

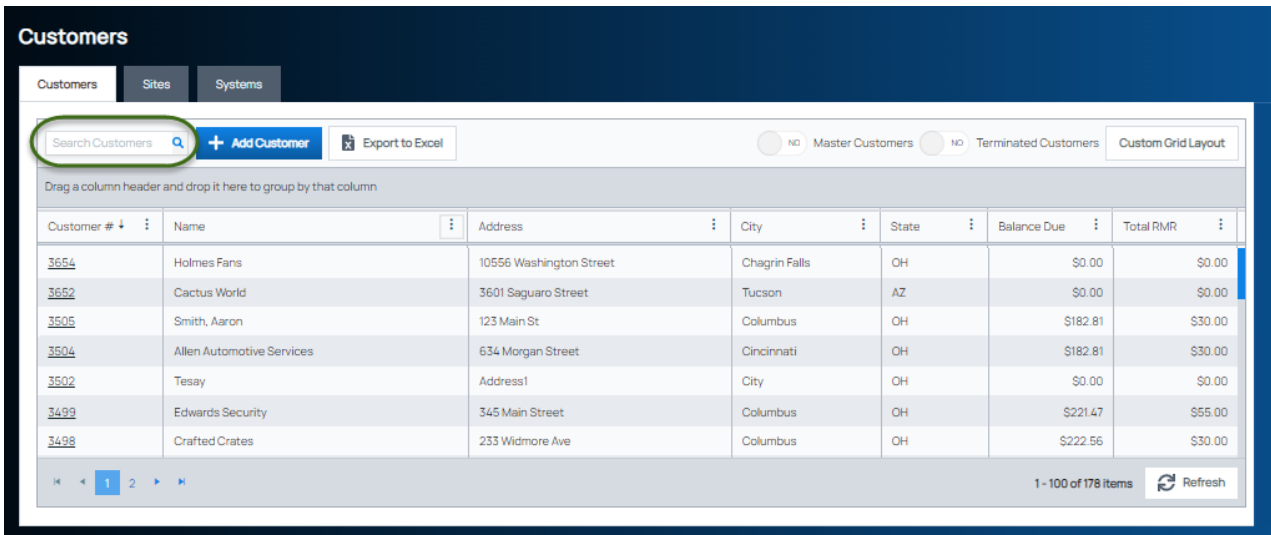
# Edit Site Documents

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

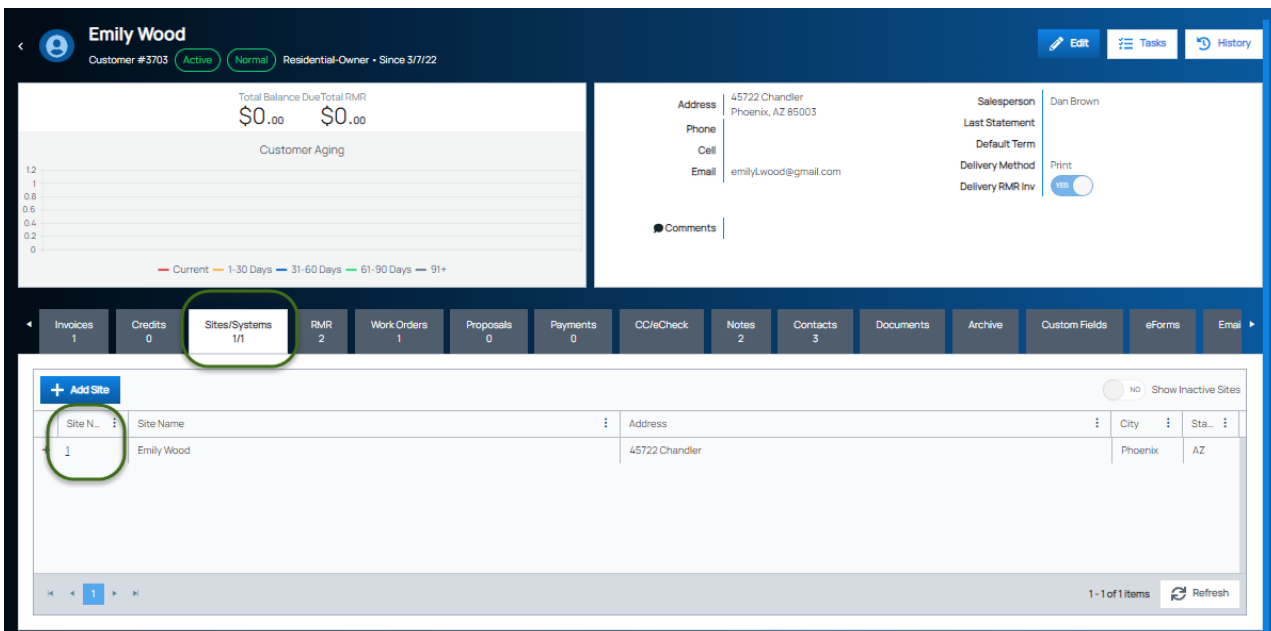
To edit a Site Document, you must first access the customer record.

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.



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.



The Site record opens. Click on the Docs tab.

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

45722 Chandler, Plymouth, MI 48170 RMR \$1.00  
(734) 258-4646  
emilyLwood@gmail.com

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 Custom Fields Item Defaults eForms Part Ledger External

+ 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

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 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 • C-3719 Security Contract.docx

Document Type Customer Contract

Save Cancel