

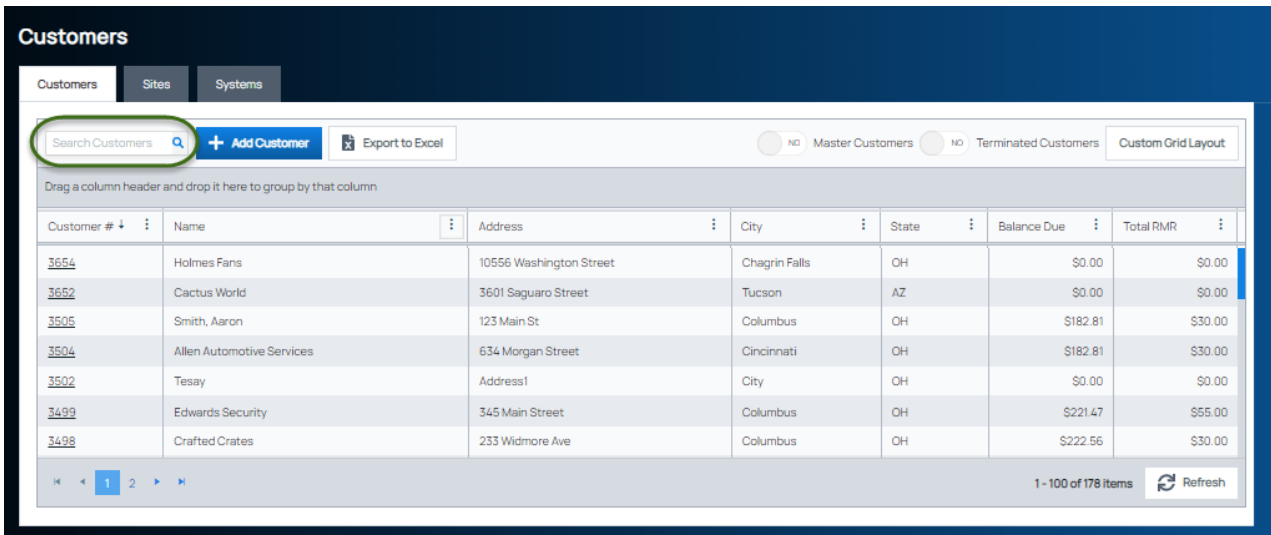
Add Site Documents

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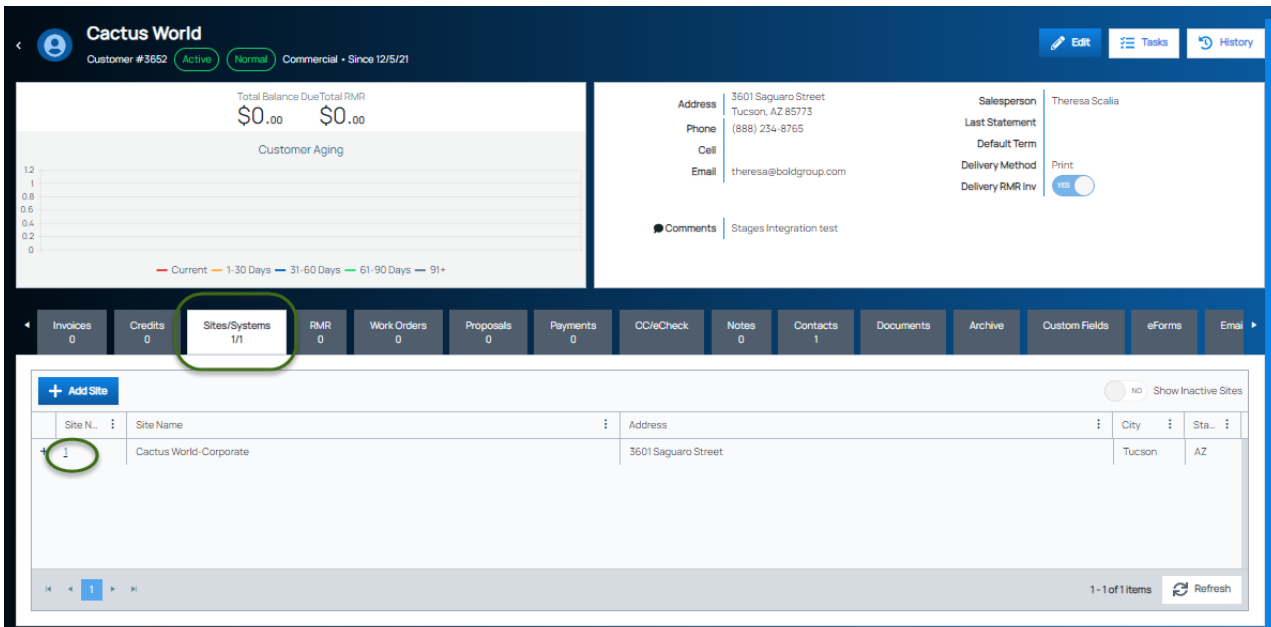
To add a Site Document, you must first access the customer record.

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 Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which you want to add a document.



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

- Click on the Select Files button – Windows file explorer opens for you to select one or multiple 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 shows the 'Docs' tab selected in a software interface. The top navigation bar includes 'Edit', 'Tasks', and 'History'. The main content area is divided into two columns. The left column displays contact information for 'Emily Wood' (45722 Chandler, Phoenix, AZ 85003, emilylwood@gmail.com) and an RMR value of \$2.00. The right column displays warranty details: Warranty Start (03/07/2022), Warranty Labor (1 Year Parts & Labor), Warranty Part (1 Year Parts & Labor), Service Level (SVC T&M RES), Sales Tax (No Tax), Tax Rate (0.0000%), Tax Exempt (-), Site Since (03/07/2022), and Inactive Date (-). Below the navigation bar, a 'Docs' tab is highlighted. The main area features a file upload section with a 'Select files...' button and a 'Drop files here to select' area. A red text label indicates '*Max file size 5MB'. Below the upload area is a table with columns for File Name, Type, Security, and Modified Date. The table currently contains no records, displaying 'No records available.' at the bottom. A pagination bar at the bottom right shows '1 - 1 of 1 items' and a 'Refresh' button.

Once uploaded, the documents appear in the grid area.

The screenshot shows the 'Docs' tab in the same software interface. The top navigation bar and main content area are identical to the previous screenshot. The 'Docs' tab is highlighted. The file upload section is the same. The table below now contains one record: 'Site Document.pdf'. The table has columns for File Name, Type, Security, and Modified Date. The record shows 'Site Document.pdf' in the File Name column, an empty cell in the Type column, 'Customer' in the Security column, and 'Mar 20, 2022, 11:57:44 PM' in the Modified Date column. To the right of the record are three action buttons: 'Replace', 'Download', and a trash icon. The pagination bar at the bottom right shows '1 - 1 of 1 items' and a 'Refresh' button.