

Replace Customer Documents

Last Modified on 04/28/2022 10:27 am EDT

Users have the ability to replace a currently attached document with a different document. This option would be used if there is a newer revision of the document or if the incorrect document was uploaded.

To replace 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 screenshot shows a web application interface for managing customers. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. There are also two toggle switches for 'Master Customers' and 'Terminated Customers', both currently set to 'NO', and a 'Custom Grid Layout' button. Below this 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 seven rows of customer data. At the bottom of the table, there is a pagination control 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 will be displayed. Click on the Documents tab. Locate the document, and then click on the Replace button.

The Windows file explorer will open. Locate and select the document that will replace the existing document. The previous document will be deleted and the selected document will now be listed in the grid area.

Emily Wood
Customer #3703 Active Normal Residential-Owner - Since 3/7/22

[Edit](#) [Tasks](#) [History](#)

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

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

Address 45722 Chandler
Phoenix, AZ 85003

Phone
Cell
Email emilylwood@gmail.com

Salesperson Dian Brown

Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv

Comments

Invoices 1

Credits 0

Sites/Systems 11

RMR 2

Work Orders 1

Proposals 0

Payments 0

CC/Check

Notes 5

Contacts 3

Documents

Archive

Custom Fields

eForms

Email

Select files... Drop files here to select *Max file size 5MB Show deleted documents

File Name	Type	Security	Modified Date	
Customer Document - Rev04.pdf		Customer	Mar 21, 2022, 10:06:43 AM	Replace Download 🗑️
Customer Document - Rev03.pdf		Customer	Mar 21, 2022, 10:06:43 AM	Replace Download 🗑️
Customer Document - Rev02.pdf		Customer	Mar 21, 2022, 9:47:59 AM	Replace Download 🗑️
Customer Document - Rev01.pdf		Customer	Mar 20, 2022, 11:56:10 PM	Replace Download 🗑️

0 - 0 of 0 Items Refresh