

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.

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
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguario Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

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.

Cactus World
Customer #3652 Active Normal Commercial Since 12/5/21

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address: 3601 Saguario Street, Tucson, AZ 85773
Phone: (888) 234-8765
Cell:
Email: theresa@boldgroup.com

Salesperson: Theresa Scalia
Last Statement
Default Term
Delivery Method
Delivery RMR Inv: YES

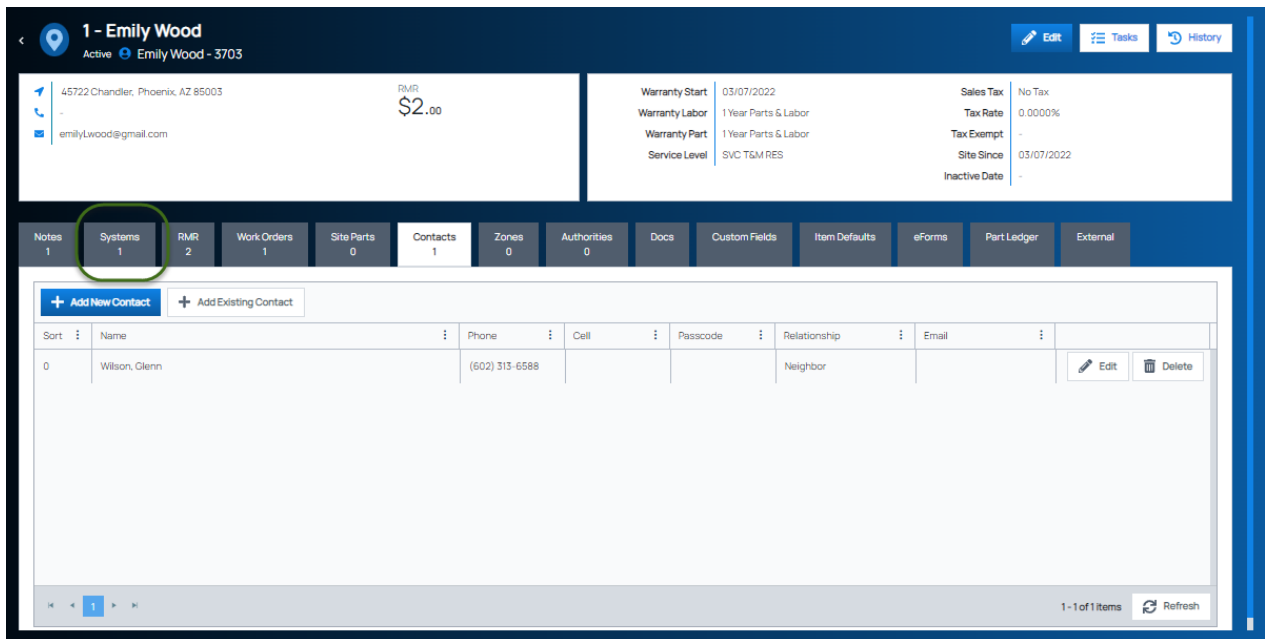
Comments: Stages Integration test

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

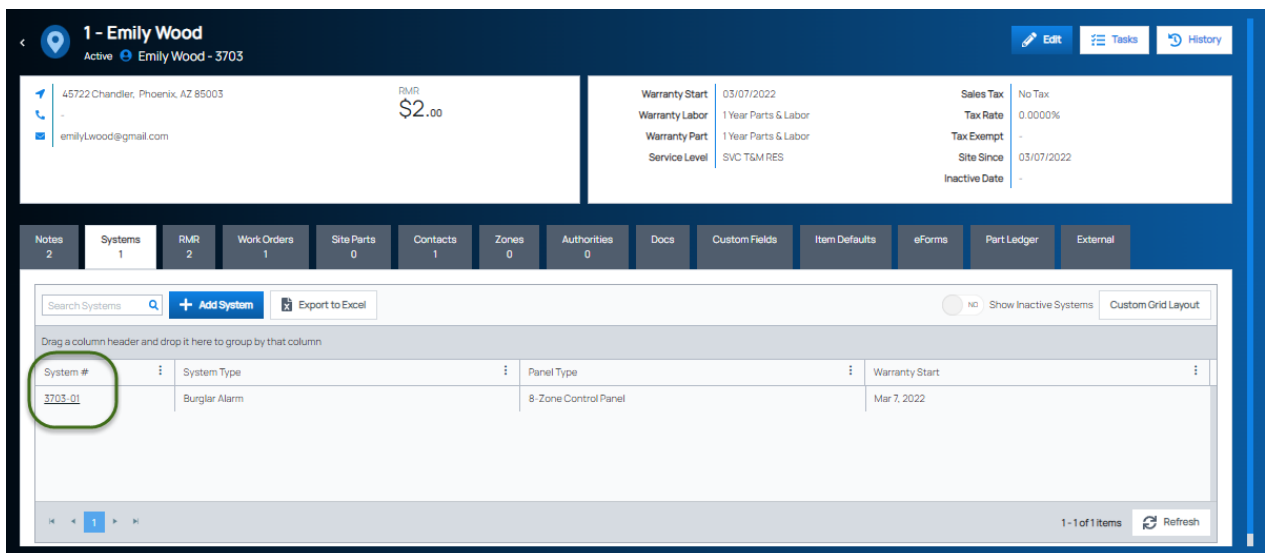
Site N.	Site Name	Address	City	Sta.
1	Cactus World-Corporate	3601 Saguario Street	Tucson	AZ

1 - 1 of 1 items Refresh

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	Warranty Labor	1 Year Parts & Labor
Panel Location	-	Warranty Part	1 Year Parts & Labor
Comments	-	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 NO 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