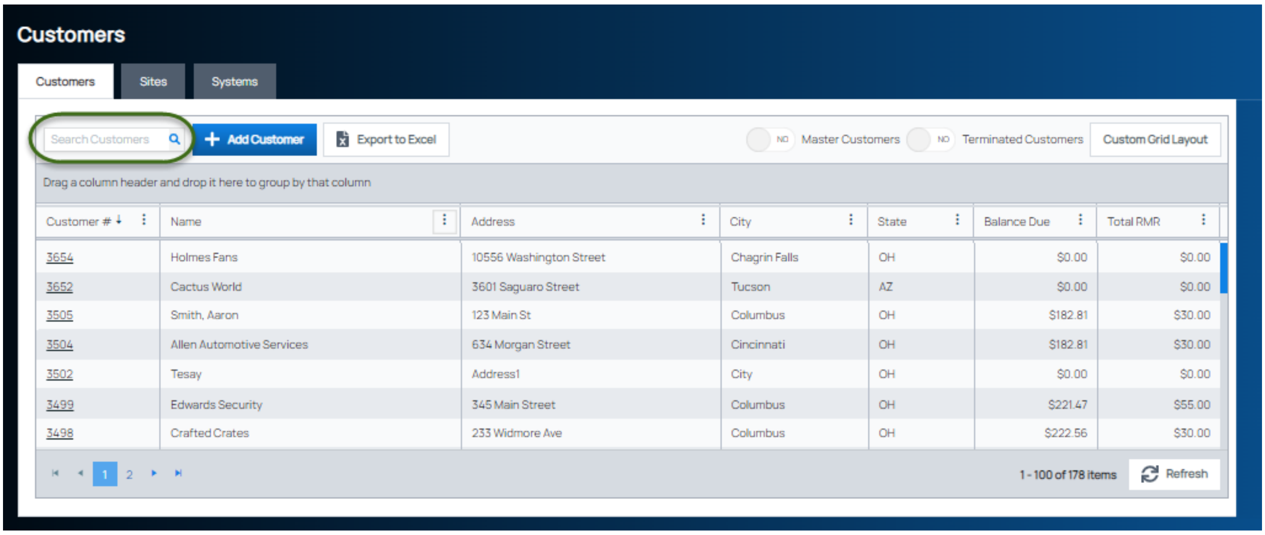
Edit Site Documents

Last Modified on 05/01/2022 6:24 am EDT

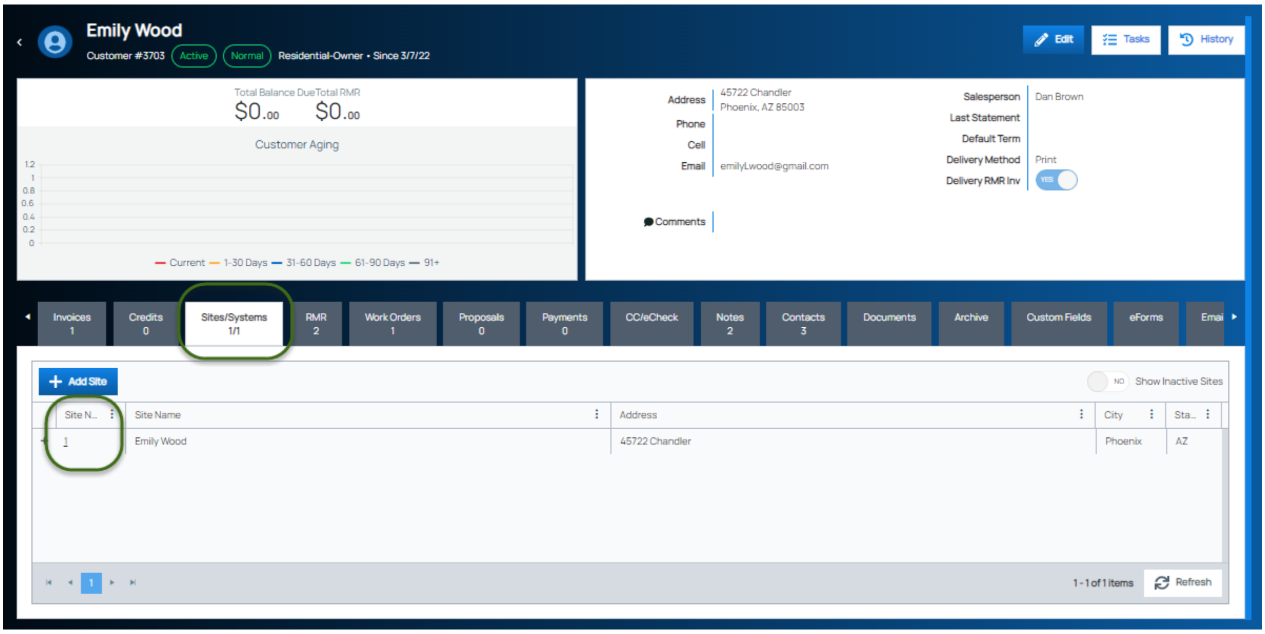
To edit a Site Document, you must first access the customer record.

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

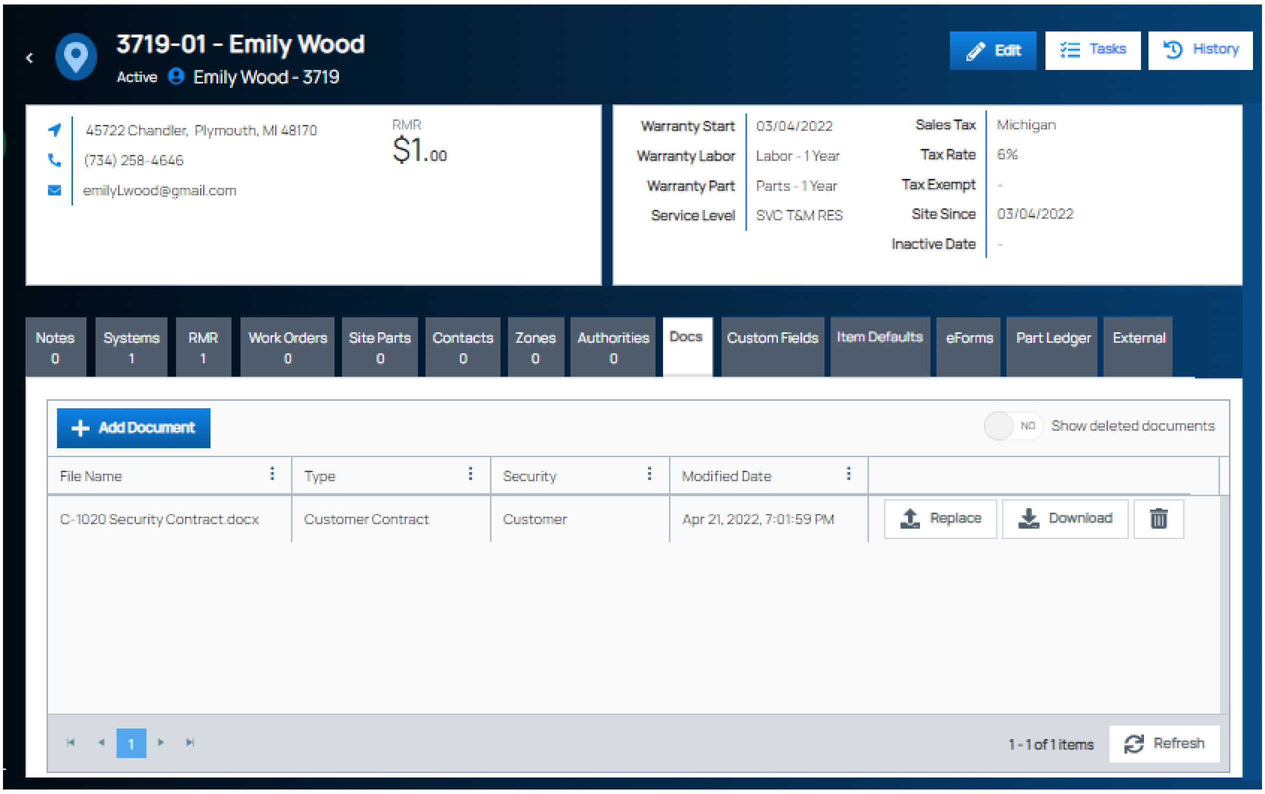
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



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 for which you want to edit a document.



The Site record will be displayed. Click on the Docs tab.



Locate the document to be edited, and then double-click anywhere on the document row within the grid.

A dialog box will be displayed, 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.