

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 screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a '+ Add Customer' button, and an 'Export to Excel' button. To the right of these are two toggle switches for 'Master Customers' and 'Terminated Customers', both currently set to 'NO', and a 'Custom Grid Layout' button. Below this is a grid of customer records. The grid has columns for 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The first row is highlighted. At the bottom of the grid, there is a pagination bar showing '1 - 100 of 178 Items' and a 'Refresh' button.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$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	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

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 screenshot shows the customer record for 'Cactus World'. At the top, there is a header with the customer name, status ('Active', 'Normal'), and type ('Commercial'). Below this is a summary section with 'Total Balance Due' and 'Total RMR' both at '\$0.00', and a 'Customer Aging' chart. To the right, there is a contact information section with 'Address', 'Phone', 'Cell', and 'Email' fields, and a 'Salesperson' field with 'Theresa Scalia'. Below this is a 'Comments' section with 'Stages Integration test'. At the bottom, there is a navigation bar with tabs for 'Invoices', 'Credits', 'Sites/Systems', 'RMR', 'Work Orders', 'Proposals', 'Payments', 'CC/eCheck', 'Notes', 'Contacts', 'Documents', 'Archive', 'Custom Fields', 'eForms', and 'Email'. The 'Sites/Systems' tab is selected and circled in green. Below the navigation bar is a table with columns for 'Site N.', 'Site Name', 'Address', 'City', and 'Sta.'. The first row is highlighted, and the '1' in the 'Site N.' column is circled in green.

Site N.	Site Name	Address	City	Sta.
1	Cactus World-Corporate	3601 Saguaro Street	Tucson	AZ

The Site record opens. Click the Systems tab.

1 - Emily Wood
Active Emily Wood - 3703

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 1 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

+ Add New Contact + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 313-6588			Neighbor		Edit Delete

1 - 1 of 1 items Refresh

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.

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Warranty Labor 1 Year Parts & Labor
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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

Search Systems + Add System Export to Excel Show Inactive Systems Custom Grid Layout

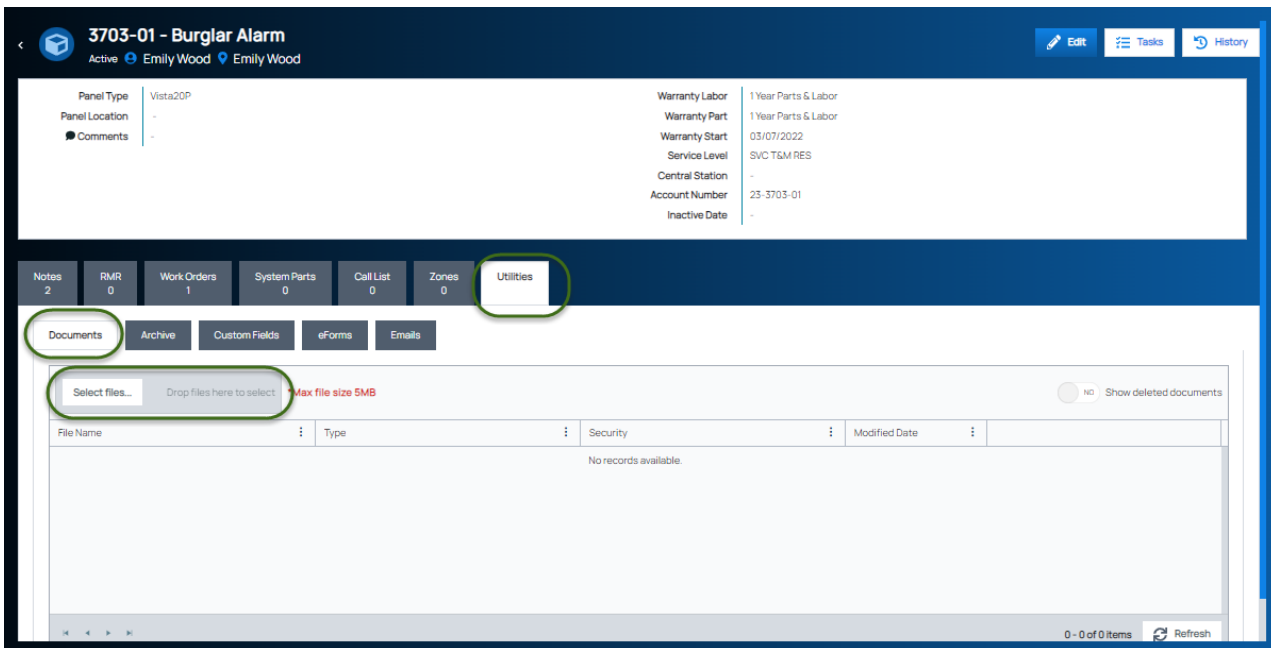
Drag a column header and drop it here to group by that column

System #	System Type	Panel Type	Warranty Start
3703-01	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

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.

