

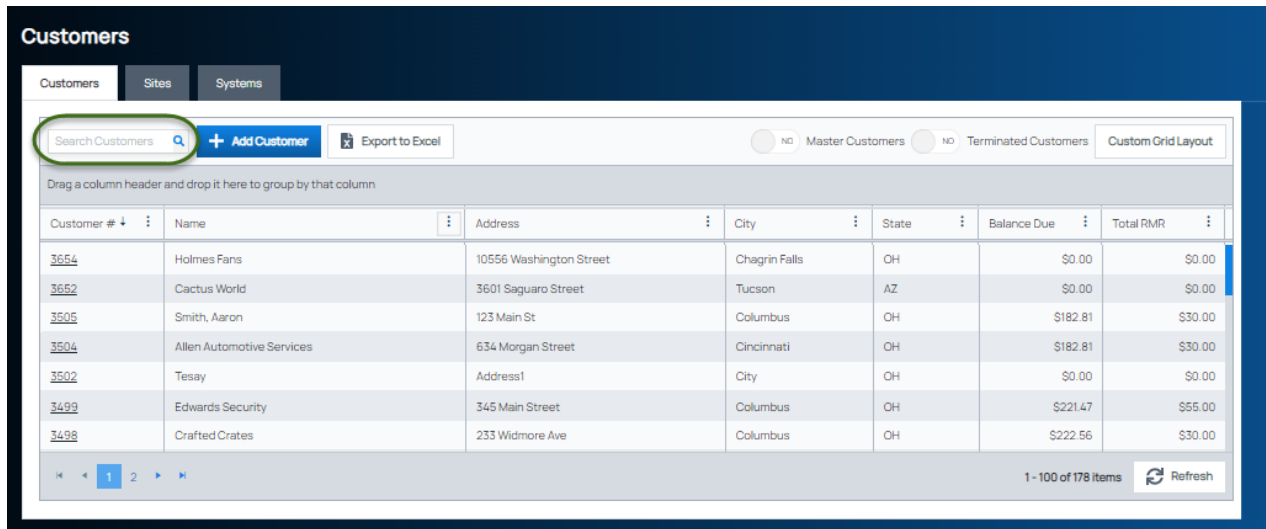
Add Site Documents

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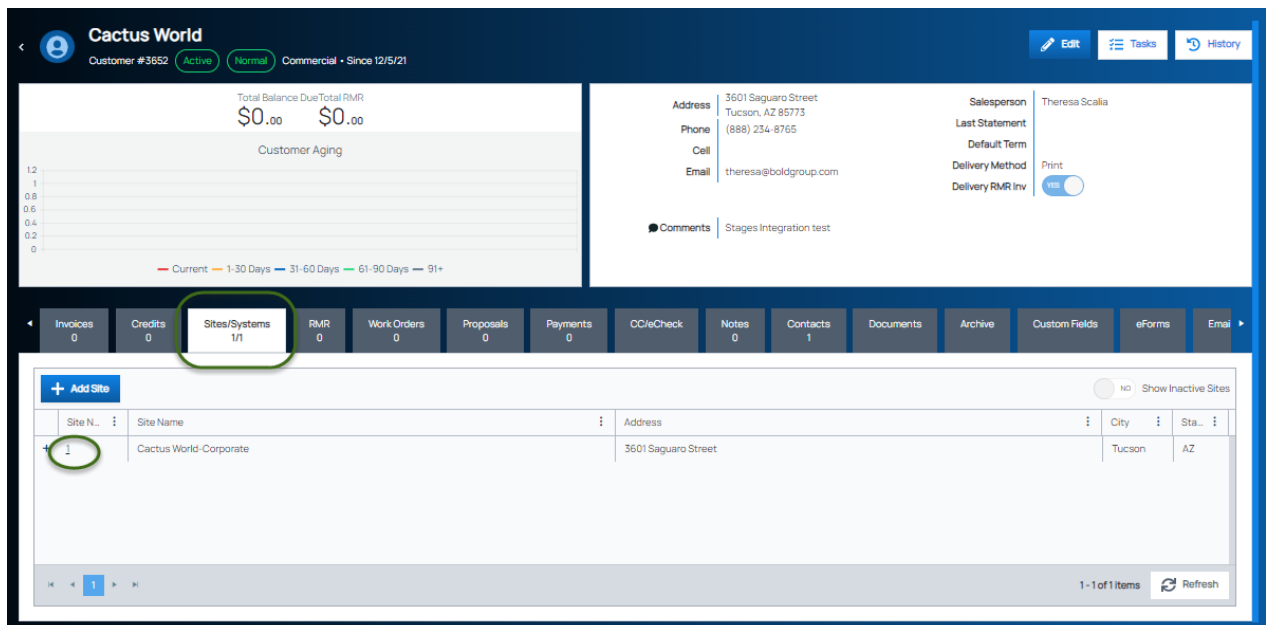
To add a Site Document, you must first access the customer record.

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

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



The Customer record will be displayed. 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 will be displayed. Click on the Docs tab. There are two methods for uploading a document:

- Click on the Select Files button – Windows file explorer will open 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 may select multiple documents at the same time.

The screenshot shows the 'Docs' tab in a software interface. At the top, there is a header for '1 - Emily Wood' with a location pin icon, 'Active', and 'Emily Wood - 3703'. Below this is a navigation bar with buttons for 'Edit', 'Tasks', and 'History'. The main content area is divided into two columns. The left column contains contact information: '45722 Chandler, Phoenix, AZ 85003', 'RMR \$2.00', and 'emilylwood@gmail.com'. The right column contains 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 is a 'Docs' tab, which is highlighted with a green circle. Underneath the 'Docs' tab is a file upload area with a 'Select files...' button (highlighted with a green circle) and a 'Drop files here to select' instruction. A red text label '*Max file size 5MB' is visible. To the right of the upload area is a toggle switch for 'Show deleted documents' set to 'NO'. Below the upload area is a table with columns: 'File Name', 'Type', 'Security', and 'Modified Date'. The table is currently empty, with the text 'No records available.' centered below the header. At the bottom right of the table area, it says '1 - 1 of 1 Items' and a 'Refresh' button.

Once uploaded, the documents will appear in the grid area.

The screenshot shows the 'Docs' tab in a software interface, similar to the previous one. The header and navigation bar are the same. The main content area is divided into two columns. The left column contains contact information: '45722 Chandler, Phoenix, AZ 85003', 'RMR \$2.00', and 'emilylwood@gmail.com'. The right column contains 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 is a 'Docs' tab, which is highlighted with a green circle. Underneath the 'Docs' tab is a file upload area with a 'Select files...' button and a 'Drop files here to select' instruction. A red text label '*Max file size 5MB' is visible. To the right of the upload area is a toggle switch for 'Show deleted documents' set to 'NO'. Below the upload area is a table with columns: 'File Name', 'Type', 'Security', and 'Modified Date'. The table now contains one row: 'Site Document.pdf', 'Customer', and 'Mar 20, 2022, 11:57:44 PM'. The 'File Name' cell is highlighted with a green circle. To the right of the table are three buttons: 'Replace', 'Download', and a trash icon. At the bottom right of the table area, it says '1 - 1 of 1 Items' and a 'Refresh' button.