


Documents Overview

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Your company has the ability to upload documents in various areas of the application, including a customer, site, system, work order, proposal, and vendor. When adding a new document, a user must select a document type from a drop-down list. The Document Types are entered and maintained in setup (Setup > Other > Document Types).

When uploading a document, it should be saved on the entity that is most logical. For example, customer-related documents should be saved at the Customer level, whereas system-related documents should be saved at the System level.

 When uploading documents, the file size cannot exceed 150 MB.
