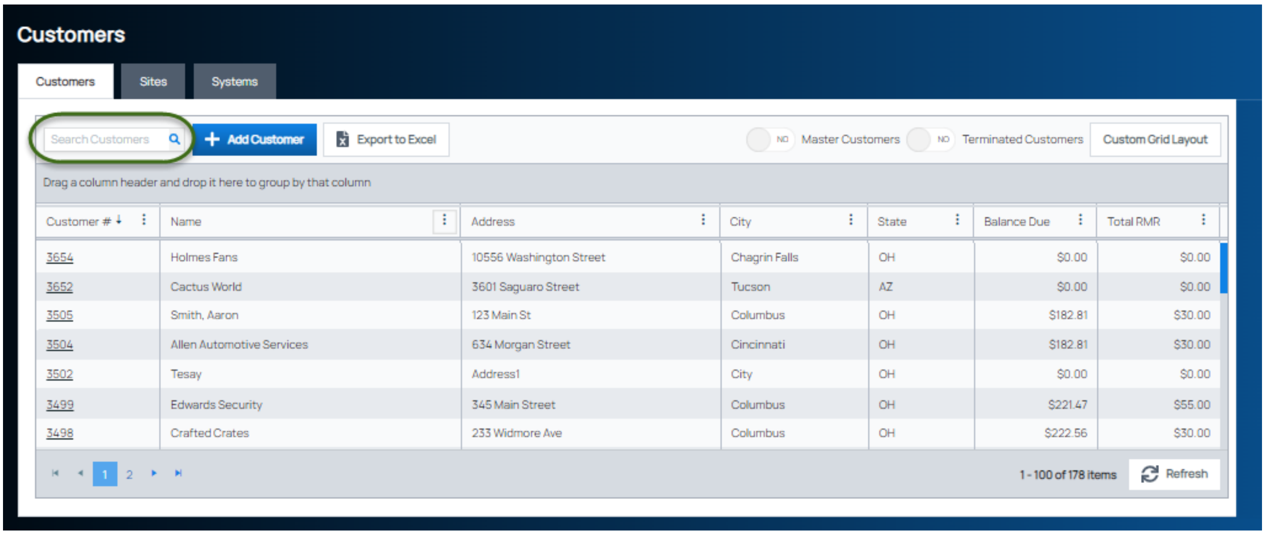
Replace System Documents

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

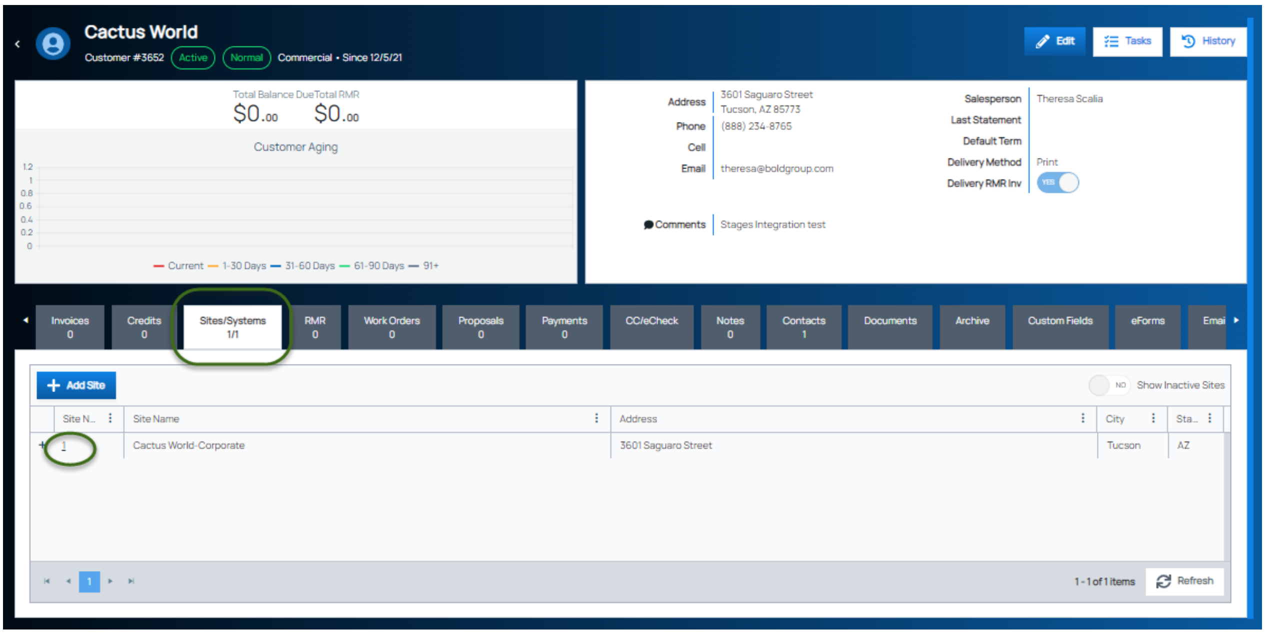
Users have the ability to replace a currently attached document with a different document. This option would be used if there is a newer revision of the document or if the incorrect document was uploaded.

To replace 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.

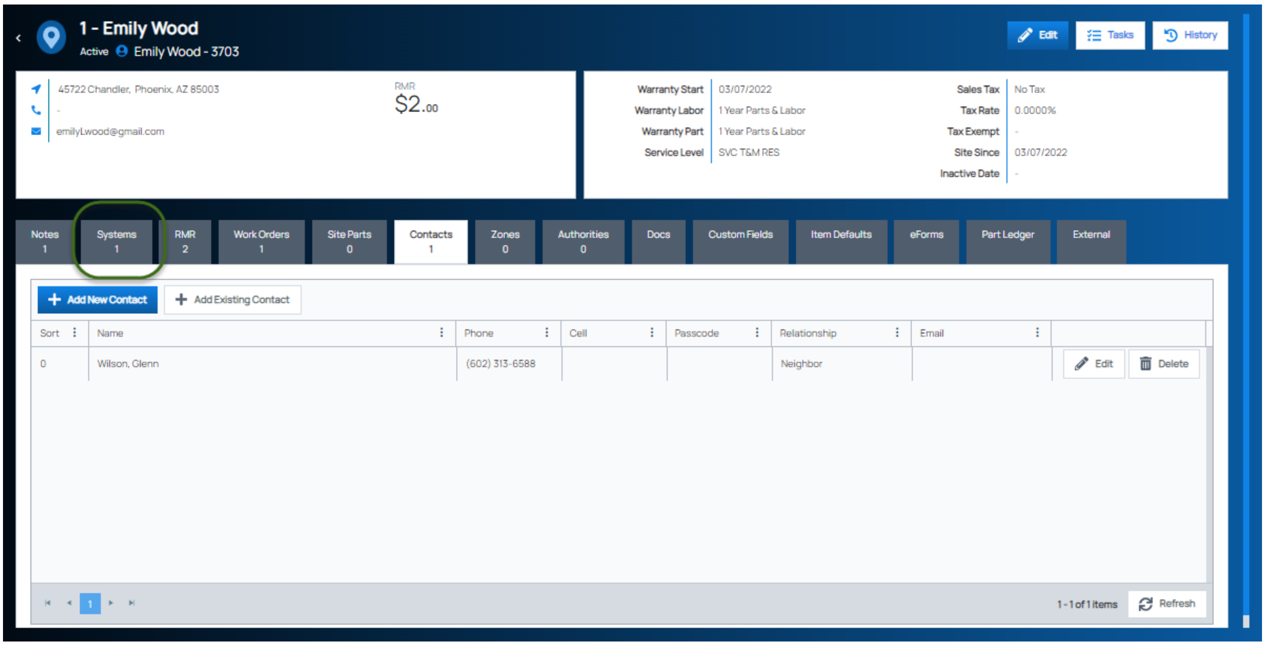
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



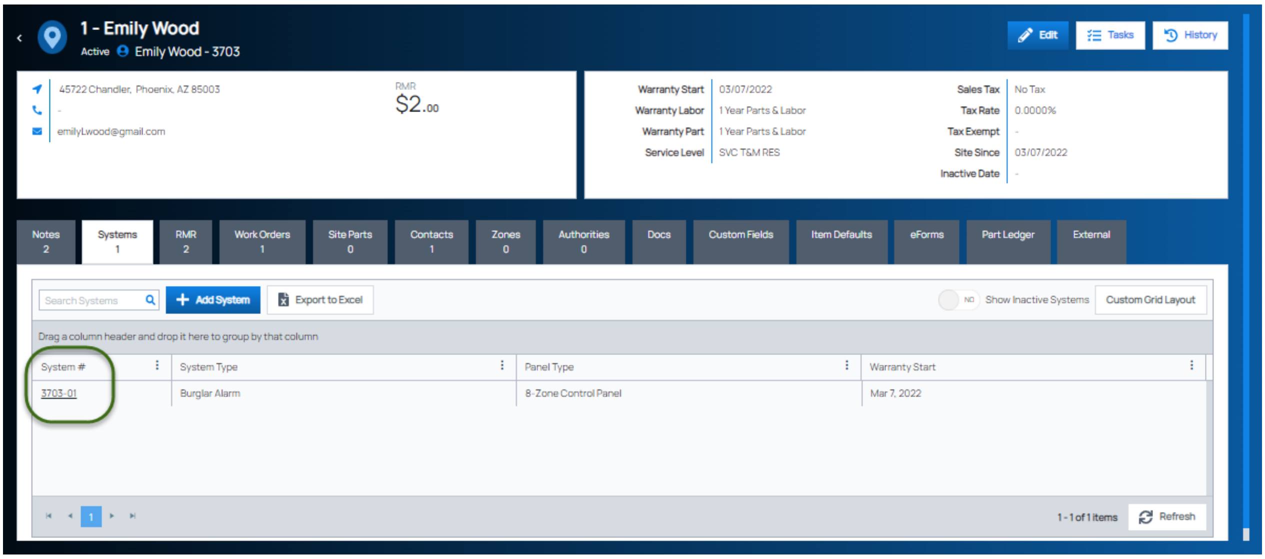
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site linked to the System for which you want to replace a document.



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

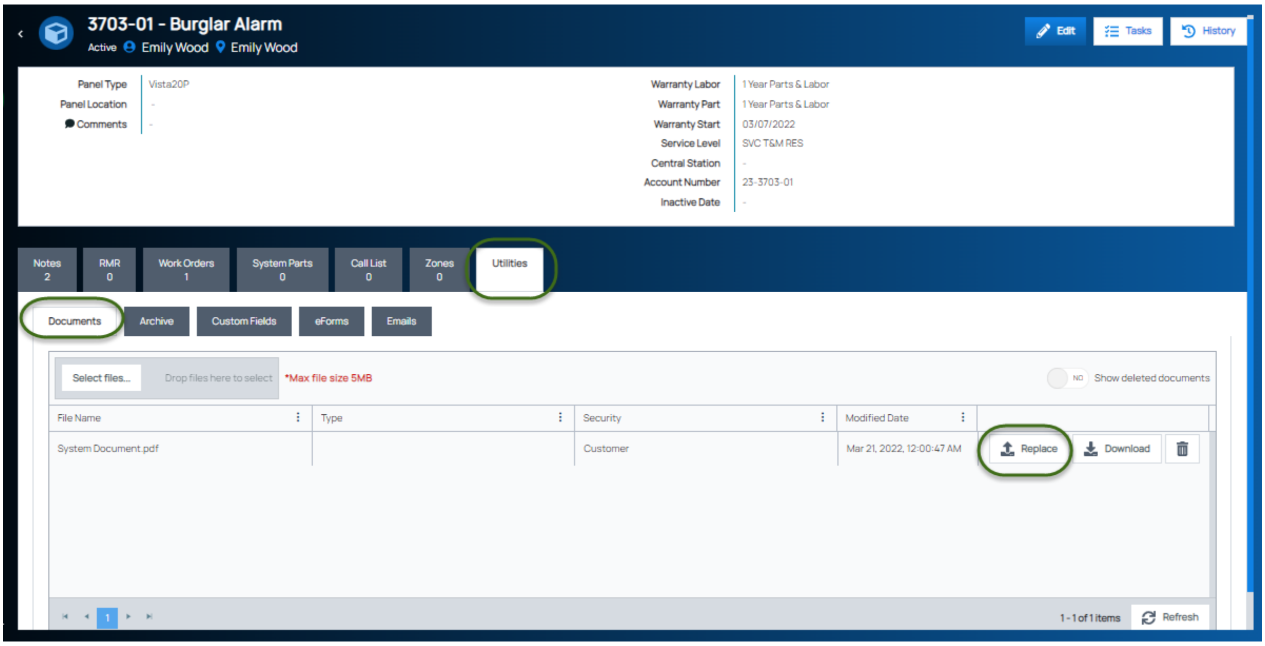


A list of Systems attached to the Site will be listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to replace a document.



The System record will be displayed. Click on the Utilities tab, and then click on the Documents tab. Locate the document, and then click on the Replace button.

The Windows file explorer will open. Locate and select the document that will replace the existing document. The previous document will be deleted, and the selected document will be listed in the grid area.


3703-01 - Burglar Alarm
Active Emily Wood Emily Wood
Edit
Tasks
History
Panel Type Vista20P
Panel Location -
Comments -
Warranty Labor 1 Year Parts & Labor
Warranty Part 1 Year Parts & Labor
Warranty Start 03/07/2022
Service Level SVC T&M RES
Central Station -
Account Number 23-3703-01
Inactive Date -
Notes 2
RMR 0
Work Orders 1
System Parts 0
Call List 0
Zones 0
Utilities
Documents
Archive
Custom Fields
eForms
Emails
Select files...
Drop files here to select
*Max file size 5MB
Show deleted documents
File Name
Type
Security
Modified Date
System Document.pdf
Customer
Mar 21, 2022, 12:00:47 AM
Replace
Download
1 - 1 of 1 items
Refresh