

Download System Documents

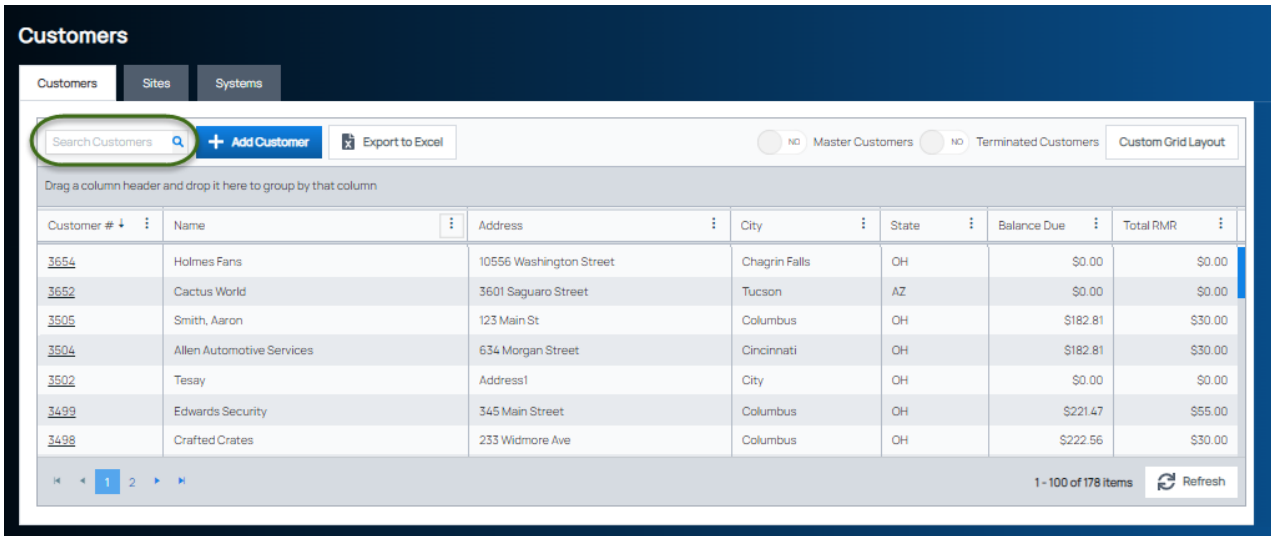
Last Modified on 12/20/2024 10:09 am EST

To open and view an attached document, download the file. The software creates a PDF file of the selected document. Once downloaded, you can open the file for viewing.

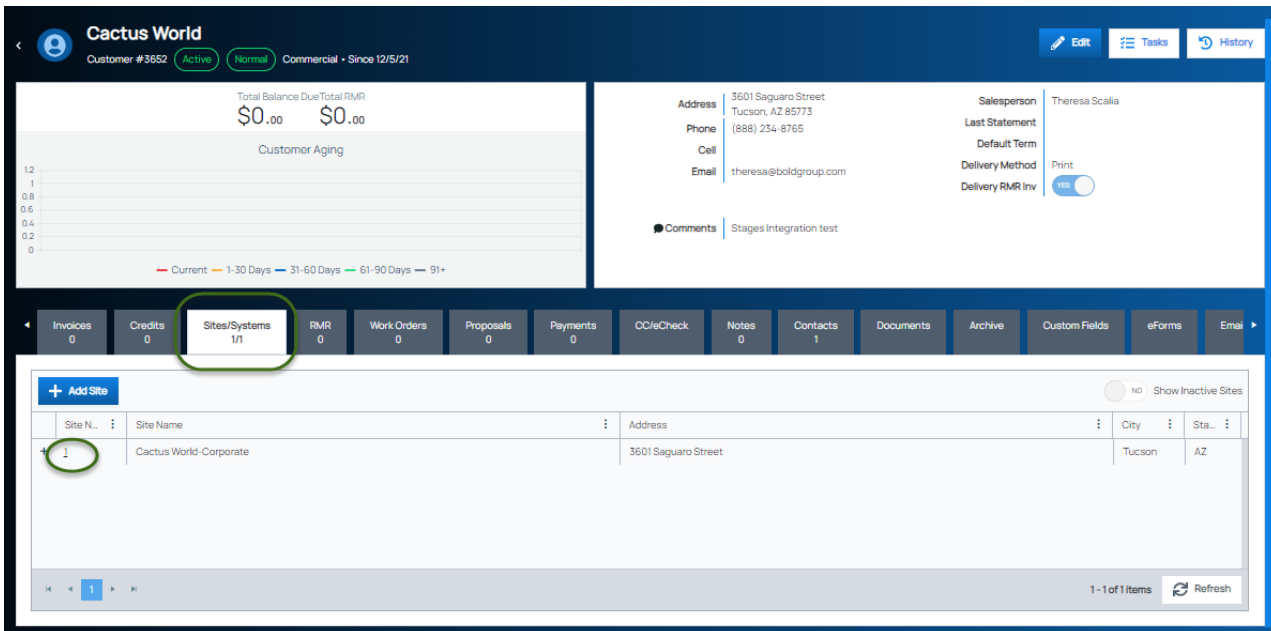
To download a System Document, you must first access the customer record.

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

The Customers list opens. Locate the customer in the list, and then click 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 download a document.



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

+ Add New Contact + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email
0	Wilson, Glenn	(602) 313-6588			Neighbor	

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 on the hyperlink of the System for which you want to download a document.

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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
3703-01	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 Download button.

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

AR Accounts Receivable < 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 Utilites

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

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