Download System Documents

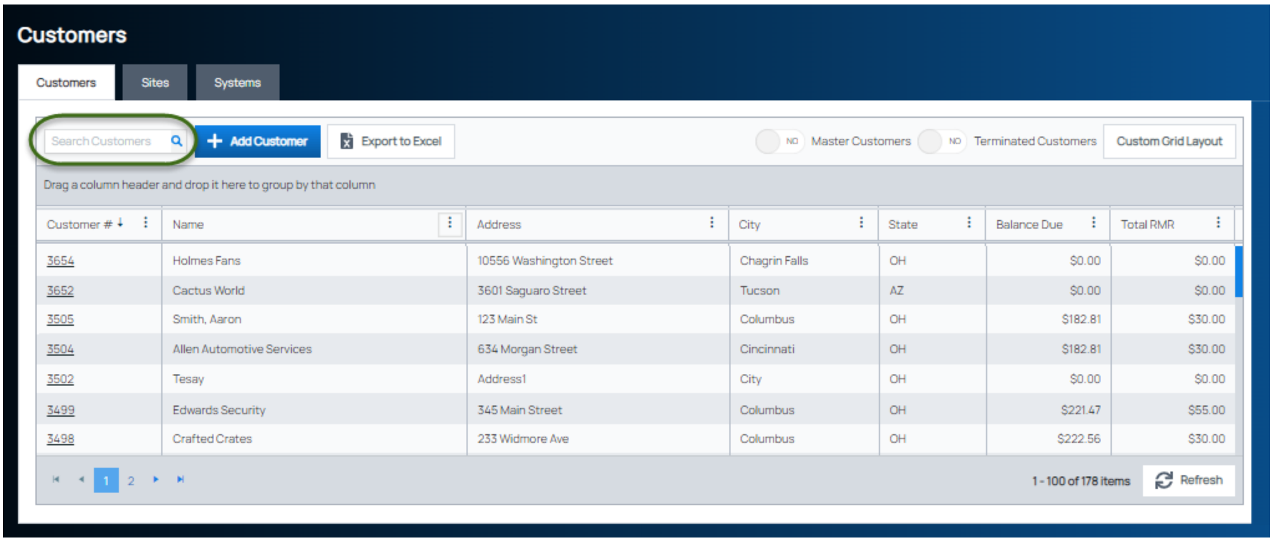
Last Modified on 12/20/2024 10:09 am EST

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.

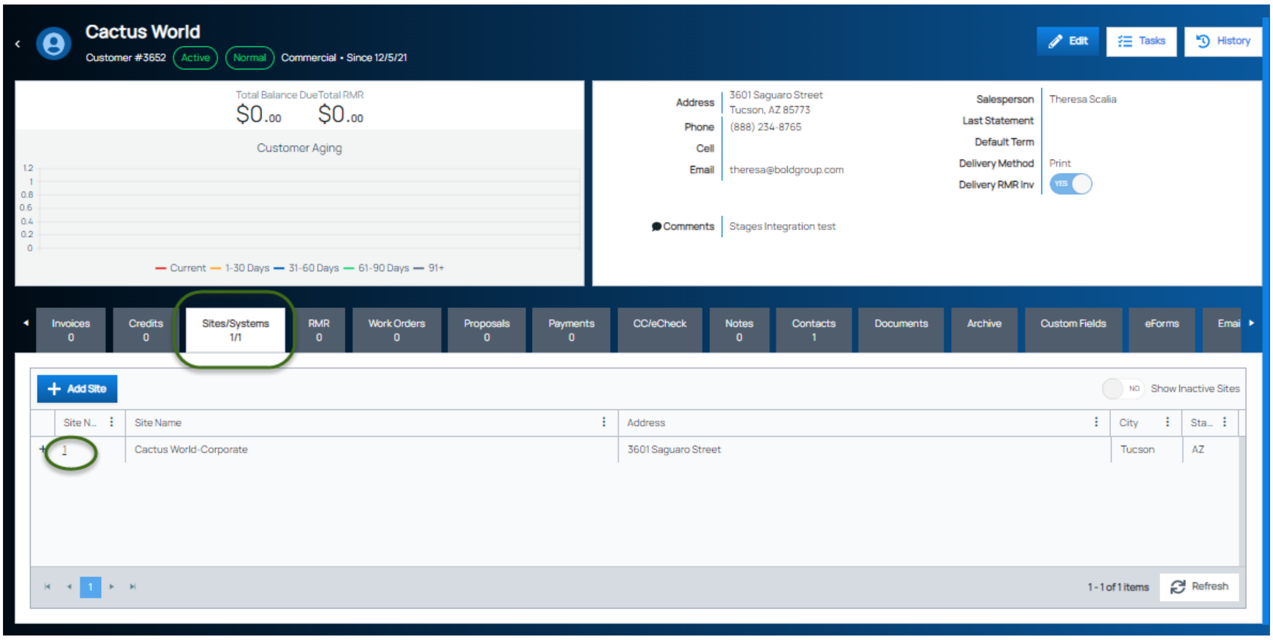
To download a System Document, you must first access the customer record.

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

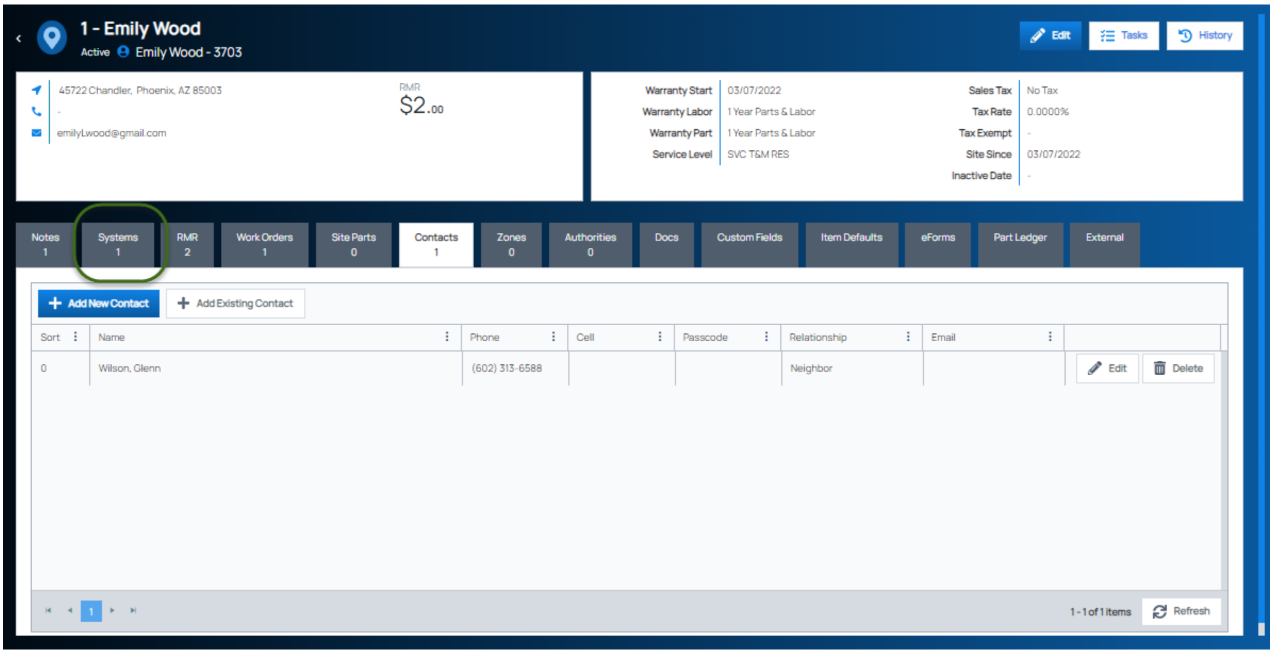
The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



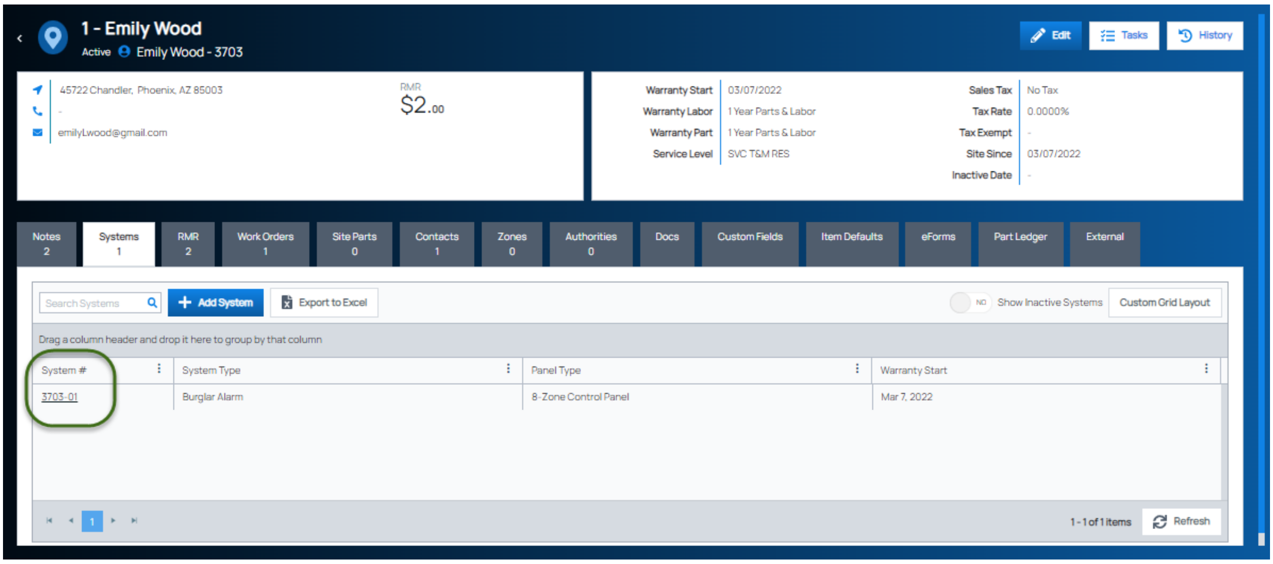
The Customer record opens. Click the Sites/Systems tab, and then in the Site Number column, click the hyperlink of the Site linked to the System for which you want to download a document.



The Site record opens. Click the Systems tab.

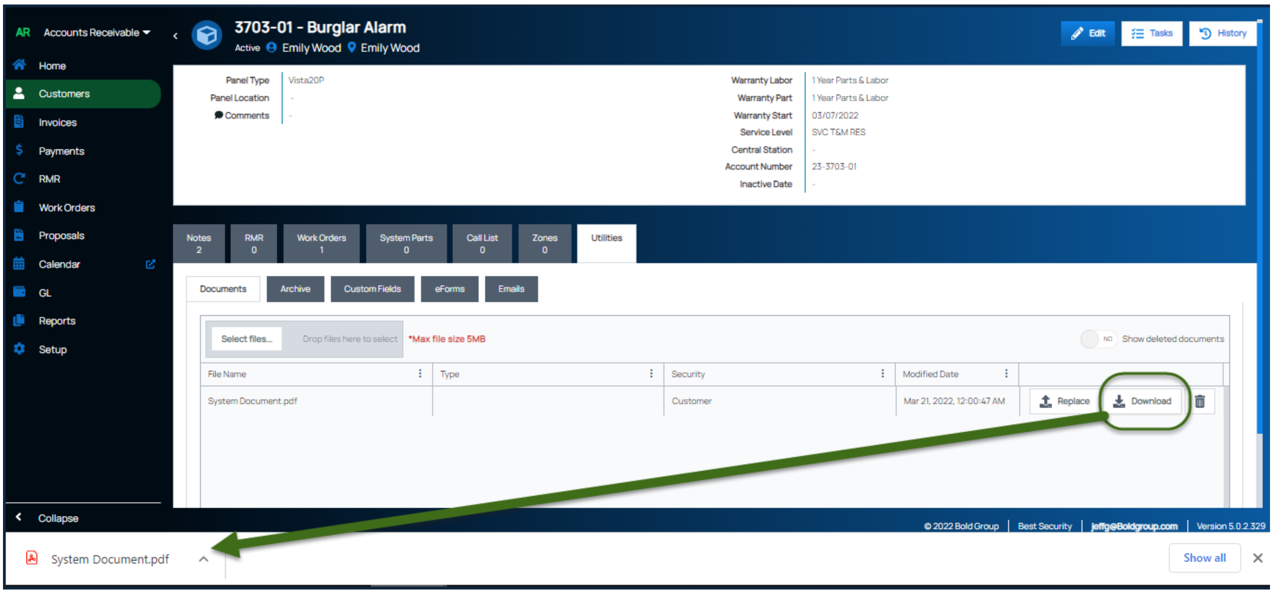


A list of Systems attached to the Site is listed in the grid area. In the System Number column, click on the hyperlink of the System for which you want to download a document.



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
Home
Customers
Invoices
Payments
RMR
Work Orders
Proposals
Calendar
GL
Reports
Setup
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
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