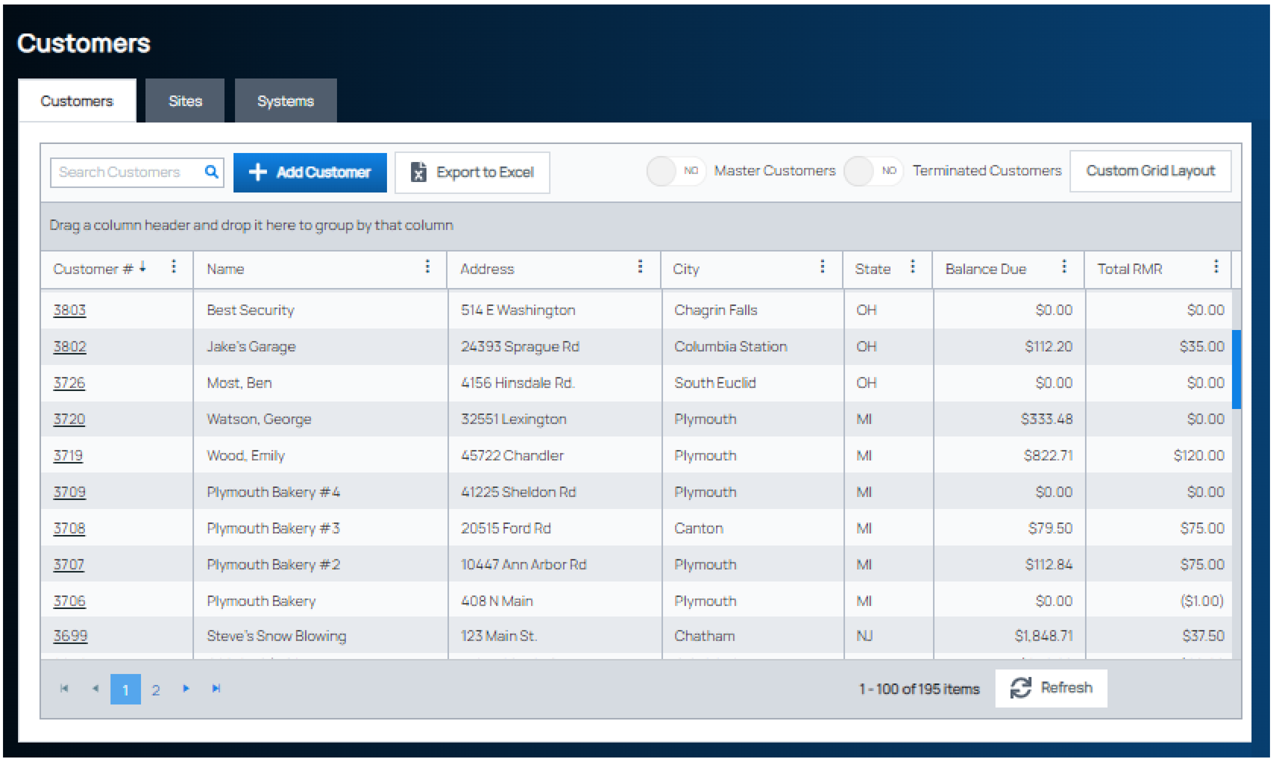
Site Record Definitions

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

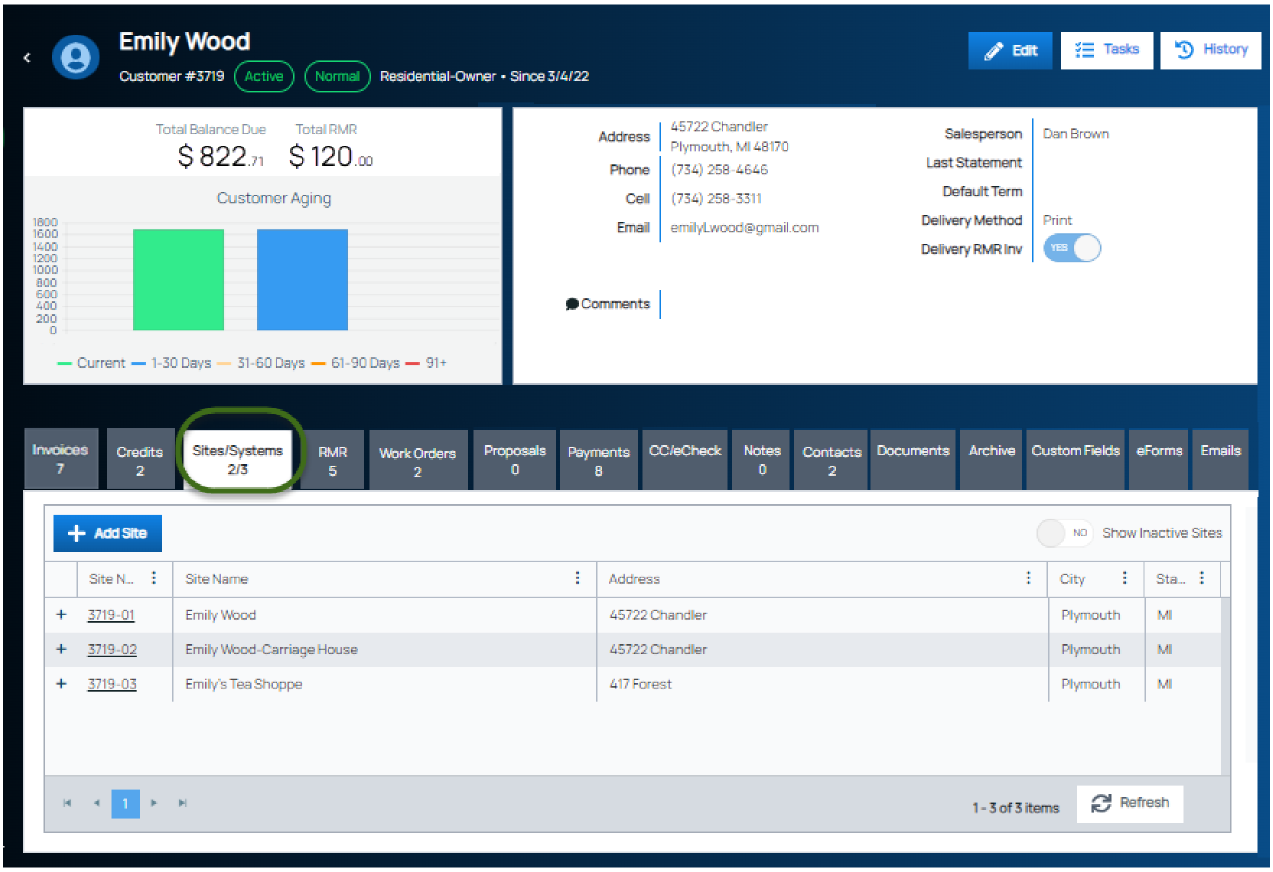
The Site record is accessed from a Customer record, and like the customer record has several tabs of information related to the Site. Users with the appropriate permissions can add, edit, or delete related to the Site.

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 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.



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

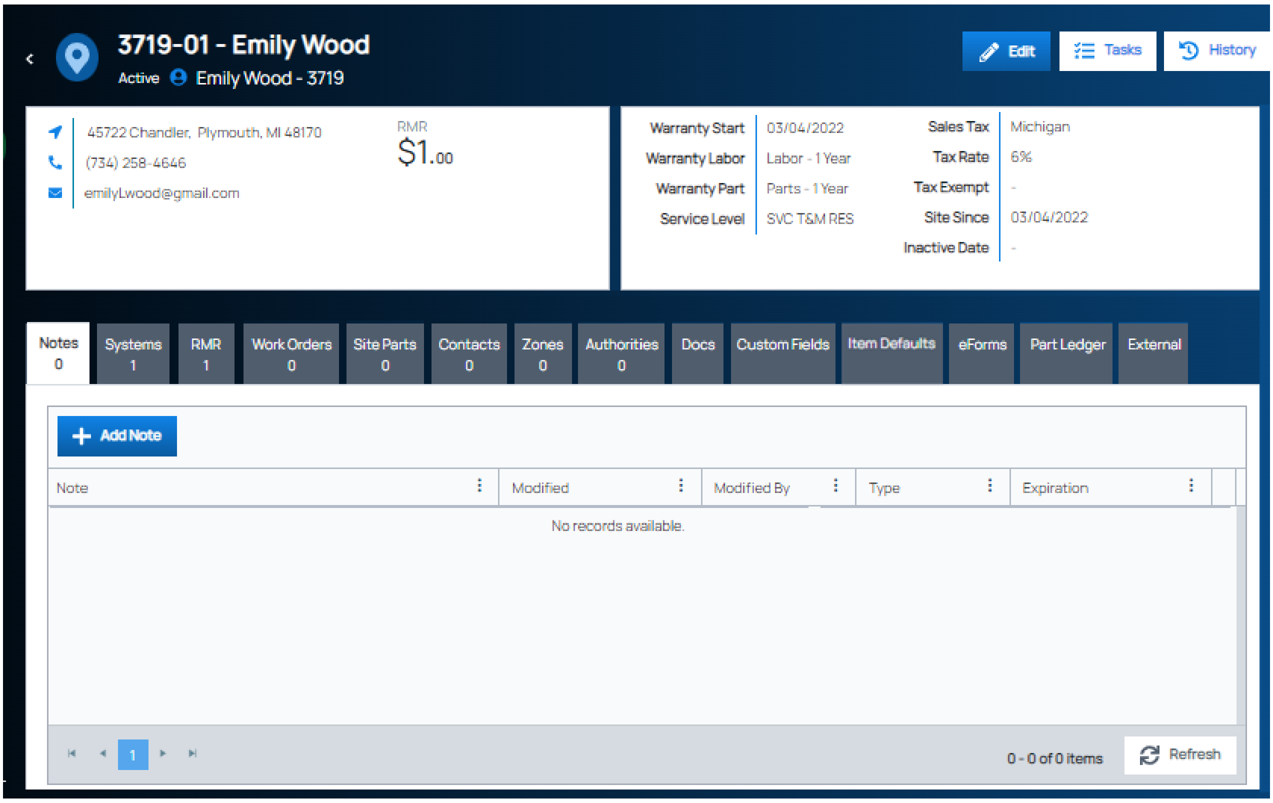
Clicking the Add Note button opens a form for entering a new note for the site.

Edit Button

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

Delete Button

Clicking the Delete button permanently deletes the note.



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

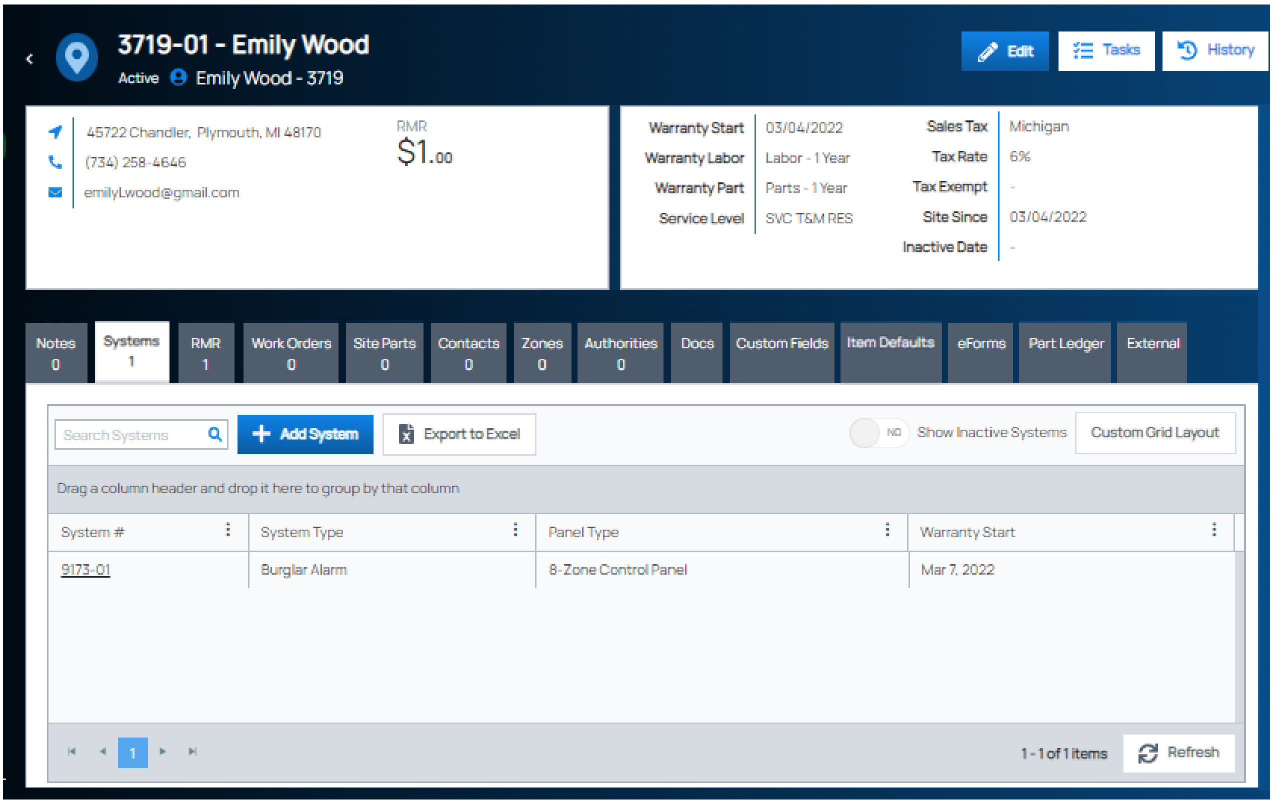
Clicking on this button creates an Excel file with the current information displayed in the grid area.

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.



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

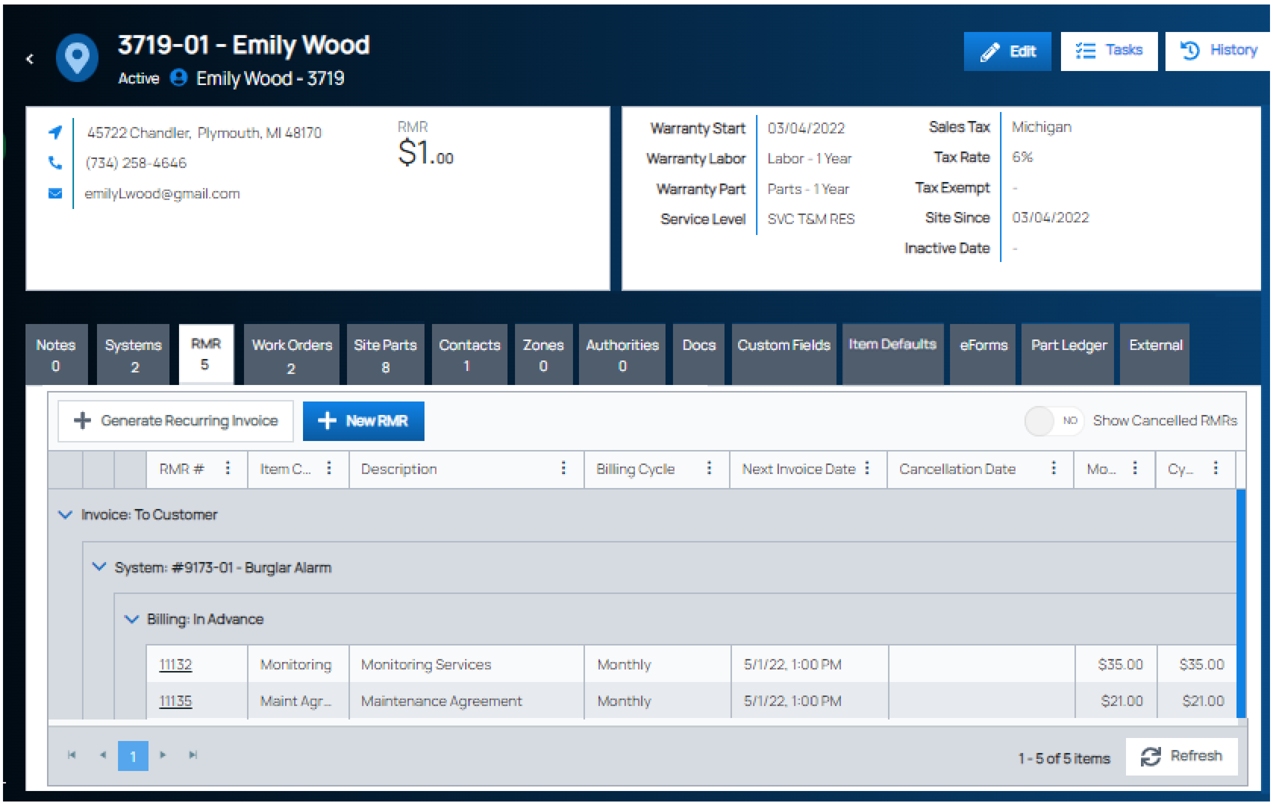
Click this button to create a recurring invoice for this one customer.

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.



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

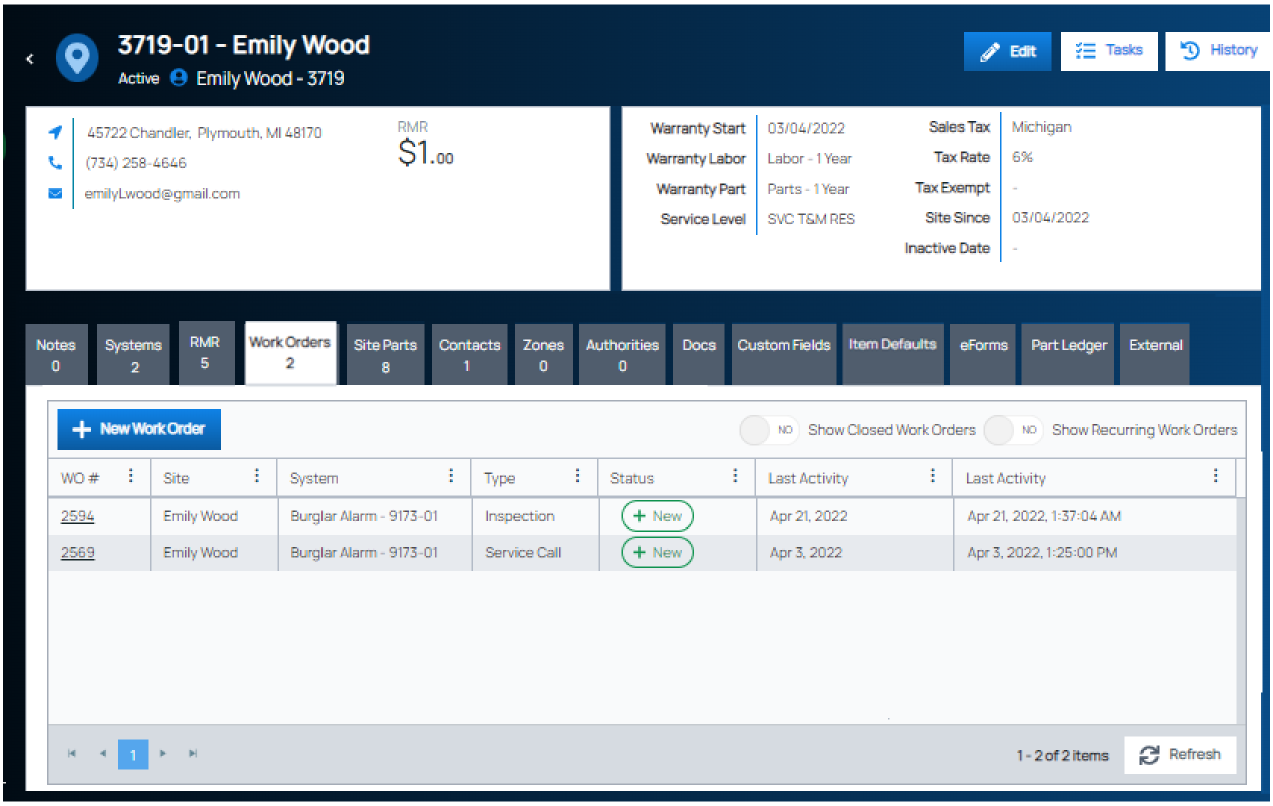
Clicking on the toggle button labeled "Show Recurring Work Orders" displays all Recurring Work Oder records.

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.

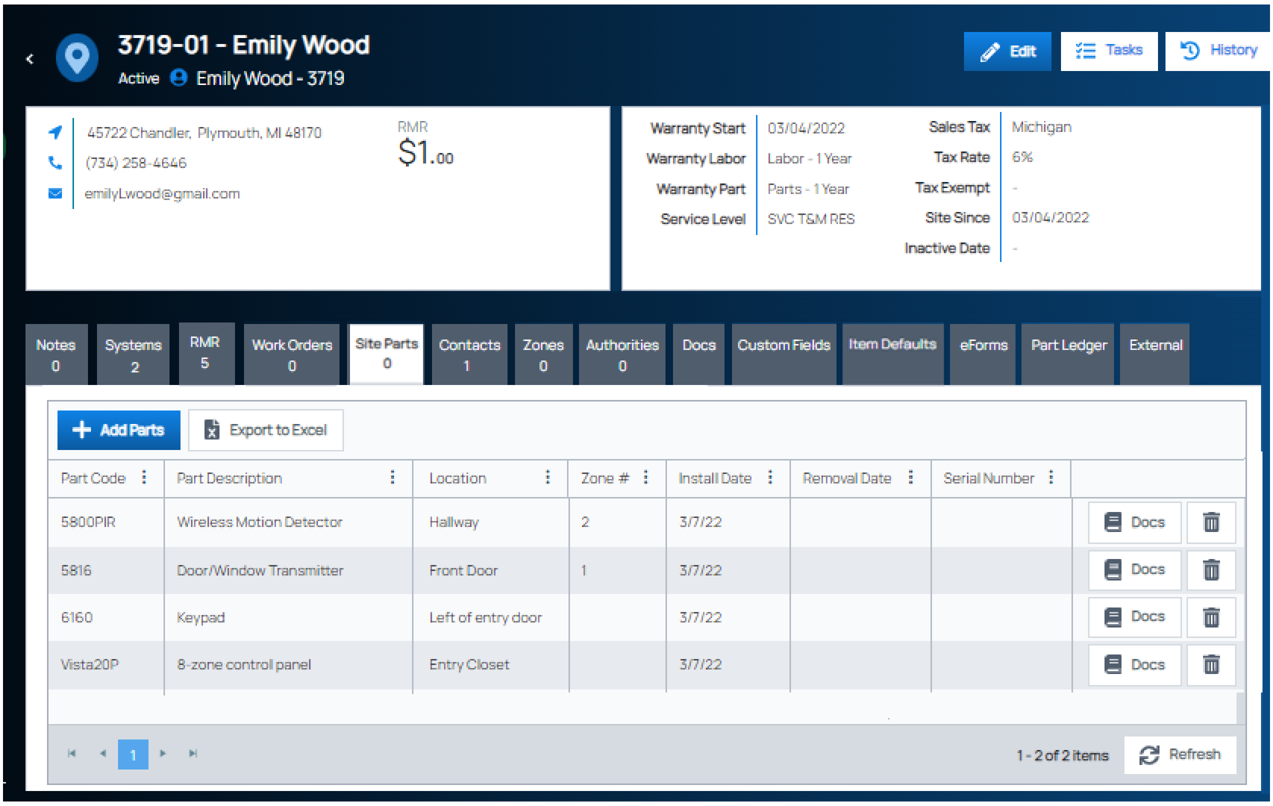


Site Parts Tab

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.



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

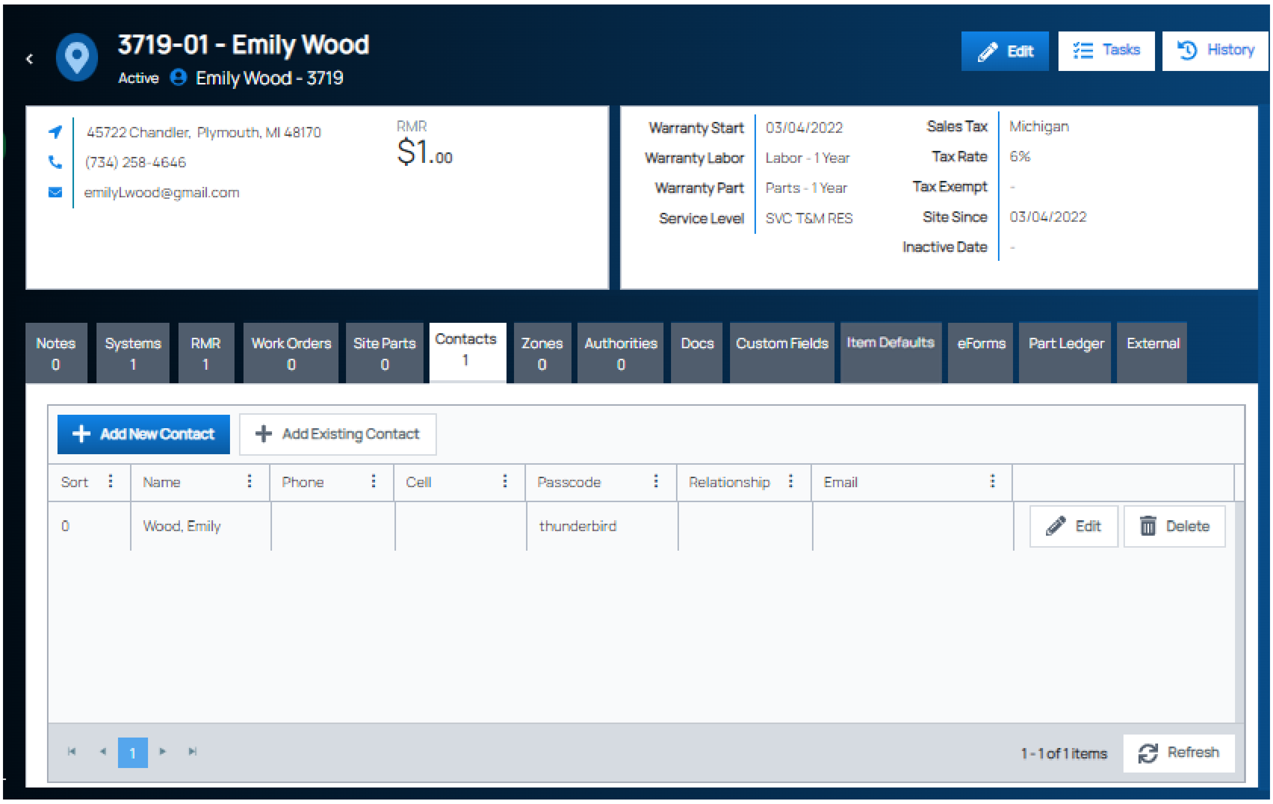
Clicking the Add Existing Contact button opens a list of all contacts in the database for all sites. You can select one or more contacts from the list to save on the current site's contact list.

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.



Zones Tab

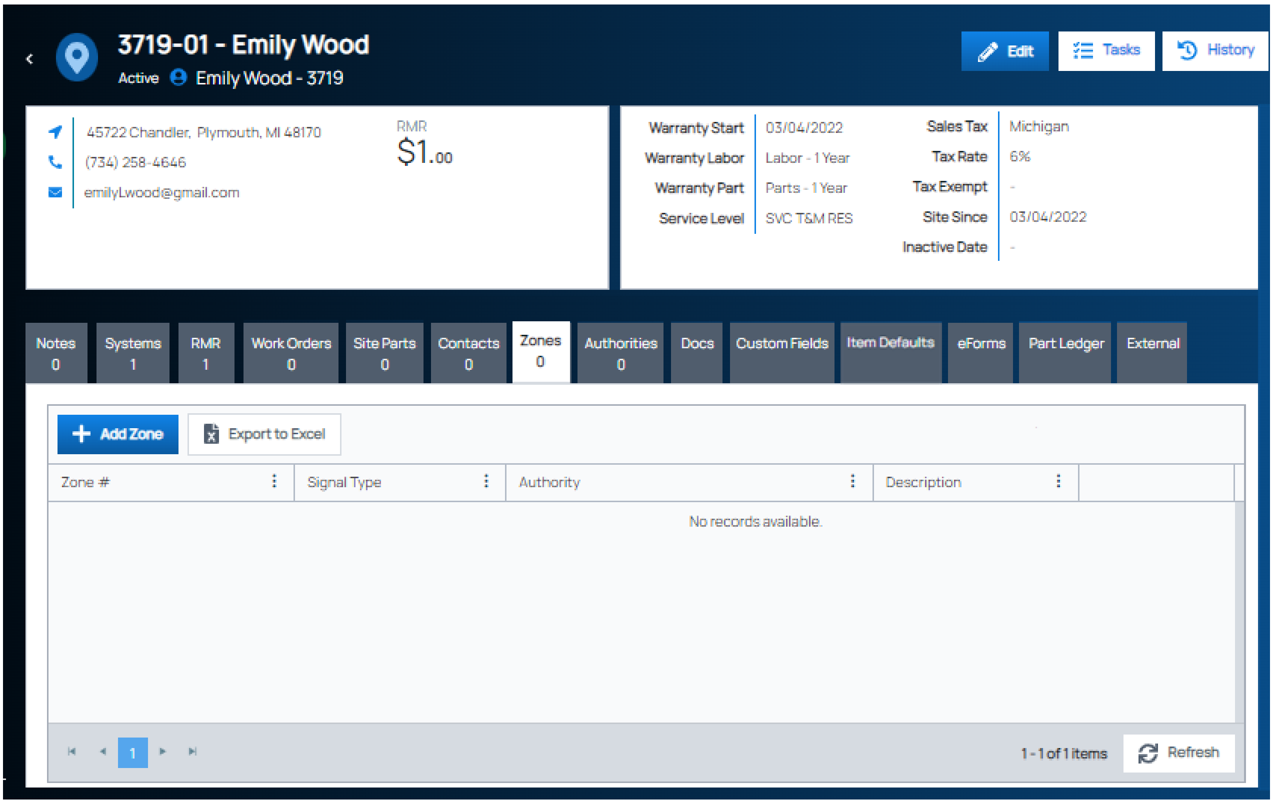
The Zones tab displays all zones for the site. Typically, zones are entered on a System record but can be entered on a site if preferred. You can add new zones to the list; edit information on existing zones; or delete zones.

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.

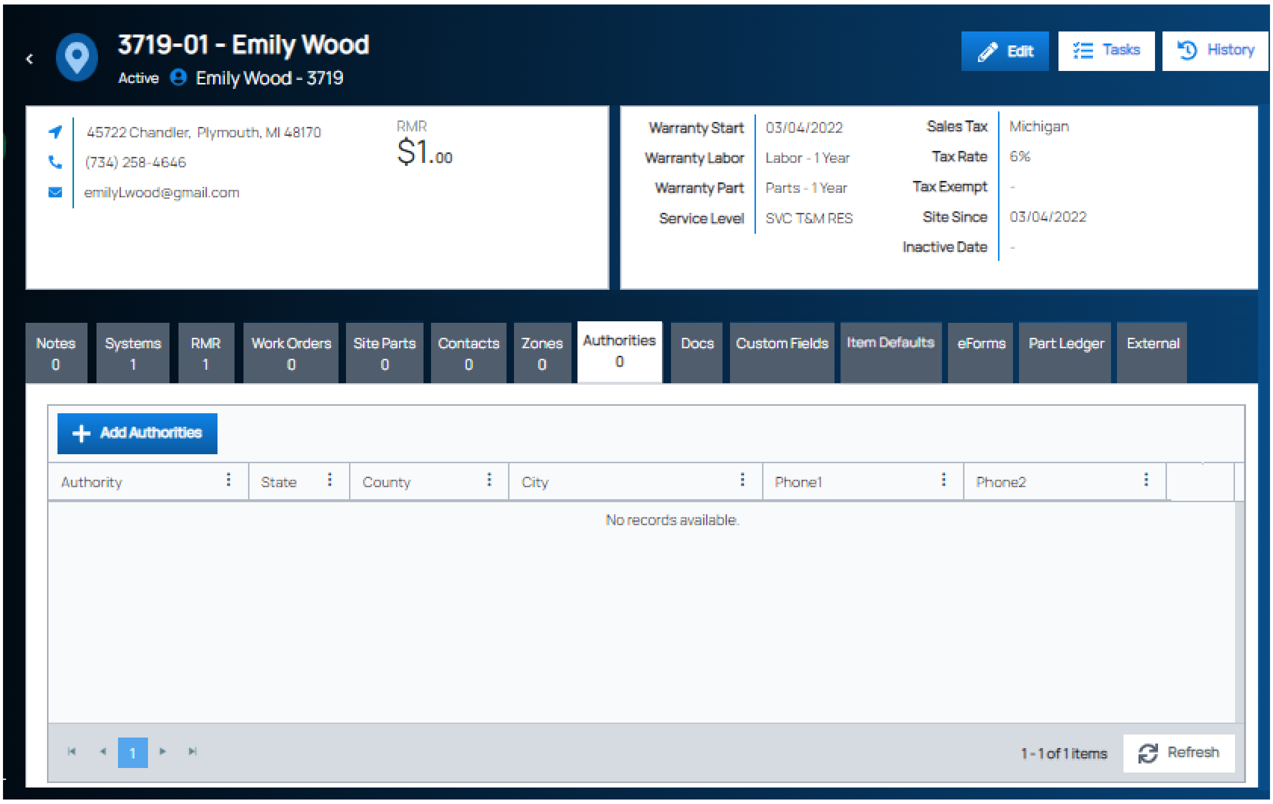


Authorities Tab

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.



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

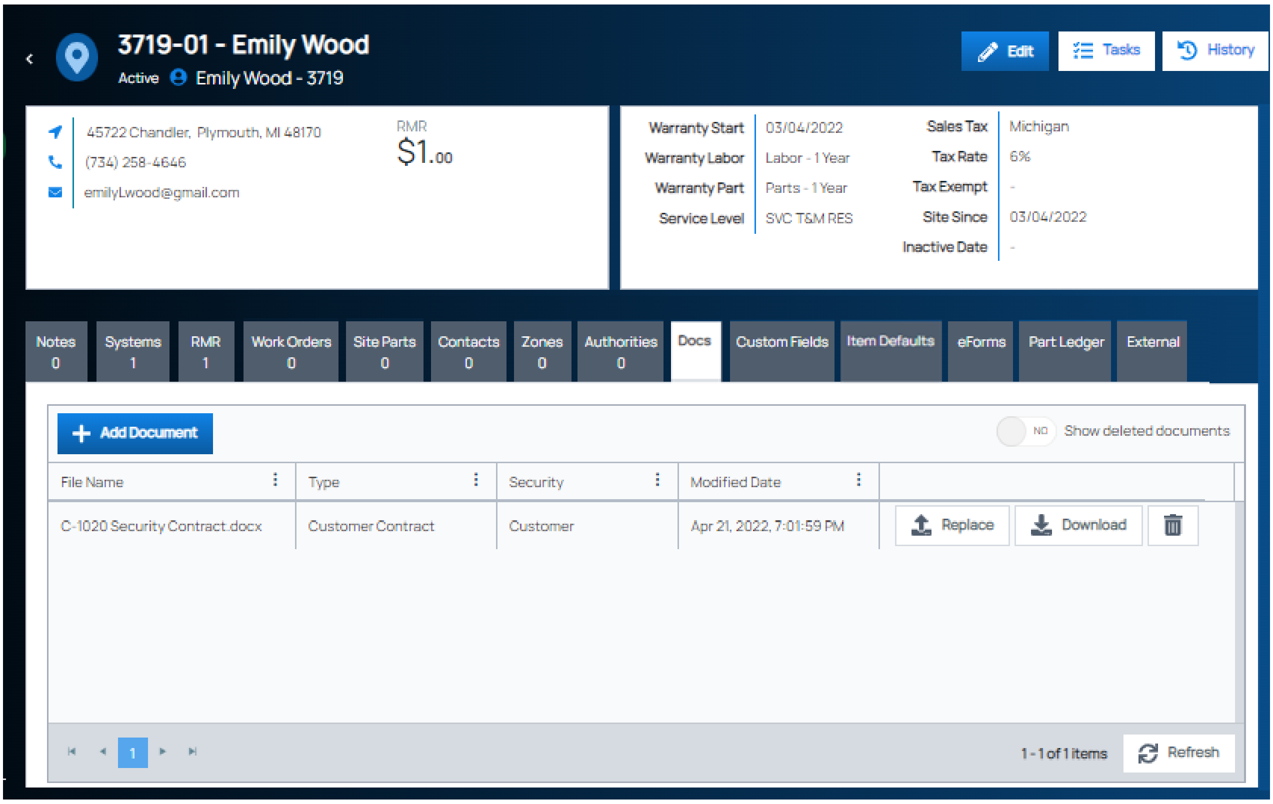
Clicking the Replace button opens a form to select a file to replace the current document. This option is typically used if there is a newer revision of the document or if the incorrect document was uploaded.

Download Button

Clicking the Download button opens the document for viewing.

Delete Button

Clicking the Delete button makes the document inactive.



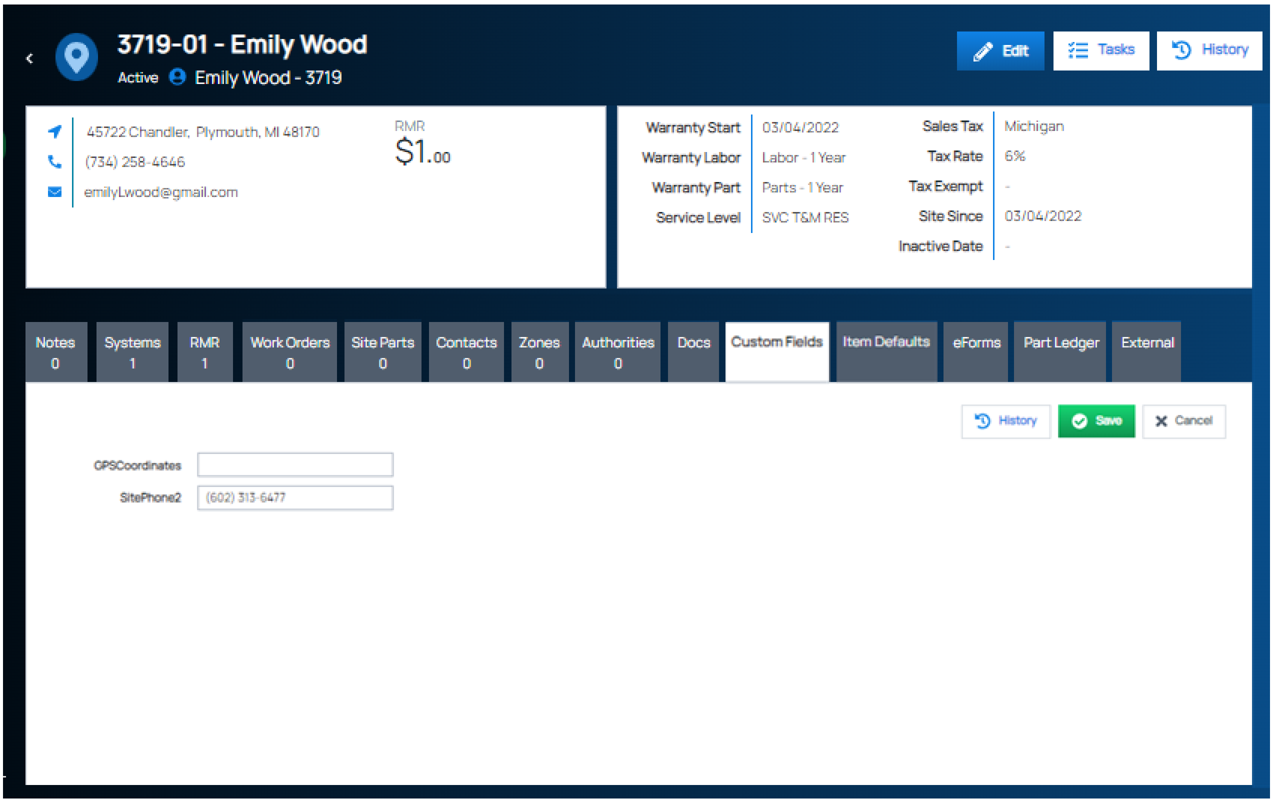
Custom Fields Tab

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.



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

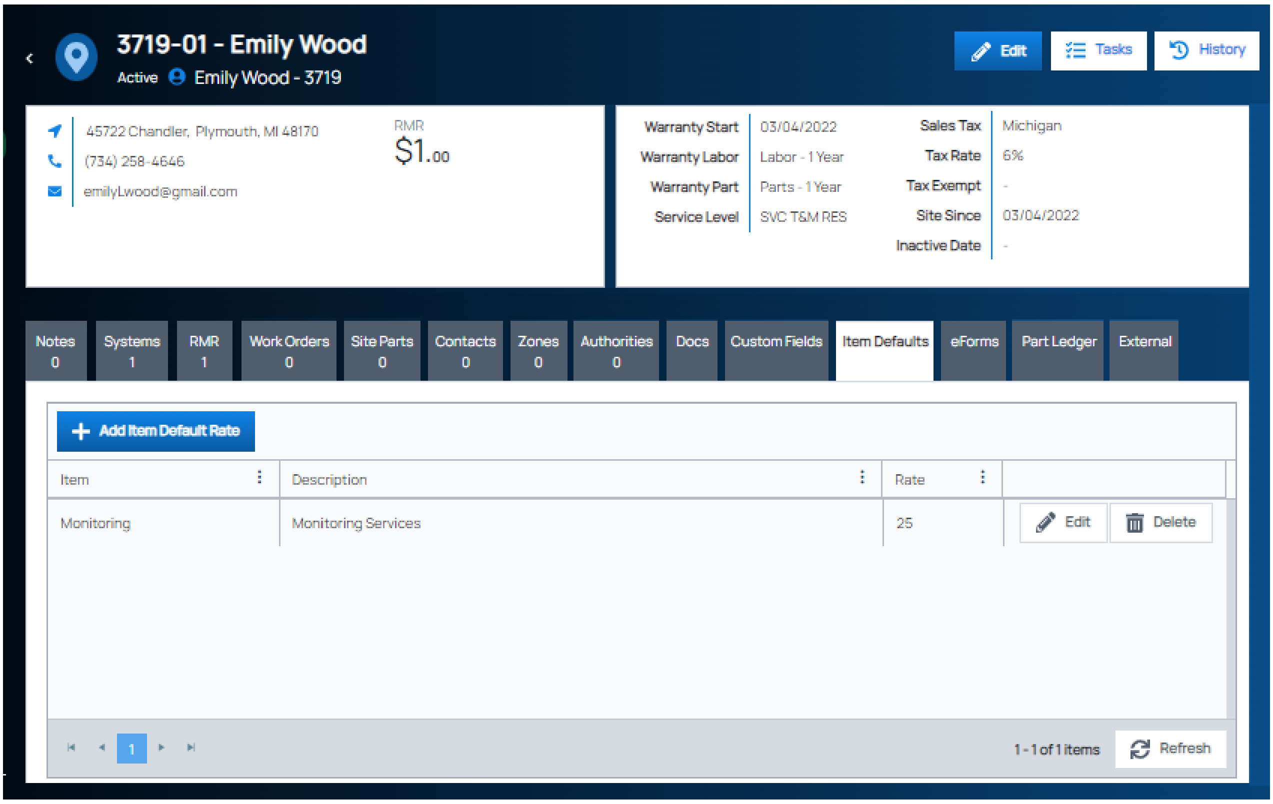
Clicking this button opens a form for selecting an invoice item and entering the default price for the site.

Edit Button

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

Delete Button

Clicking the Delete button permanently deletes the record.



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.