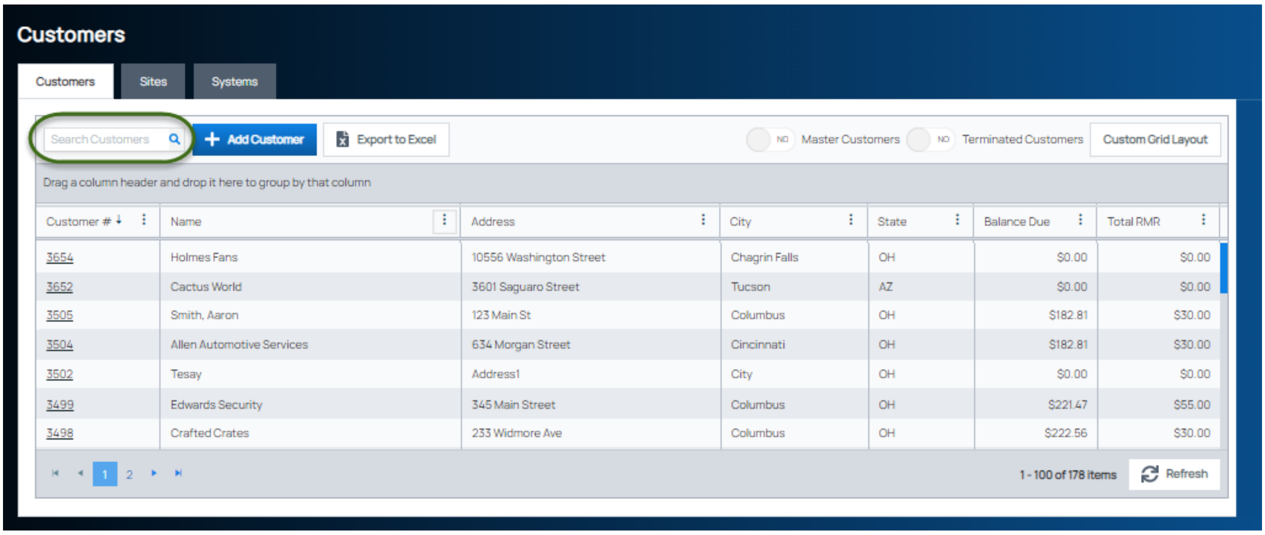
Add System Documents

Last Modified on 05/01/2022 6:21 am EDT

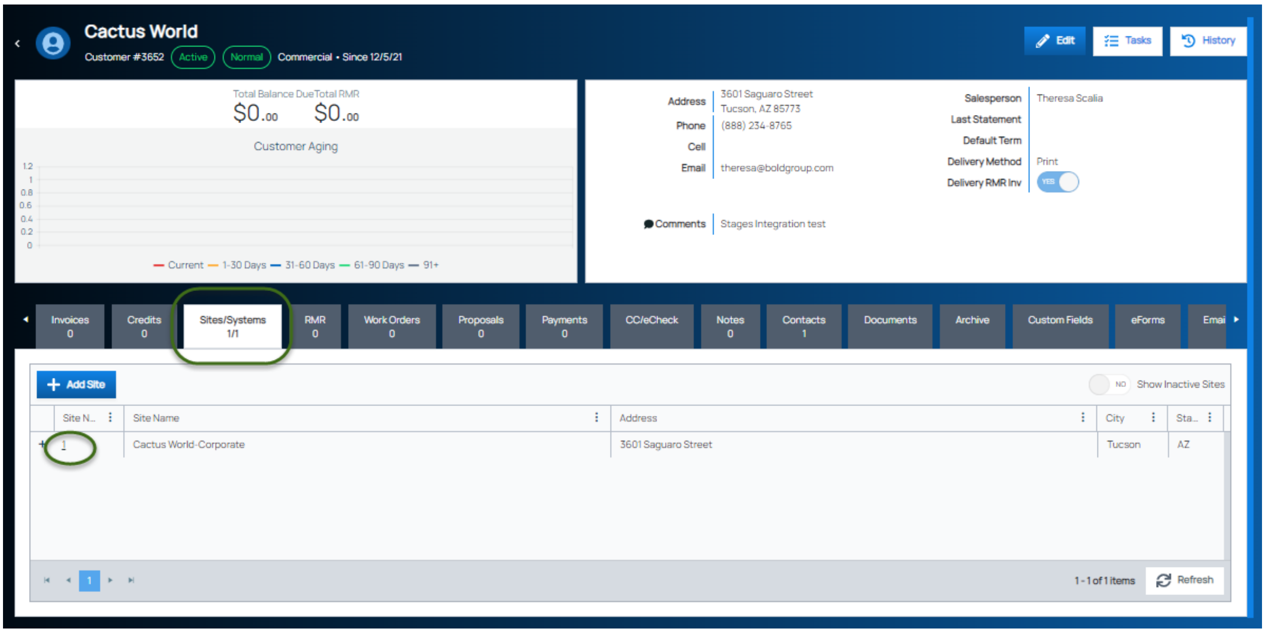
To add a System Document, you must first access the customer record.

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

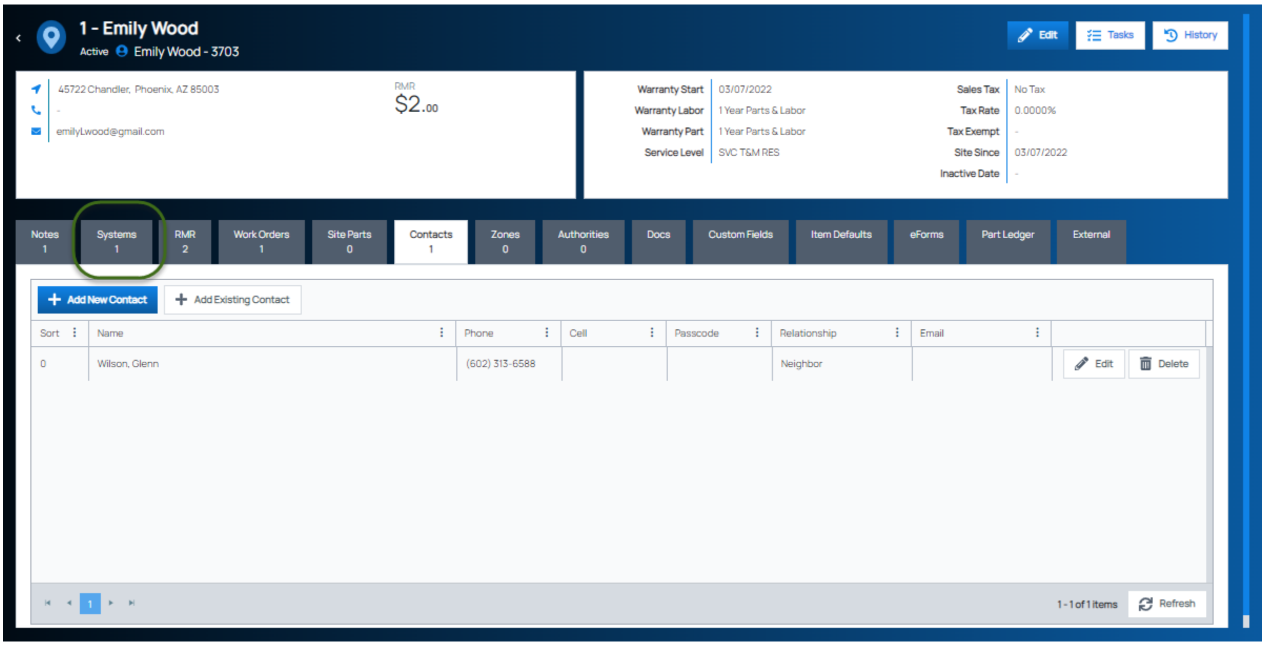
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



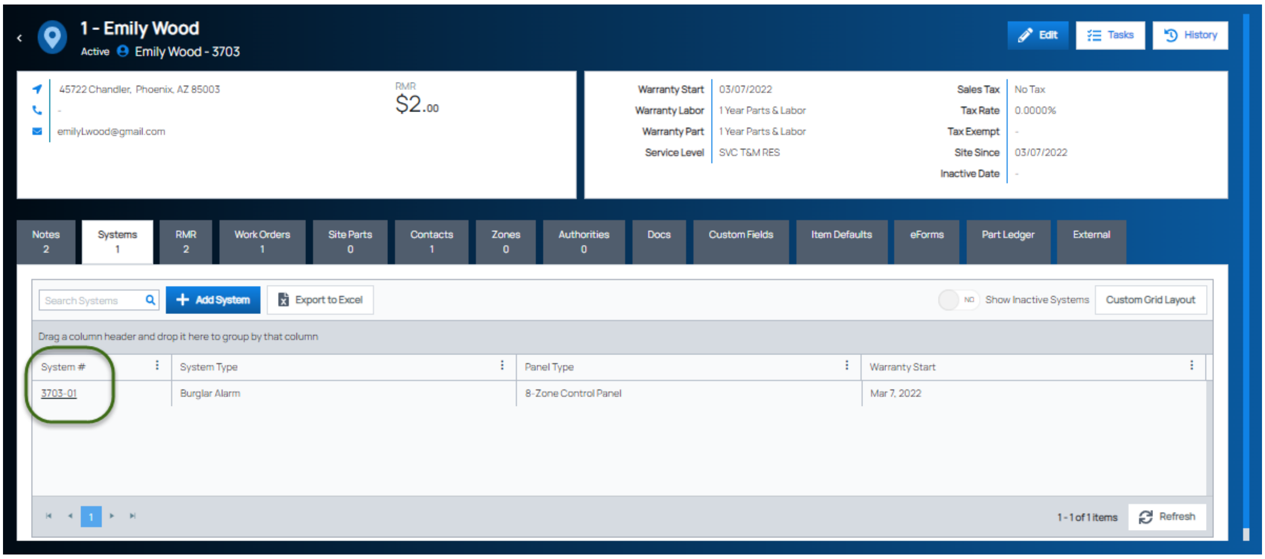
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site that is linked to the System to which you want to add a document.



The Site record will be displayed. Click on the Systems tab.

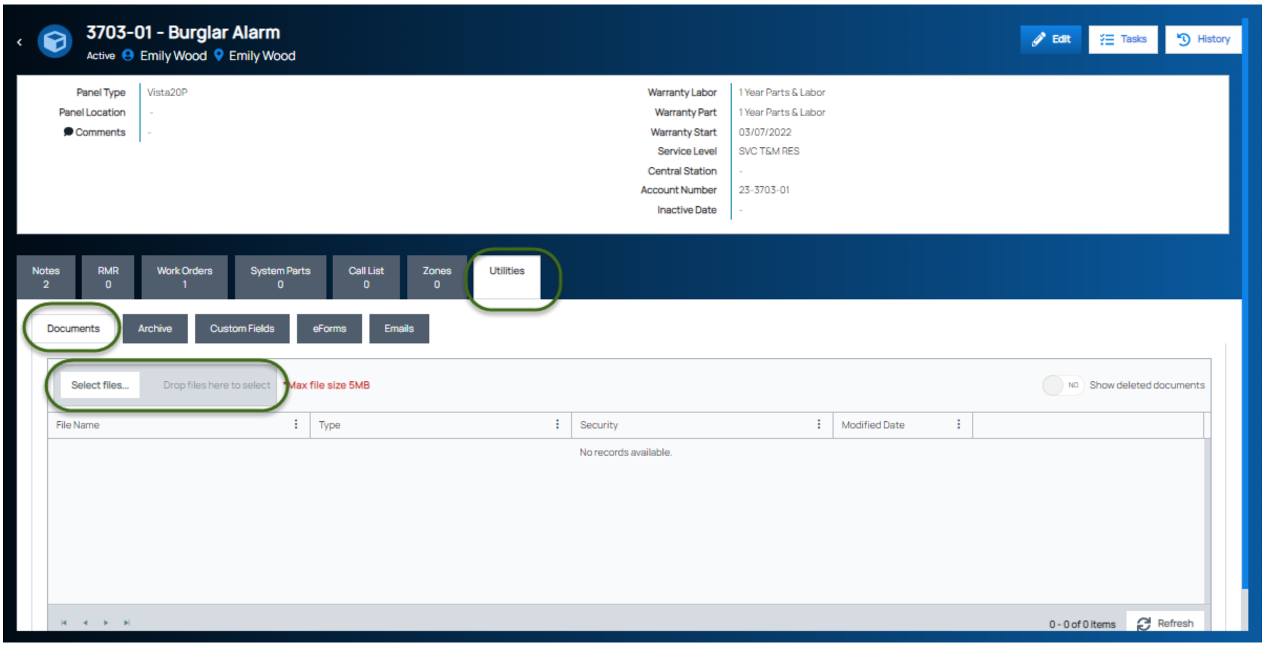


A list of Systems attached to the Site will be listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to add a document.



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

- Click on the Select Files button – Windows file explorer will open 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 may select multiple documents at the same time.



Once uploaded, the documents will appear in the grid area.