

Replace Customer Documents

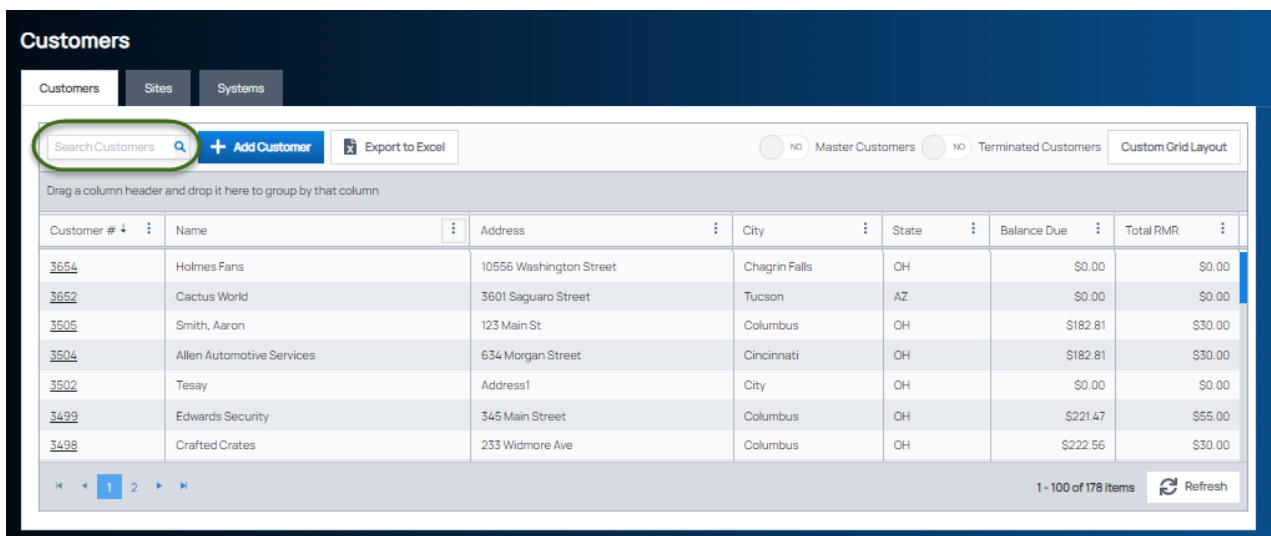
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You can replace a currently attached document with a different document. Do this if there is a newer revision of the document or if the incorrect document was uploaded.

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

From the main menu, arrive at the Customers list with this path: 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 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. To the right of the search bar are two radio buttons for 'Master Customers' and 'Terminated Customers', both set to 'NO', and a 'Custom Grid Layout' button. Below this is a grid of customer records. The grid has columns for Customer #, Name, Address, City, State, Balance Due, and Total RMR. The first row is highlighted in blue. At the bottom of the grid, there is a pagination control showing '1' and '2' with arrows, and a 'Refresh' button.

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. Locate the document, and then click on the **Replace** button.

The Windows file explorer opens. Locate and select the document that will replace the existing document. The previous document is deleted and the selected document is 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

12	
1	
0.8	
0.6	
0.4	
0.2	
0	

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

Address 45722 Chandler
Phoenix, AZ 85003

Phone

Cell

Email emily.wood@gmail.com

Comments

Salesperson Dan Brown

Last Statement

Default Term

Delivery Method

Delivery RMR Inv YES

Invoices 1
Credits 0
Sites/Systems 1/1
RMR 2
Work Orders 1
Proposals 0
Payments 0
CC/eCheck
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	Actions
Customer Document - Rev04.pdf		Customer	Mar 21, 2022, 10:06:43 AM	Replace Download Delete
Customer Document - Rev03.pdf		Customer	Mar 21, 2022, 10:06:43 AM	Replace Download Delete
Customer Document - Rev02.pdf		Customer	Mar 21, 2022, 9:47:59 AM	Replace Download Delete
Customer Document - Rev01.pdf		Customer	Mar 20, 2022, 11:56:10 PM	Replace Download Delete

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0 - 0 of 0 items
Refresh