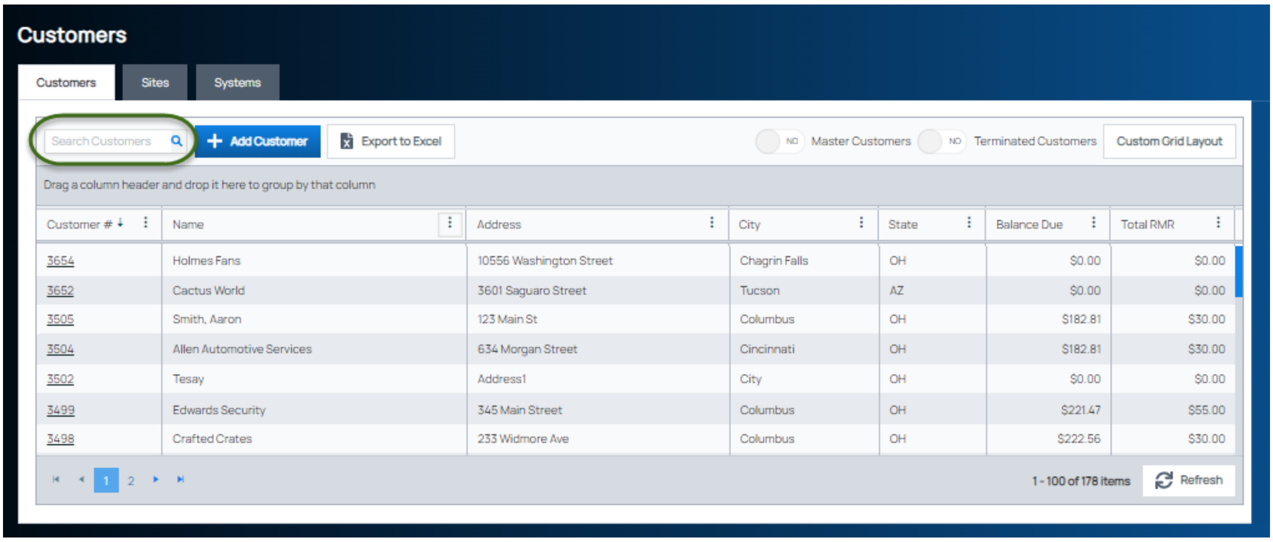
Add System Documents

Last Modified on 12/20/2024 10:00 am EST

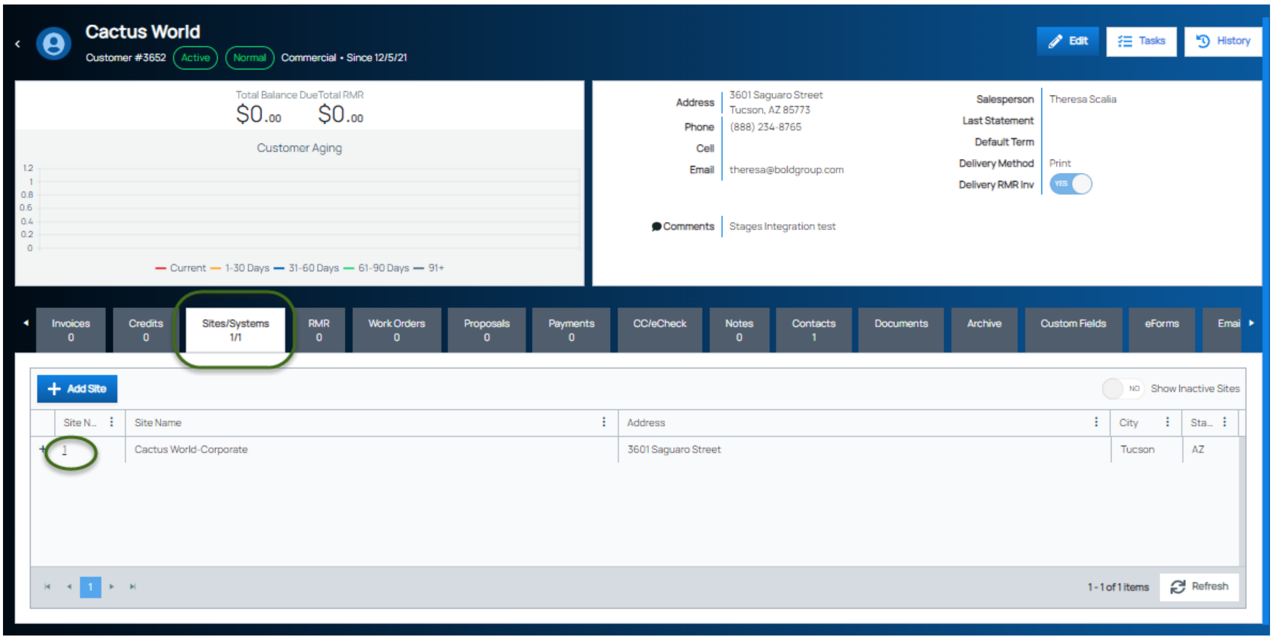
To add a System Document, you must first access the customer record.

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

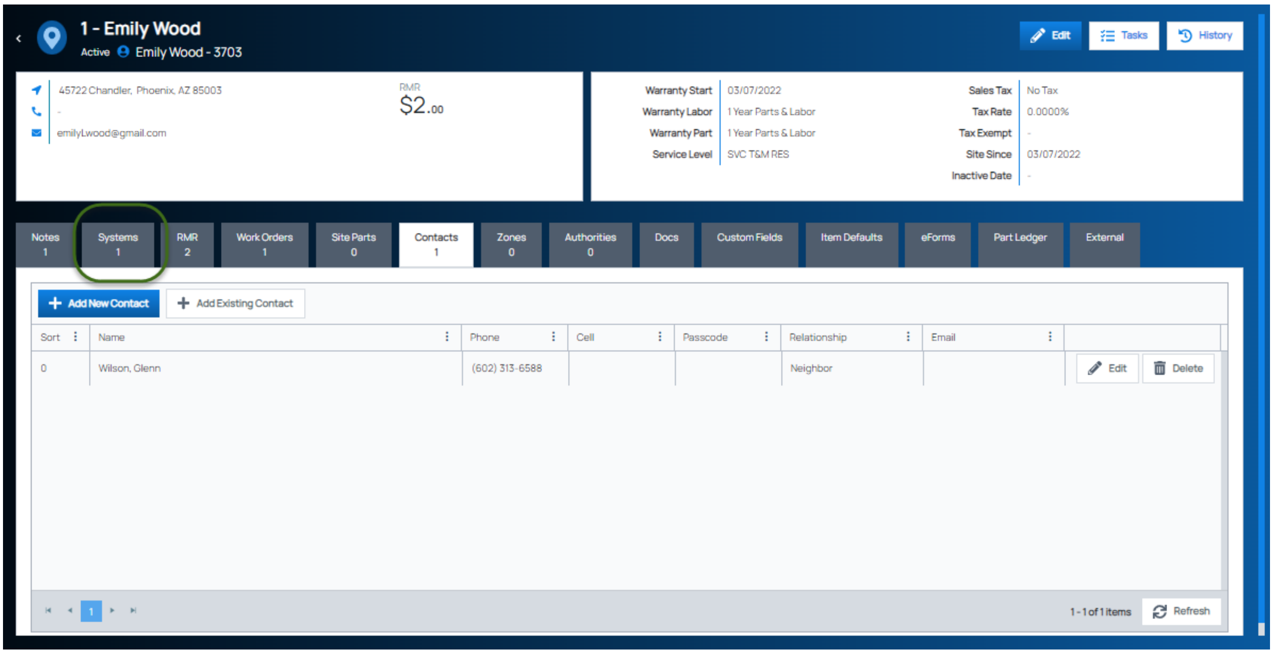
The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



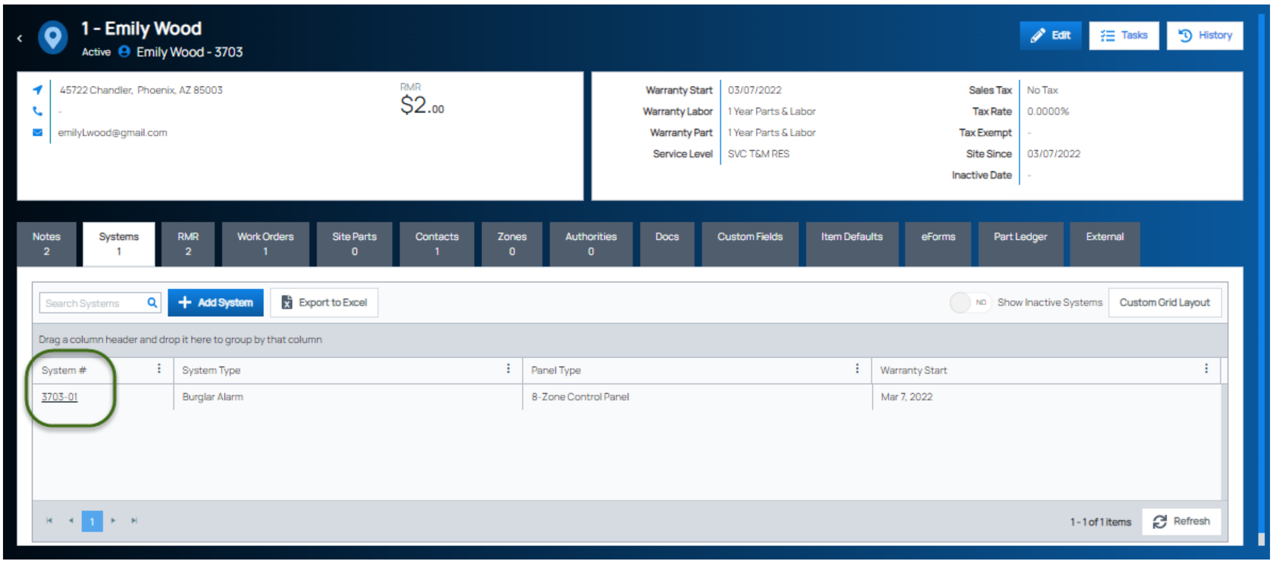
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site that is linked to the System to which you want to add a document.



The Site record opens. Click the Systems tab.

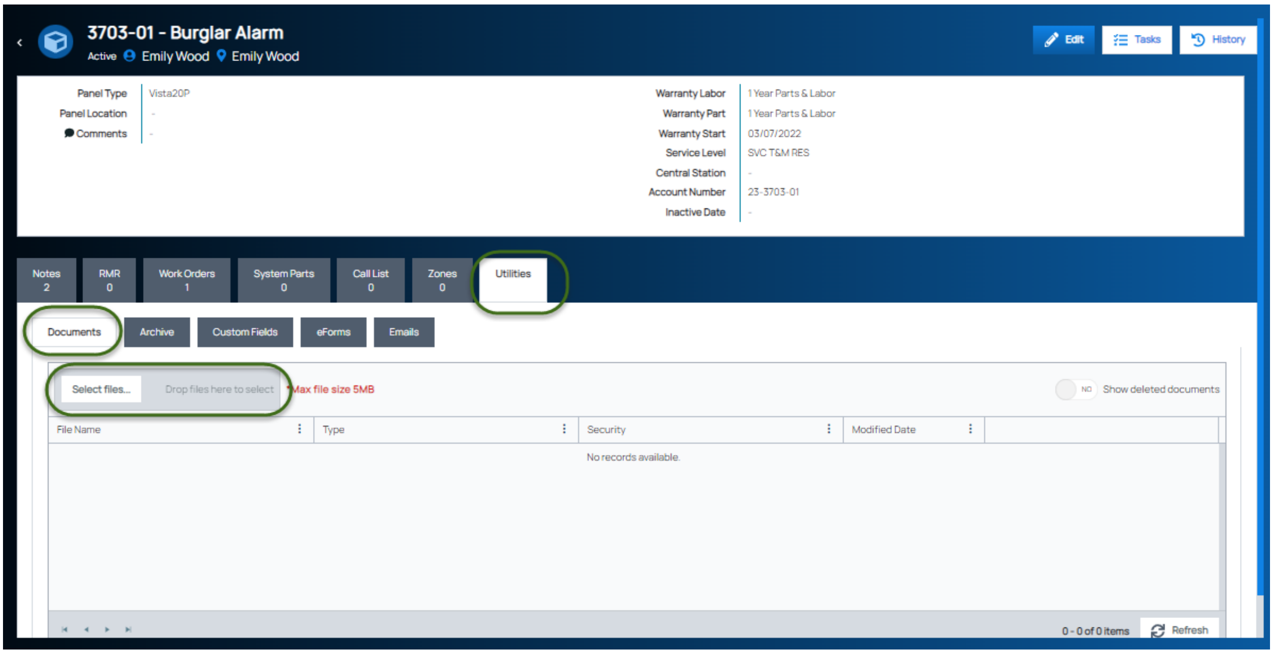


A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System for which you want to add a document.



The System record opens. Click the Utilities tab, and then click the Documents tab. There are two methods for uploading a document:

- Click the Select Files button; the Windows file explorer opens for you to select one or multiple documents from the same folder.
- With the Windows file explorer open to the location of the document(s), drag and drop the file(s) into the gray box to the right of the Select Files button. You can select multiple documents at the same time.



Once uploaded, the documents appear in the grid area.