Customer Explorer Documents-Add

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Follow the steps below to add one or more existing documents to a Customer, Site or System Document folder. The right-click Document functions shown on Customer Documents are the same for Site and System Documents. The process described below applies to adding existing Documents for Customers, Sites and Systems. Make certain to attached documents to the appropriate area of the customer tree.

1. To add an existing document to the list, highlight the Documents option from the customer tree; right-click and select Add Existing Document.

2. The Document Add form will be displayed. A User may add one or multiple documents at one time. In the header section of the Document Add form, enter a Description for the document. Select the appropriate Security Level from the drop-down list. Select the appropriate Document Type from the drop-down list.

3. Once the header information has been filled in, navigate to the grid area below the header to locate the document. Click the to the right of the File field; the Windows File Explorer will open. Locate and select the file to be attached then double-click on the file name. If you want to add more than one file, highlight the first file, the hold down the CTRL key on your keyboard to select additional files.

4. The File name, Description, Security Level and Document Type will fill in on the first line of the file grid area. If additional documents are being added at this time, proceed to the next line in the file grid and follow the instructions from step 3 above. Continue until all documents to be attached are listed. As each new file is added to the file grid, the Description, Security Level and File Type (Document Type) will default from the information that was entered in the header area of the Document Add form. Modify each file line with the appropriate selections.

5. Once the document list is complete, click the Upload button located at the lower right of the Document Add form. The documents will be added and displayed in the Customer's Documents list.