

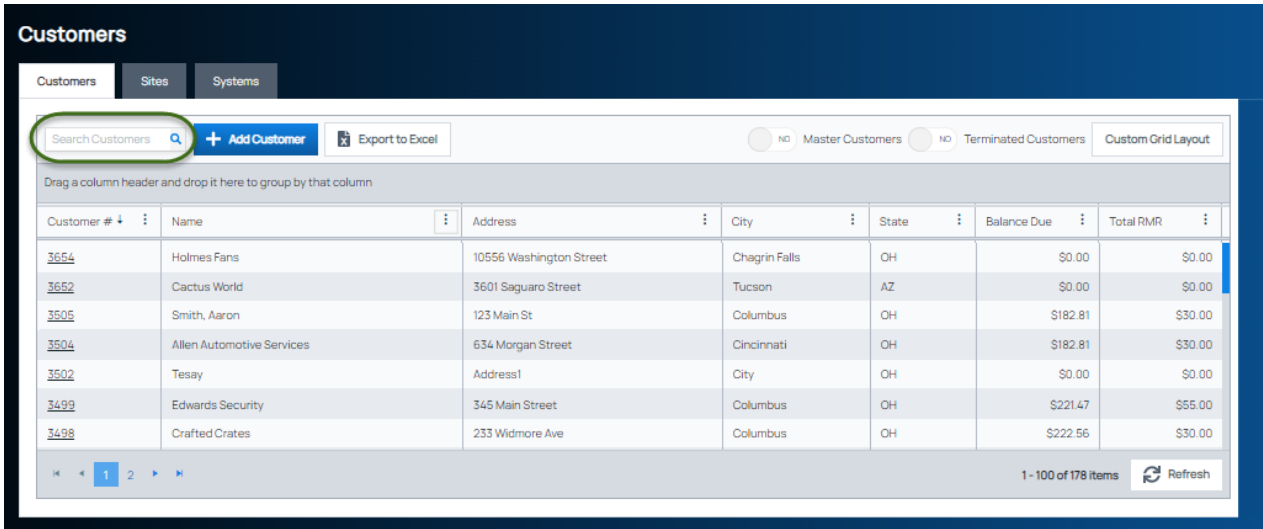
Edit System Documents

Last Modified on 05/01/2022 6:22 am EDT

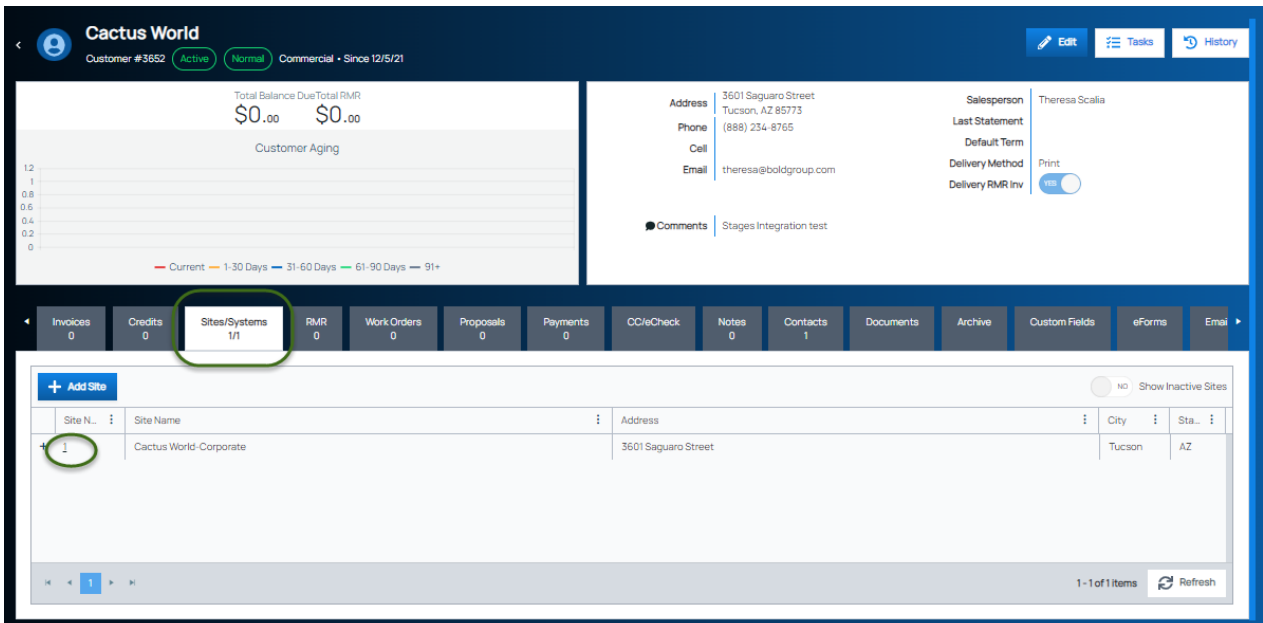
To edit a System Document, you must first access the customer record.

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 to which the System is linked for which you want to add a document.



The Site record will be displayed. Click on 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 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.

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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 NO 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 will be displayed. Click on the Documents tab. Within the grid area, locate the document to be edited, and then double-click on the document record.

9173-01 - Burglar Alarm Active Emily Wood Emily Wood Edit Tasks History

Panel Type	Vista20P	Warranty Labor	Labor - 1 Year
Panel Location	Entry closet	Warranty Part	Parts - 1 Year
Comments	-	Warranty Start	03/07/2022
		Service Level	SVC T&M RES
		Central Station	-
		Account Number	23-9173-01
		Inactive Date	-

Notes: 0 | RMR: 1 | Work Orders: 1 | System Parts: 4 | Call List: 1 | Zones: 2 | **Documents** | Archive | Custom Fields | eForms | Emails

[+ Add Document](#) Show deleted documents

File Name	Type	Security	Modified Date	
Floor plan.pdf	Site Floor Plan	Customer	Apr 22, 2022, 12:37:04 AM	Replace Download Delete

0 - 0 of 0 items Refresh

The document edit form will be displayed. Users may edit the File Name and the Document Type fields. Make the necessary changes and then click on the Save button.

Edit Floor plan.pdf ×

File Name *

Document Type

Save Cancel