

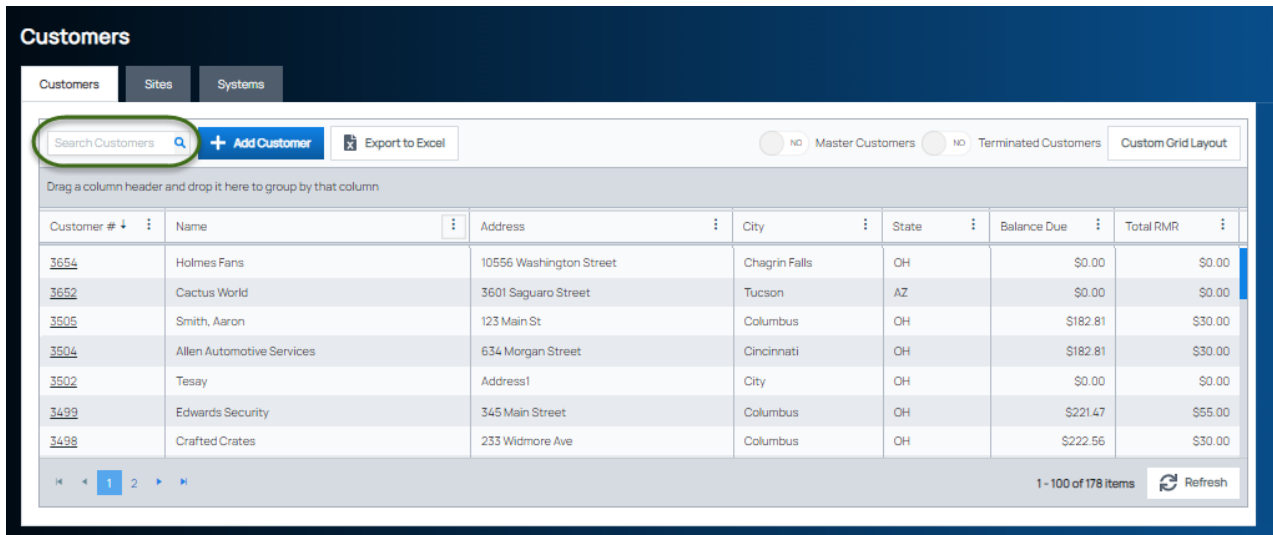
# Edit a Customer

Last Modified on 03/31/2025 3:15 pm EDT

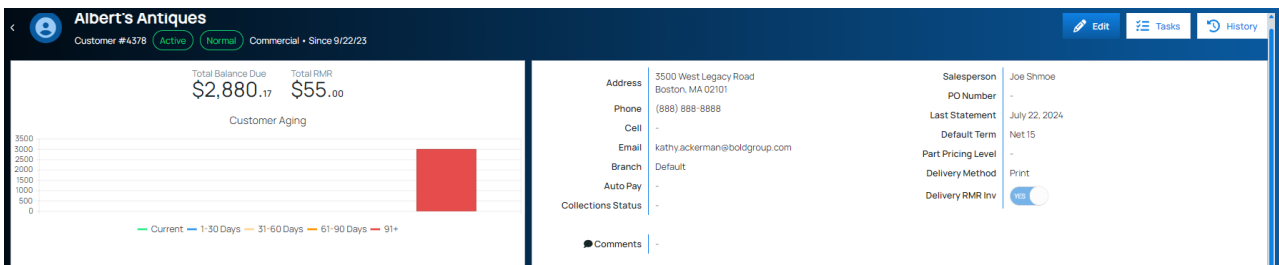
To edit a Customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the Customer you want to edit, and then click on the hyperlink in the Customer # column to open the customer record.

At the upper left of the page is a search field. You can type in the first four characters of either the customer number or the customer name to locate the record faster.



The Customer record opens. At the upper right of the page, click the **Edit** button.



The customer opens in edit mode. Make the necessary changes, and then click the **Save** button at the upper right of the page when finished.

**Albert's Antiques**  
Customer #4378   Active   Normal   Commercial • Since 9/22/23

Save
Cancel

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**Residential/Commercial**    Residential    Commercial

**Business Name** • Albert's Antiques ✖

**Customer Number** • 4378

**Address**

3500 West Legacy Road

Address 2

Boston   Massachusetts   02101   + Plus...

**Timezone** • (America/New\_York) (UTC-05:00) Eastern Time (New York)

**Email** • kathy.ackerman@boldgroup.com

**Phone** • (888) 888-8888   Ext

**Cell Phone** • ( ) - -

**Customer Status** • Active

**Priority Level** • Normal

**Customer Type** • Commercial

**Customer Since** • 9/22/2023 📅

**Do Not Enter Collections**    NO

**Salesperson** • Joe Shmoe

**PO Number** • PO Number

**Default Term** • Net 15

**Recurring Term** • Net 10   ✕

**Service Invoice Term** •

**Manual Invoice Term** • Net 30 Days   ✕

**Part Pricing Level** •

**Branch** • Default

**Master Customer** • Master Customer Search: name - cust #

**Delivery Method** • Print

**Prevent RMR Delivery**    NO

**No Late Fees**    NO

**Late Fee**    ⬇

**No Statements**    NO

**Show Open Invoices**    NO

**Show Contacts On Sites**    NO