

Docs Tab

Last Modified on 11/07/2016 2:31 pm EST

Upload and Manage documents linked to this customer.

Documents *Max File Size 5MB

Show Deleted Documents [Upload Files](#)

File Name	Description	Type	Security	Modified	
AlarmBill (2 pages).pdf			Internal	8/26/2015	

Add Documents

Upload Files

Click "Upload Files" on the right side of the page. Select the file(s) you would like to upload from your documents and click the "enter" key on your keyboard.

Documents *Max File Size 5MB

Show Deleted Documents [Upload Files](#)

File Name	Description	Type	Security	Modified	
note.png			Internal	8/1/2016	

The document(s) will appear below.

Complete Fields

Complete document fields by clicking the space beneath each heading.

File Name	Description	Type	Security	Modified	
Vendor Notes.png	Notes	Other	Internal	8/1/2016	

File Name

Edit the file name if you wish. If you wish to upload a new file to overwrite this document click the upload icon that appears when editing the field.

Description

enter a brief description of the document.

Type

Select the document type from the dropdown box. [\(hyperlink to adding doc types\)](#)


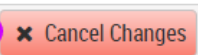
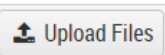
Security??



Save Changes

Click "Save Changes" on the left side of the page to update.

Documents

*Max File Size 5MB

  Show Deleted Documents 

File Name	Description	Type	Security	Modified	
Vendor Notes.png	Notes	Other	Internal	8/1/2016	 

Download Files

To download a file to your documents, click the download icon to the right of the file.

File Name	Description	Type	Security	Modified	
Vendor Notes.png	Notes	Other	Internal	8/1/2016	