

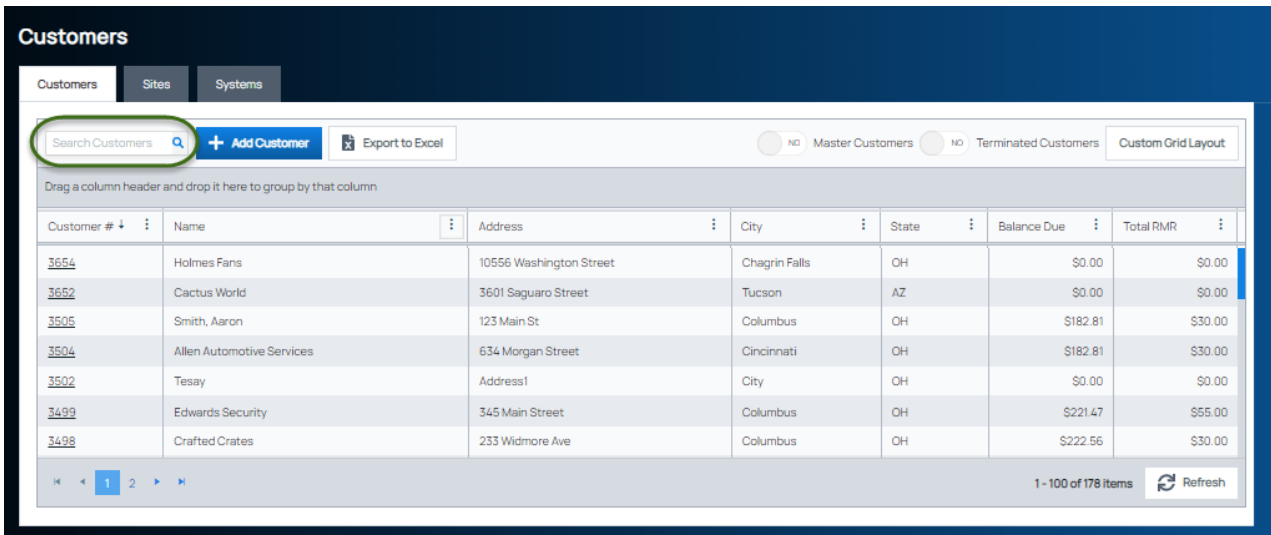
Edit System Documents

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

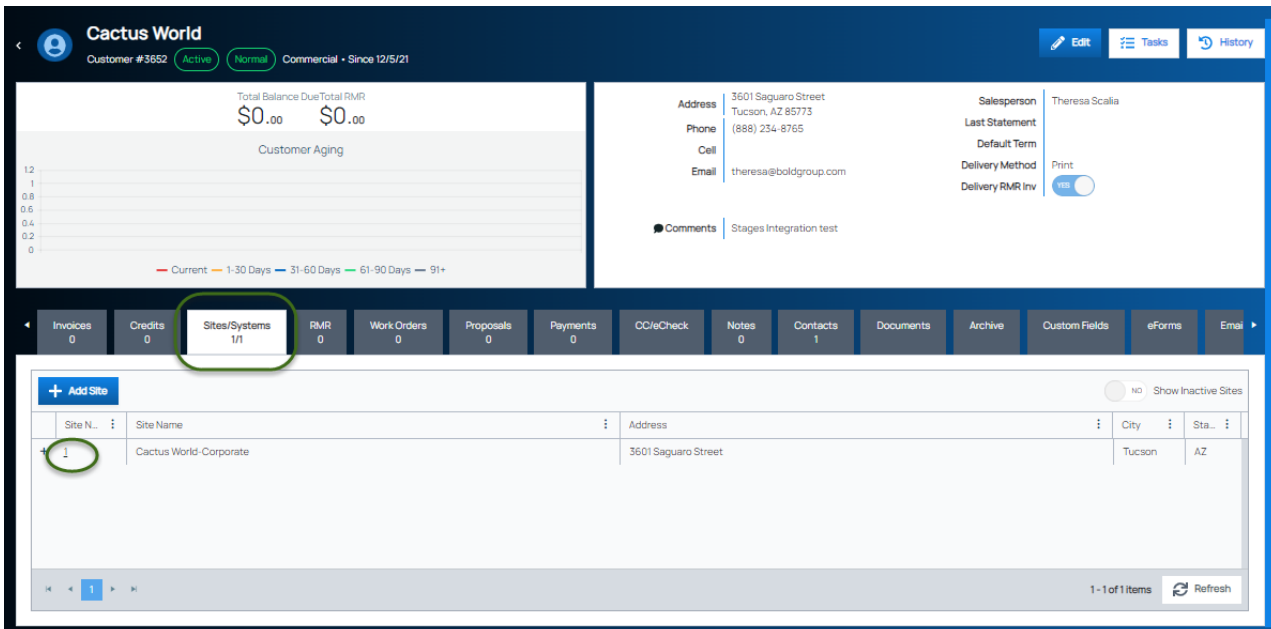
To edit a System Document, access the customer record.

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.

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

0 - 0 of 0 items Refresh

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.

Edit Floor plan.pdf ✕

File Name *

Document Type

Save Cancel