Download Site Documents

Last Modified on 12/16/2024 2:47 pm EST

To be able to open and view an attached document, you will need to download the file. The software creates a .pdf file of the selected document. Once downloaded you may open the .pdf file for viewing.

To download 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.

Customers Site	es Systems							
Search Customers	earch Customers 9 + Add Customer Export to Excel							Custom Grid Layout
Drag a column header	and drop it here to group by the	at column						
Customer # ↓ :	Name	1	Address	÷	City i	State :	Balance Due	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	ОН	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro 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	Тезау		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

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 download a document.

Cactus World Oustomer #3652 (Active) (Normal) Commercial - Since 12/5/21	🖉 Esit 😤 Taska 🕥 History
Total Balance DueTotal RMR \$0.00 \$0.00 Customer Aging	Address 3601 Saguaro Street Tucion, AZ 65773 Salesperson (888) 234-8765 Theresa Scalia Phone (888) 234-8765 Default Term Cell Default Term Print Email theresa@boldgroup.com DeliveryRMR.Inv
Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+ Invoices Credits Sites/Systems RMR Work Orders Proposals Payment 0 0 0 0 0	0 1
Add Site Site N : Site Name Cactus World-Corporate	i Address i Othy i Sta_ i 3601 Saguaro Street Tucson AZ
и « <mark>1</mark> » и	1-1of1items 2 Refresh

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

In a few seconds, the file will appear on your taskbar. Double-click on the file to open for viewing.

AR Accounts Receivable -	< O Active Emily Wood Active Emily Wood - 3703				🖋 Edit 🚝 Tasks 🏐 History
Customers Customers Payments CRMR	 ✓ 45722 Chandler, Phoenix, AZ 85003 - ← emilyLixood@gmail.com 	52.00	Warranty Start 03/07/2022 Warranty Labor 1Year Parts & Labor Warranty Part 1Year Parts & Labor Service Level SVC T6M RES	Sales Tax Tax Rate Tax Exempt Site Since Inactive Date	0.0000% t - 0.0/07/2022
Work Orders Vorders Proposals Calendar GL	Notes Systems PMR Work Orders 2 1 2 1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1	0 1 0	0 Docs Custom Fields Herr	Defaults eForms Part	Ledger External
 Reports Setup 	File Name : Site Document.pdf	Type I	Security : Customer		2 Replace
 Collapse Site Document.pdf 	^			© 2022 Bold Group Best S	Security jeffg@Boldgroup.com Version 5.0.2: