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.

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

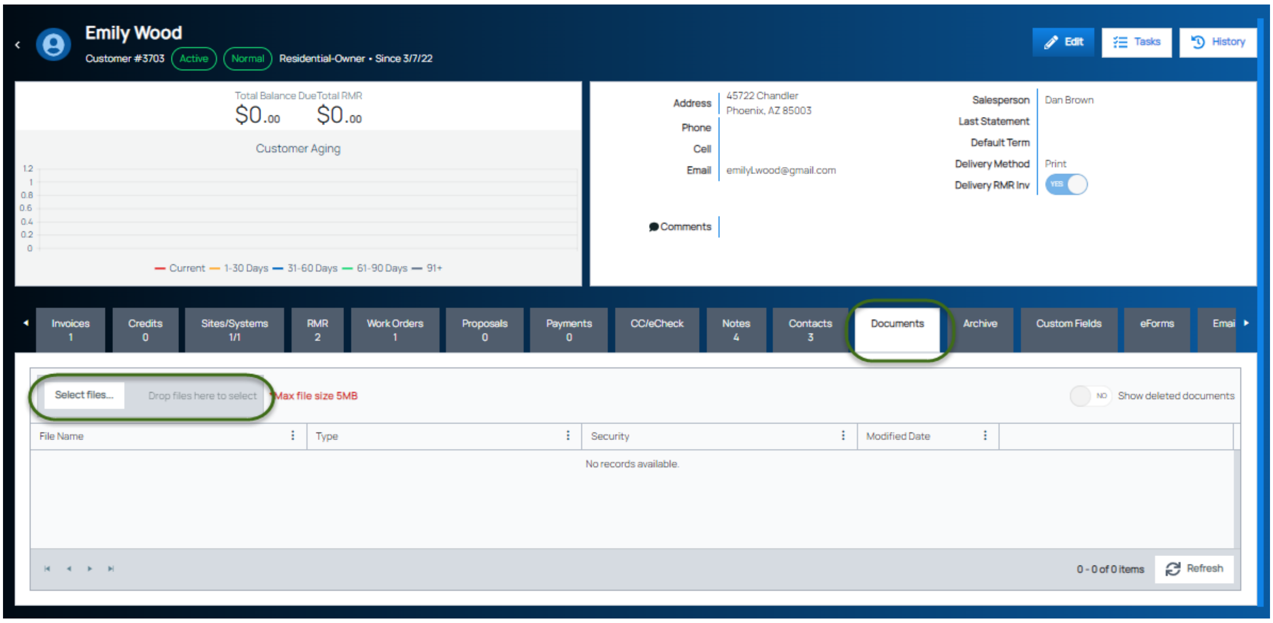
To add a Customer Document, you must first access the customer record.

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

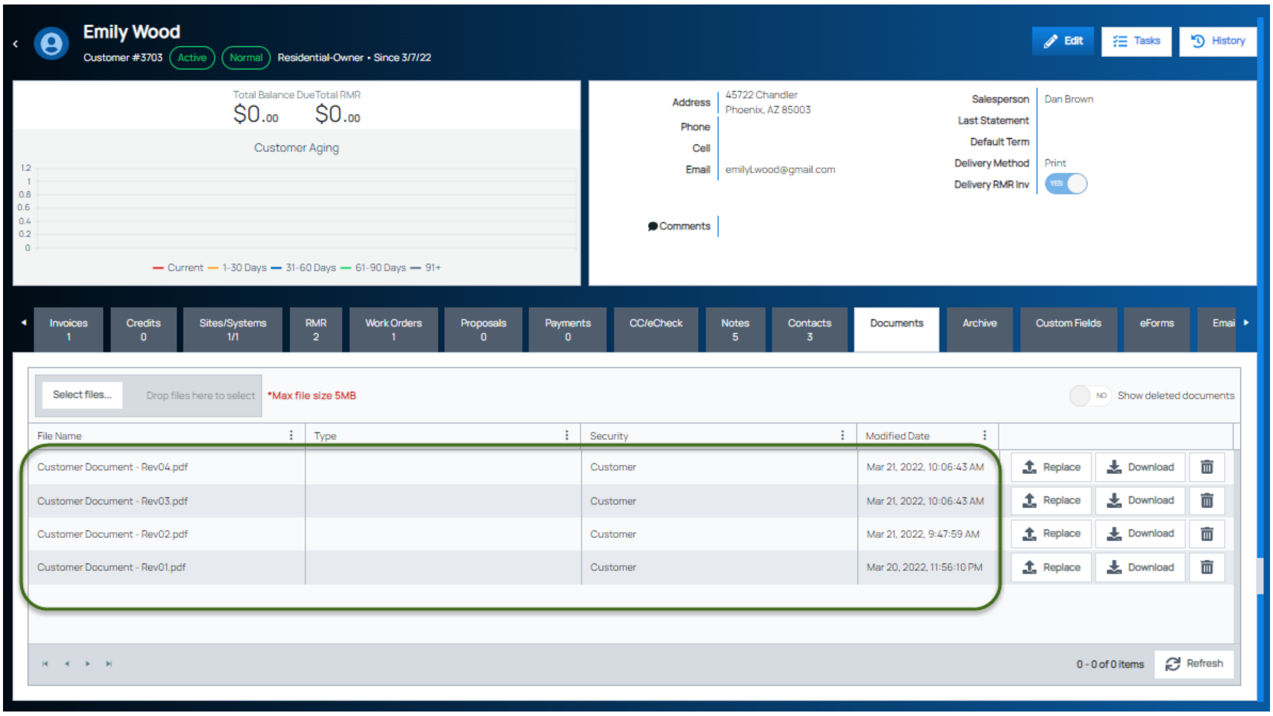
The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

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.



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
Current 1-30 Days 31-60 Days 61-90 Days 91+
Address 45722 Chandler Phoenix, AZ 85003
Phone
Cell
Email emilyLwood@gmail.com
Comments
Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv
Invoices 1
Credits 0
Sites/Systems 1/1
RMR 2
Work Orders 1
Proposals 0
Payments 0
CC/eCheck
Notes 5
Contacts 3
Documents
Archive
Custom Fields
eForms
Select files...
Drop files here to select
*Max file size 5MB
Show deleted documents
File Name
Type
Security
Modified Date
Customer Document - Rev04.pdf Customer Mar 21, 2022, 10:06:43 AM
Customer Document - Rev03.pdf Customer Mar 21, 2022, 10:06:43 AM
Customer Document - Rev02.pdf Customer Mar 21, 2022, 9:47:59 AM
Customer Document - Rev01.pdf Customer Mar 20, 2022, 11:56:10 PM
Replace
Download
0 - 0 of 0 items
Refresh