Replace Customer Documents

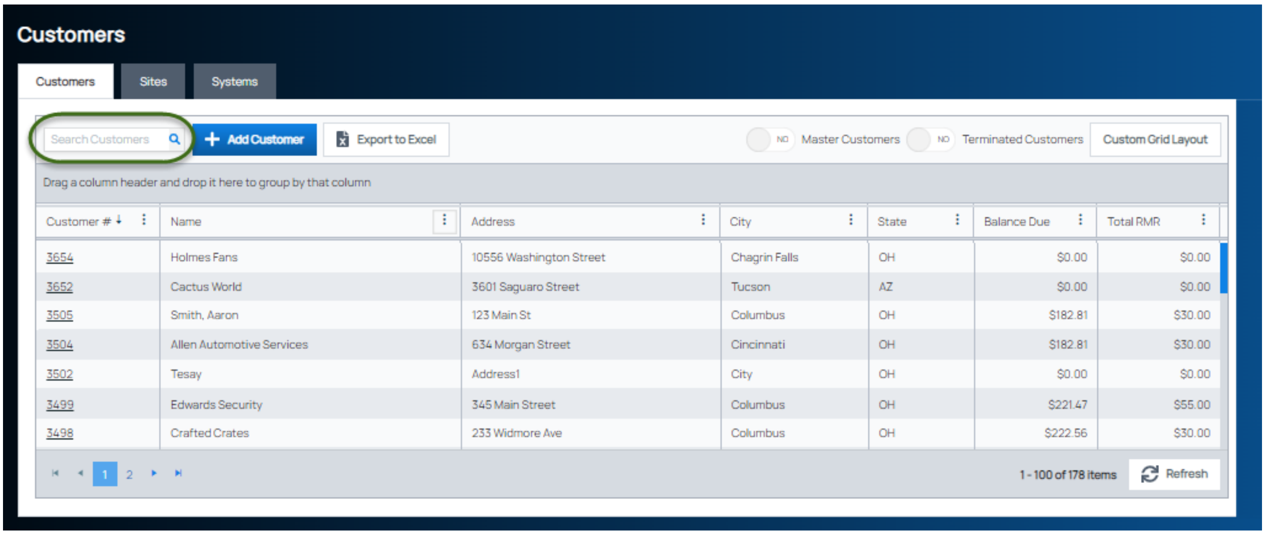
Last Modified on 04/28/2022 10:27 am EDT

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.

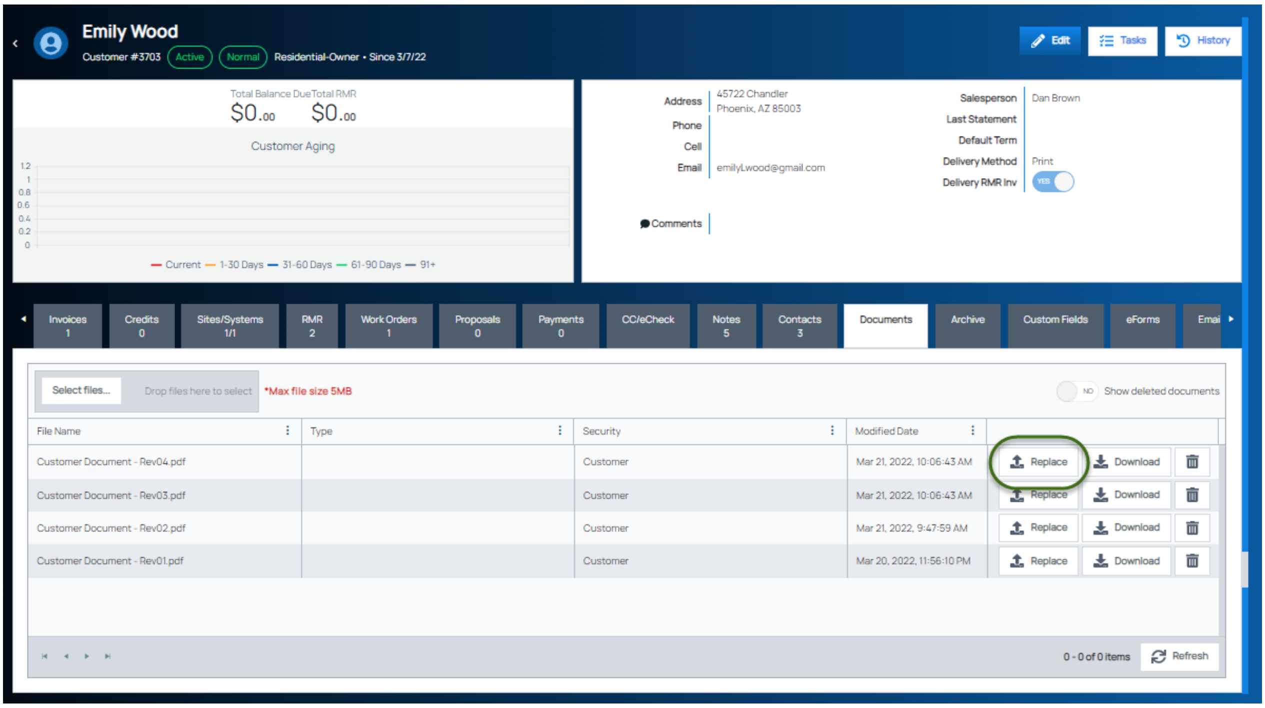
From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

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 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
1.2
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
emilyLwood@gmail.com
Salesperson
Dan Brown
Last Statement
Default Term
Delivery Method
Print
Delivery RMR Inv
YES
Comments
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
Emai
Select files...
Drop files here to select
*Max file size 5MB
NO
Show deleted documents
File Name
Type
Security
Modified Date
Customer Document - Rev04.pdf
Customer
Mar 21, 2022, 10:06:43 AM
Customer Document - Rev03.pdf
Customer
Mar 21, 2022, 10:06:43 AM
Customer Document - Rev02.pdf
Customer
Mar 21, 2022, 9:47:59 AM
Customer Document - Rev01.pdf
Customer
Mar 20, 2022, 11:56:10 PM
Replace
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0 - 0 of 0 items
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