

# Multiple ways of looking up a customer site (Managely)

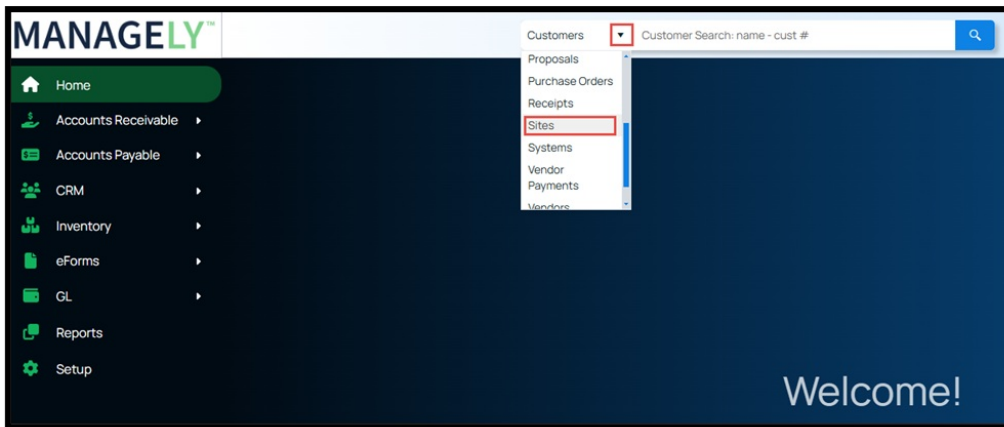
11/20/2024 9:08 am EST

Site in Managely is the physical location where the services are installed.

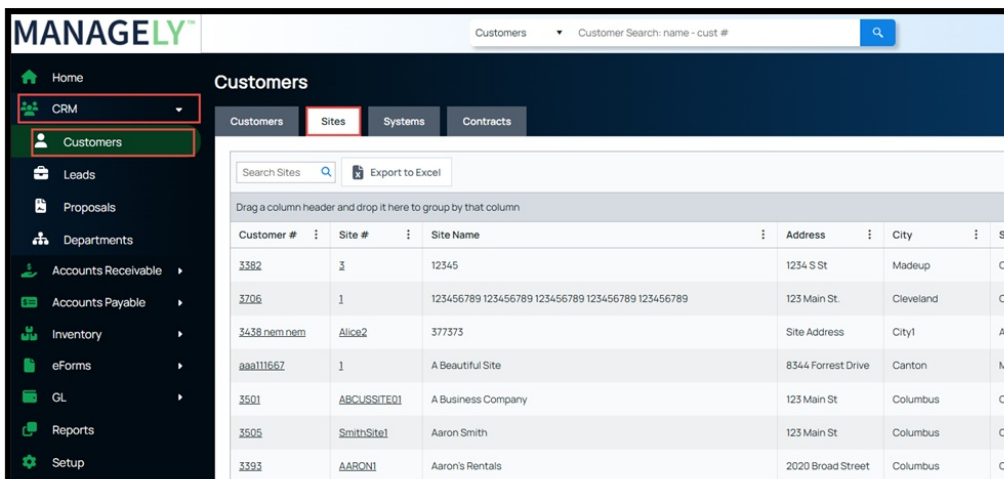
In Managely a customer site can be looked up in multiple ways.

There are multiple ways of looking up a customer site in Managely by the site number or address.

1. Switch the search criteria from the top drop-down from Customers to Sites (then type the site number or address in the search area and push the Enter key or click the magnifying glass icon):



2. Search the site from the main menu by accessing CRM -> Customers -> Sites:



3. Access the site from the customer's account by accessing the Sites/Systems tab (on the customer's account):

The screenshot displays a customer account interface for "My Test Account" (Customer # 3702). The account is active and normal, with a residential status since 6/16/23. Key financial metrics include a Total Balance Due of \$3,520.02 and a Total RMR of \$150.00. A Customer Aging bar chart shows a single bar in the 91+ days category. The contact information includes an address at 123 Main St, Ann Arbor, MI 48185, and an email at just\_t\_a\_email@justanemail.com. The Sites/Systems tab is highlighted, showing a table with two sites: Site 1 (My Test Account) and Site 2 (SiteWithoutZip).

Site Number	Site Name	Address	City	State
1	My Test Account	123 Main St	Ann Arbor	MI
2	SiteWithoutZip	123 Main St	Canton	MI