

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.

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 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.

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 NO 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 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.

3719-01 - Emily Wood
Active Emily Wood - 3719

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: 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 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.

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RMR \$1.00

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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

Search Systems + Add System Export to Excel Show Inactive Systems Custom Grid Layout

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 Refresh

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.

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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" 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 Order 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.

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: 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 NO Show Closed Work Orders NO 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 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.

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 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	
5800PIR	Wireless Motion Detector	Hallway	2	3/7/22			<div style="display: flex; justify-content: space-between; font-size: 8px;"> Docs Trash </div>
5816	Door/Window Transmitter	Front Door	1	3/7/22			<div style="display: flex; justify-content: space-between; font-size: 8px;"> Docs Trash </div>
6160	Keypad	Left of entry door		3/7/22			<div style="display: flex; justify-content: space-between; font-size: 8px;"> Docs Trash </div>
Vista20P	8-zone control panel	Entry Closet		3/7/22			<div style="display: flex; justify-content: space-between; font-size: 8px;"> Docs Trash </div>

1
1 - 2 of 2 items
Refresh

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.

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 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			Edit Delete

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 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.

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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 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.

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RMR \$1.00

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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 Authorities

Authority	State	County	City	Phone1	Phone2
No records available.					

1 - 1 of 1 items Refresh

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.

3719-01 - Emily Wood
Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170 RMR **\$1.00**
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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: 1, Custom Fields: 0, Item Defaults: 0, eForms: 0, Part Ledger: 0, External: 0

+ Add Document 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 Delete

1 - 1 of 1 items Refresh

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.

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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: 0, Custom Fields: 0, Item Defaults: 0, eForms: 0, Part Ledger: 0, External: 0

GPSCoordinates:
SitePhone2: (602) 313-6477

History Save Cancel

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.

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Active Emily Wood - 3719

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

+ Add Item Default Rate

Item	Description	Rate	
Monitoring	Monitoring Services	25	Edit Delete

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.