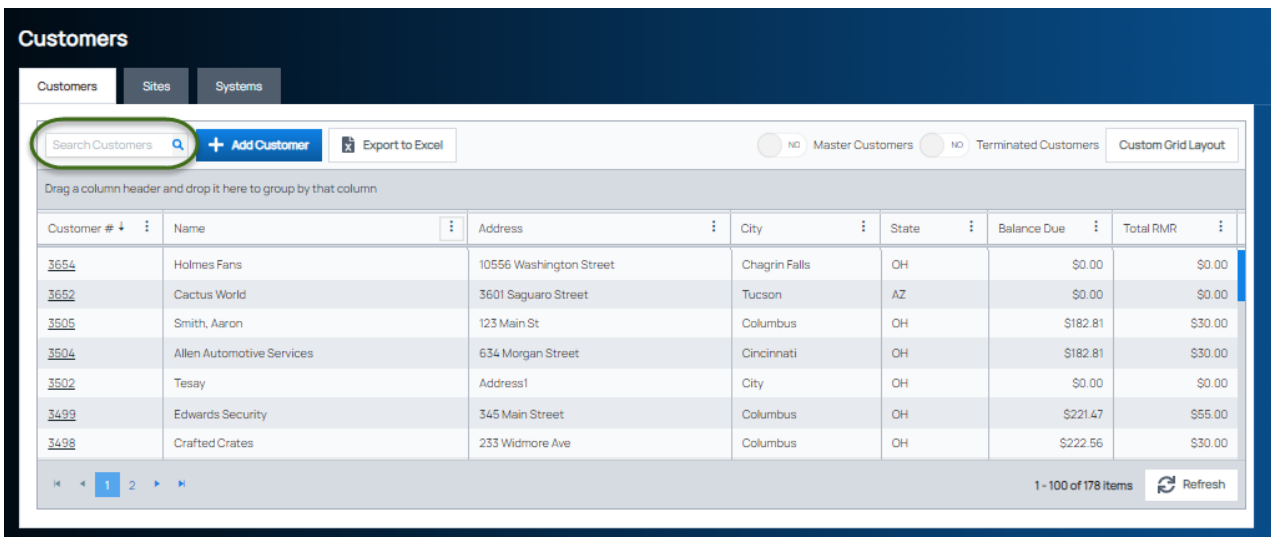
Last Modified on 12/12/2024 1:51 pm EST

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

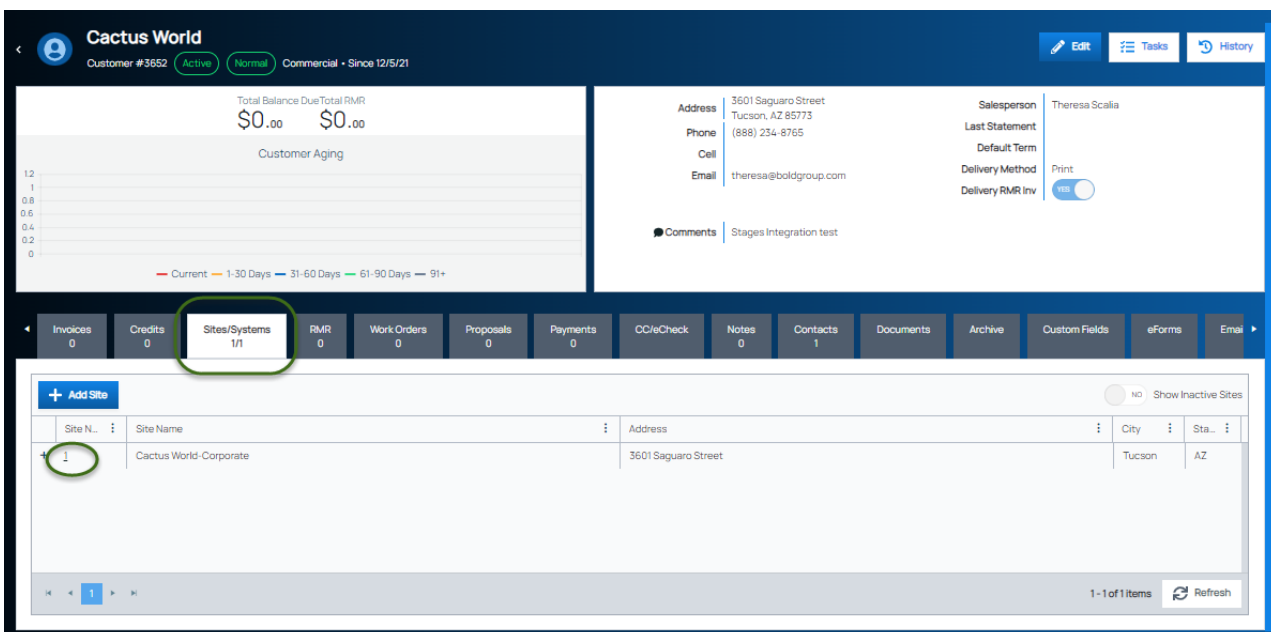
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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.



The Customer record opens. 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 opens. Click on the **Edit** button located at the upper right of the page.

1 - Cactus World-corporate  
Active Cactus World - 3652

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

RMR \$0.00

Warranty Start	12/05/2021	Sales Tax	Cebuga
Warranty Labor	1 Year Parts & Labor	Tax Rate	10.555%
Warranty Part	1 Year Parts & Labor	Tax Exempt	-
Service Level	SVC T&M RES	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: Custom Fields: Item Defaults: eForms: Part Ledger: External

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 Items Refresh

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

1 - Cactus World-corporate  
Active Cactus World - 3652

Use Customer Address  OFF

Site Name: Cactus World-Corporate

Address: 3601 Saguario Street  
Suite 550  
Tucson  
Arizona

Phone: (888) 234-8765 ext. 85773 Plus4

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:

Save Cancel