

Edit Customer Documents

Last Modified on 12/12/2024 2:28 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 screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs, there is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. To the right of these buttons are two toggle switches for 'Master Customers' and 'Terminated Customers', both currently turned off, and a 'Custom Grid Layout' button. Below the search and action buttons, there is a instruction: 'Drag a column header and drop it here to group by that column'. The main part of the interface is a table with the following columns: 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The table contains several rows of customer data. At the bottom of the table, there is a pagination bar showing '1' of 2 pages and a 'Refresh' button. The text '1 - 100 of 178 Items' is also visible.

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

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

Legend: Current (green), 1-30 Days (blue), 31-60 Days (orange), 61-90 Days (red), 91+ (purple)

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: 0 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	<a>Replace <a>Download <a>Trash

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 •

Document Type ▼