Documents Tab

The Documents tab displays all documents uploaded to the customer.

Show Deleted Documents

Clicking on the toggle button labeled **Show Deleted Documents**, displays all documents that users have deleted. When deleting a document, it is not permanently removed from the database, just inactivated.

Add Document Button

Clicking the Add Document button opens a form for selecting one or more documents to attach to the customer.

Replace Button

Clicking the Replace button opens a form to select a file to replace the current document. This option is typically used if there is a newer revision of the document or if the incorrect document was uploaded.

Download Button

Clicking the Download button opens the document for viewing.

Delete Button

Clicking the Delete button makes the document inactive.

Emily Wood

Customer #3719 (Active) (Normal) Residential-Owner • Since 3/4/22

[Edit] [Tasks] [History]

Total Balance Due	Total RMR
$822.71	$120.00

Customer Aging

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

Address	45722 Chandler Plymouth, MI 48170
Phone	(734) 258-4646
Cell	(734) 258-3311
Email	emilyLwood@gmail.com

Salesperson	Dan Brown
Last Statement	
Default Term	
Delivery Method	Print
Delivery RMR Inv	YES

💬 Comments |

Invoices 7	Credits 2	Sites/Systems 2/3	RMR 5	Work Orders 2	Proposals 0	Payments 8	CC/eCheck	Notes 0	Contacts 2	Documents	Archive	Custom Fields	eForms	Emails

[+ Add Document]

(NO) Show deleted documents

File Name ⋮	Type ⋮	Security ⋮	Modified Date ⋮	
1003 Contract.pdf	Customer Contract	Customer	Apr 18, 2022, 6:38:20 PM	[↥ Replace] [↧ Download] [🗑]

|◀ ◀ **1** ▶ ▶|

0 - 0 of 0 items [🔄 Refresh]