

Sites List

Last Modified on 12/12/2024 1:44 pm EST

The Sites List is a tab available when navigating to CRM > Customers.

Sites Tab

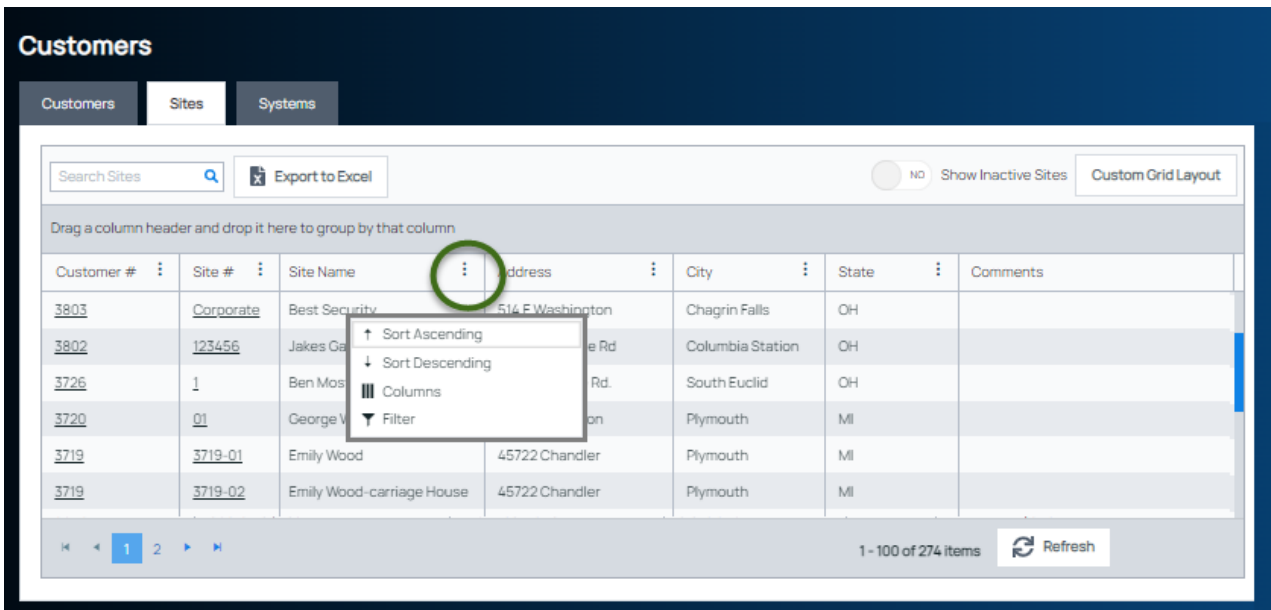
The default view in the grid area of the Sites tab displays the customer number, site number, site name, address, and comments (site). There are many other columns available to include in the grid area.

The screenshot shows the 'Customers' section with the 'Sites' tab selected. The interface includes a search bar for 'Search Sites', an 'Export to Excel' button, and a 'Show Inactive Sites' toggle. A 'Custom Grid Layout' button is also present. Below these is a grid of site data with the following columns: Customer #, Site #, Site Name, Address, City, State, and Comments. The grid contains 12 rows of data. At the bottom, there is a pagination control showing '1' of 2 pages and a 'Refresh' button.

Customer #	Site #	Site Name	Address	City	State	Comments
3803	Corporate	Best Security	514 E Washington	Chagrin Falls	OH	
3802	123456	Jakes Garage	24393 Sprague Rd	Columbia Station	OH	
3726	1	Ben Most	4156 Hinsdale Rd.	South Euclid	OH	
3720	01	George Watson	32551 Lexington	Plymouth	MI	
3719	3719-01	Emily Wood	45722 Chandler	Plymouth	MI	
3719	3719-02	Emily Wood-carriage House	45722 Chandler	Plymouth	MI	
3709	3705-1	Plymouth Bakery #4	41225 Sheldon Rd	Plymouth	MI	
3708	1	Plymouth Bakery #3	20515 Ford Rd	Canton	MI	
3707	1	Plymouth Bakery #2	10447 Ann Arbor Rd	Plymouth	MI	
3706	1	Plymouth Bakery	408 N Main	Plymouth	MI	

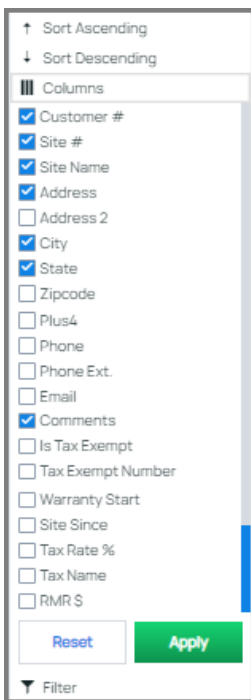
Custom Grid Layout

You can customize the grid layout. Clicking on the ellipse button on any of the column headers will display a list of options.



On the Sites List, the options are Sort Ascending, Sort Descending, Columns, and Filter.

Clicking on the Columns option will display a list of all the available columns to display in the grid.



Once you have made selections, you may save the layout so that you do not have to repeat this process every time you open the Sites List.

In the example below, we want a view of the Sites List that includes the Site Phone and Site Since date, and want to save this layout for future use.

To save this layout, click on the Custom Grid Layout button at the upper right of the page.

Customers

Customers Sites Systems

Search Sites NO Show Inactive Sites **Custom Grid Layout**

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

Customer #	Site #	Site Name	Address	City	State	Phone	Site Since
3698	"Site num...	"Site Name" Abc ...	8800 Lyra Drive	Columbus	OH		Feb 18, 2022
3382	3	12345	1234 S St	Madeup	CA		Apr 16, 2021
3501	ABCUSI...	A Business Comp...	123 Main St	Columbus	OH	(888) 555-1234	Jun 11, 2021
3505	SmithSite1	Aaron Smith	123 Main St	Columbus	OH	(888) 555-1234	Jul 13, 2021
3393	AARONI	Aaron's Rentals	2020 Broad St...	Columbus	OH	(888) 555-4646	Apr 5, 2021
3452	1	Ab Customer 1	100 High Street	Dallas	TX	(888) 555-2456	Apr 23, 2021
3519	ABCIS001	Ab Customer Sgs ...	987 Riverside ...	Columbus	OH	(999) 555-1234	Jul 14, 2021
3382	4	Ab Integration De...	1234 Main St	Orange	CA		Apr 22, 2021
2260	1	Ab Man3	1234 Test	Colorado Springs	CO	(555) 555-5551	Aug 28, 2020
1539	1	Ab Manitou	1234 Test Rd	Colorado Springs	CO	(555) 555-5551	Jan 23, 2020

1 - 100 of 274 items

A dialog box will be displayed to enter the Name of the layout. There are two options for saving:

- Save Layout – If this option is selected, the custom layout will only be available to the logged in user that created the layout.
- Save As Global Layout – Selecting this option will make the layout available to all users. Keep in mind, if other users have access to this layout, they are able to make changes to the original layout.

Custom Grid Layouts

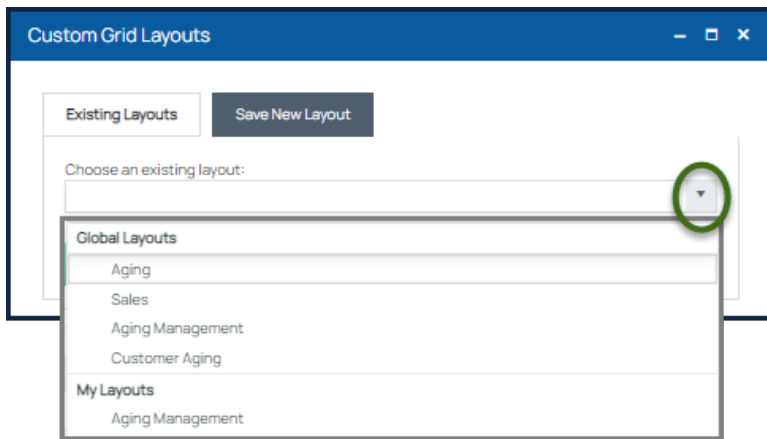
Existing Layouts
Save New Layout

Name:

If the user leaves the page displaying the Custom Grid Layout, and then returns, the default grid view will be displayed. To open a Custom Grid Layout, click on the Custom Grid Layout button at the upper right of the page.

The Custom Grid Layouts dialog box will be displayed. Click on the drop-down arrow in the “Choose an existing layout” field to locate the desired layout for viewing, and then click the Apply Layout button.

Once the grid is loaded, click on the Refresh button at the lower right of the page to refresh the data within the grid.

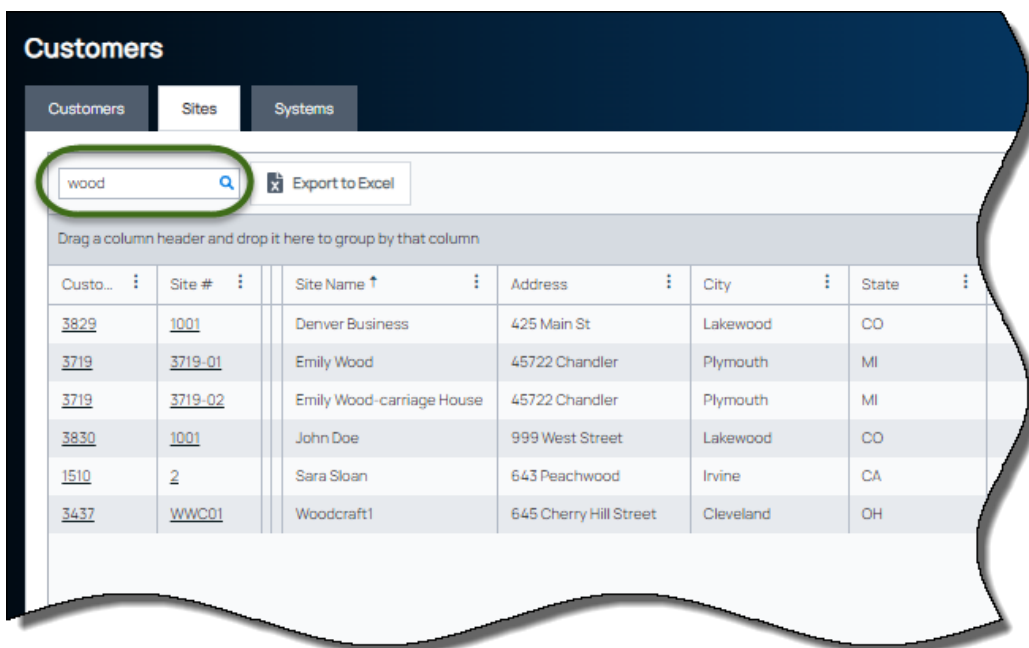


Site Search

At the upper left of the Sites List is a search field. Users can search by any criteria available. Type in your criteria for the search into the search box. You must enter at least four characters to trigger the search engine. The search engine will look for the criteria entered in any of the columns displayed in the grid.

In our example below, we typed the word “wood” into the Search Sites box. The software found five sites containing that string of characters. In the search results, the software found three sites containing “wood”, and three sites where “wood” is part of the city name.

If you want to go directly to the Site record, click on the hyperlink in the Site # column. If you want to open the customer record, click on the hyperlink in the Customer # column.



Sites List Function Buttons

At the top of the Sites List are three function buttons, each of which is described below.

- Export to Excel – Clicking on this button will export the current page of data displayed in the grid area. An Excel file icon will be displayed on your task bar to open the file for viewing.
- Show Inactive Sites – Setting this toggle button to Yes will display a list of all sites where an inactive date was

entered on the Site record.

- Custom Grid Layout – Allows users to create, update, and retrieve custom grid layouts. See the topic on this feature earlier in this article.

The screenshot shows a web application interface for 'Customers' with a 'Sites' tab selected. At the top, there are navigation tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Sites' with a magnifying glass icon. To the right of the search bar is an 'Export to Excel' button with an Excel icon. Further right is a radio button labeled 'NO' next to the text 'Show Inactive Sites', and a 'Custom Grid Layout' button. Below these controls is a message: 'Drag a column header and drop it here to group by that column'. The main area contains a table with columns: Customer #, Site #, Site Name, Address, City, State, Phone, and Site Since. The table has five rows of data. At the bottom of the table, there is a pagination control showing '1' of two pages and a 'Refresh' button. The text '1 - 100 of 274 items' is also visible.

Customer #	Site #	Site Name	Address	City	State	Phone	Site Since
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