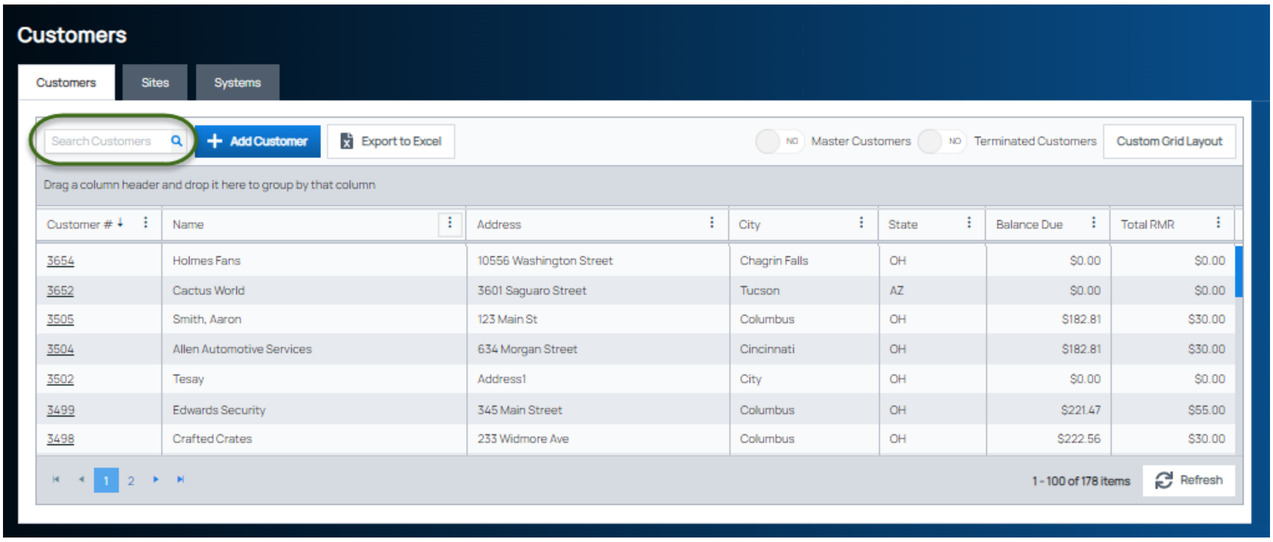
Edit System Documents

Last Modified on 12/20/2024 10:14 am EST

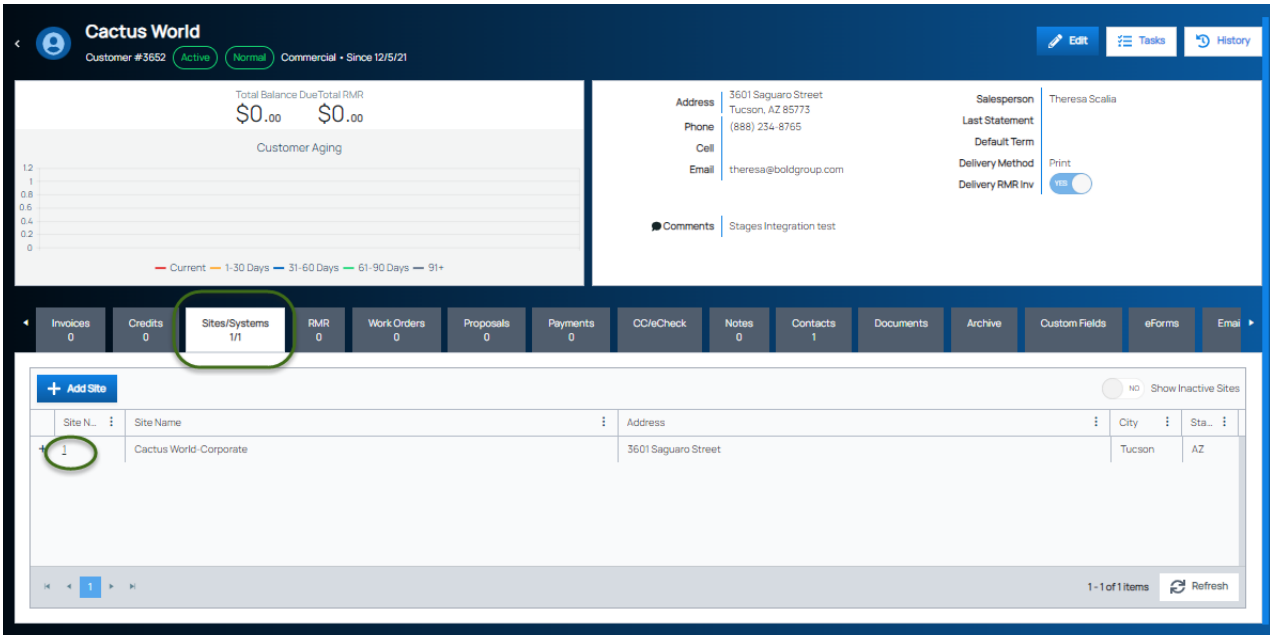
To edit a System Document, access the customer record.

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

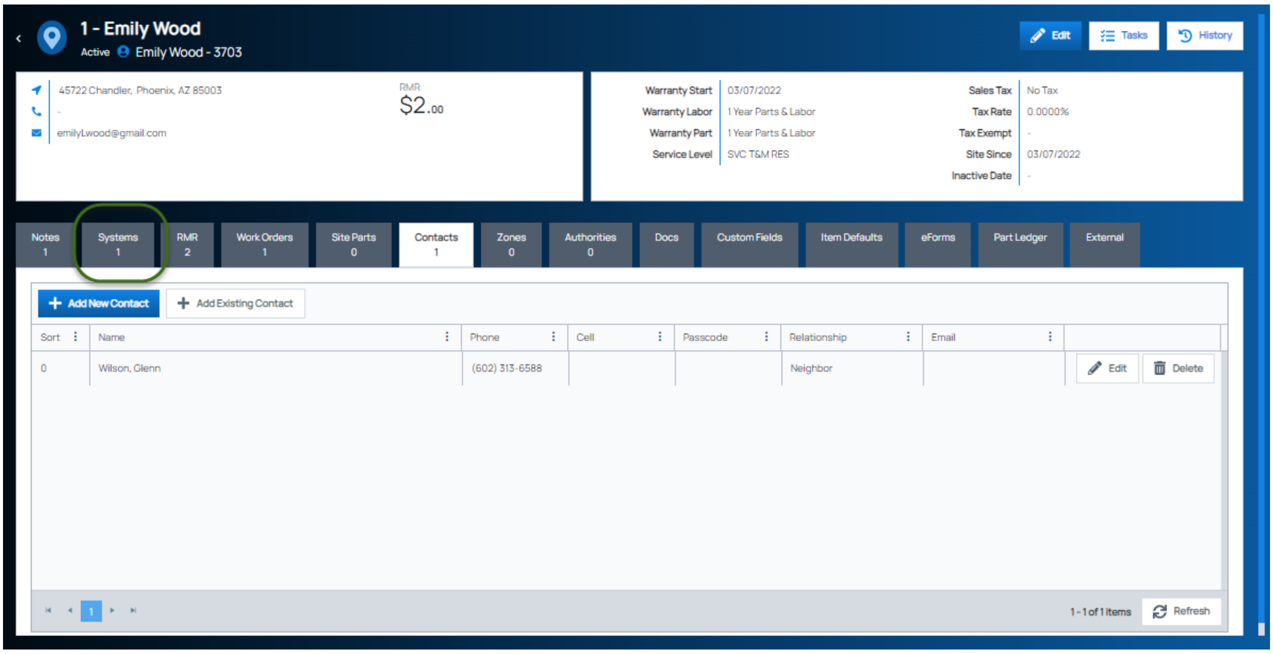
The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



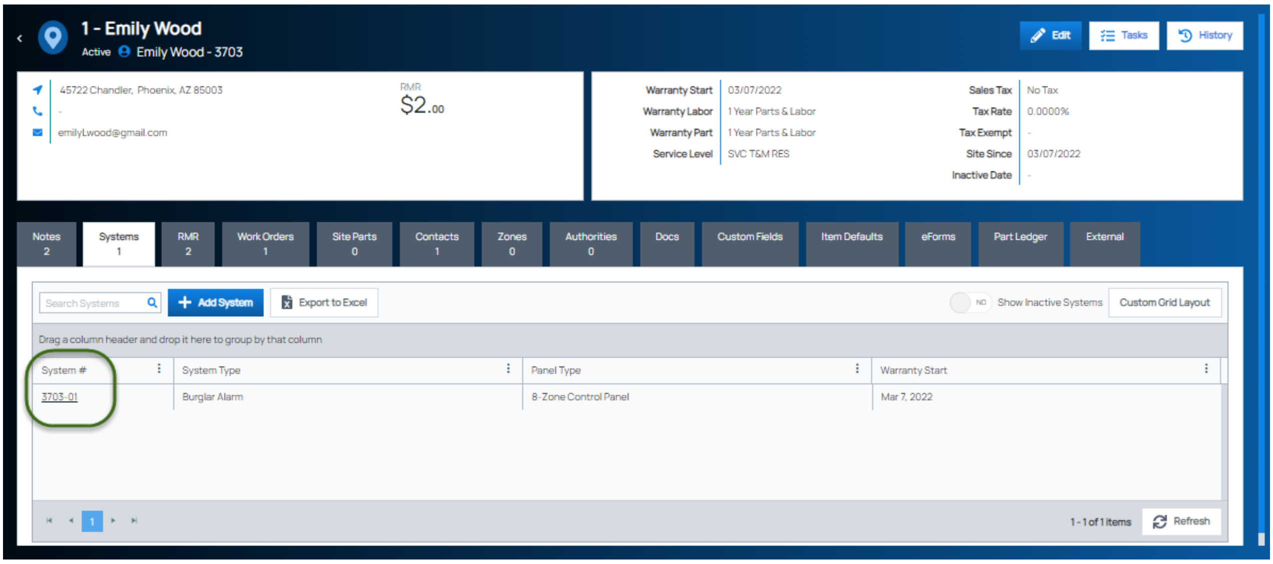
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site to which the System is linked for which you want to add a document.



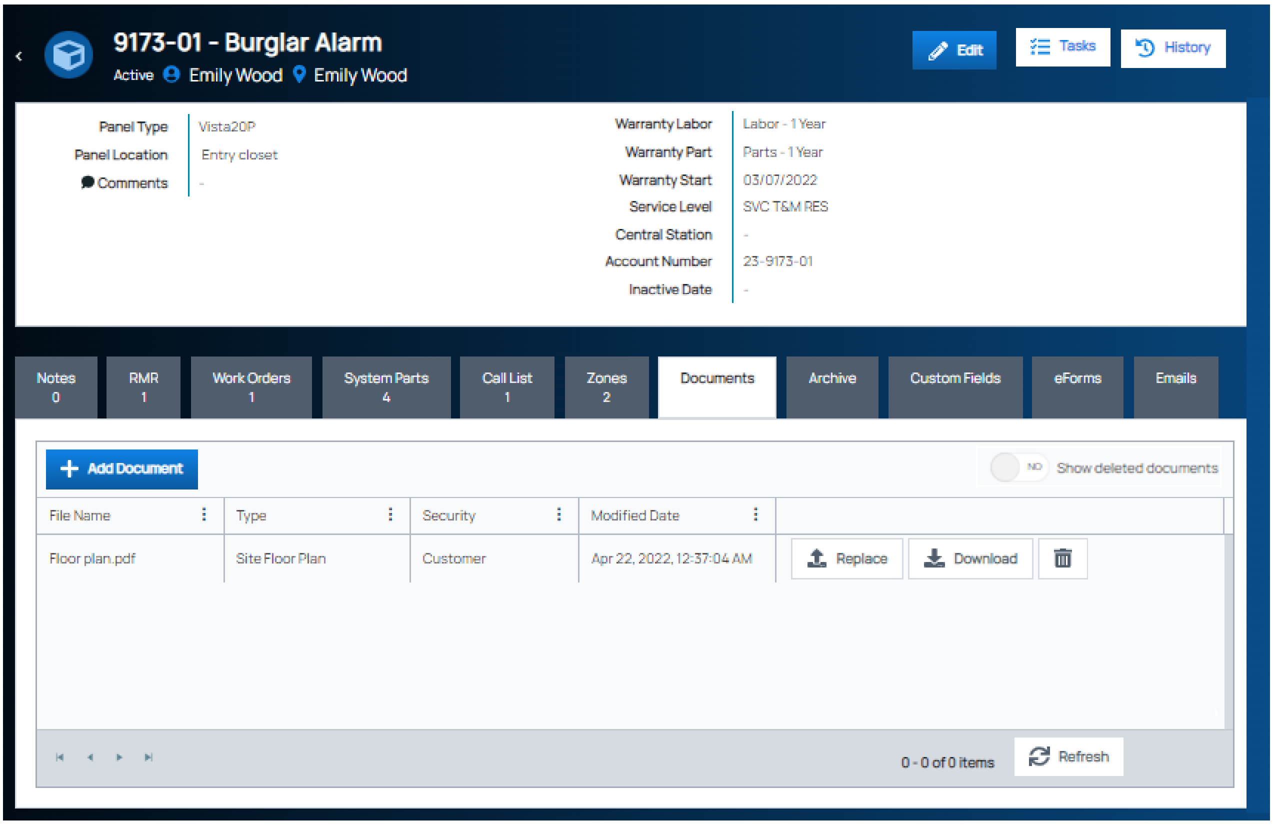
The Site record opens. Click the Systems tab.



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 Documents tab. Within the grid area, locate the document to be edited, and then double-click the document record.



The document edit form opens. You can edit the File Name and the Document Type fields. Make the necessary changes and then click the **Save** button.