

# 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.

### Customers

Customers

Sites

Systems

Search Customers

+ Add Customer

Export to Excel

NO

Master Customers

NO

Terminated Customers

Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3654</a>	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3652</a>	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
<a href="#">3505</a>	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
<a href="#">3504</a>	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
<a href="#">3502</a>	Tesay	Address1	City	OH	\$0.00	\$0.00
<a href="#">3499</a>	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
<a href="#">3498</a>	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 2

1 - 100 of 178 items

Refresh

The customer record opens. Click on the Documents tab.

Emily Wood

Customer #3719

Active

Normal

Residential-Owner • Since 3/4/22

Edit

Tasks

History

Total Balance Due

\$822.71

Total RMR

\$120.00

Customer Aging

Bar chart showing Customer Aging. The Y-axis ranges from 0 to 1800. The X-axis shows five categories: Current (green), 1-30 Days (blue), 31-60 Days (orange), 61-90 Days (yellow), and 91+ (red). The 'Current' bar is the highest, reaching approximately 1600. The '1-30 Days' bar is the second highest, reaching approximately 1400. The other bars are significantly lower.

Address

45722 Chandler  
Plymouth, MI 48170

Phone

(734) 258-4646

Cell

(734) 258-3311

Email

emilyLwood@gmail.com

Salesperson

Dan Brown

Last Statement

Default Term

Delivery Method

Print

Delivery RMR Inv

YES

Comments

Invoices 7

Credits 2

Sites/Systems 2/3

RMR 5

Work Orders 2

Proposals 0

Payments 8

CC/eCheck

Notes 0

Contacts 2

Documents

Archive

Custom Fields

eForms

Emails

+ Add Document

NO Show deleted documents

File Name	Type	Security	Modified Date	
1003 Contract.pdf	Customer Contract	Customer	Apr 18, 2022, 6:38:20 PM	<div>Replace</div> <div>Download</div> <div></div>

0 - 0 of 0 items

Refresh

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.

Edit C-3719 Security Contract.docx

File Name

C-3719 Security Contract.docx

Document Type

Customer Contract

Save

Cancel