

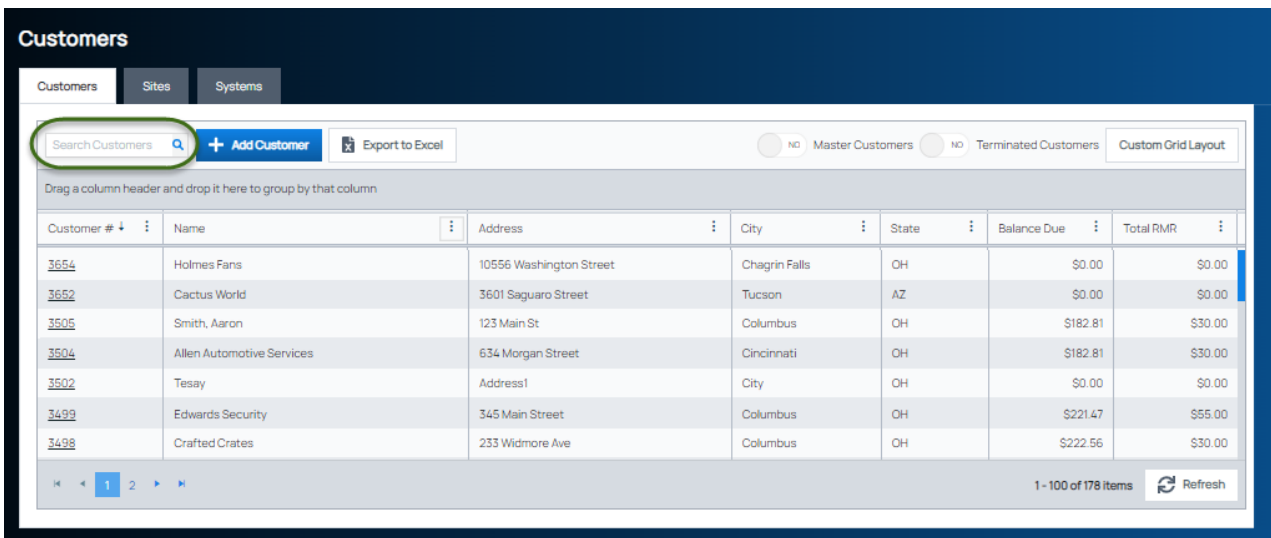
Edit a Customer

Last Modified on 12/12/2024 1:19 pm EST

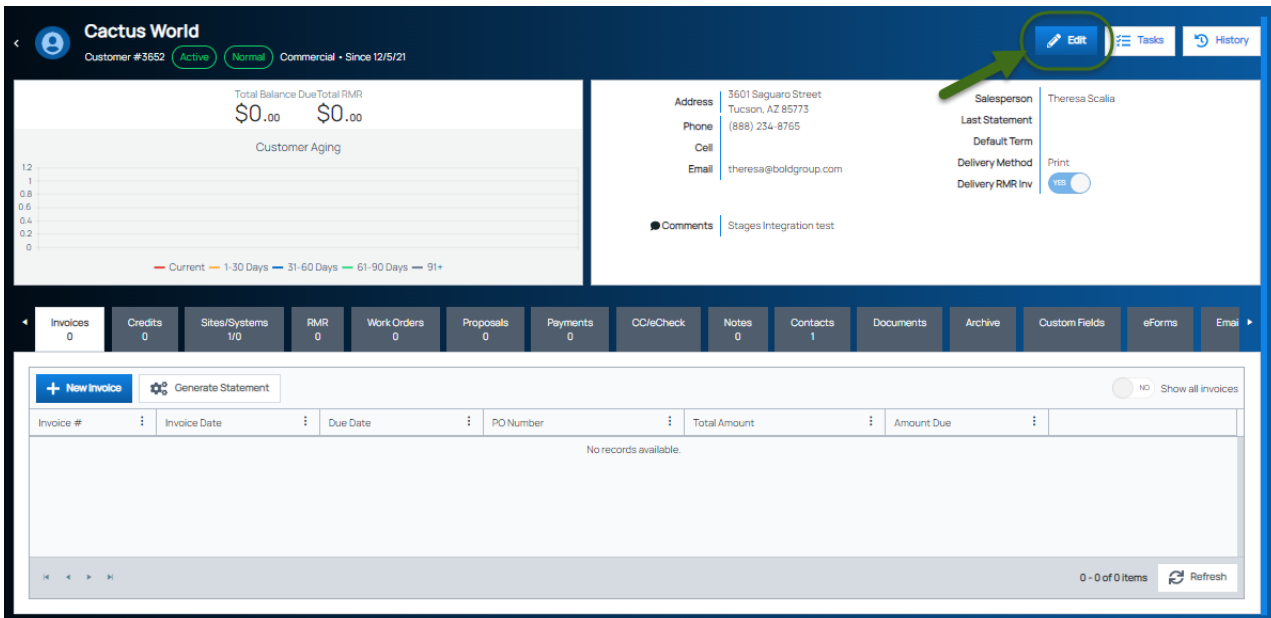
To edit a Customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list will be displayed. 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 may type in the first four characters of either the customer number or the customer name to locate the record faster.



The Customer record will be displayed. At the upper right of the page, click on the Edit button.



The Customer will be displayed in edit mode. Make the necessary changes, and then click the Save button at the upper right of the page when finished.



Cactus World

Customer #3652 Active Normal Commercial - Since 12/5/21

Save

Cancel

Residential/Commercial Residential Commercial

Business Name • Cactus World

Customer Number • 3652

Address 3601 Saguaro Street

Suite 550

Tucson Arizona 85773 - Plus...

Email • theresa@boldgroup.com

Phone (888) 234-8765 Ext

Cell Phone () - -

Customer Status • Active

Priority Level • Normal

Customer Type • Commercial

Customer Since 12/5/2021

Salesperson • Theresa Scalia

Default Term • Net 30 Days

Recurring Term

Service Invoice Term

Manual Invoice Term

Master Customer • Master Customer

Delivery Method • Print

Prevent RMR Delivery NO

No Late Fees NO

Late Fee 0.00

No Statements NO

Show Open Invoices NO