

Download Site Documents

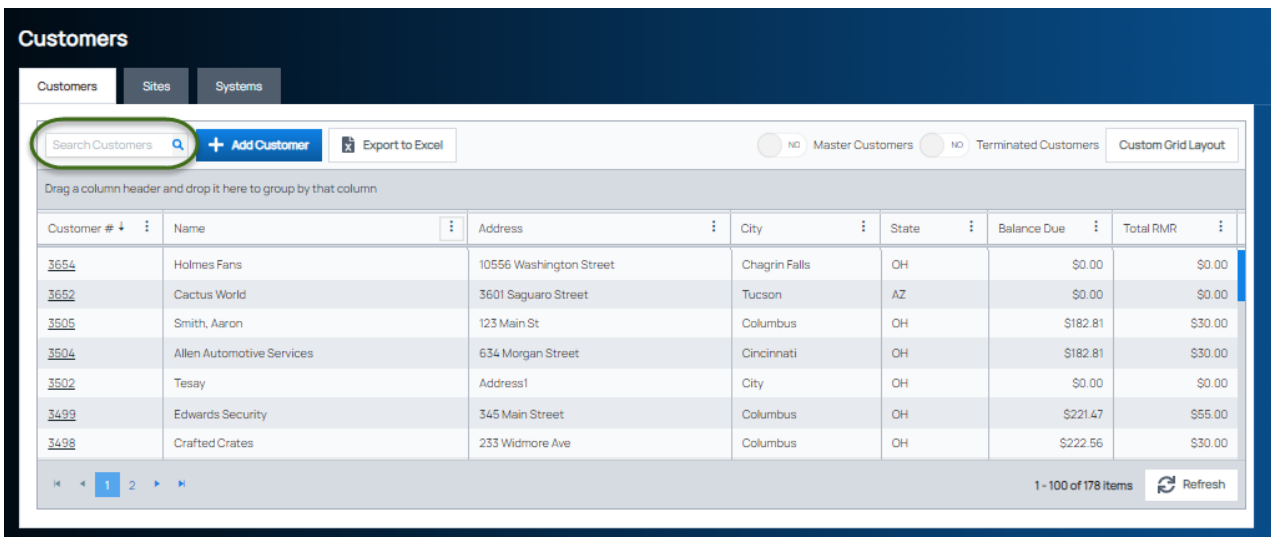
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To be able to open and view an attached document, you will need to download the file. The software creates a .pdf file of the selected document. Once downloaded you may open the .pdf file for viewing.

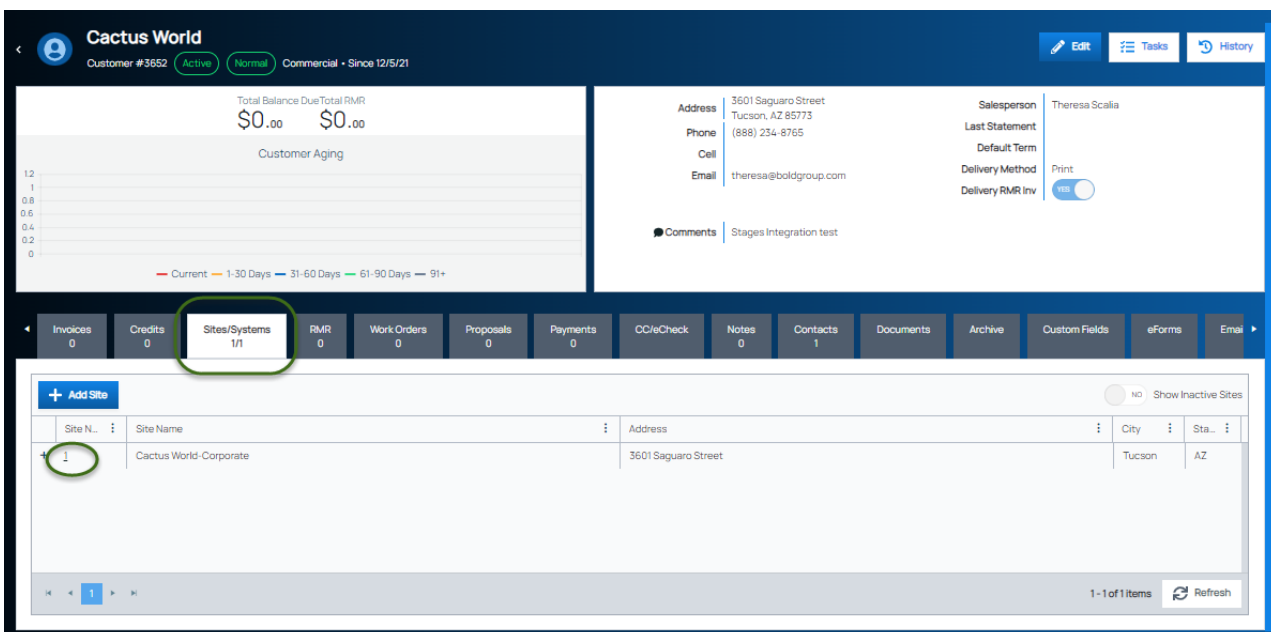
To download a Site Document, you must first access the customer record.

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



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 < 1 - Emily Wood
Active Emily Wood - 3703

Home
Customers
Invoices
Payments
RMR
Work Orders
Proposals
Calendar
GL
Reports
Setup

45722 Chandler, Phoenix, AZ 85003
emilylwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC-T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes 2 Systems 1 RMR 2 Work Orders 1 Site Parts 0 Contacts 1 Zones 0 Authorities 0 Docs Custom Fields Item Defaults eForms Part Ledger External

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