

# Sites/Systems Tab

Last Modified on 04/18/2022 4:09 pm EDT

The Sites/Systems tab displays all active Sites for the customer.

## Show Inactive Sites

Clicking on the toggle button labeled "Show Inactive Sites", will display all active and inactive sites.

## Add Site Button

Clicking on the Add Site button will open the Site form to create a new site for the customer.

## Show Systems

Clicking on the "+" symbol to the left of a Site will display a list of all Systems linked to the Site record.

## Site and System Hyperlink

In the Site # column or System # column, clicking on the hyperlink will open the Site or System record for viewing.

The screenshot shows the user interface for the Sites/Systems tab. At the top, the user's name "Emily Wood" is displayed, along with customer details: Customer #3719, status "Active" and "Normal", and "Residential-Owner" since 3/4/22. There are buttons for "Edit", "Tasks", and "History".

Key financial metrics are shown: Total Balance Due of \$822.71 and Total RMR of \$120.00. A "Customer Aging" bar chart is present, with a legend for Current, 1-30 Days, 31-60 Days, 61-90 Days, and 91+.

Contact information includes Address (45722 Chandler, Plymouth, MI 48170), Phone (734) 258-4646, Cell (734) 258-3311, and Email emilylwood@gmail.com. Salesperson is Dan Brown. Other fields include Last Statement, Default Term, Delivery Method (Print), and Delivery RMR Inv (YES).

A navigation bar shows counts for various modules: Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), CC/Check, Notes (0), Contacts (2), Documents, Archive, Custom Fields, eForms, and Emails.

The main content area features a "+ Add Site" button and a "Show Inactive Sites" toggle (currently set to NO). A table lists sites and their associated systems:

Site N.	Site Name	Address	City	Sta.
- 3719-01	Emily Wood	45722 Chandler	Plymouth	MI
System Details:				
System #	System Type	Panel Type	Warranty Start Date	
9173-01	Burglar Alarm	8-zone control panel	3/7/20, 12:00 AM	
CCTV	CCTV	1	3/4/22, 12:00 AM	
+ 3719-02	Emily Wood - Carriage House	45722 Chandler	Plymouth	MI

At the bottom, there is a pagination control showing "1" of 2 items and a "Refresh" button.