

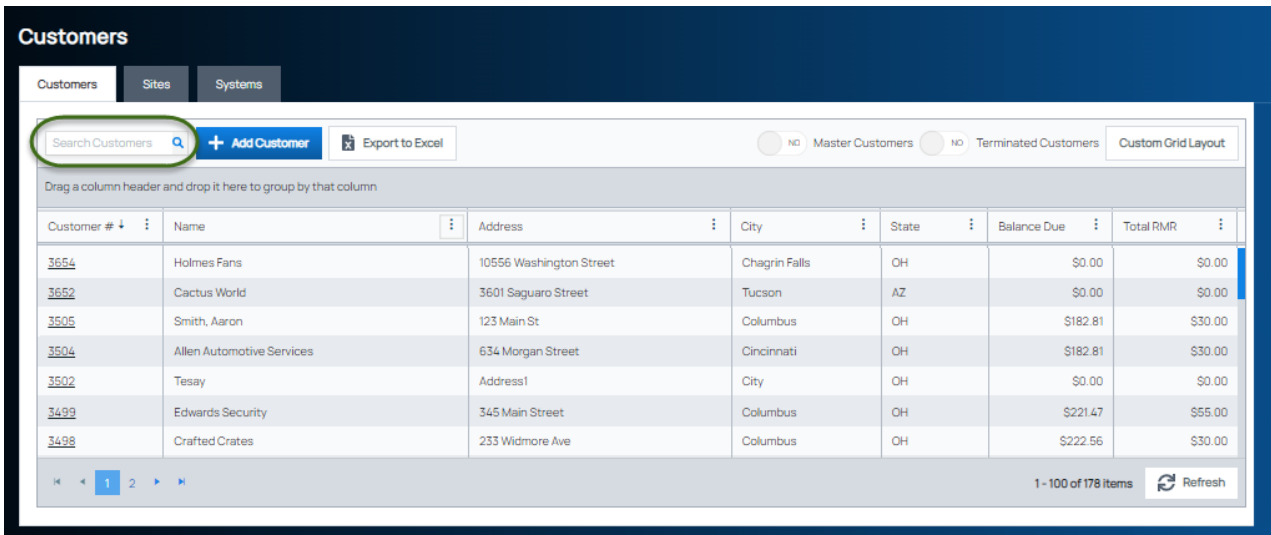
Site Custom Fields

Last Modified on 12/12/2024 1:56 pm EST

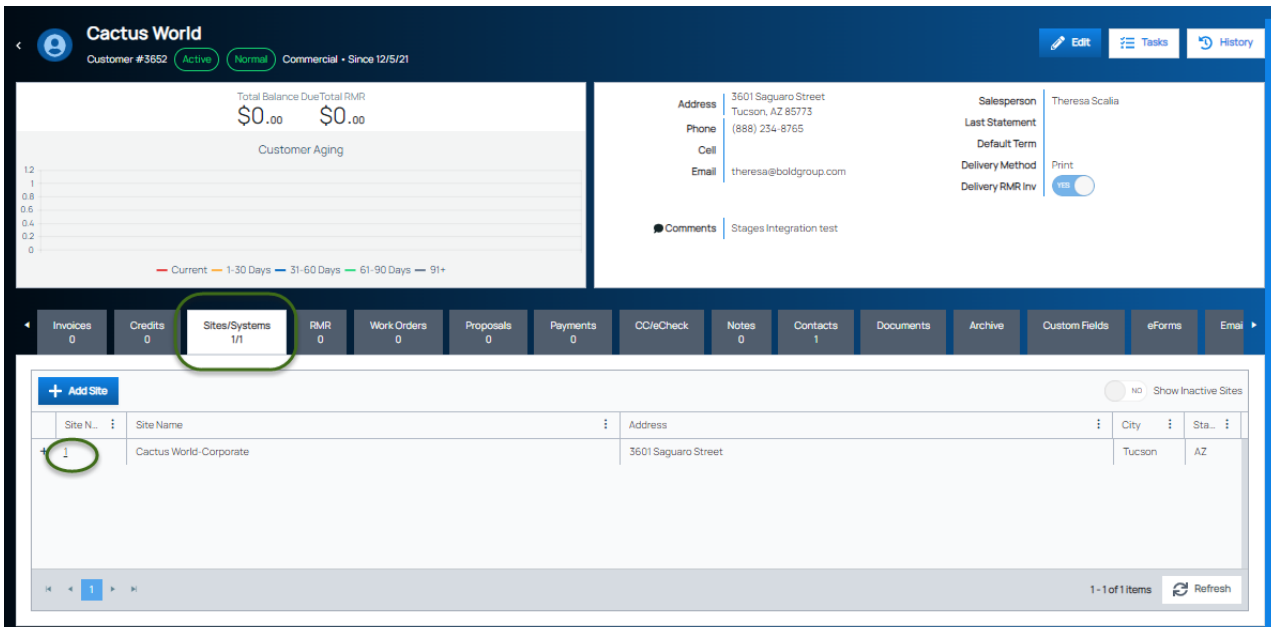
To access the Site Custom Fields, you must first open a customer record.

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

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



The Customer record opens. 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 opens. Click on the Custom Fields tab.

In the bottom panel of the page, the custom fields are 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

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start	03/07/2022	Sales Tax	No Tax
Warranty Labor	1 Year Parts & Labor	Tax Rate	0.0000%
Warranty Part	1 Year Parts & Labor	Tax Exempt	-
Service Level	SVC TSM RES	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