

# Customer Information

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When highlighting the Customer Information menu option from the customer tree, the information displayed in the Active Pane is setup data from the Customer Information form along with any Customer Custom Field data. When right-clicking on the Customer Information tree option several options are available.

Follow the links below for more information on the right-click options.

[Edit Customer Setup](#)

[Document Imaging](#)

[Mail Merge](#)

[Customer Snapshot](#)

[Refresh](#)

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