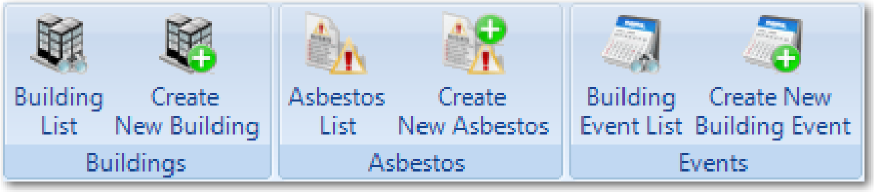
Viewing/Editing Buildings

Wed, Jan 17, 2024 Estates

To view the details of a Building you will need to follow these steps:

1. Click on the Building tab at the top of the screen. The User will the be presented with the following menu items:



2. The first step is to select the Client to create the Building against. For information on how to do this, see the Client Selection page.

3. Once a Client has been selected, a list of Buildings already set up for the selected Client is displayed. This view can changed to fit the Users needs by dragging each column into the order they would like them to be viewed and by using the Right Click Functionality to determine what columns are visible or not. To open a Building, double-click it or select the Building from the list and click "Next".

4. When the Building has been opened, it's possible to any information concerning the Building here. Please note that Cost/Sub Cost Code can be edited providing the User has the correct permissions. For more information on permissions, see the Permissions page. Click "Next" to proceed.

5. The next page displays the Building Contacts. A list of all the contacts that are associated to the Building can be seen and opened to view them in more detail from this page. Each contact will be shown with a Contact Name, Job Title, Type and the state the contact is in at present (Active or Inactive). It is also possible add more contacts from this point or to even remove existing contacts from the Building. When ready, click "Next" to continue.

6. Lastly, the Addresses screen is displayed. Different addresses can viewed or edited by selecting the address from the Address Type field. All fields can amended to the Users requirements.

7. Once any changes have been made, click "Finish" to apply the changes.