

# Add Customer Documents

Last Modified on 11/02/2023 3:51 pm EDT

Your company has the ability to 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).

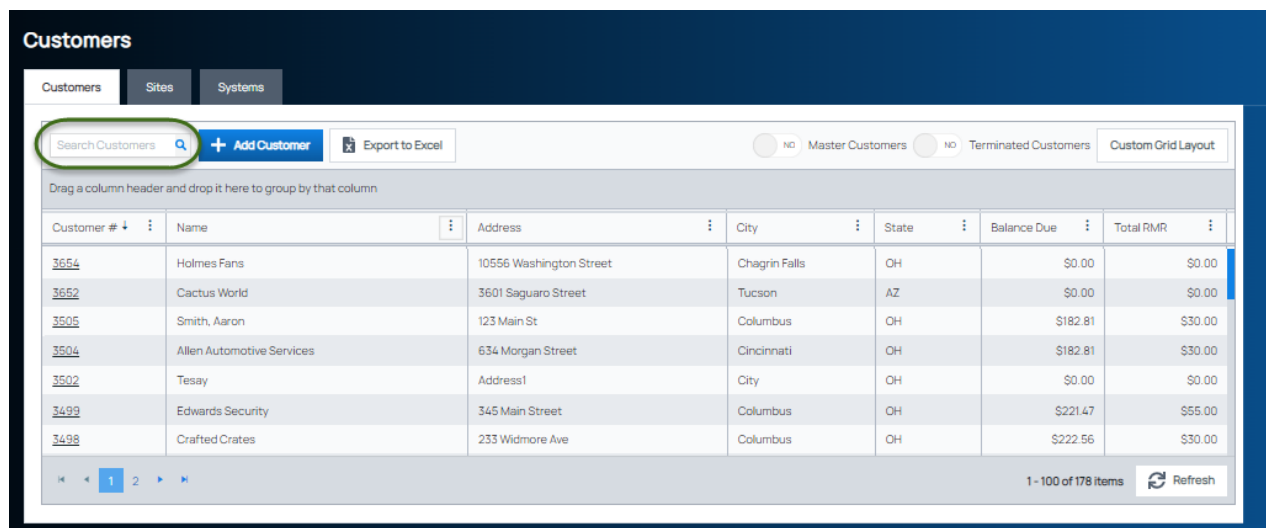
When uploading a document, it should be saved on the entity that is most logical. For example, customer-related documents should be saved at the customer level, whereas system-related documents should be saved at the system level.

**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: Accounts Receivable > Customers.

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



| Customer #           | Name                      | Address                 | City          | State | Balance Due | Total RMR |
|----------------------|---------------------------|-------------------------|---------------|-------|-------------|-----------|
| <a href="#">3654</a> | Holmes Fans               | 10556 Washington Street | Chagrin Falls | OH    | \$0.00      | \$0.00    |
| <a href="#">3652</a> | Cactus World              | 3601 Saguaro Street     | Tucson        | AZ    | \$0.00      | \$0.00    |
| <a href="#">3505</a> | Smith, Aaron              | 123 Main St             | Columbus      | OH    | \$182.81    | \$30.00   |
| <a href="#">3504</a> | Allen Automotive Services | 634 Morgan Street       | Cincinnati    | OH    | \$182.81    | \$30.00   |
| <a href="#">3502</a> | Tesay                     | Address1                | City          | OH    | \$0.00      | \$0.00    |
| <a href="#">3499</a> | Edwards Security          | 345 Main Street         | Columbus      | OH    | \$221.47    | \$55.00   |
| <a href="#">3498</a> | Crafted Crates            | 233 Widmore Ave         | Columbus      | OH    | \$222.56    | \$30.00   |

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

- Click on 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.

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

Total Balance Due Total RMR  
**\$0.00** **\$0.00**

Customer Aging

Address 45722 Chandler Phoenix, AZ 85003  
Phone  
Cell  
Email emilylwood@gmail.com

Salesperson Dan Brown  
Last Statement  
Default Term  
Delivery Method Print  
Delivery RMR Inv

**Documents**

Select files... Drop files here to select \*Max file size 5MB

File Name : Type : Security : Modified Date :  
No records available.

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Once uploaded, the documents appear in the grid area.

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**Documents**

Select files... Drop files here to select \*Max file size 5MB

| File Name                     | Type | Security | Modified Date             |                  |
|-------------------------------|------|----------|---------------------------|------------------|
| Customer Document - Rev04.pdf |      | Customer | Mar 21, 2022, 10:06:43 AM | Replace Download |
| Customer Document - Rev03.pdf |      | Customer | Mar 21, 2022, 10:06:43 AM | Replace Download |
| Customer Document - Rev02.pdf |      | Customer | Mar 21, 2022, 9:47:59 AM  | Replace Download |
| Customer Document - Rev01.pdf |      | Customer | Mar 20, 2022, 11:56:10 PM | Replace Download |

0 - 0 of 0 items Refresh