Download Customer Documents

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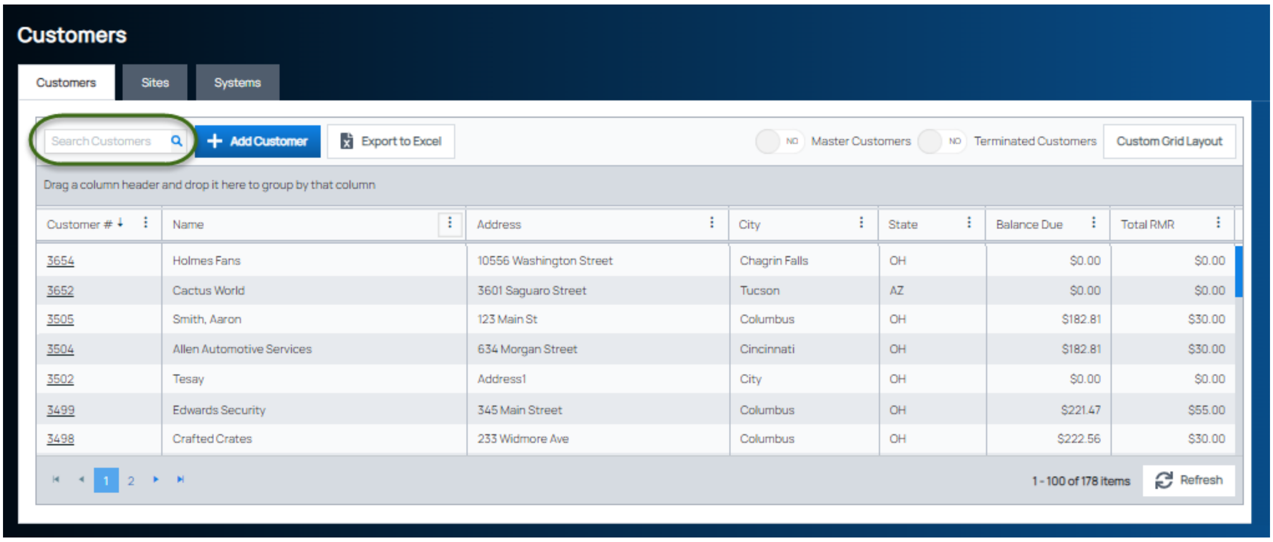
To be able to open and view an attached document, you will need to download the file. The software creates a PDF file of the selected document. Once downloaded you can open the file.

To download 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 the **Download** button.

In a few seconds, the file will appear on your taskbar. Double-click on the file to open for viewing.