

Download Site Documents

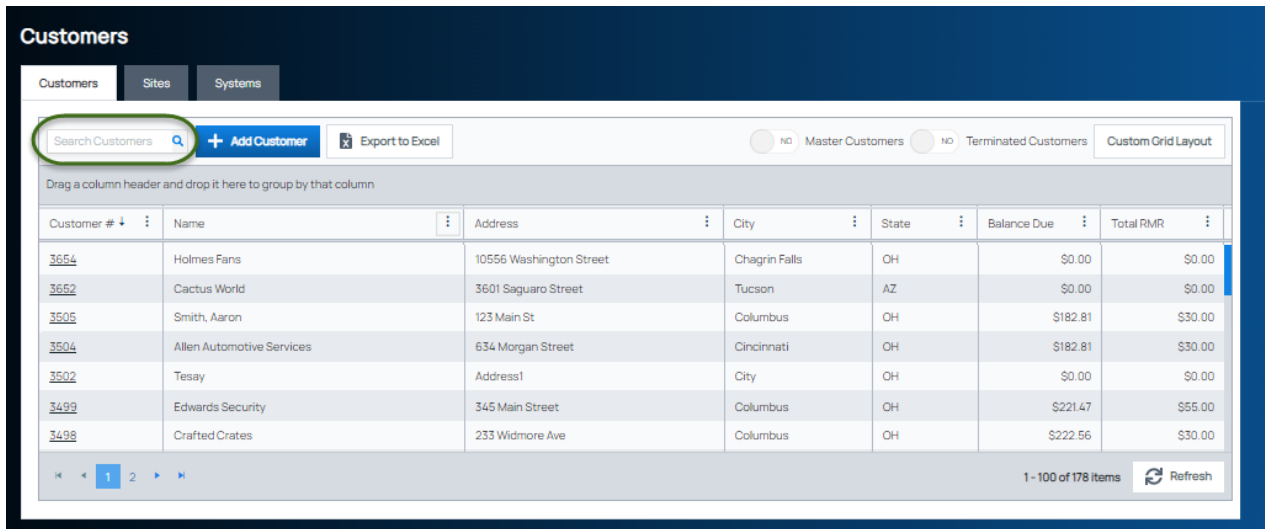
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To be able to open and view an attached document, you will need to download the file. The software creates a .pdf file of the selected document. Once downloaded you may open the .pdf file for viewing.

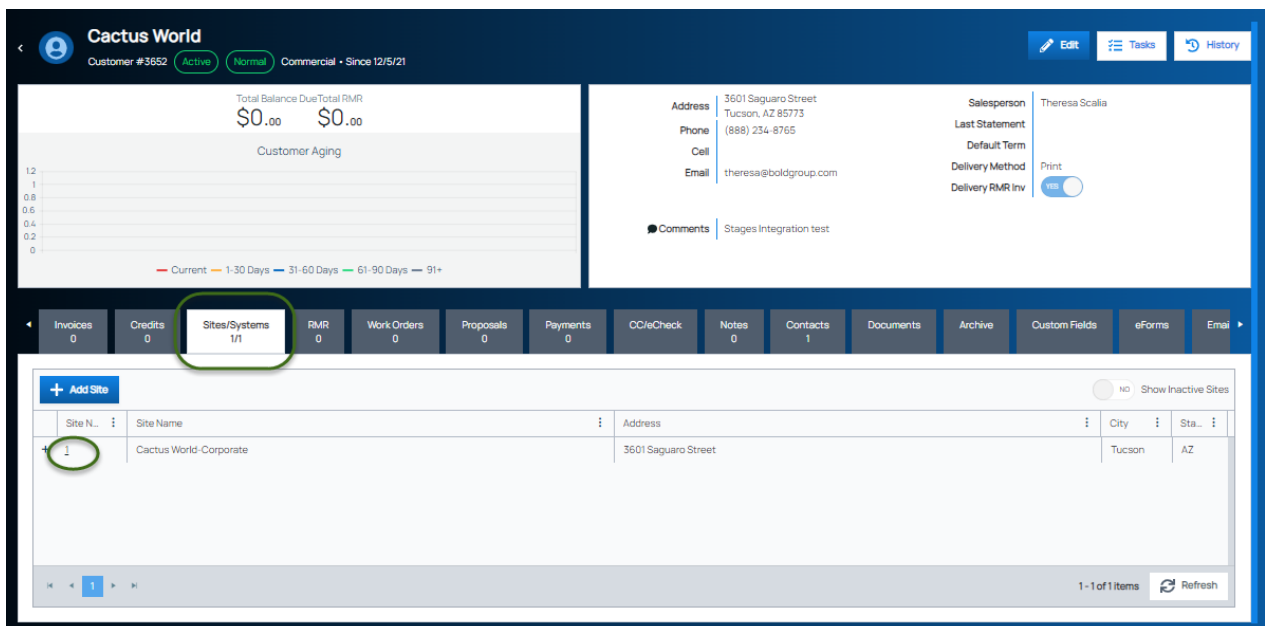
To download a Site Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: 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.



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 for which you want to download a document.



The Site record will be displayed. Click on 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.

The screenshot shows a software interface for 'Accounts Receivable' with a user profile for '1 - Emily Wood'. The interface includes a sidebar with navigation options like Home, Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, and Setup. The main content area displays customer information for '45722 Chandler, Phoenix, AZ 85003' with an RMR amount of '\$2.00'. It also shows warranty details and a 'Docs' tab. A file upload area is visible with a table listing a file named 'Site Document.pdf'. A green circle highlights the 'Download' button for this file. A green arrow points from this button to the 'Site Document.pdf' file in the Windows taskbar at the bottom of the screen.

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