

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:

The screenshot displays a software interface for a customer record. At the top, the customer name is "Buy N Large (Primary)" with address "123 Main St. Cokato, MN 55321" and phone "(123) 456-7890". The ID is "4295013744" and the branch is "Hennepin East". A navigation bar includes "tasks appointments social email". The left sidebar has a "documents" section highlighted. The main content area shows a table of documents:

Name	Type	Version	Description	Date Stored
Type: Documentation (1 item)				
Recruitment Agreement.docx				1/13/2020 10:19:38 AM
Type: Proposal (1 item)				
Customer Contract Quote.pdf				1/13/2020 10:22:15 AM

To Add a Document:

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

upload new file

file information

File path \\tsclient\p\Documentation Resources\Recruitment Ag

Name Recruitment Agreement.docx

Type Documentation

Version

Expiration Date

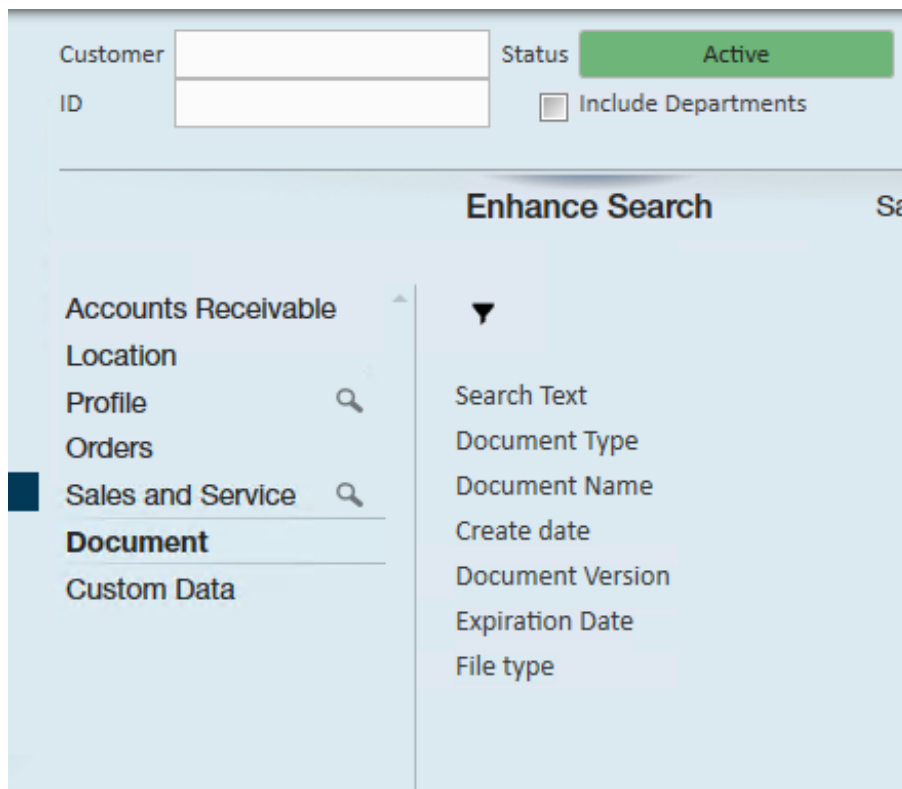
Description

Save and close

Save

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:



Related Articles