Download Customer Documents

Last Modified on 12/12/2024 2:26 pm EST

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.

Customers Site	es Systems										
Search Customers	Add Customer	Export to Excel	No Master Customers No Terminated Customers Custom Grid Layour								
Drag a column header	and drop it here to group by the	at column									
Customer # 🕴 :	Name	1	Address	1	City :	State :	Balance Due	Total RMR			
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	ОН	\$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	ОН	\$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 the Download button.

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

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	Home		Coston	Hell #3703		dential-Own	er • Sinde Sim 22											
•	Customers				Total Balance	DueTotal RM				Address	45722 Char Phoenix, AZ			Salespersor				
B	Invoices				Custom		0			Phone				Last Statement Default Term				
	Payments	12	2		Custom	er Aging				Email	emilyLwood	d⊚gmail.com		Delivery Method				
C	RMR	0.0							_		1			Delivery RMR Inv	YES			
	Work Orders	0.0	4							Comments								
	Proposals		0 0 - Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+															
	Calendar 🗹																	
		4	Invoices	Credits	Sites/Systems	RMR	Work Orders	Proposals	Payment	ts CC/eCheck	Notes	Contacts	Documents	Archive	Custom Fields	a eForms	Emai	
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	Reports																	
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