Prospect Documents

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Existing Documents and Scanned Documents may be attached when receiving a Purchase Order. To add a document to a Purchase Order receipt, follow the instructions below.
Existing Documents and Scanned Documents may be attached to a Prospect record. To add a document to a Prospect, follow the instructions below.
1. Open the Prospect record where a document will be attached.
2. Once the Prospect record is open, click the Documents button on the Prospect Toolbar. Click the New button located at the lower right of the form then click Add or Scan button.

- If selecting the Add button, continue by following the instructions for Adding General Documents steps 2 through 5.

Once the document has been uploaded, it will be displayed in the Job Documents list [within the Job record] and in the Job Documents folder within the Customer Explorer.

- If selecting the Scan button, continue by following the instructions for Scanning General Documents steps 2 through 6.

Once the document has been uploaded, it will be displayed in the Prospect Documents list [within the Prospect record] and in the Prospect Documents folder within the Customer Explorer.