Replace Site Documents

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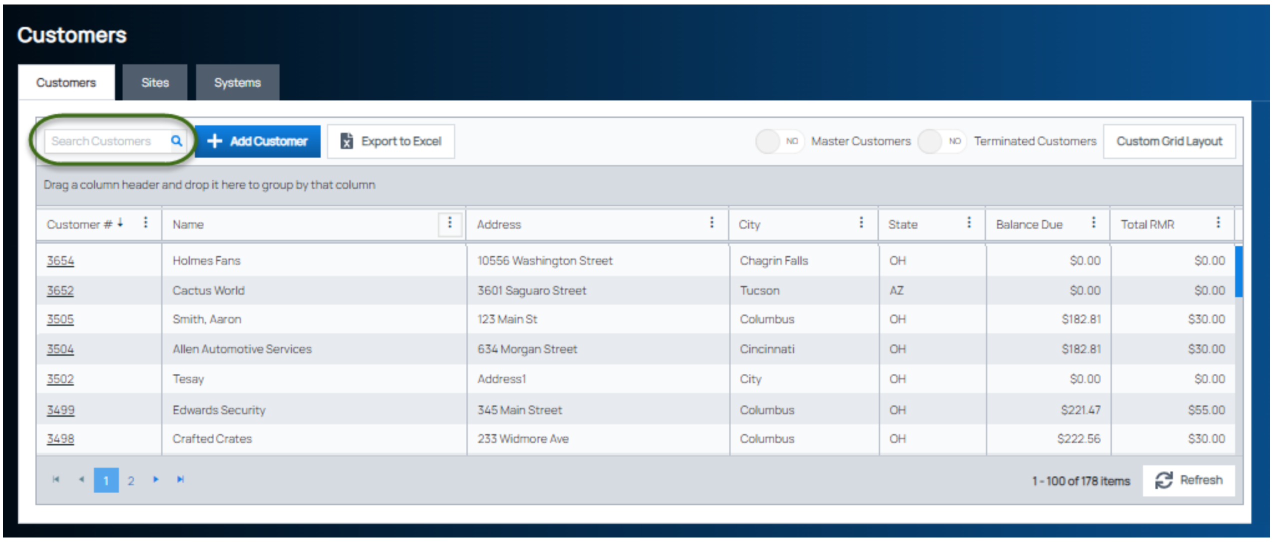
You can replace a currently attached document with a different document. Use this option if there is a newer revision of the document or if the incorrect document was uploaded.

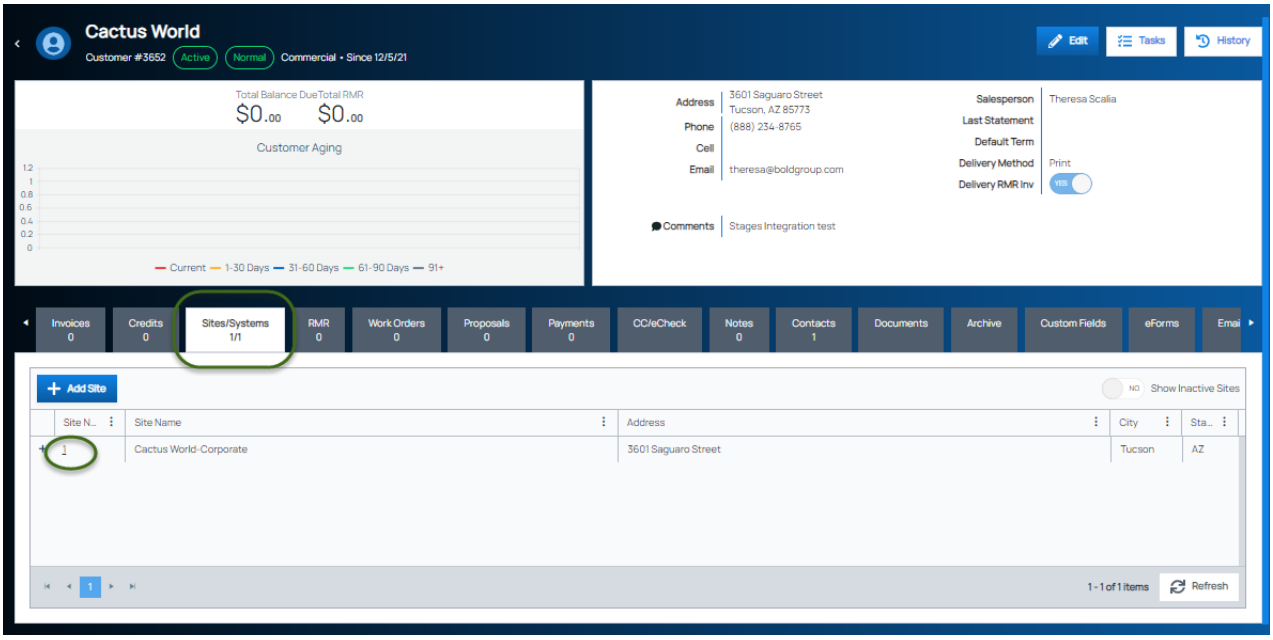
To replace a Site Document, you must first access the customer record.

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.