

Add Customer Documents

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You can upload documents in various areas of the application, including a customer, site, system, work order, proposal, and vendor. When adding a new document, a user must select a document type from a drop-down list. The Document Types are entered and maintained in setup (Setup > Other > [Document Types](#)).

When uploading a document, saved on the entity that is most logical. For example, customer-related documents should be saved at the customer level, whereas system-related documents should be saved at the system level.

i When uploading documents, the file size cannot exceed 150 MB.

To add a Customer Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

The Customer record opens. Click on the Documents tab. There are two methods for uploading a document:

- Click the **Select Files** button; the Windows File Explorer opens for you to select one or more documents from the same folder.
- With the Windows File Explorer open to the location of the document(s), drag and drop the file(s) into the gray box to the right of the Select Files button. You can select multiple documents at the same time.

The screenshot displays the customer record for Emily Wood (Customer #3703). The interface includes a header with the customer's name and status (Active, Normal), a navigation bar with tabs for Invoices, Credits, Sites/Systems, RMR, Work Orders, Proposals, Payments, CC/eCheck, Notes, Contacts, Documents (highlighted), Archive, Custom Fields, eForms, and Email. The main content area shows a summary of financial data (Total Balance Due Total RMR: \$0.00) and a Customer Aging chart. Below this, there are sections for Address, Phone, Cell, Email, Salesperson, Last Statement, Default Term, Delivery Method, and Delivery RMR Inv. A 'Select files...' button is highlighted with a green circle, and a gray box to its right is intended for file uploads. The bottom of the screen shows a grid area with the message 'No records available.' and a 'Refresh' button.

Once uploaded, the documents appear in the grid area.

Emily Wood

Customer #3703 Active Normal Residential-Owner - Since 3/7/22

Edit
Tasks
History

Total Balance Due/Total RMR

\$0.00 \$0.00

Customer Aging

12	
1	
0.8	
0.6	
0.4	
0.2	
0	

— Current
 — 1-30 Days
 — 31-60 Days
 — 61-90 Days
 — 91+

Address	45722 Chandler Phoenix, AZ 85003	Salesperson	Dan Brown
Phone		Last Statement	
Cell		Default Term	
Email	emily.wood@gmail.com	Delivery Method	Print
		Delivery RMR Inv	<input checked="" type="radio"/> YES

● Comments

Select files...

Drop files here to select

*Max file size 5MB

NO Show deleted documents

File Name	Type	Security	Modified Date	
Customer Document - Rev04.pdf		Customer	Mar 21, 2022, 10:06:43 AM	<input type="button" value="Replace"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
Customer Document - Rev03.pdf		Customer	Mar 21, 2022, 10:06:43 AM	<input type="button" value="Replace"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
Customer Document - Rev02.pdf		Customer	Mar 21, 2022, 9:47:59 AM	<input type="button" value="Replace"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
Customer Document - Rev01.pdf		Customer	Mar 20, 2022, 11:56:10 PM	<input type="button" value="Replace"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>

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