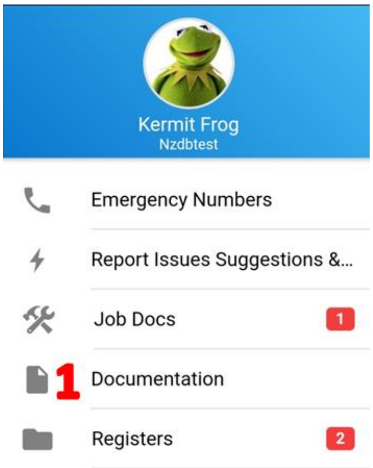
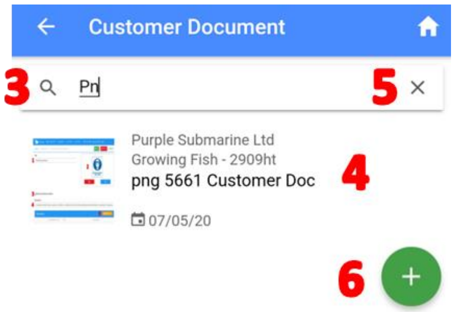
Customer Documents

Here you can access Customer Documents that have loaded into the system in the web app under **Documentation/Customer Document** or added in the mobile app as per below.

1. From the Main Menu select Documentation.
2. Select Customer Documents.
3. Type in the search bar to narrow down the selection.
4. Click on the item you wish to view – click the link to see notes for viewing PDF.
5. Click the X to clear the search box.
6. Click to add new documents or images.





7. Select a Customer & Worksite.
8. Select Job No – this field is optional
9. Type in a Title – this can be used to search on.
10. Description & Review Date are optional
11. Click **+ADD FILE** to upload file or take a picture.
12. Tap the cloud to load more images.
13. Click **✓OKAY** when finished.
14. To see the files loaded or add more click **VIEW FILES**.
15. Click to save.