

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.

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
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguro 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

1 - 100 of 178 items Refresh

The Customer record will be displayed. 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

— Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+

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	<input type="button" value="Replace"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>

0 - 0 of 0 items

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.

Edit C-3719 Security Contract.docx ✕

File Name

Document Type