

# Replace System Documents

Last Modified on 12/20/2024 10:19 am EST

You can replace a currently attached document with a different document. Use this option 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: 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.

**Customers**

Customers Sites Systems

Search Customers  + Add Customer Export to Excel

Master Customers  Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

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

**Cactus World**

Customer #3652 Active Normal Commercial - Since 12/5/21

Total Balance Due Total RMR  
\$0.00 \$0.00

Customer Aging

Address 3601 Saguaro Street  
Tucson, AZ 85773  
Phone (888) 254-8765  
Cell  
Email theresa@boldgroup.com

Salesperson Theresa Scalia  
Last Statement  
Default Term  
Delivery Method Print  
Delivery RMR Inv

Comments Stages Integration test

Invoices 0 Credits 0 **Sites/Systems 1/1** RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 1 Documents Archive Custom Fields eForms Email

+ Add Site Show Inactive Sites

Site N.	Site Name	Address	City	Sta.
<a href="#">1</a>	Cactus World-Corporate	3601 Saguaro Street	Tucson	AZ

1 - 1 of 1 items Refresh

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

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 replace a document.

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: 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
<a href="#">3703-01</a>	Burglar Alarm	8-Zone Control Panel	Mar 7, 2022

1 - 1 of 1 items Refresh

The System record opens. Click the Utilities tab, and then click the Documents tab. Locate the document, and then click the **Replace** button.

The Windows file explorer opens. Locate and select the document to replace the existing document. The previous document is deleted, and the selected document is listed in the grid area.

**3703-01 - Burglar Alarm**  
Active Emily Wood Emily Wood

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	<b>Replace</b> Download

1 - 1 of 1 items Refresh