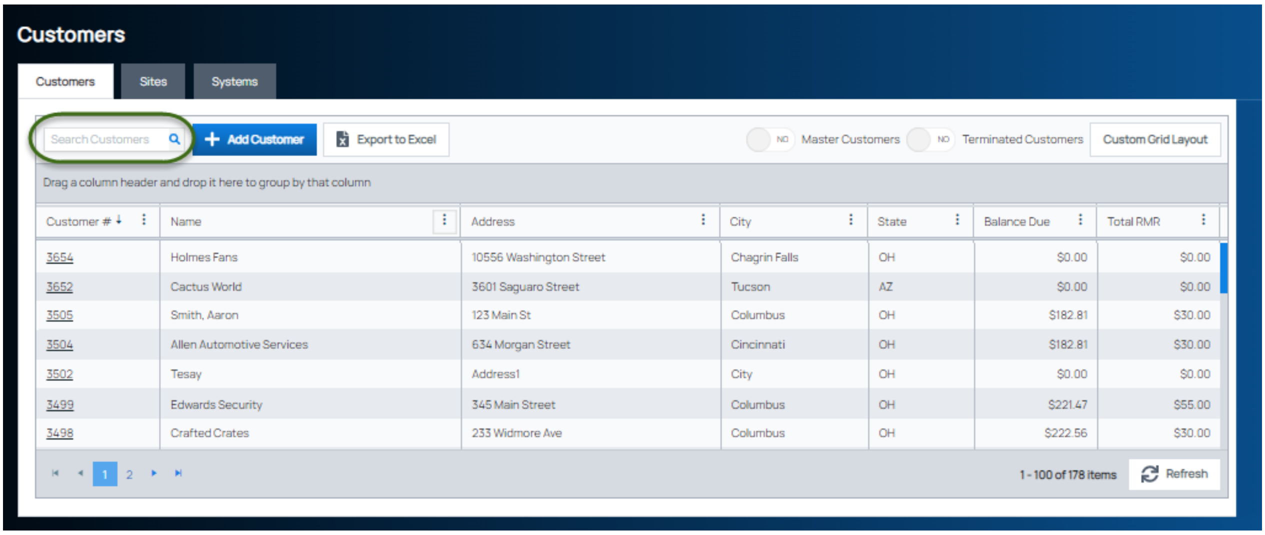
Site Custom Fields

Last Modified on 05/01/2022 6:25 am EDT

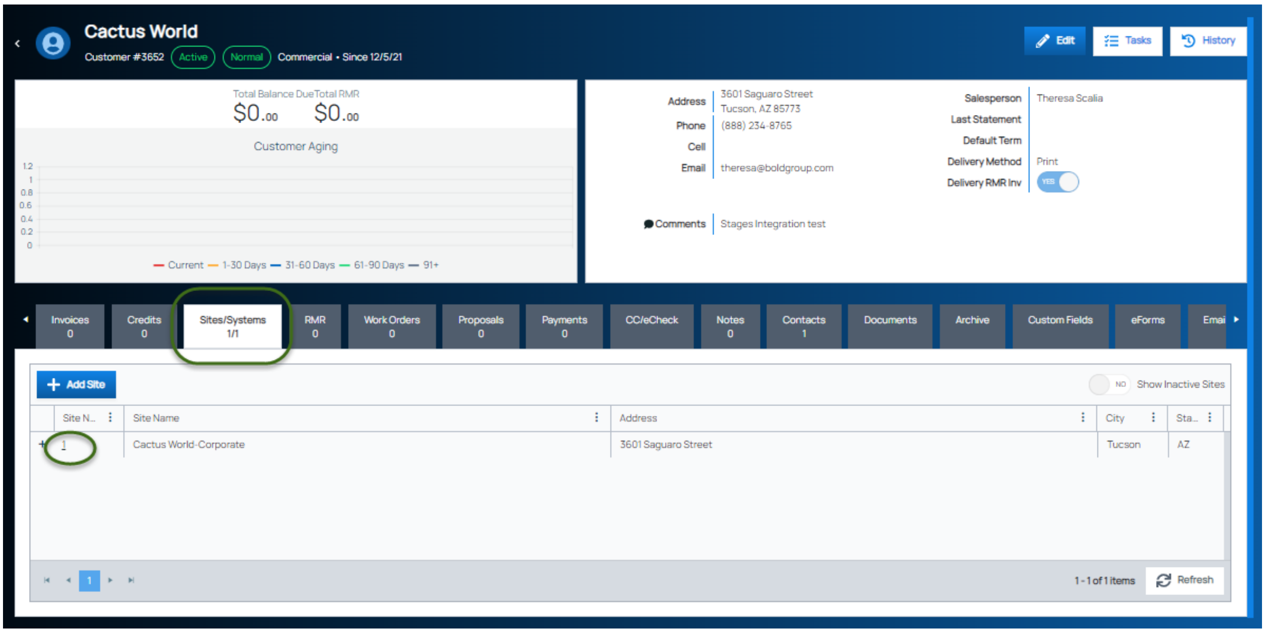
To access the Site Custom Fields, you must first open a customer record.

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

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



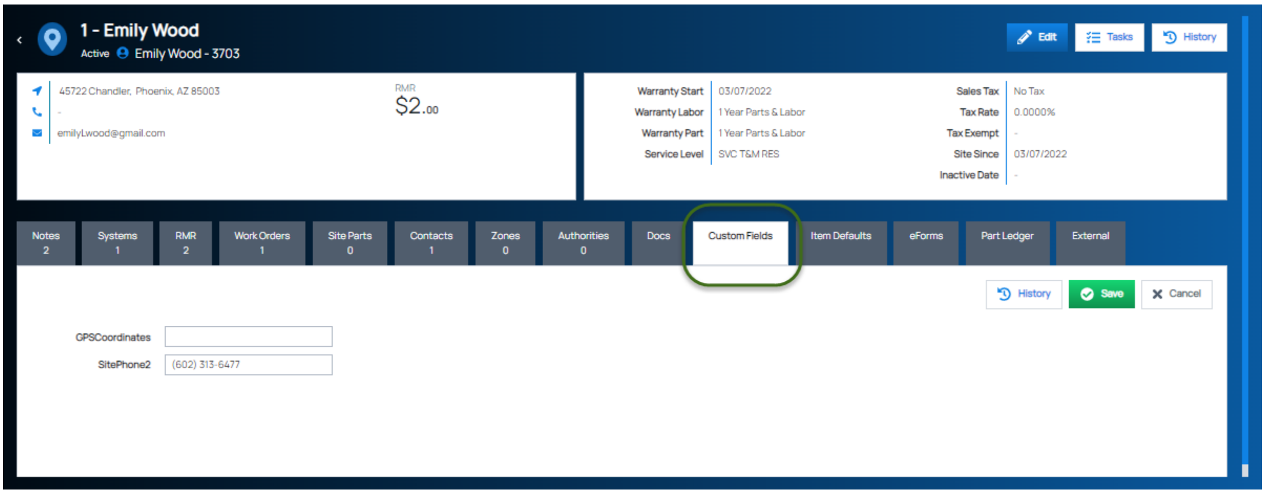
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site for which you want to access the Custom Fields.



The Site record will be displayed. Click on the Custom Fields tab.

In the bottom panel of the page, the custom fields will be displayed. Enter information according to your company's policies and procedures.

When finished entering information, click on the Save button.


1 - Emily Wood
Active
Emily Wood - 3703
Edit
Tasks
History
45722 Chandler, Phoenix, AZ 85003
-
emilyLwood@gmail.com
RMR
$2.00
Warranty Start 03/07/2022
Warranty Labor 1 Year Parts & Labor
Warranty Part 1 Year Parts & Labor
Service Level SVC T&M RES
Sales Tax No Tax
Tax Rate 0.0000%
Tax Exempt -
Site Since 03/07/2022
Inactive Date -
Notes 2
Systems 1
RMR 2
Work Orders 1
Site Parts 0
Contacts 1
Zones 0
Authorities 0
Docs
Custom Fields
Item Defaults
eForms
Part Ledger
External
History
Save
Cancel
GPSCoordinates
SitePhone2 (602) 313-6477


History
Save
Cancel
GPSCoordinates
SitePhone2 (602) 313-6477