Customer Explorer Documents Overview and Topics

Existing Documents and Scanned Documents may be attached to a Customer, Site or System record from the Customer Explorer. The process is the same for attaching, editing or deleting documents in any area of the Customer Explorer. Below is a screen shot of a Customer Explorer record showing where documents may be attached or located for viewing.

Note:

- Documents may not be attached from the Job Documents folder; these documents are attached to a particular Job. The document(s) may be opened for viewing.
- Documents that are attached to Service or Inspection Tickets are listed and viewable under the System Documents.

Follow the links below for SedonaDocs instructions for the Customer Explorer.

- Add an Existing Document
- Scan New Document
- Edit Existing Document
- Delete Existing Document
- View Existing Document