

Multiple ways of looking up a customer system (Managely)

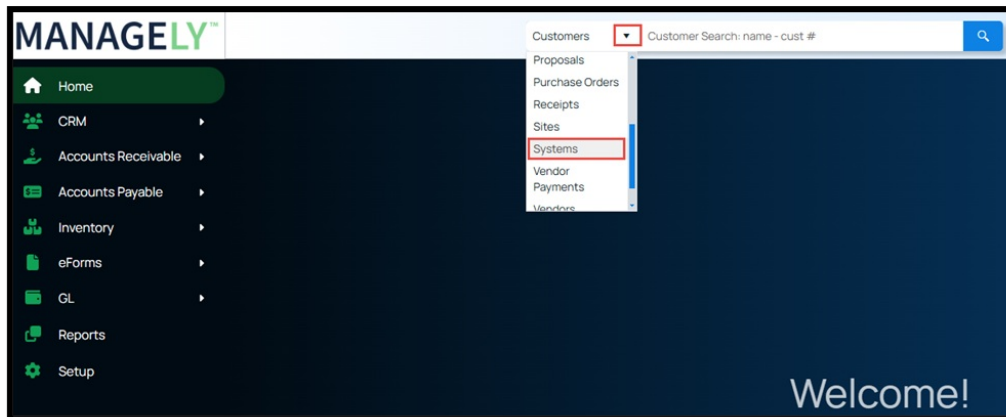
11/20/2024 9:09 am EST

The system in Managely is the equipment installed.

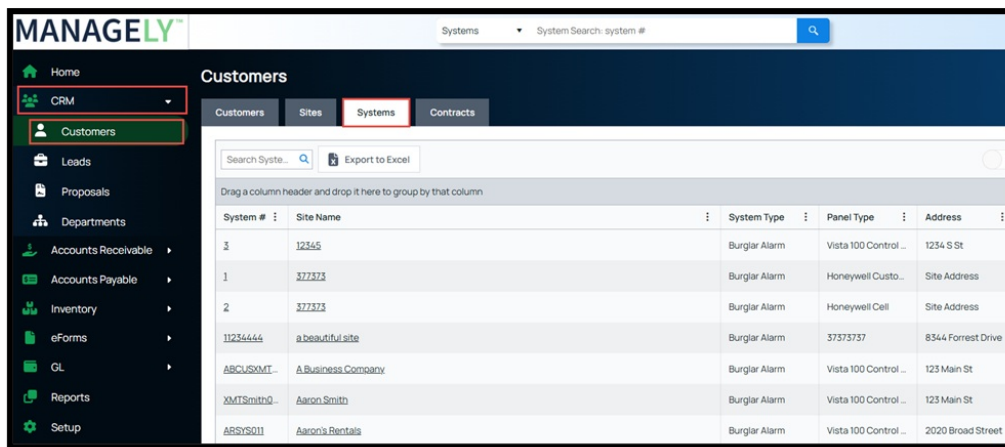
In Managely a customer system can be looked up in multiple ways.

There are multiple ways of looking up a customer system in Managely by the system number.

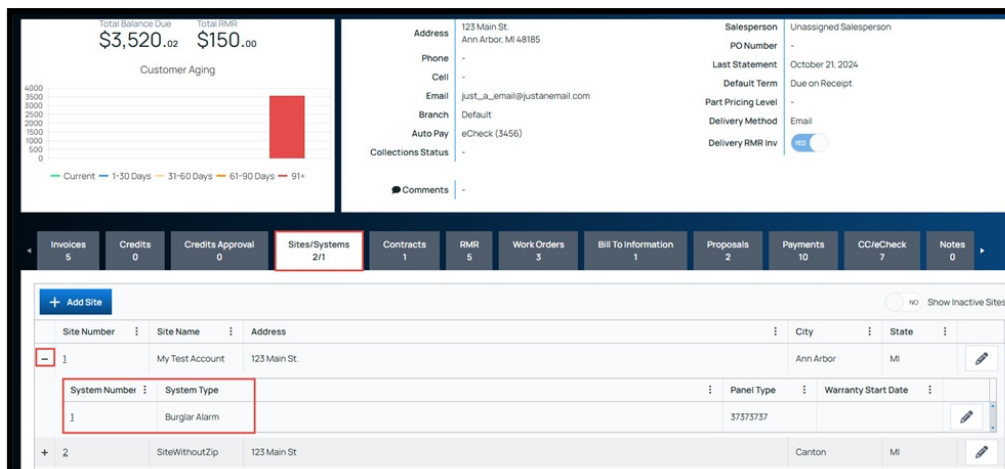
1. Switch the search criteria from the top drop-down from Customers to Systems (then type the system number in the search area and push the Enter key or click the magnifying glass icon):



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



3. Access the system from the customer's account by accessing the Sites/Systems tab (on the customer's account) and then click on the + (plus) icon to expand the site and see the system:



4. Click the system number under the site information above and the system information will display:

