

# Replace Site Documents

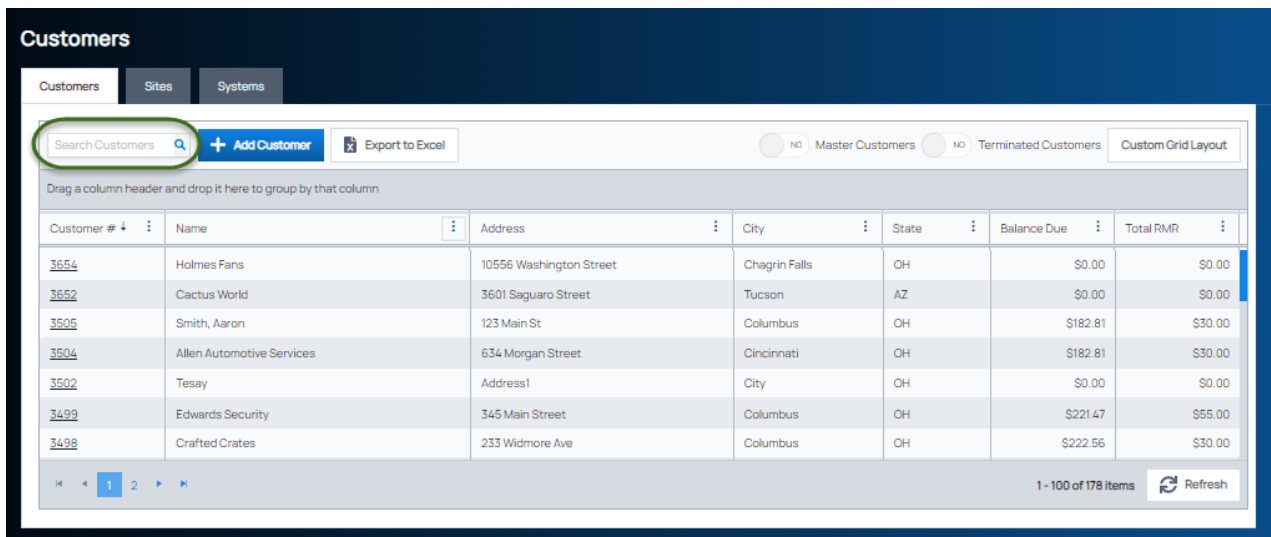
Last Modified on 12/16/2024 2:51 pm EST

You can replace a currently attached document with a different document. Use this option if there is a newer revision of the document or if the incorrect document was uploaded.

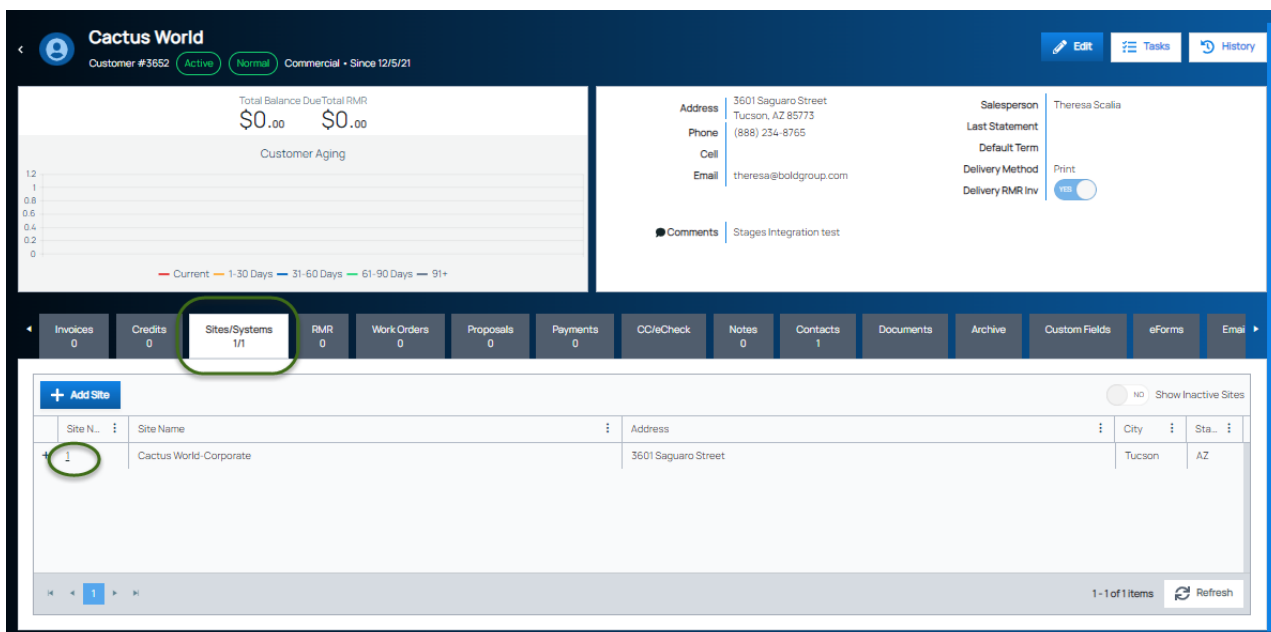
To replace a Site Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: 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 to which you want to replace a document.



The Site record opens. Click on the Docs tab. Locate the document, and then click the **Replace** button.

The Windows file explorer opens. Locate and select the document to replace the existing document. The previous

document is deleted and the selected document is listed in the grid area.

The screenshot displays 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 two main sections: a left sidebar with navigation tabs (Notes, Systems, RMR, Work Orders, Site Parts, Contacts, Zones, Authorities, Docs, Custom Fields, Item Defaults, eForms, Part Ledger, External) and a main content area. The 'Docs' tab is highlighted with a green circle. The main content area shows a file grid with one item: 'Site Document.pdf'. The 'Replace' button for this item is also highlighted with a green circle. The grid has columns for File Name, Type, Security, and Modified Date. The 'Replace' button is located to the right of the 'Modified Date' column. The bottom of the grid shows '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