Edit Site Documents

Last Modified on 12/16/2024 2:49 pm EST

To edit 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.

ustomers Site	es Systems							
Search Customers	Add Customer	Export to Excel			NO Master Cust	corners ND Te	erminated Customers	Custom Grid Layout
Drag a column header	and drop it here to group by the	at column						
Customer # 🕴 🚦	Name	i	Address	1	City :	State :	Balance Due	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	он	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	он	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	он	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

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

Cestomer #3703 (Active) Normal Residential-Owner - Since 3/7/22	<mark>∕ Edit</mark> ह Tasks 🏵 H	listory
Total Balance Due Total RMR \$0.00 \$0.00	Address 45722 Chandler Salesperson Dan Brown Phoenik, AZ 85003 Last Statement	
Customer Aging	Cell Default Term Email emilyLwood@gmail.com DeliveryRMRInv 0	
08 05 04 02 0 0 - Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+	Comments	
Invoices Credits Sites/Systems RMR Work-Orders Proposals Payment 1 0 1/1 2 1 0 0	nts CC/eCheck Notes Contacts Documents Archive Custom Fields eForms E 2 3	Emai 🕨
+ Add Site	No Show Inactive S	iites
Site N : Site Name	i Address i City i Sta.	:
1 Emily Wood	45722 Chandler AZ	
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The Site record opens. Click on the Docs tab.

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•	 ✓ 45722 Chandler, Plymouth, MI 48170 № (734) 258-4646 ✓ emilyLwood@gmail.com 						Wa V	Warranty Labor Labor - 1 Year Tax Rate 6% Warranty Part Parts - 1 Year Tax Exempt -						*					
	otes O	Systems 1	RMR 1	Work C 0		Site Parts 0	Contacts 0	Zones 0	Authorities 0	Docs	Cu	stom Fields	Item Defa	aults	eForms	Part Lee	dger	External	
	+	Add Docum	ent													ND St	now de	leted doc	uments
	File	Name		÷	Туре		÷	Security	:	Modi	ified D	Date	:						
	C-10	20 Security C	Contract.d	locx	Custo	omer Contrac	ct	Customer	T	Apr 2	21, 202	22, 7:01:59 PN	Α	1 Re	place	🛃 Do	wnloa	d 🛅	I
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Locate the document to be edited, and then double-click anywhere on the document row within the grid.

A dialog box opens showing the file name of the document in the banner. There are only two editable fields available: the File Name and the Document Type. After making the necessary changes, click the **Save** button.

Edit C-3719 Security Contract.docx							
File Name • Document Type	C-3719 Security Contract.docx	•					
	Save						