Enterprise - Saving Customer Contracts and Important Customer Documents

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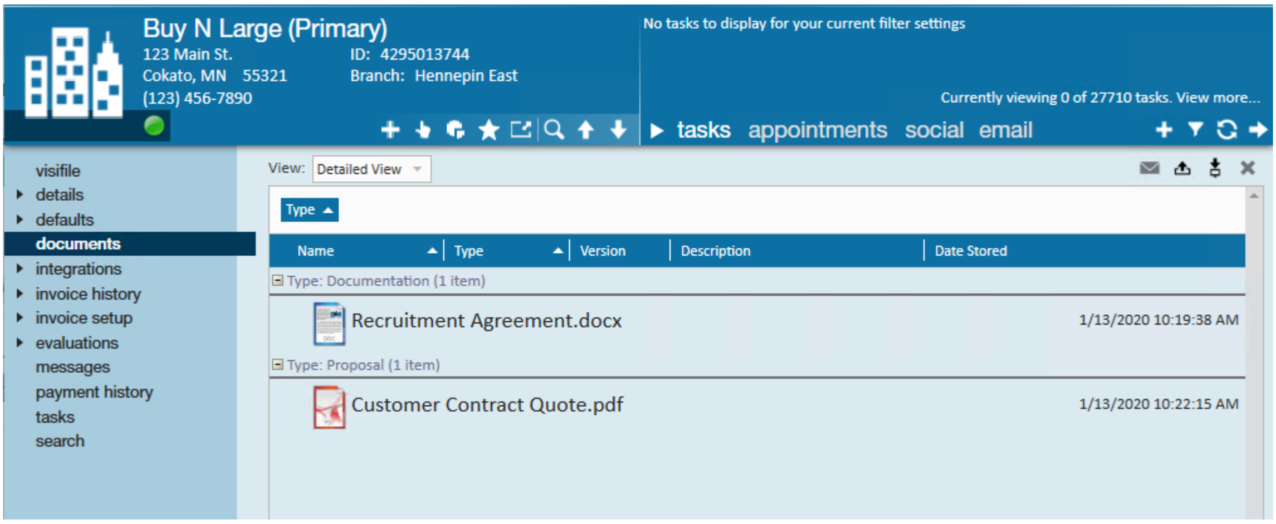
Saving Documents

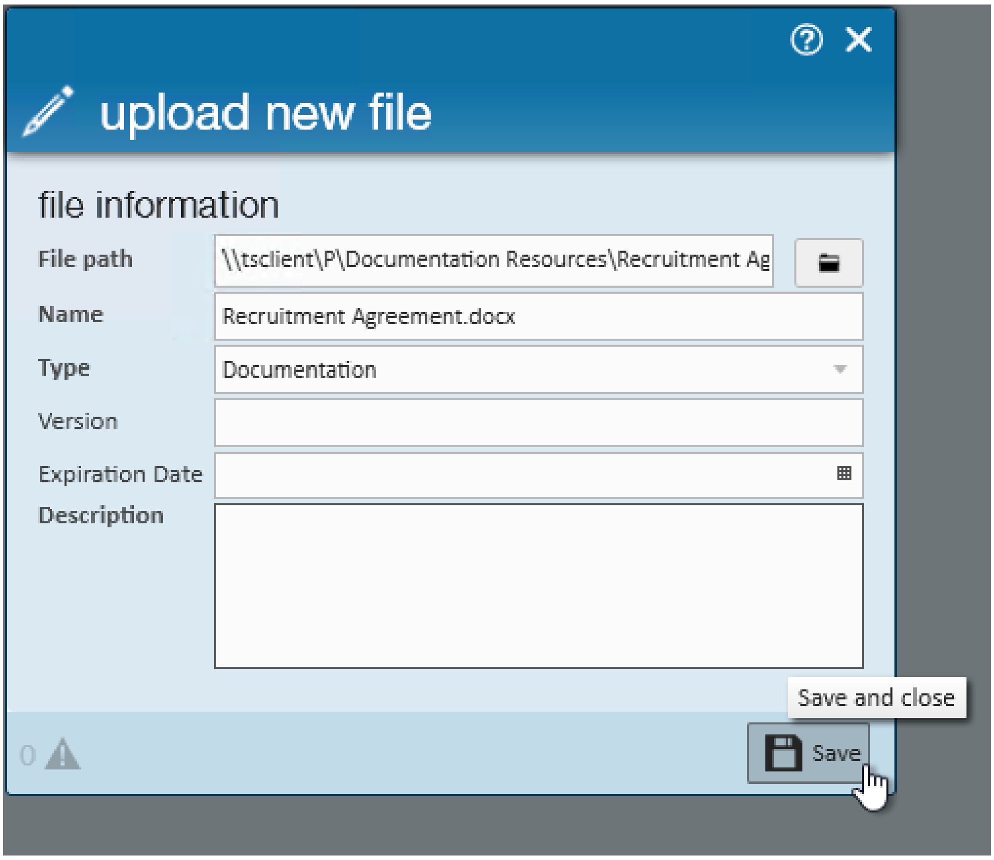
Where do you store your customer's contracts, important documents, job order requests, etc.? Why not in their record where they can be electronically stored anytime you need them. No need to go digging in your filing cabinets ever again!

Navigate to the customer record > Documents to review, upload, or download any customer specific documents:



To Add a Document:

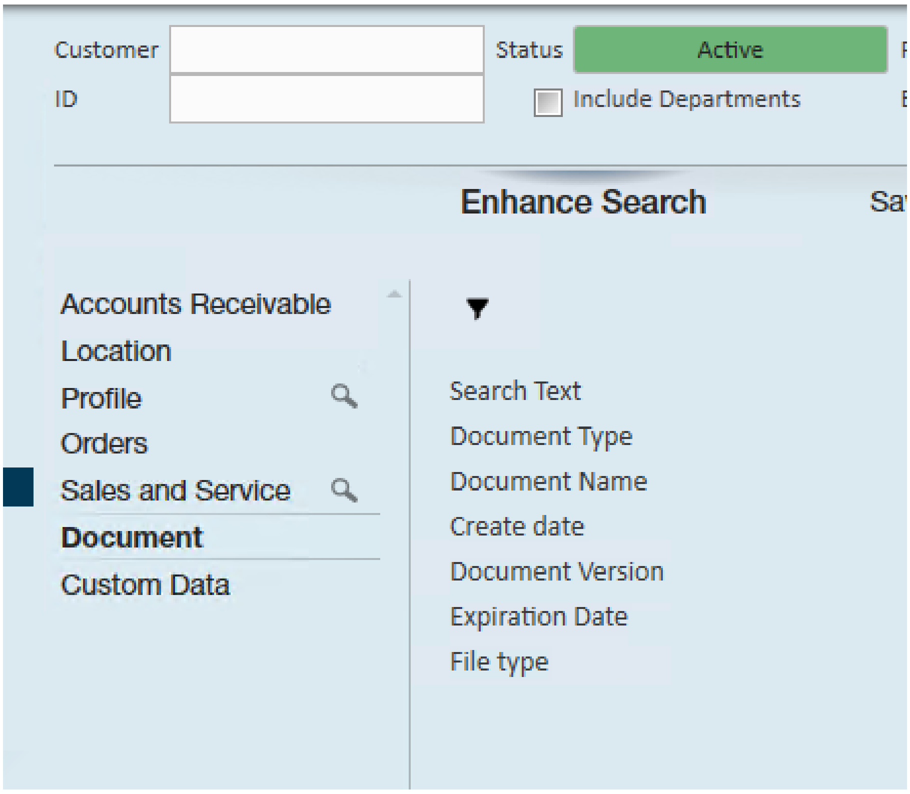
1. Select the  icon in the upper right
2. Enter the following information



1. Select the file from your computer (if you are having trouble finding it check out Accessing Local Drives in Enterprise)
2. Select the type of document
3. Optionally enter version, expiration or a description

3. Select Save

You can also search for customers based on what documents they have:



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