

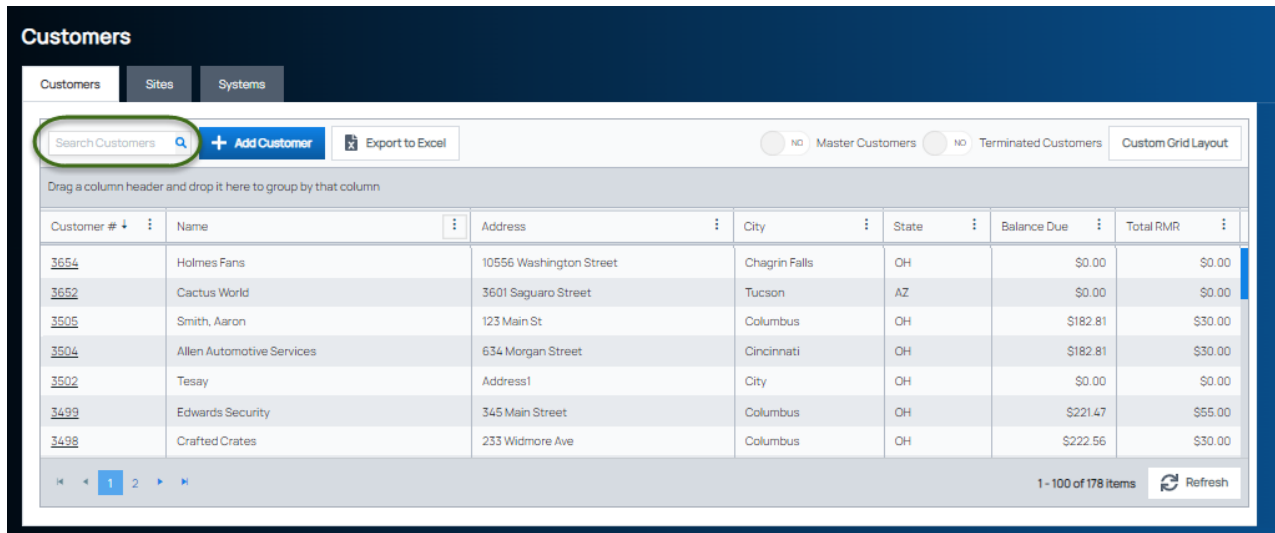
Edit a Customer

Last Modified on 05/14/2025 4:28 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.



Customers

Customers Sites Systems

Search Customers + Add Customer Export to Excel

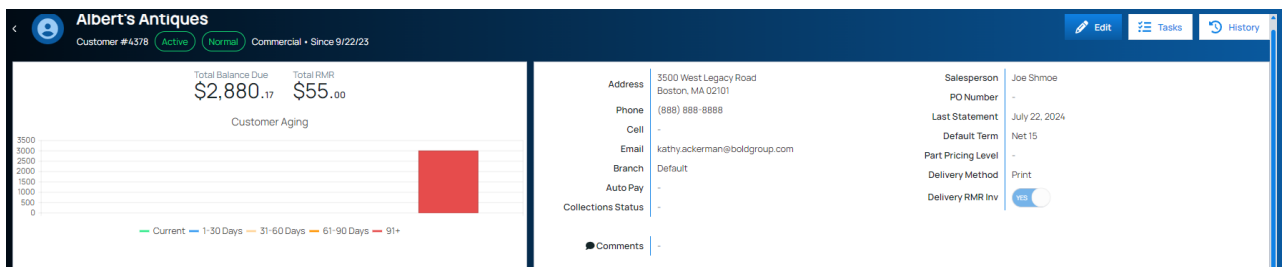
Master Customers Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
3554	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3552	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	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

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



Albert's Antiques

Customer #4378 Active Normal Commercial • Since 9/22/23

[Edit](#) [Tasks](#) [History](#)

Total Balance Due: **\$2,880.17**

Total RMR: **\$55.00**

Customer Aging

Legend: Current (green), 1-30 Days (blue), 31-60 Days (orange), 61-90 Days (red), 91+ (dark red)

Address: 5000 West Legacy Road, Boston, MA 02101

Phone: (888) 888-8888

Cell: -

Email: kathy.ackerman@boldgroup.com

Branch: Default

Auto Pay: -

Collections Status: -

Comments: -

Salesperson: Joe Shmoe

PO Number: -

Last Statement: July 22, 2024

Default Term: Net 15

Part Pricing Level: -

Delivery Method: Print

Delivery RMR Inv: ☒

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. For a description of the fields on the customer detail page, refer to [Add a Customer](#).

Albert's Antiques

Customer #4378

ActiveNormalCommercial • Since 9/22/23

SaveCancel

Residential/Commercial

Residential

Commercial

Business Name • Albert's Antiques

Customer Number • 4378

Address • 3500 West Legacy Road

Address 2 •

BostonMassachusetts02101Plus...

Timezone • (America/New_York) (UTC-05:00) Eastern Time (New York)

Email • kathy.ackerman@boldgroup.com

Phone • (888) 888-8888Ext

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 10X

Service Invoice Term •

Manual Invoice Term • Net 30 DaysX

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 • 189.86

No Statements • NO

Show Open Invoices • NO

Show Contacts On Sites • NO