Replace Customer Documents

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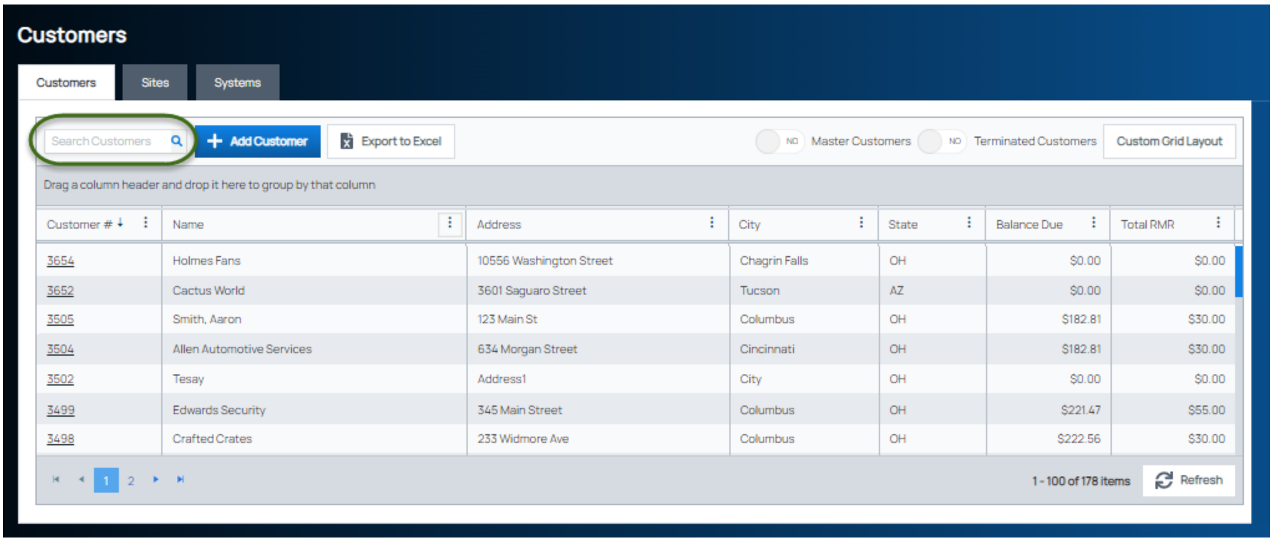
You can replace a currently attached document with a different document. Do this if there is a newer revision of the document or if the incorrect document was uploaded.

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

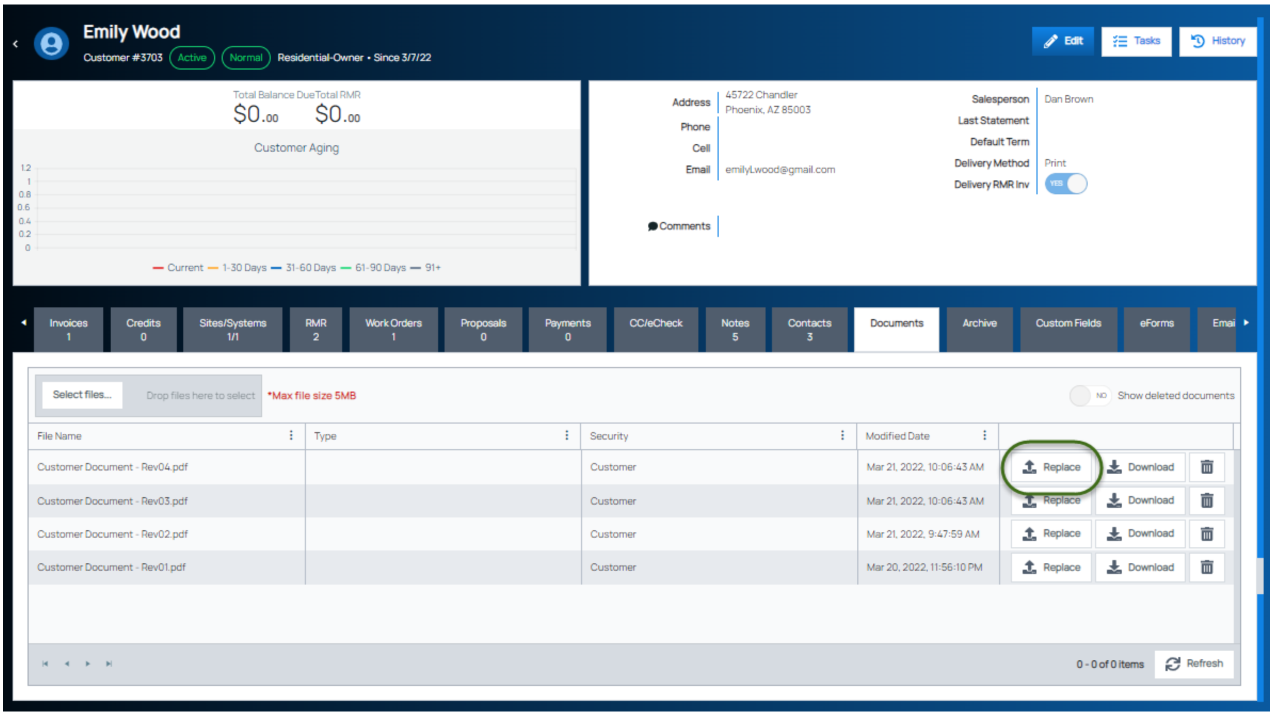
From the main menu, arrive at the Customers list with this path: CRM > Customers.

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 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
Current
1-30 Days
31-60 Days
61-90 Days
91+
Address
45722 Chandler
Phoenix, AZ 85003
Phone
Cell
Email
emilyLwood@gmail.com
Comments
Salesperson
Dan Brown
Last Statement
Default Term
Delivery Method
Print
Delivery RMR Inv
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
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
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
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