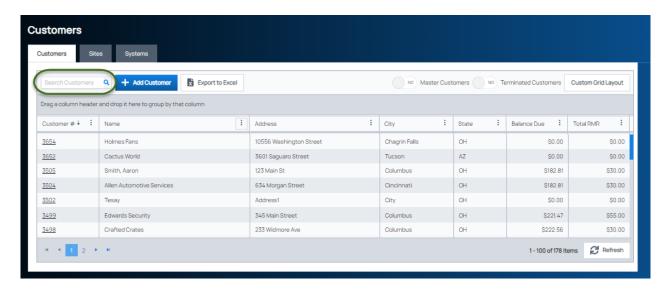
Edit Customer Documents

Last Modified on 04/28/2022 10:25 am EDT

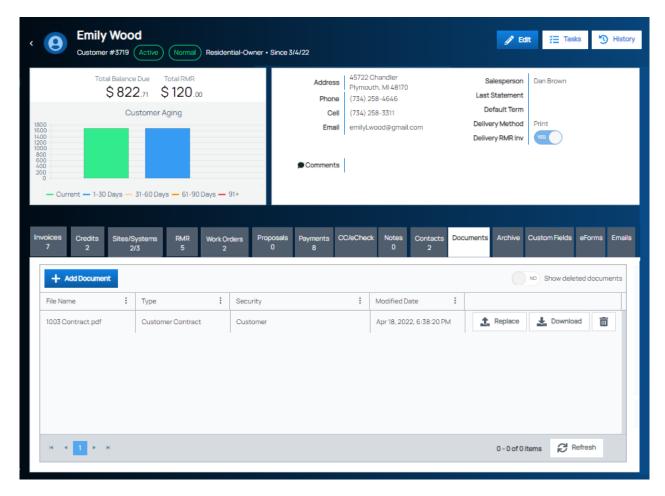
To edit a Customer Document, you must first access the customer record.

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

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



The Customer record will be displayed. 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 will be displayed, 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.

