

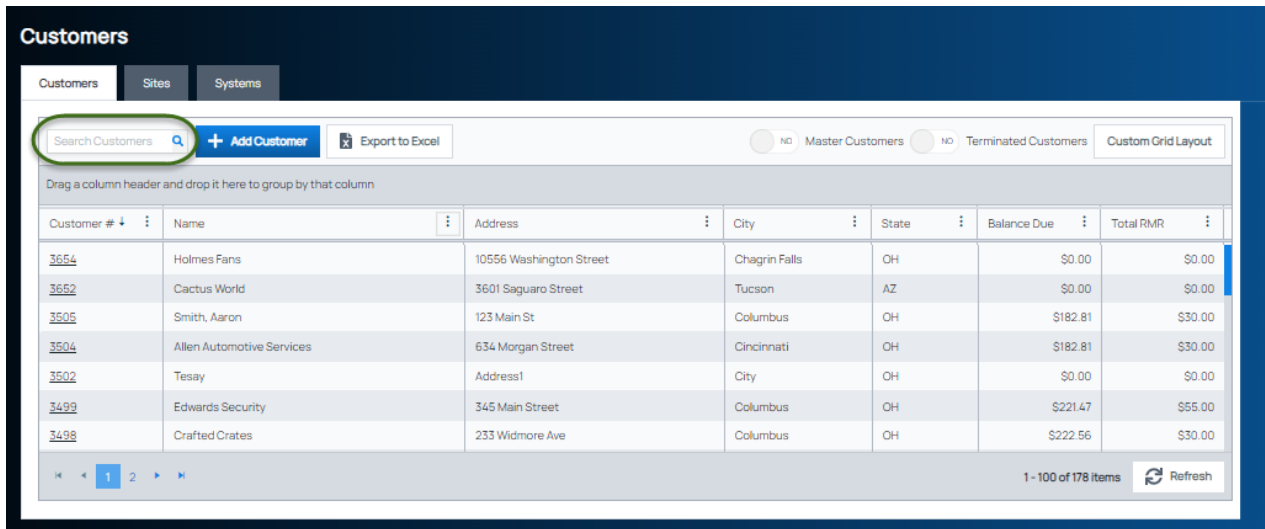
# Edit Site Documents

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

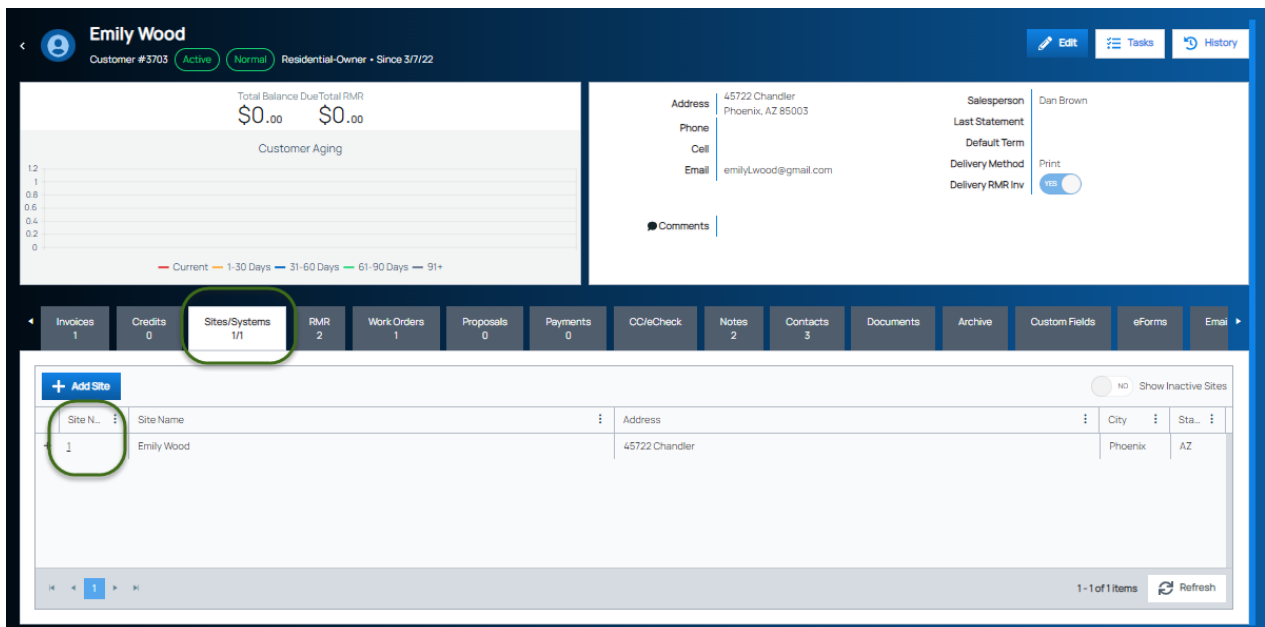
To edit a Site Document, you must first access the customer record.

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.

**3719-01 - Emily Wood**  
Active Emily Wood - 3719

45722 Chandler, Plymouth, MI 48170  
(734) 258-4646  
emilyLwood@gmail.com

RMR \$1.00

Warranty Start	03/04/2022	Sales Tax	Michigan
Warranty Labor	Labor - 1 Year	Tax Rate	6%
Warranty Part	Parts - 1 Year	Tax Exempt	-
Service Level	SVC T&M RES	Site Since	03/04/2022
		Inactive Date	-

Notes: 0, Systems: 1, RMR: 1, Work Orders: 0, Site Parts: 0, Contacts: 0, Zones: 0, Authorities: 0, Docs: 1, Custom Fields: 0, Item Defaults: 0, eForms: 0, Part Ledger: 0, External: 0

+ Add Document NO Show deleted documents

File Name	Type	Security	Modified Date	
C-1020 Security Contract.docx	Customer Contract	Customer	Apr 21, 2022, 7:01:59 PM	Replace Download Delete

1 - 1 of 1 items Refresh

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.

**Edit C-3719 Security Contract.docx**

File Name: C-3719 Security Contract.docx

Document Type: Customer Contract

Save Cancel