Download System Documents

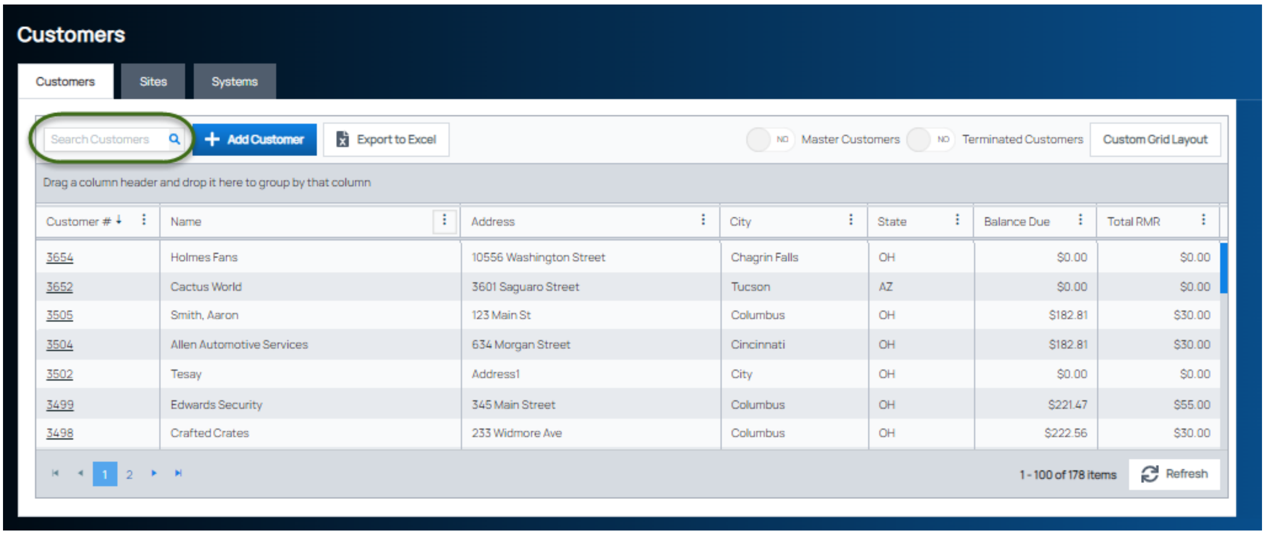
Last Modified on 05/01/2022 6:22 am EDT

To be able to open and view an attached document, you will need to download the file. The software creates a .pdf file of the selected document. Once downloaded you may open the .pdf file for viewing.

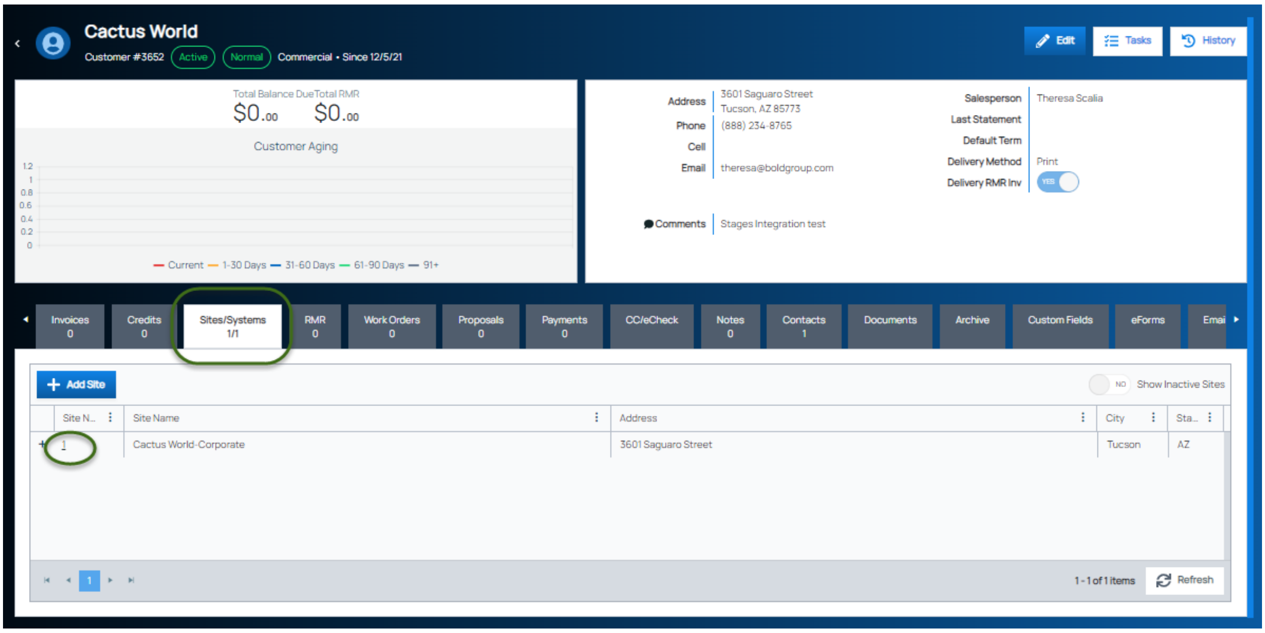
To download a System Document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

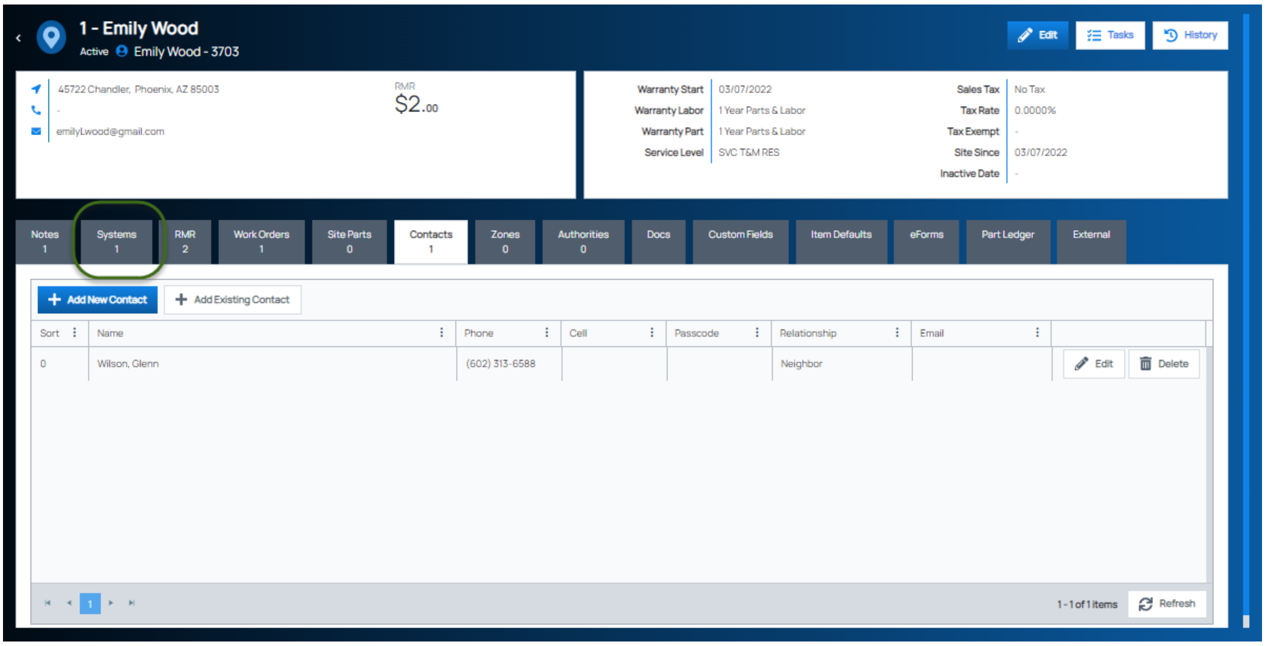
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



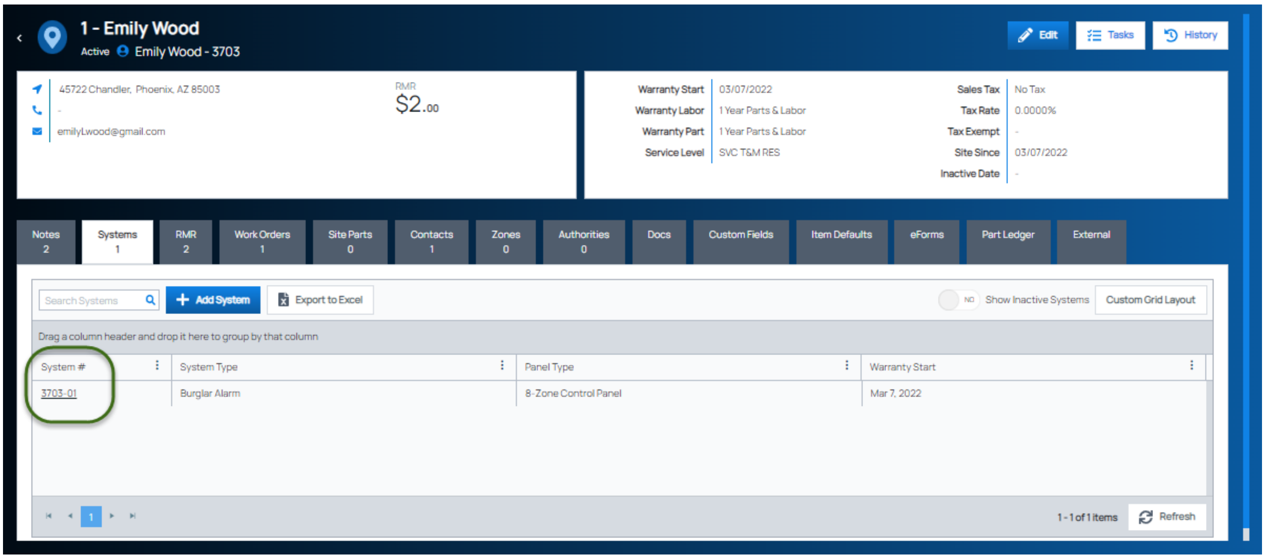
The Customer record will be displayed. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site linked to the System for which you want to download a document.



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

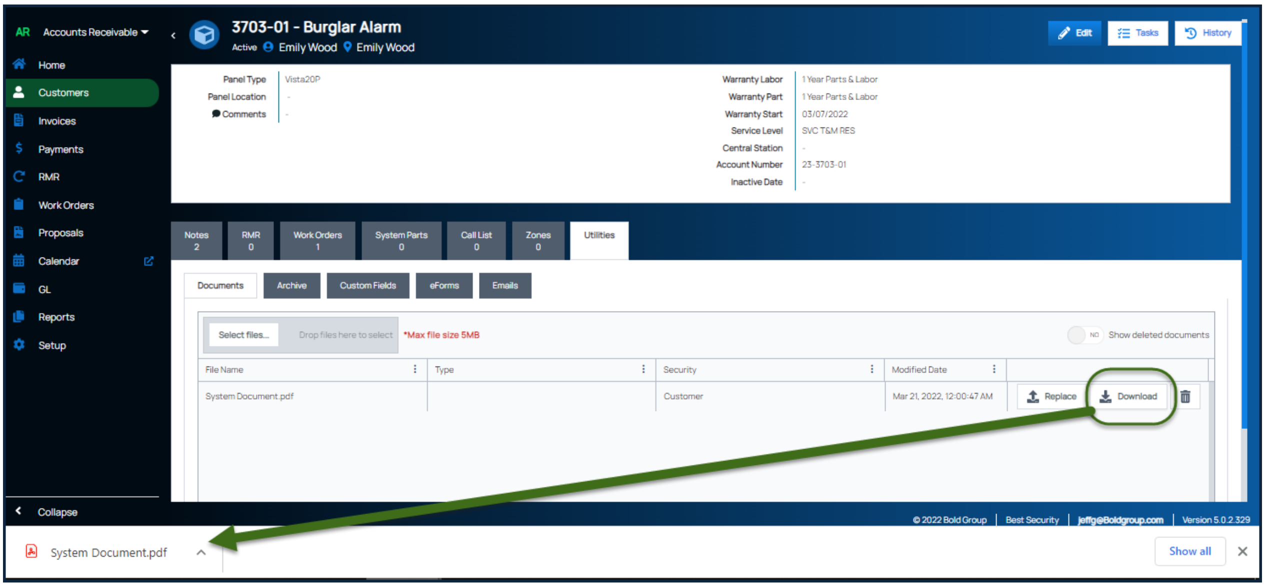


A list of Systems attached to the Site will be listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to download a document.



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 Download button.

In a few seconds, the file will appear on your taskbar. Double-click on the file to open for viewing.



AR
Accounts Receivable
Home
Customers
Invoices
Payments
RMR
Work Orders
Proposals
Calendar
GL
Reports
Setup
Collapse
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
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