

Replace Site Documents

Last Modified on 05/01/2022 6:25 am EDT

Users have the ability to replace a currently attached document with a different document. This option would be used if there is a newer revision of the document or if the incorrect document was uploaded.

To replace 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.

Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

Master Customers Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

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 to which you want to replace a document.

Cactus World
Customer #3652 Active Normal Commercial Since 12/5/21

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address: 3601 Saguario Street, Tucson, AZ 85773
Phone: (888) 234-8765
Cell:
Email: theresa@boldgroup.com

Salesperson: Theresa Scalia
Last Statement
Default Term
Delivery Method
Delivery RMR Inv:

Comments: Stages Integration test

Invoices 0 Credits 0 **Sites/Systems 1/1** RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 1 Documents Archive Custom Fields eForms Email

Site N.	Site Name	Address	City	Sta.
1	Cactus World-Corporate	3601 Saguario Street	Tucson	AZ

1 - 1 of 1 items Refresh

The Site record will be displayed. Click on the Docs tab. Locate the document, and then click on the Replace button.

The Windows file explorer will open. Locate and select the document that will replace the existing document. The previous document will be deleted and the selected document will be listed in the grid area.

The screenshot shows a software interface for a user named Emily Wood. The top navigation bar includes 'Edit', 'Tasks', and 'History' buttons. Below the navigation bar, there are several tabs: Notes (2), Systems (1), RMR (2), Work Orders (1), Site Parts (0), Contacts (1), Zones (0), Authorities (0), Docs (selected), Custom Fields, Item Defaults, eForms, Part Ledger, and External. The 'Docs' tab is highlighted with a green circle. The main content area displays a file management interface with a 'Select files...' prompt and a 'Drop files here to select' instruction. A table lists the files, with one file named 'Site Document.pdf' shown. The table has columns for File Name, Type, Security, and Modified Date. The 'Replace' button is highlighted with a green circle. The bottom of the interface shows a pagination bar with '1-1 of 1 items' and a 'Refresh' button.

File Name	Type	Security	Modified Date	
Site Document.pdf		Customer	Mar 20, 2022, 11:57:44 PM	Replace Download