Managing Another Contractor

When using the Multi-Site Manager function, you have the option to manage other contractors with your account if necessary. This article covers features that can be accessed using the Multi-Site Manager:

- Overview scenario including an irrigation contractor, a maintenance contractor, and a landscape contractor shown in Figure 1.
- Manage all your customers from your Master Account. See Figure 2.
- View customers of your sub-contractors, locations, or regions. See Figure 3.
- Create customers for your sub-contractor accounts. See Figure 4.
- Move customers to a sub-contractor or region. See Figures 5A and 5B.

Overview

An irrigation contractor can add sub-contractors using the same steps they would use to add customers. See this link [1] for details. See an example of how this setup would work with three contractors.

- The **irrigation contractor (master account)** can see all customers and controllers shown in the illustration below.
- The **maintenance contractor** only has visibility of controllers labeled F–J.
- The **landscape contractor** only has visibility of customers labeled A–E.

Figure 1

Master Account (Irrigation Contractor)

We have provided a second scenario where the irrigation contractor has created abbreviations to organize different groups. Changing the organization name is key to understanding which contractor manages the different customers. For more information on editing the organization name, click here [2].

The example below shows the following:

IC – Customers are managed by the **IRRIGATION CONTRACTOR.**

LC – Customers are managed by the **LANDSCAPE CONTRACTOR.**

LAC – Customers are managed by the **LANDSCAPE ARCHITECT CONTRACTOR.**

Figure 2

Viewing the Sub-Contractor or Region Account

This account will provide the plan of the sub-contractor, the customers in the account, the personal controllers in that account, and the users.

1. Click on the **SUB ACCOUNT.**
2. You will see the information that the sub-contractor or region can see.

Figure 3

Create Customers

This is the normal setup for the new customer. However, this customer is now a customer of your sub-contractor. Your main Account will also retain visibility.

1. Click on the **SUB ACCOUNT.**
2. You will see the information that the sub-contractor or region can see.
3. Click the **+** button next to **CUSTOMERS.**

Figure 4

Move Customers

If a customer already exists in the master account, you can easily move the customer to one of your sub-contractors or regions.

1. Click the three-dot icon next to the customer. Click **MOVE CUSTOMER.**
2. Select the contractor who will manage this customer. Click **MOVE.**

Figure 5A

Figure 5B