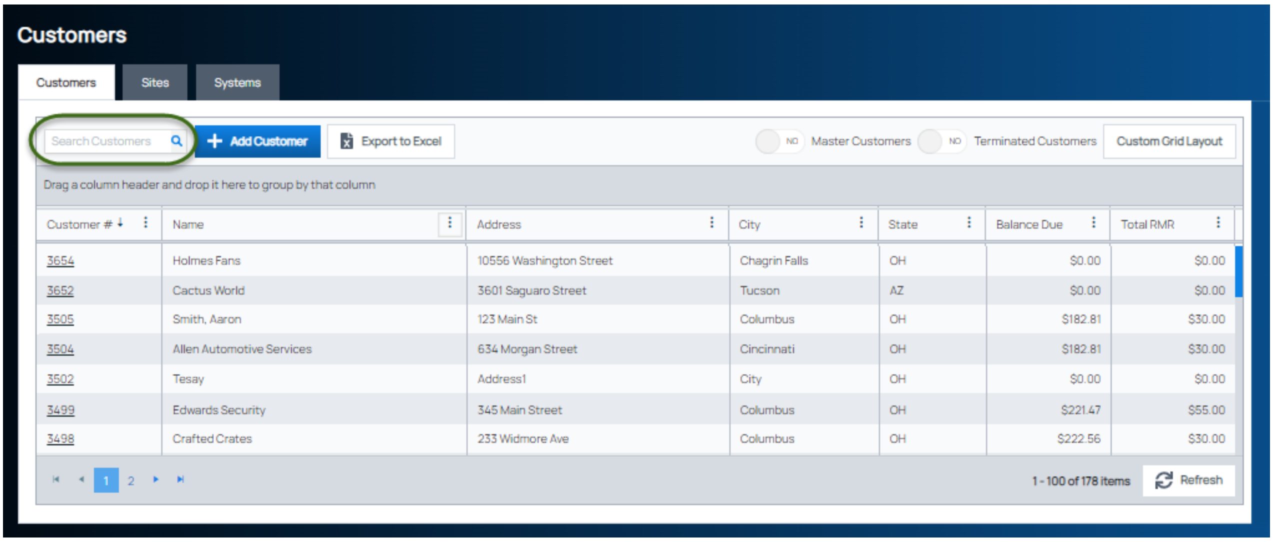
Replace System Documents

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

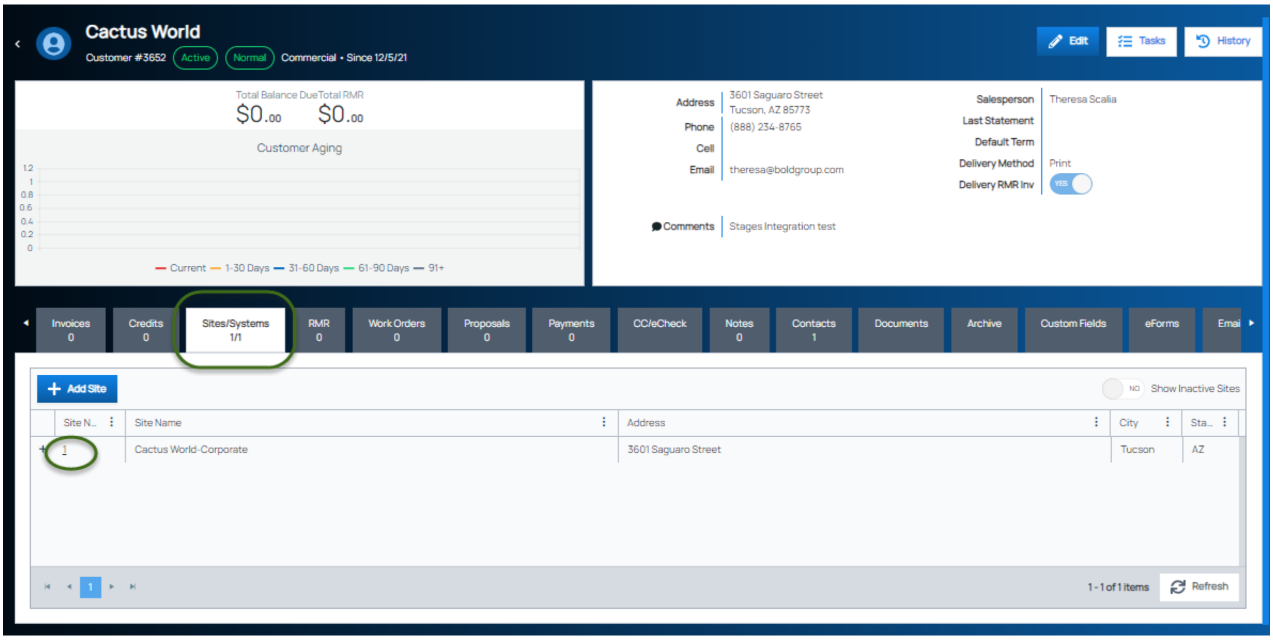
You can replace a currently attached document with a different document. Use this option if there is a newer revision of the document or if the incorrect document was uploaded.

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.

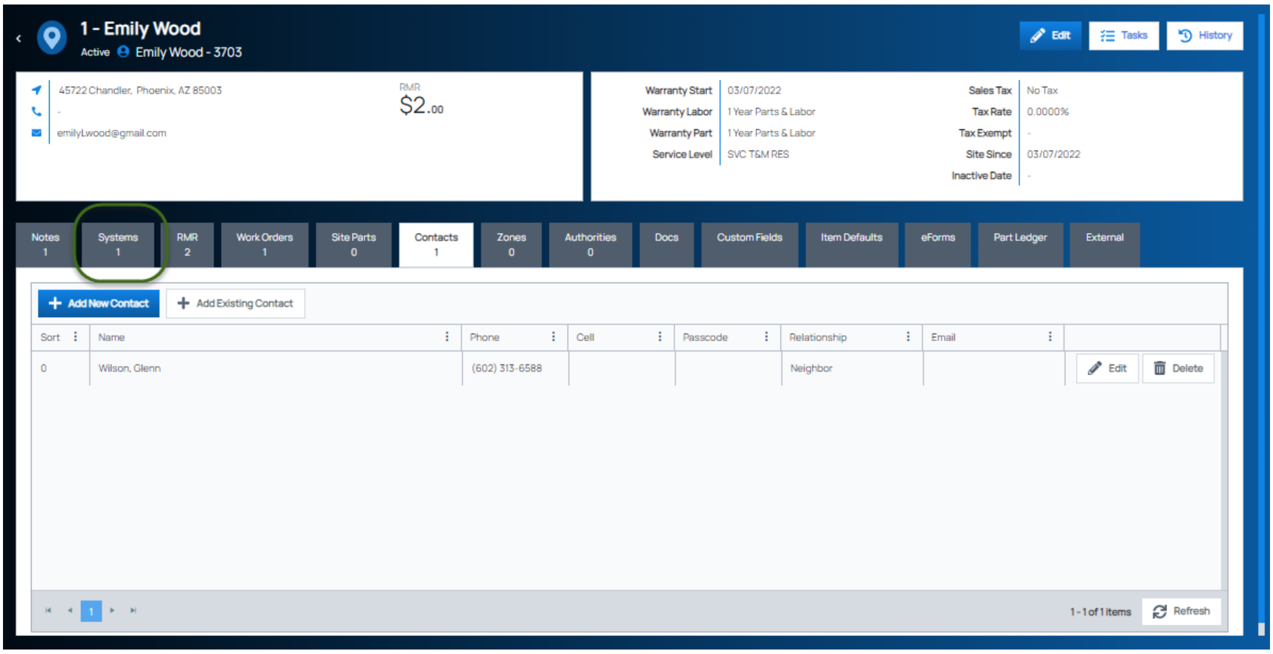
The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



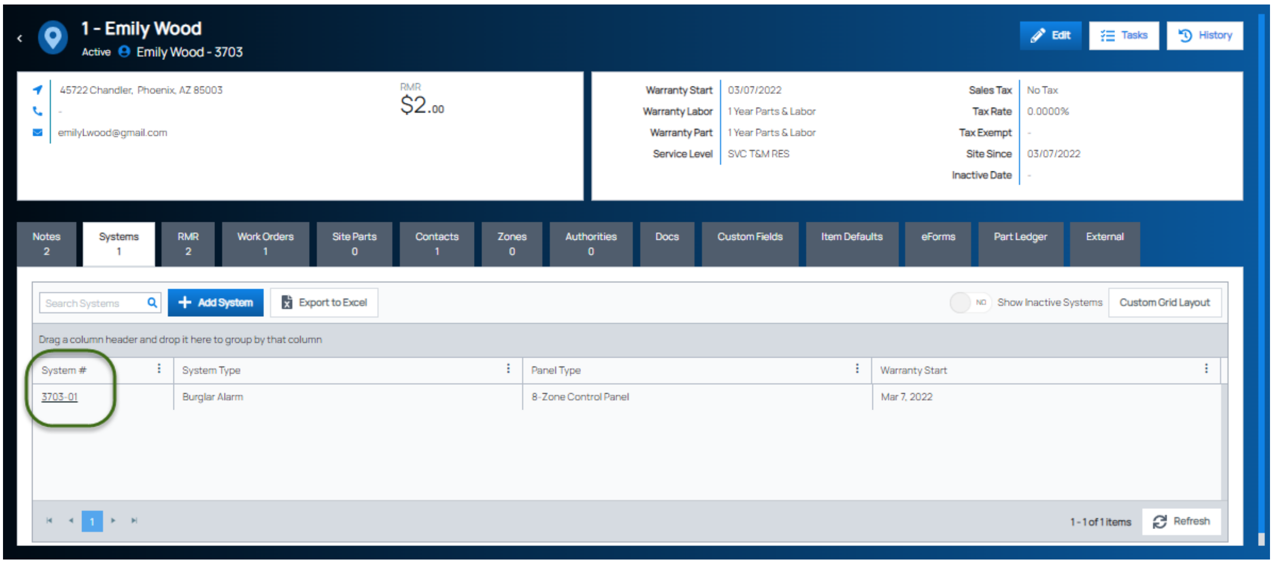
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site linked to the System for which you want to replace a document.



The Site record opens. Click the Systems tab.

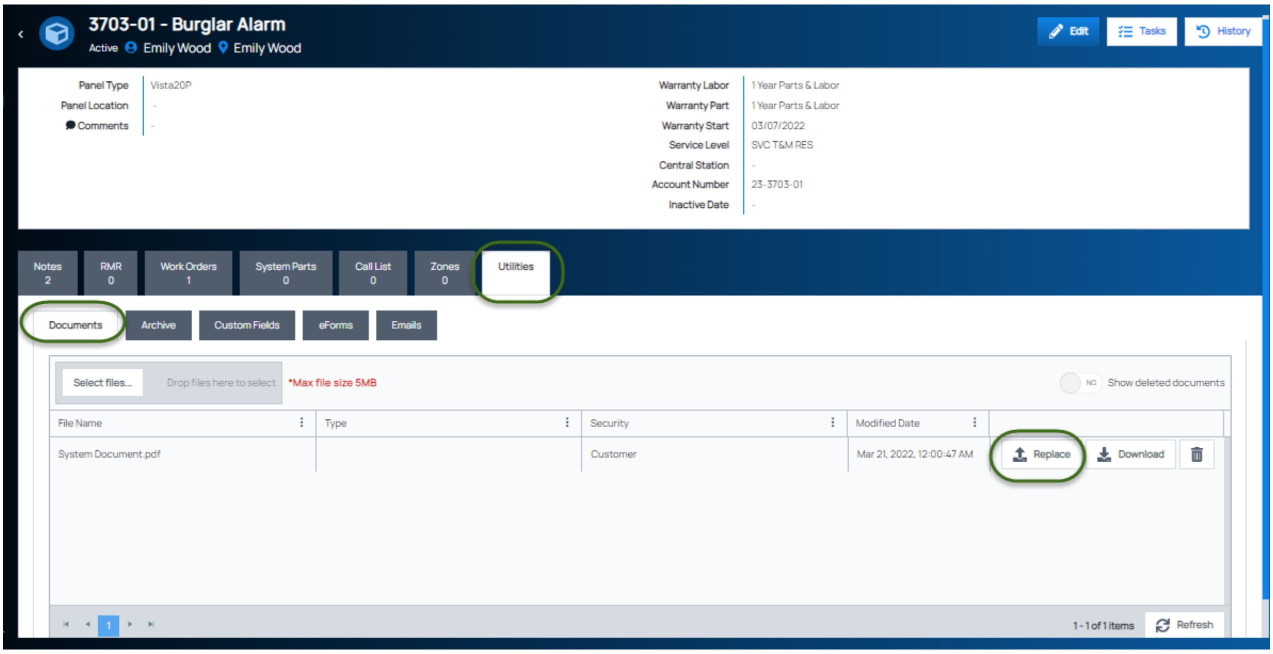


A list of Systems attached to the Site is listed in the grid area. In the System Number column, click the hyperlink of the System for which you want to replace a document.



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
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