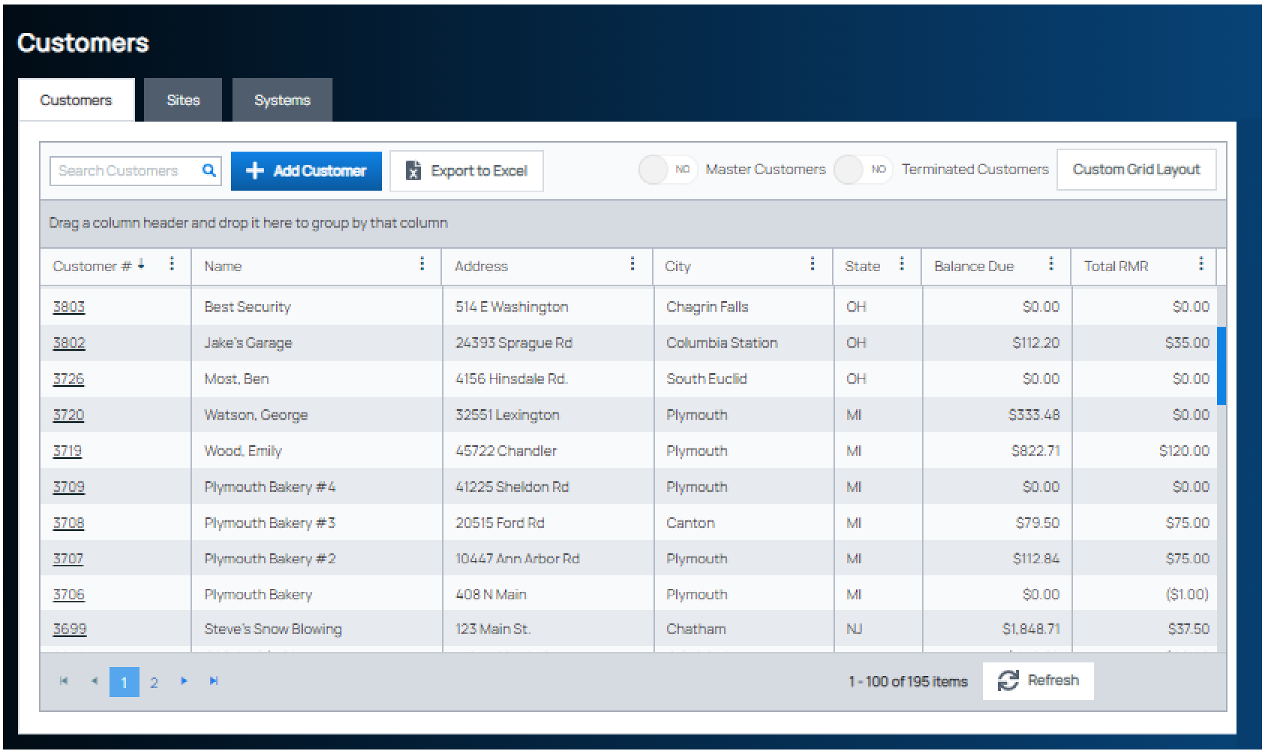
Site Record Definitions

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

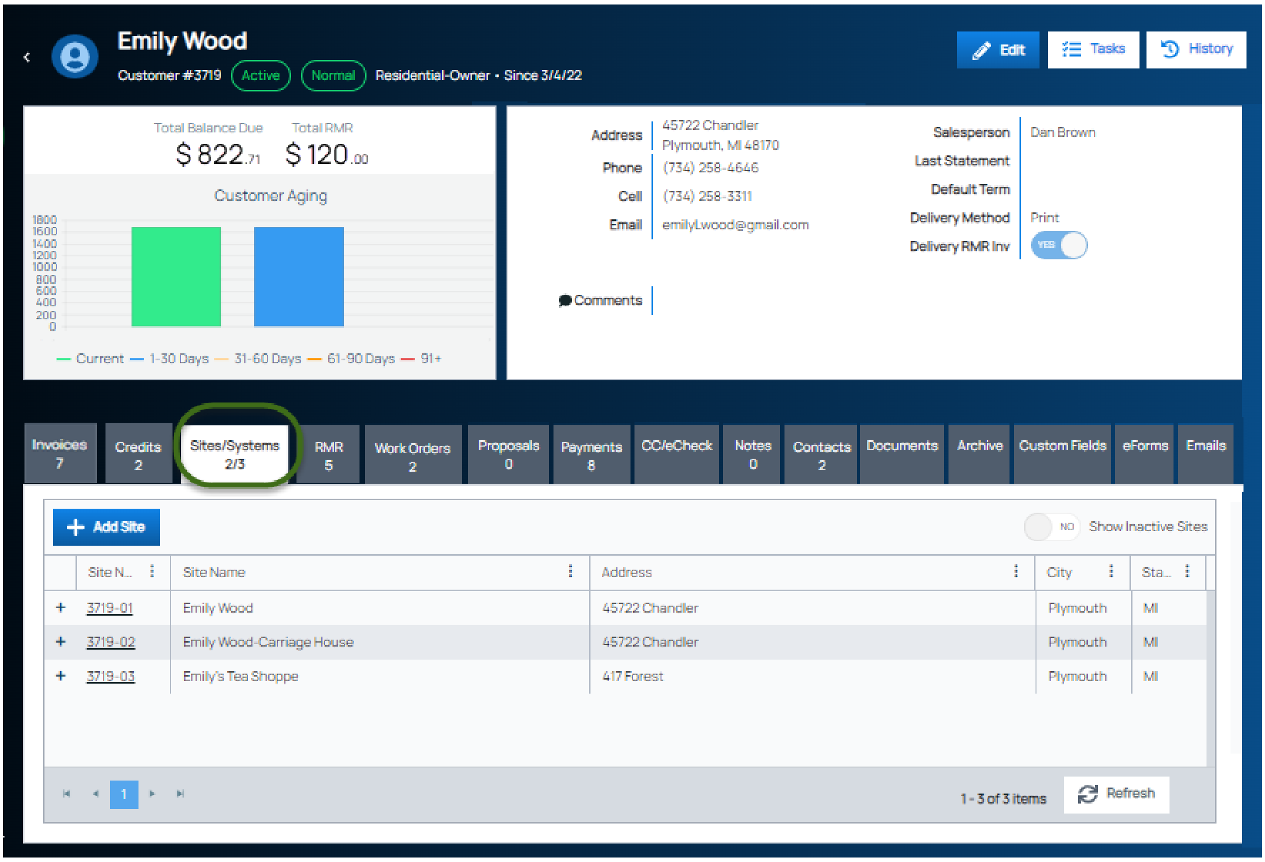
The Site record is accessed from a Customer record, and like the customer record has several tabs of information related to the Site. Users with the appropriate permissions may add, edit or delete related to the Site.

To open a Site record, navigate to Accounts Receivable > Customers. The customer list will be displayed. Locate the customer record containing the site with which you want to work, and then click on the hyperlink in the customer# column.



The customer record will be displayed. Click on the Sites/Systems tab.

A list of all active sites linked to the customer are displayed in the grid area. Click on the hyperlink of the site number to be viewed.



The Site record will be displayed. The Site record consists of 14 tabs, each of which is explained below.

Notes Tab

The Notes tab will display all Notes on file for the customer.

Add Note Button

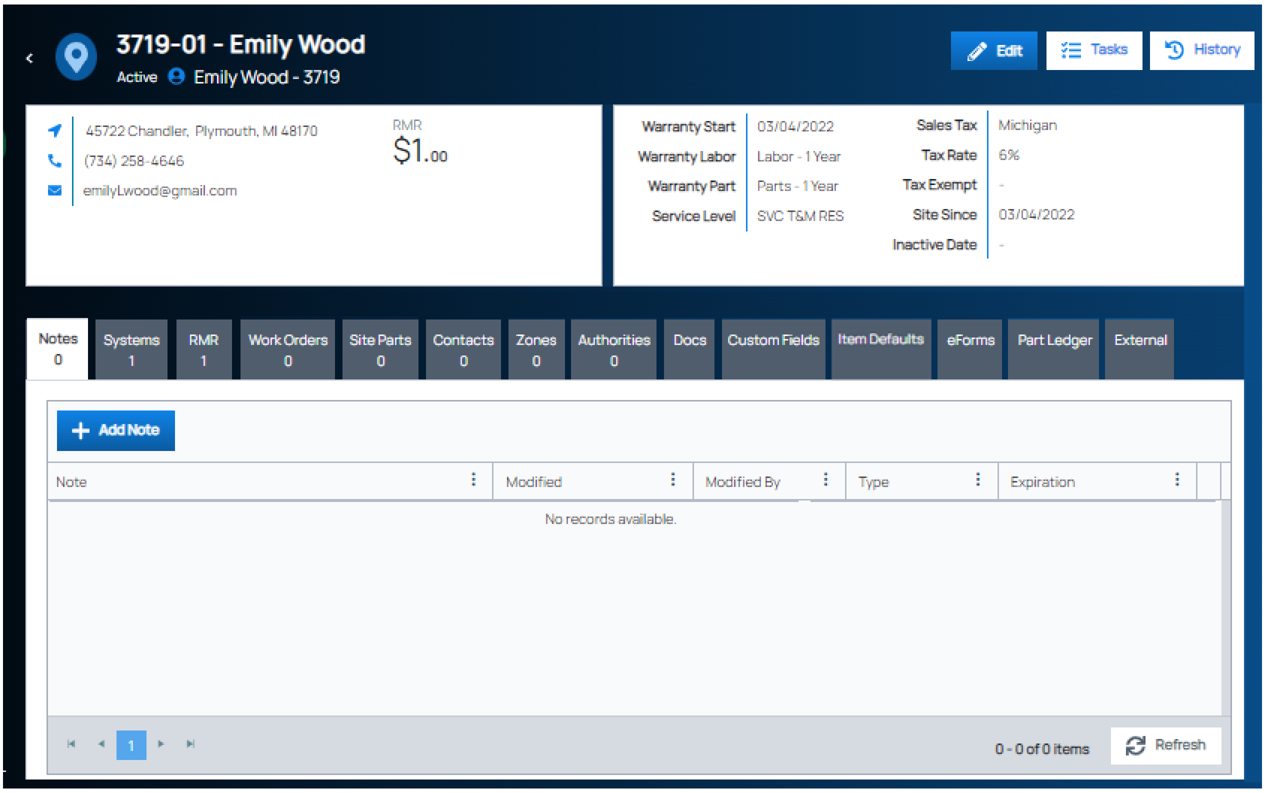
Clicking on the Add Note button will open a form for entering a new note for the site.

Edit Button

Clicking on the Edit button will open the note for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the note.



Systems Tab

The Systems tab will display all system records associated with the site. Clicking on the hyperlink of a System # will open the system record for viewing.

Add System Button

Clicking on the Add System button will open a form for entering a new system for the site.

Export to Excel

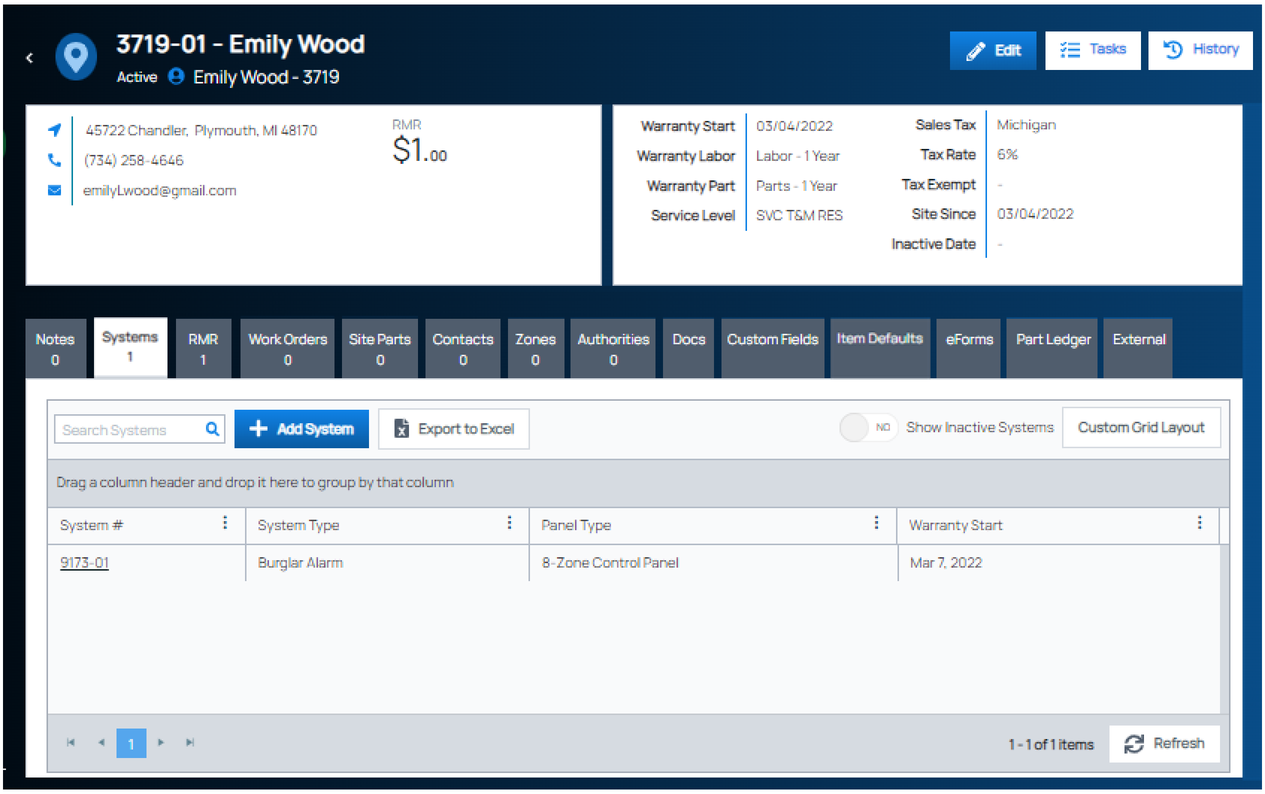
Clicking on this button will create an Excel file with the current information displayed in the grid area.

Show Inactive Systems

Setting the toggle button to Yes will display all systems linked to the site that have been inactivated.

Custom Grid Layout

Allows users to create, update, and retrieve custom grid layouts.



RMR Tab

The RMR tab will display all active RMR that was setup on the Site or a System associated with the Site.

Generate Recurring Invoice Button

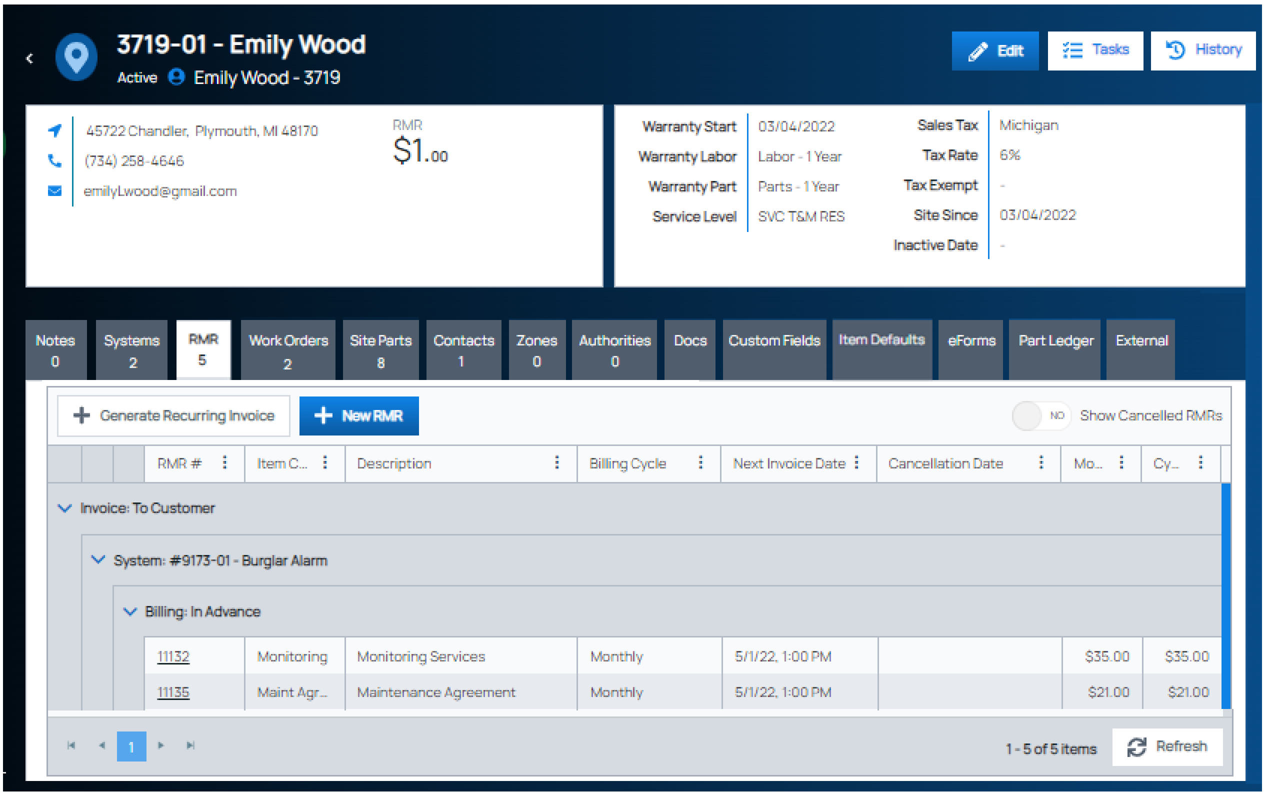
Clicking on this button will allow users to create a recurring invoice for this one customer.

New RMR Button

Clicking on the New RMR button will open a form for entering a new RMR for the site.

Show Cancelled RMRs

Setting the toggle button to Yes will display all previously cancelled RMR for the site or any system associated with the site.



Work Orders Tab

The Work Orders tab displays all open work orders for the site.

Show Closed Work Orders

Clicking on the toggle button labeled “Show Closed Work Orders” will display all open or closed work order records.

Show Recurring Work Orders

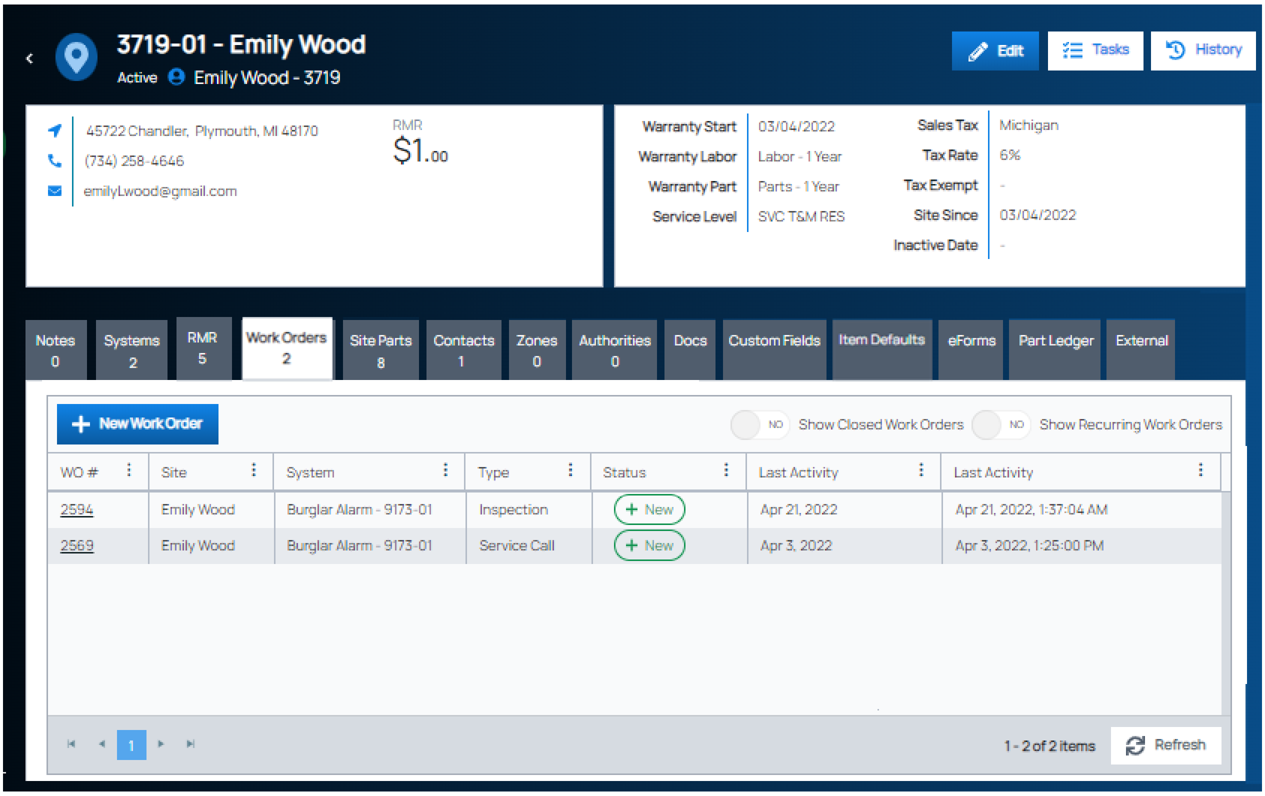
Clicking on the toggle button labeled “Show Recurring Work Orders” will display all Recurring Work Oder records.

New Work Order Button

Clicking on the New Work Order button will open the Work Order form to create a new work order for the site.

Work Order Hyperlink

In the WO # column, clicking on the hyperlink of a Work Order will open the work order for viewing and/or editing. Users with permissions are able to make changes to the work order and re-save, only if the work order has not been closed.

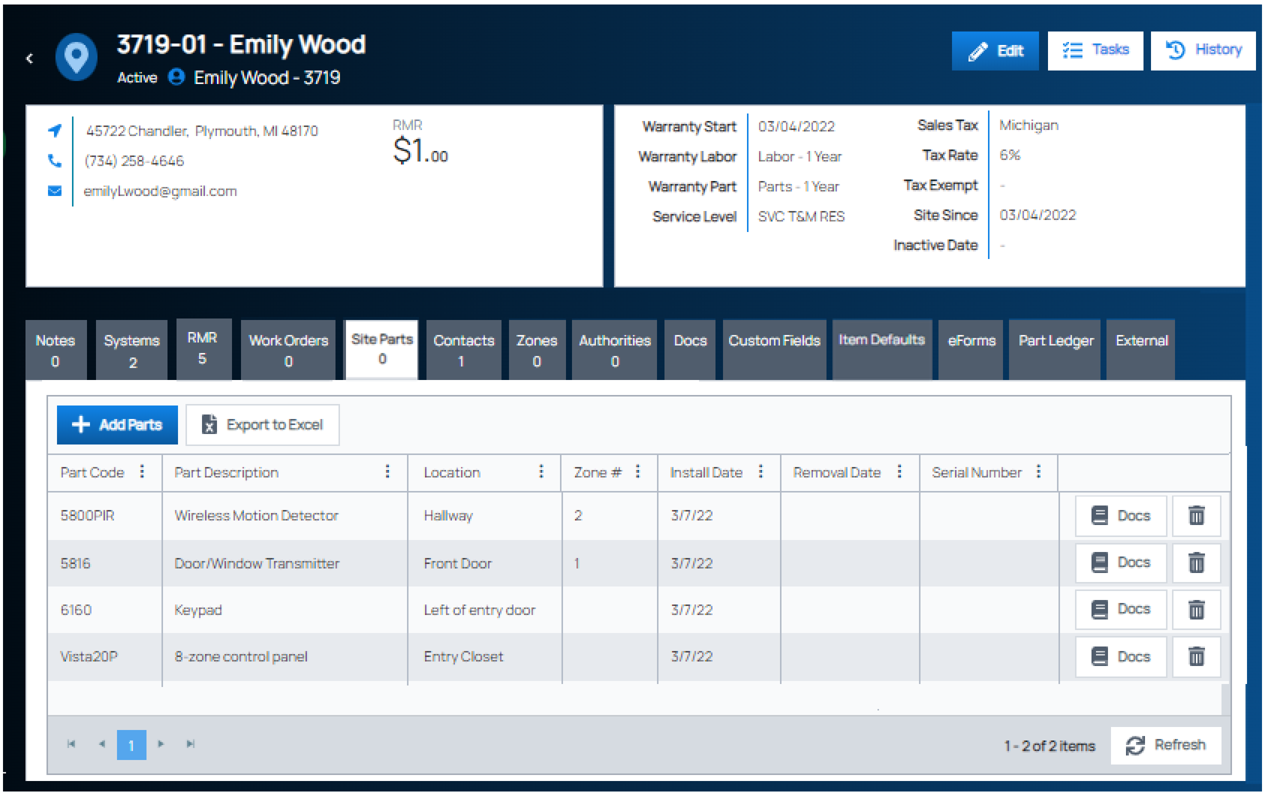


Site Parts Tab

The Site Parts tab displays all parts installed at the site. Typically, parts lists are entered on a System record, but may be entered on a site if preferred. Users are able to add new parts to the list, edit information on existing parts, or delete parts from the list.

Export to Excel

Clicking on this button will create an Excel file with the current information displayed in the grid area.



Contacts Tab

The Contacts tab displays all contacts for the site.

Add New Contact Button

Clicking on the Add New Contact button will open a form for entering a new contact for the site.

Add Existing Contact Button

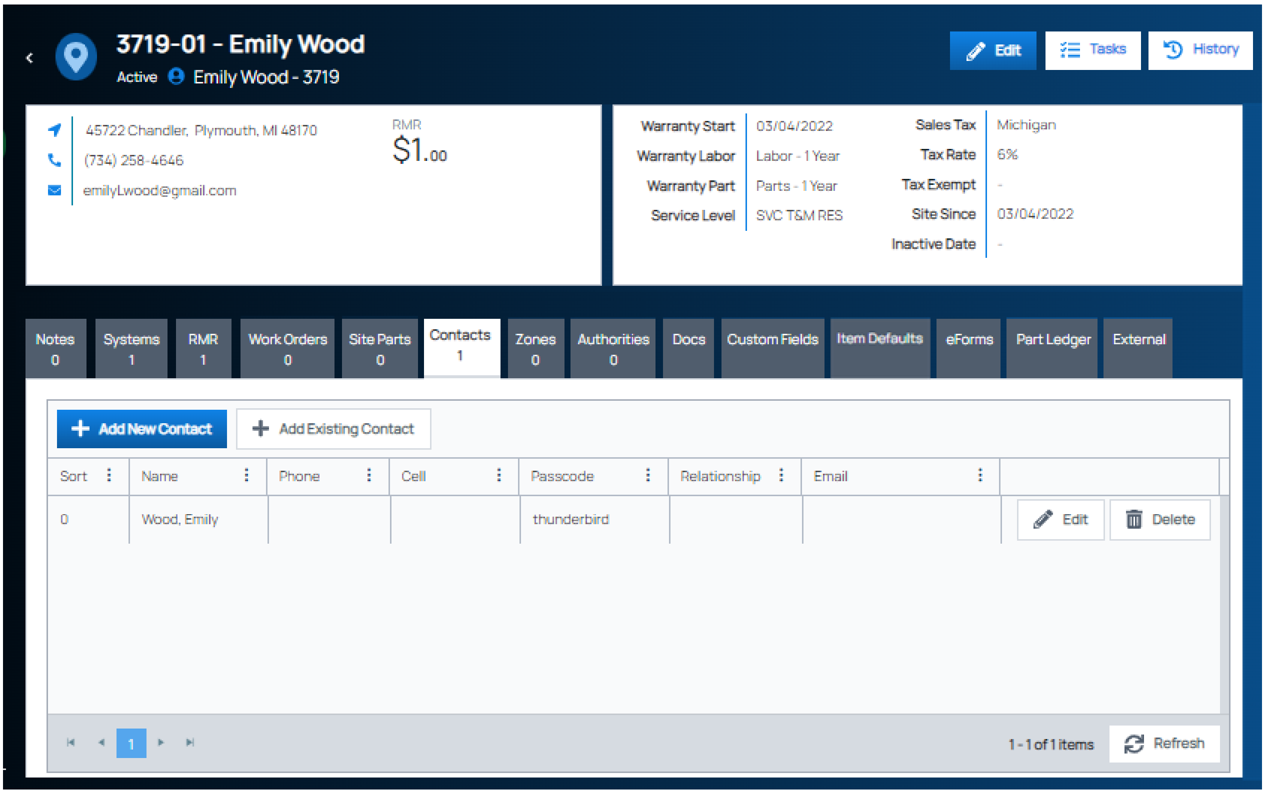
Clicking on the Add Existing Contact button will open a list of all contacts in the database for all sites. Users may select one or more contacts from the list to save on the current site's contact list.

Edit Button

Clicking on the Edit button will open the contact record for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the contact record.



Zones Tab

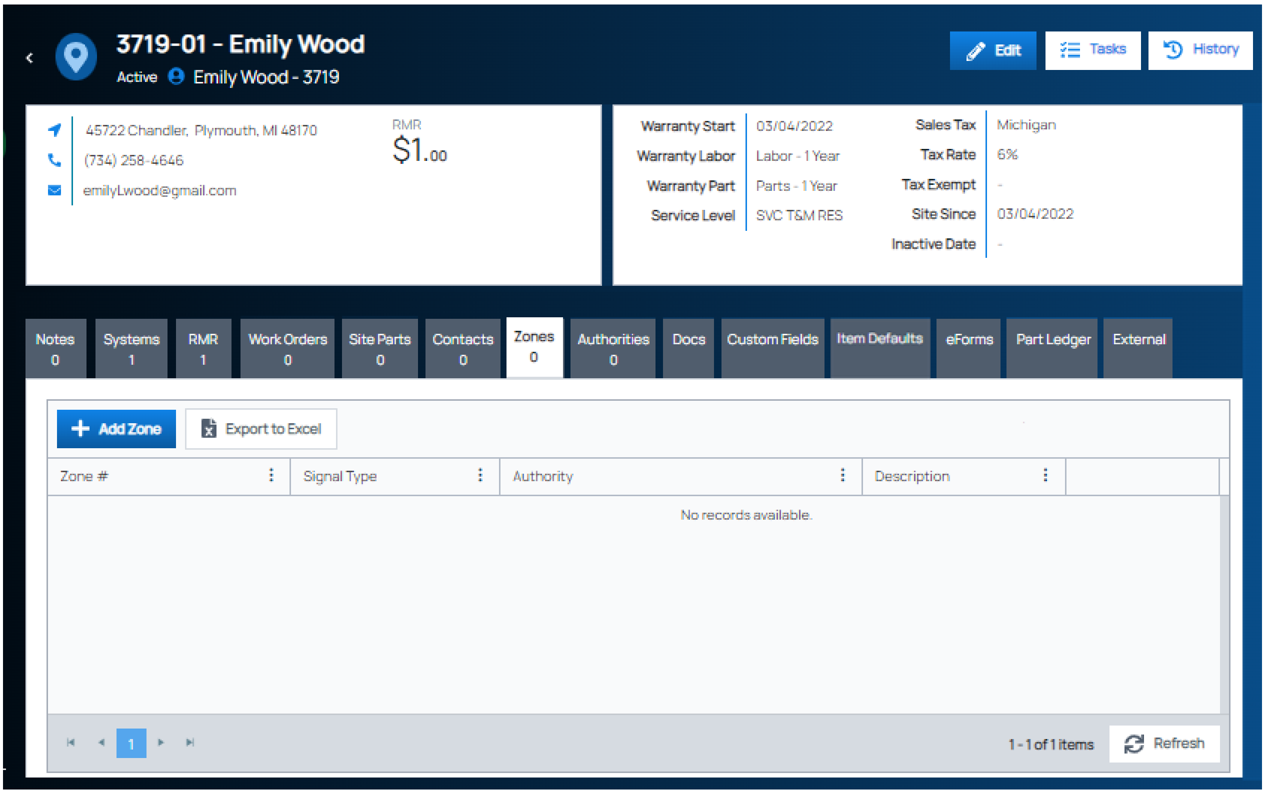
The Zones tab displays all zones for the site. Typically, zones are entered on a System record, but may be entered on a site if preferred. Users are able to add new zones to the list, edit information on existing zones or delete zones.

Add Zone Button

Clicking on the Add Zone button will open a form for entering a new zone for the site.

Export to Excel

Clicking on this button will create an Excel file with the current information displayed in the grid area.

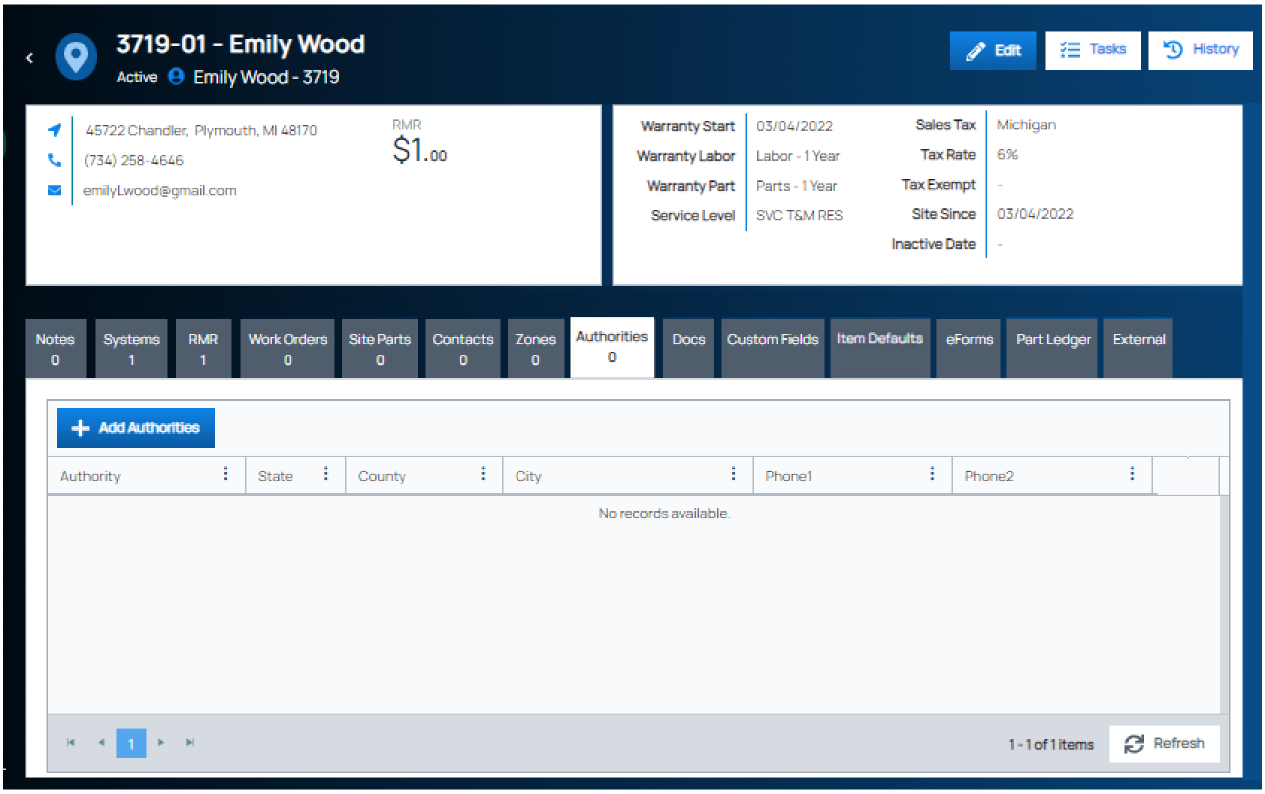


Authorities Tab

The Authorities tab displays all authority records for the site. Typically, authorities are entered on a System record, but may be entered on a site if preferred. Users are able to add new authorities to the list, edit information on existing records, or delete authority records.

Add Authorities Button

Clicking on this button will open a form for entering a new authority for the site.



Docs Tab

The Documents tab will display all documents attached to the site record.

Show Deleted Documents

Clicking on the toggle button labeled "Show Deleted Documents" will display all documents that users deleted. When deleting a document, it is not permanently removed from the database, just inactivated.

Add Document Button

Clicking on the Add Document button will open a form for selecting one or more documents to attach to the site.

Replace Button

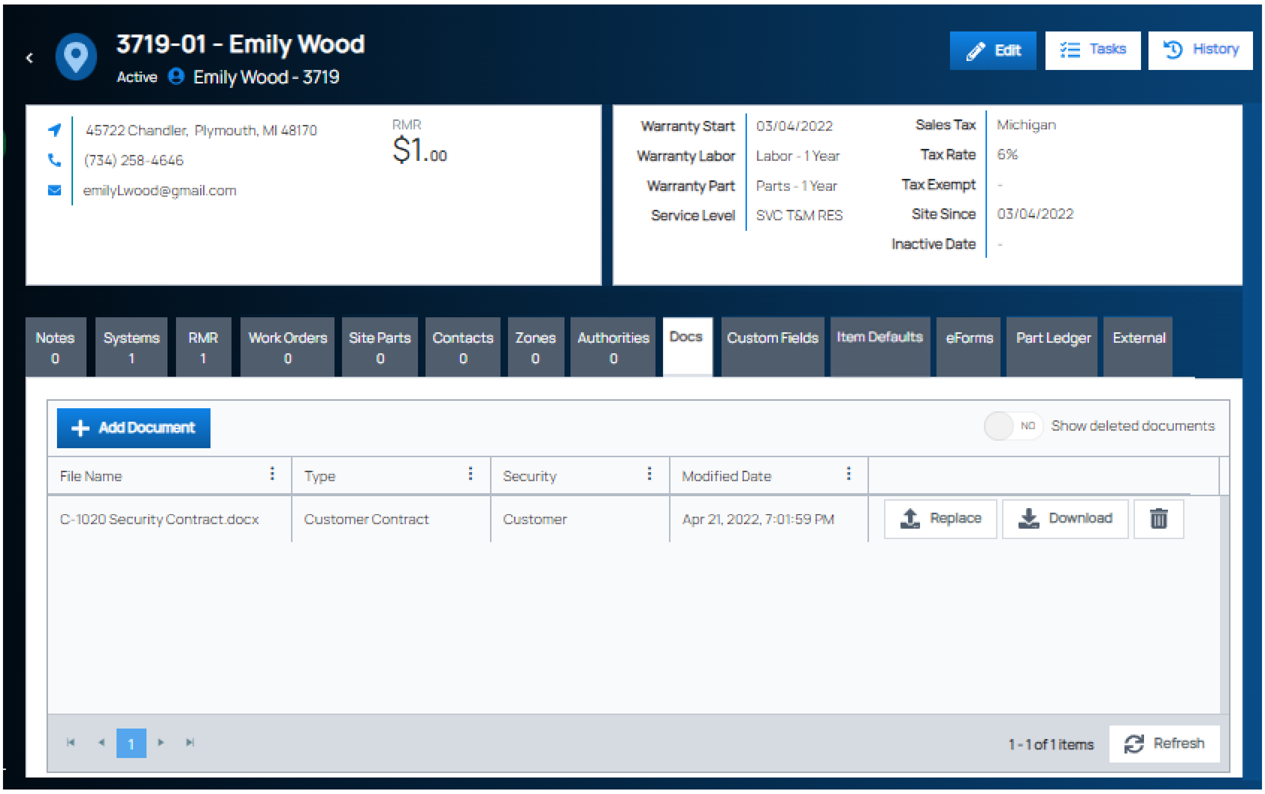
Clicking on the Replace button will open a form to select a file to replace the current document. This option is typically used if there is a newer revision of the document or if the incorrect document was uploaded.

Download Button

Clicking on the Download button will open the document for viewing.

Delete Button

Clicking on the Delete button will make the document inactive.



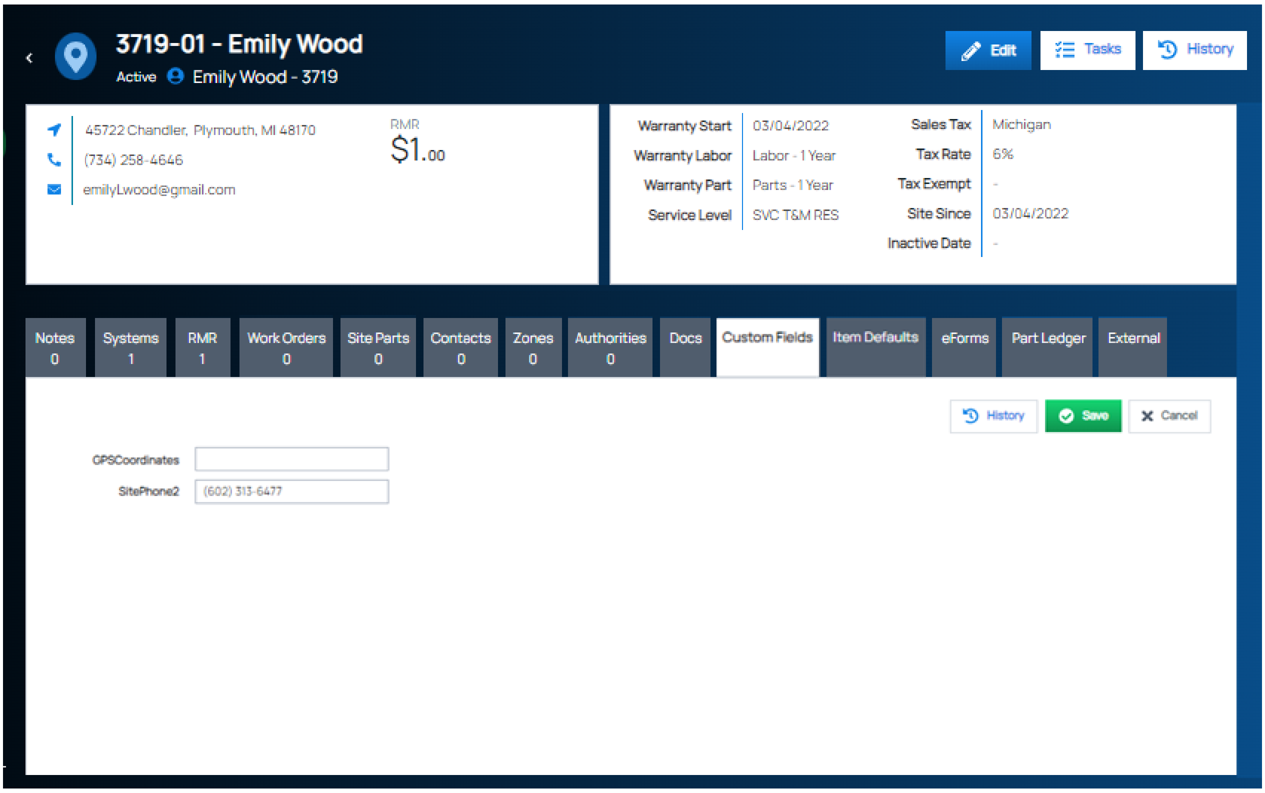
Custom Fields Tab

The Custom Fields tab will display the site level custom fields. The fields shown on this page are configured by your company in Setup > Operations > Custom Fields.

History Button

Clicking on the History button will display a list of all changes that have been made to any of the custom fields and which user made the change and when.

The Save and Cancel buttons are only shown if a user starts entering information into a custom field.



Item Defaults Tab

The Item Defaults tab will display any invoice items that have been setup with special pricing for the site.

Add Item Default Rate Button

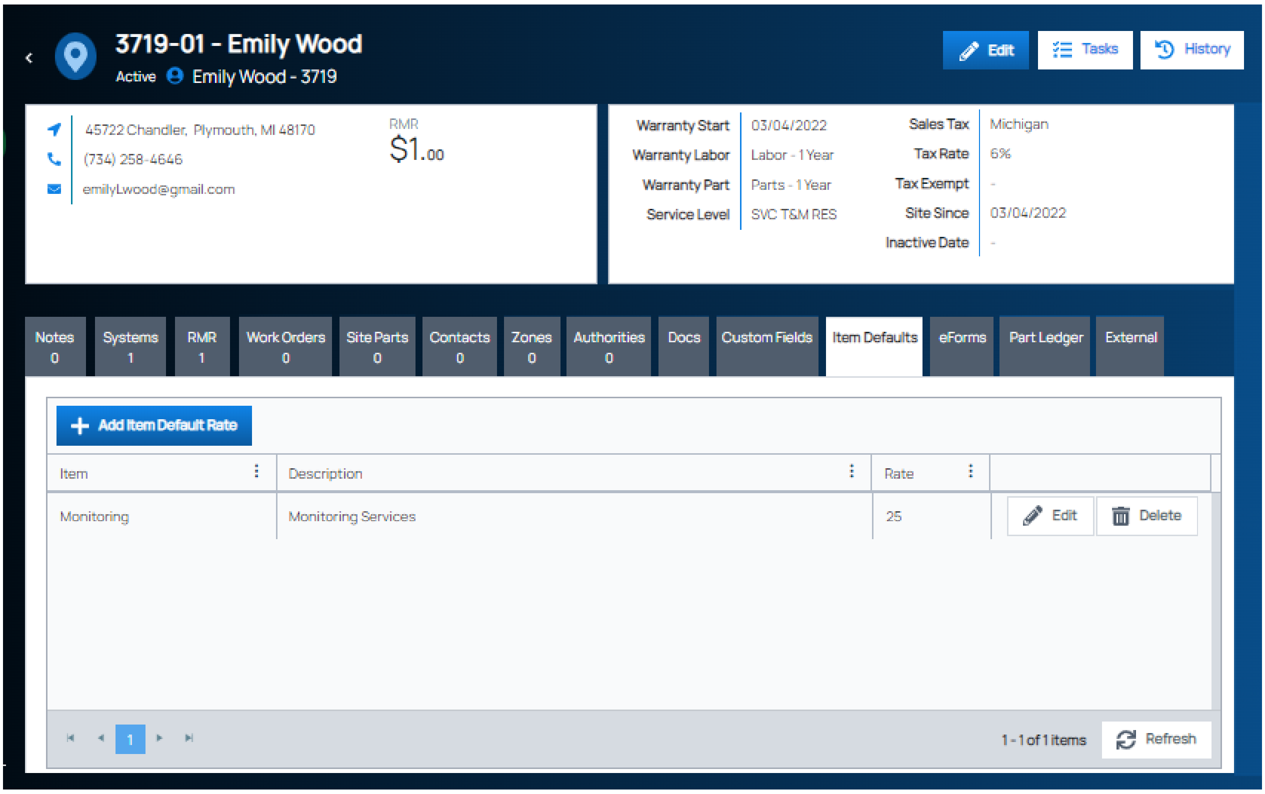
Clicking on this button will open a form for selecting an invoice item and entering the default price for the site.

Edit Button

Clicking on the Edit button will open the record for viewing and/or editing.

Delete Button

Clicking on the Delete button will permanently delete the record.



eForms Tab

This tab is for future development.

Part Ledger Tab

This tab is for future development.

External Tab

This tab is for future development.