

Site Record Definitions

Last Modified on 12/12/2024 2:15 pm EST

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 can add, edit, or delete related to the Site.

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

The screenshot shows the 'Customers' grid in a CRM system. The grid has the following columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The grid is currently displaying 100 of 195 items. The grid is currently displaying 100 of 195 items. The grid is currently displaying 100 of 195 items.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3803	Best Security	514 E Washington	Chagrin Falls	OH	\$0.00	\$0.00
3802	Jake's Garage	24393 Sprague Rd	Columbia Station	OH	\$112.20	\$35.00
3726	Most, Ben	4156 Hinsdale Rd.	South Euclid	OH	\$0.00	\$0.00
3720	Watson, George	32551 Lexington	Plymouth	MI	\$333.48	\$0.00
3719	Wood, Emily	45722 Chandler	Plymouth	MI	\$822.71	\$120.00
3709	Plymouth Bakery #4	41225 Sheldon Rd	Plymouth	MI	\$0.00	\$0.00
3708	Plymouth Bakery #3	20515 Ford Rd	Canton	MI	\$79.50	\$75.00
3707	Plymouth Bakery #2	10447 Ann Arbor Rd	Plymouth	MI	\$112.84	\$75.00
3706	Plymouth Bakery	408 N Main	Plymouth	MI	\$0.00	(\$1.00)
3699	Steve's Snow Blowing	123 Main St.	Chatham	NJ	\$1,848.71	\$37.50

The customer record opens. 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.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Edit Tasks History

Total Balance Due: **\$822.71** Total RMR: **\$120.00**

Customer Aging

— Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+

Address 45722 Chandler
Plymouth, MI 48170

Phone (734) 258-4646

Cell (734) 258-3311

Email emilyLwood@gmail.com

Salesperson Dan Brown

Last Statement

Default Term

Delivery Method Print

Delivery RMR Inv

Comments

Invoices 7 **Credits** 2 **Sites/Systems** 2/3 **RMR** 5 **Work Orders** 2 **Proposals** 0 **Payments** 8 **CC/eCheck** **Notes** 0 **Contacts** 2 **Documents** **Archive** **Custom Fields** **eForms** **Emails**

+ Add Site Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
+ 3719-01	Emily Wood	45722 Chandler	Plymouth	MI
+ 3719-02	Emily Wood-Carriage House	45722 Chandler	Plymouth	MI
+ 3719-03	Emily's Tea Shoppe	417 Forest	Plymouth	MI

1 - 3 of 3 items Refresh

The Site record opens. The Site record consists of 14 tabs, each of which is explained below.

Notes Tab

The Notes tab displays all Notes on file for the customer.

Add Note Button

Clicking the Add Note button opens a form for entering a new note for the site.

Edit Button

Clicking the Edit button opens the note for viewing and/or editing.

Delete Button

Clicking the Delete button permanently deletes the note.

3719-01 - Emily Wood
Active Emily Wood - 3719

Edit **Tasks** **History**

<p>45722 Chandler, Plymouth, MI 48170 (734) 258-4646 emilyLwood@gmail.com</p> <p>RMR \$1.00</p>	<p>Warranty Start 03/04/2022 Warranty Labor Labor - 1 Year Warranty Part Parts - 1 Year Service Level SVC T&M RES</p> <p>Sales Tax Michigan Tax Rate 6% Tax Exempt - Site Since 03/04/2022 Inactive Date -</p>
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Notes: 0 | Systems: 1 | RMR: 1 | Work Orders: 0 | Site Parts: 0 | Contacts: 0 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

+ Add Note

Note	Modified	Modified By	Type	Expiration
No records available.				

0 - 0 of 0 items **Refresh**

Systems Tab

The Systems tab displays 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 the Add System button opens a form for entering a new system for the site.

Export to Excel

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

Show Inactive Systems

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

Custom Grid Layout

Use this to create, update, and retrieve custom grid layouts.

3719-01 - Emily Wood
Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170 RMR **\$1.00**
(734) 258-4646
emilyLwood@gmail.com

Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes: 0 | **Systems: 1** | RMR: 1 | Work Orders: 0 | Site Parts: 0 | Contacts: 0 | Zones: 0 | Authorities: 0 | Docs: 0 | Custom Fields: 0 | Item Defaults: 0 | eForms: 0 | Part Ledger: 0 | External: 0

Search Systems **+ Add System** Show Inactive Systems

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

System #	System Type	Panel Type	Warranty Start
9173-01	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items

RMR Tab

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

Generate Recurring Invoice Button

Click this button to create a recurring invoice for this one customer.

New RMR Button

Clicking the New RMR button opens a form for entering a new RMR for the site.

Show Cancelled RMRs

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

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Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170
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emilyLwood@gmail.com

RMR \$1.00

Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes 0 Systems 2 **RMR 5** Work Orders 2 Site Parts 8 Contacts 1 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Generate Recurring Invoice + New RMR Show Cancelled RMRs

RMR #	Item C...	Description	Billing Cycle	Next Invoice Date	Cancellation Date	Mo..	Cy..
Invoice: To Customer							
System: #9173-01 - Burglar Alarm							
Billing: In Advance							
11132	Monitoring	Monitoring Services	Monthly	5/1/22, 1:00 PM		\$35.00	\$35.00
11135	Maint Agr...	Maintenance Agreement	Monthly	5/1/22, 1:00 PM		\$21.00	\$21.00

1 - 5 of 5 items Refresh

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" displays all open or closed work order records.

Show Recurring Work Orders

Clicking on the toggle button labeled "Show Recurring Work Orders" displays all Recurring Work Order records.

New Work Order Button

Clicking the New Work Order button opens 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 opens 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.

3719-01 - Emily Wood
Edit Tasks History

45722 Chandler, Plymouth, MI 48170 RMR \$1.00

(734) 258-4646

emilyLwood@gmail.com

Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes 0
Systems 2
RMR 5
Work Orders 2
Site Parts 8
Contacts 1
Zones 0
Authorities 0
Docs
Custom Fields
Item Defaults
eForms
Part Ledger
External

+ New Work Order
 Show Closed Work Orders
 Show Recurring Work Orders

WO #	Site	System	Type	Status	Last Activity	Last Activity
2594	Emily Wood	Burglar Alarm - 9173-01	Inspection	+ New	Apr 21, 2022	Apr 21, 2022, 1:37:04 AM
2569	Emily Wood	Burglar Alarm - 9173-01	Service Call	+ New	Apr 3, 2022	Apr 3, 2022, 1:25:00 PM

1 - 2 of 2 items
Refresh

Site Parts Tab

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

Export to Excel

Clicking this button creates an Excel file with the current information displayed in the grid area.

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Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170 RMR \$1.00
(734) 258-4646
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Warranty Start 03/04/2022 Sales Tax Michigan
Warranty Labor Labor - 1 Year Tax Rate 6%
Warranty Part Parts - 1 Year Tax Exempt -
Service Level SVC T&M RES Site Since 03/04/2022
Inactive Date -

Notes 0 Systems 2 RMR 5 Work Orders 0 Site Parts 0 Contacts 1 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Add Parts Export to Excel

Part Code	Part Description	Location	Zone #	Install Date	Removal Date	Serial Number	Docs	Delete
5800PIR	Wireless Motion Detector	Hallway	2	3/7/22			Docs	Delete
5816	Door/Window Transmitter	Front Door	1	3/7/22			Docs	Delete
6160	Keypad	Left of entry door		3/7/22			Docs	Delete
Vista20P	8-zone control panel	Entry Closet		3/7/22			Docs	Delete

1 - 2 of 2 items Refresh

Contacts Tab

The Contacts tab displays all contacts for the site.

Add New Contact Button

Clicking the Add New Contact button opens a form for entering a new contact for the site.

Add Existing Contact Button

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

Edit Button

Clicking the Edit button opens the contact record for viewing or editing.

Delete Button

Clicking the Delete button permanently deletes the contact record.

3719-01 - Emily Wood
Active Emily Wood - 3719

Edit **Tasks** **History**

45722 Chandler, Plymouth, MI 48170 **RMR \$1.00**
(734) 258-4646
emilyLwood@gmail.com

Warranty Start 03/04/2022 **Sales Tax** Michigan
Warranty Labor Labor - 1 Year **Tax Rate** 6%
Warranty Part Parts - 1 Year **Tax Exempt** -
Service Level SVC T&M RES **Site Since** 03/04/2022
Inactive Date -

Notes 0 Systems 1 RMR 1 Work Orders 0 Site Parts 0 **Contacts 1** Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Add New Contact **+ Add Existing Contact**

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wood, Emily			thunderbird			

1 - 1 of 1 items Refresh

Zones Tab

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

Add Zone Button

Clicking the Add Zone button opens a form for entering a new zone for the site.

Export to Excel

Clicking this button creates an Excel file with the current information displayed in the grid area.

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Active Emily Wood - 3719

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Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes 0 Systems 1 RMR 1 Work Orders 0 Site Parts 0 Contacts 0 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

+ Add Zone Export to Excel

Zone #	Signal Type	Authority	Description
No records available.			

1 - 1 of 1 items Refresh

Authorities Tab

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

Add Authorities Button

Clicking this button opens a form for entering a new authority for the site.

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RMR \$1.00

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Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes: 0, Systems: 1, RMR: 1, Work Orders: 0, Site Parts: 0, Contacts: 0, Zones: 0, Authorities: 0, Docs, Custom Fields, Item Defaults, eForms, Part Ledger, External

+ Add Authorities

Authority	State	County	City	Phone1	Phone2
No records available.					

1 - 1 of 1 items Refresh

Docs Tab

The Documents tab displays all documents attached to the site record.

Show Deleted Documents

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

Add Document Button

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

Replace Button

Clicking the Replace button opens 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 the Download button opens the document for viewing.

Delete Button

Clicking the Delete button makes the document inactive.

3719-01 - Emily Wood
Active Emily Wood - 3719

Edit **Tasks** **History**

<p>45722 Chandler, Plymouth, MI 48170 (734) 258-4646 emilyLwood@gmail.com</p> <p>RMR \$1.00</p>	<p>Warranty Start 03/04/2022 Warranty Labor Labor - 1 Year Warranty Part Parts - 1 Year Service Level SVC T&M RES</p> <p>Sales Tax Michigan Tax Rate 6% Tax Exempt - Site Since 03/04/2022 Inactive Date -</p>
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Notes: 0 | Systems: 1 | RMR: 1 | Work Orders: 0 | Site Parts: 0 | Contacts: 0 | Zones: 0 | Authorities: 0 | **Docs** | Custom Fields | Item Defaults | eForms | Part Ledger | External

+ Add Document NO Show deleted documents

File Name	Type	Security	Modified Date	
C-1020 Security Contract.docx	Customer Contract	Customer	Apr 21, 2022, 7:01:59 PM	Replace Download Trash

1 - 1 of 1 items Refresh

Custom Fields Tab

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

History Button

Clicking the History button 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.

3719-01 - Emily Wood

Active
Emily Wood - 3719

Edit
Tasks
History

📍 45722 Chandler, Plymouth, MI 48170

📞 (734) 258-4646

✉️ emilyLwood@gmail.com

RMR
\$1.00

Warranty Start	03/04/2022	Sales Tax	Michigan
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Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes 0
Systems 1
RMR 1
Work Orders 0
Site Parts 0
Contacts 0
Zones 0
Authorities 0
Docs
Custom Fields
Item Defaults
eForms
Part Ledger
External

History
Save
X Cancel

GPSCoordinates

SitePhone2

Item Defaults Tab

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

Add Item Default Rate Button

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

Edit Button

Clicking the Edit button opens the record for viewing or editing.

Delete Button

Clicking the Delete button permanently deletes the record.

3719-01 - Emily Wood
Edit Tasks History

45722 Chandler, Plymouth, MI 48170
 (734) 258-4646
 emilyLwood@gmail.com

RMR
\$1.00

Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs	Custom Fields	Item Defaults	eForms	Part Ledger	External
0	1	1	0	0	0	0	0	0	0	0	0	0	0

+ Add Item Default Rate

Item	Description	Rate	
Monitoring	Monitoring Services	25	<div style="display: flex; justify-content: flex-end; gap: 5px;"> Edit Delete </div>

1 - 1 of 1 items
Refresh

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.