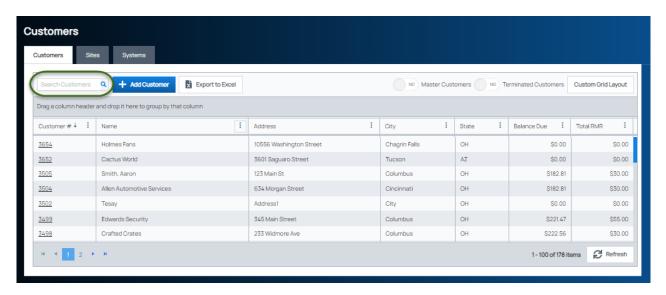
Edit Customer Documents

Last Modified on 12/02/2025 1:37 pm EST

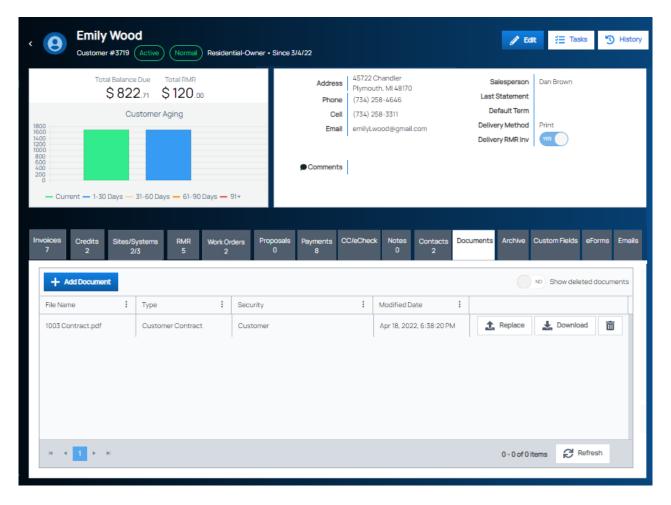
To edit a customer document, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The customer record opens. Click on the Documents tab.



Locate the document to be edited, and then double-click anywhere on the document row within the grid.

A dialog box opens showing the file name of the document in the banner. There are only two editable fields available: the File Name and the Document Type. After making the necessary changes, click the **Save** button.

