Add Site Documents

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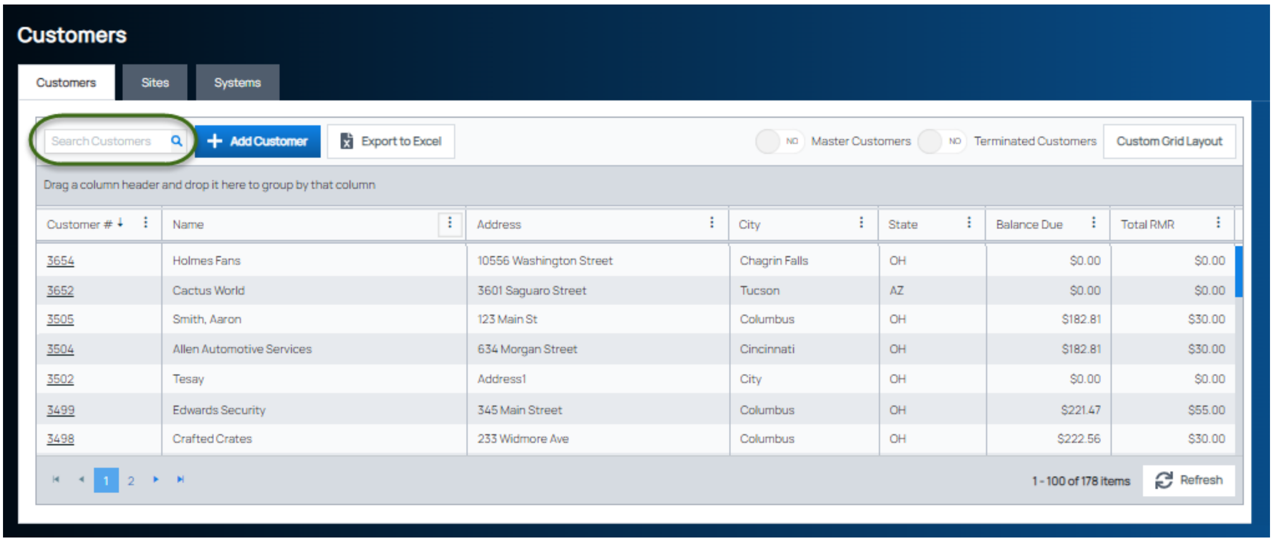
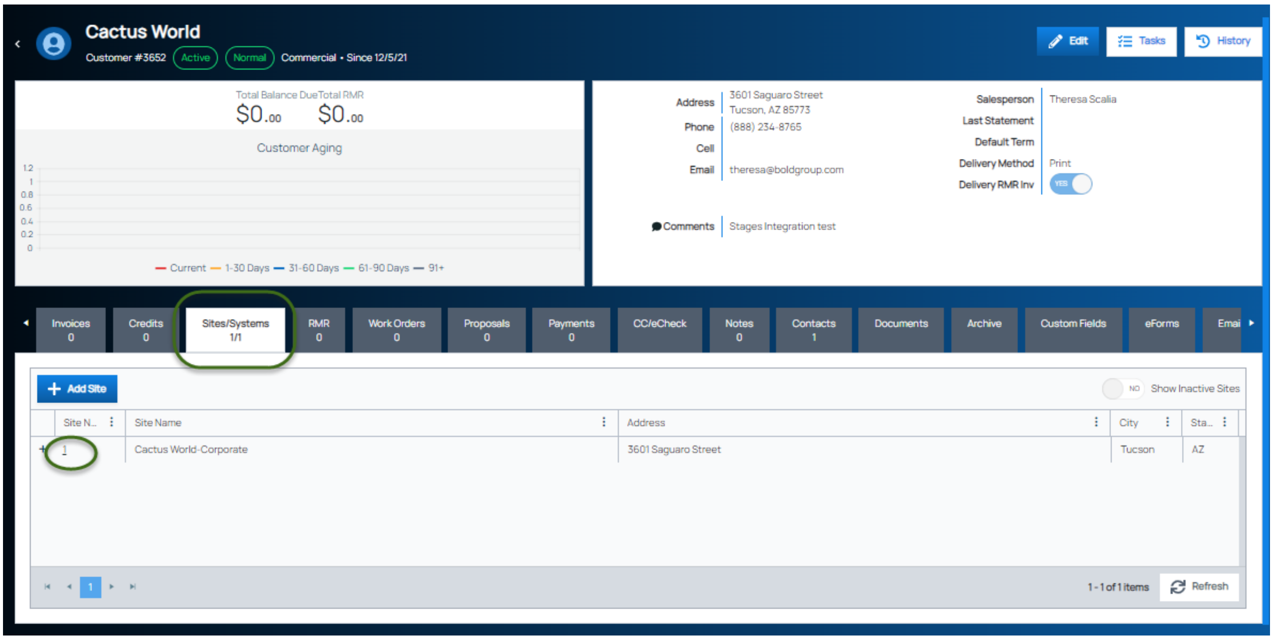
To add a Site Document, you must first access the customer record.

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.



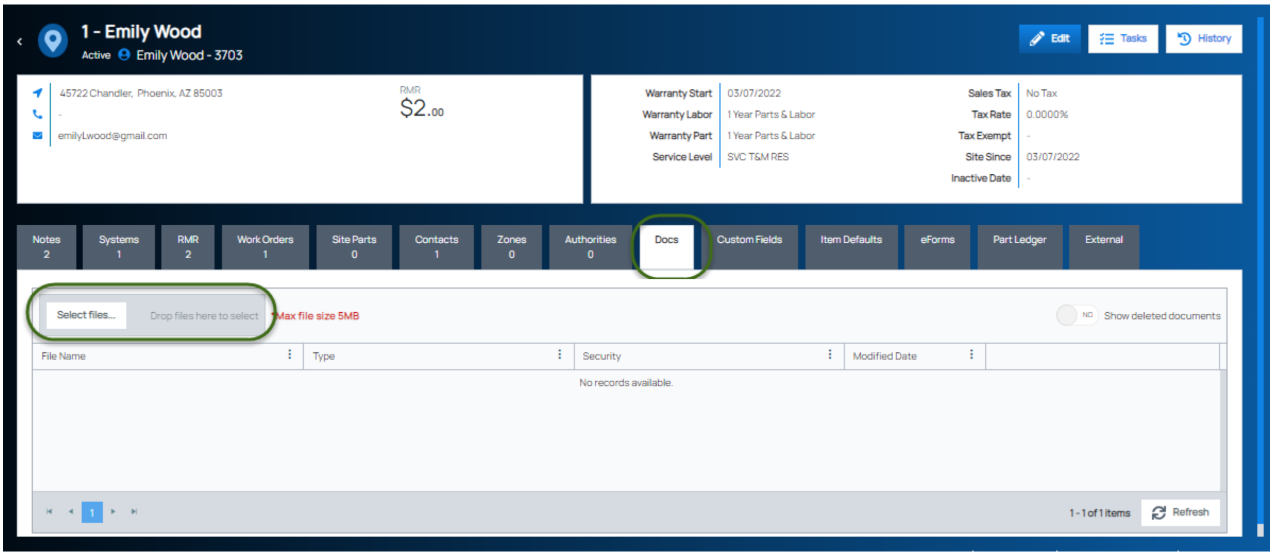
The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which you want to add a document.



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.



Once uploaded, the documents appear in the grid area.