Terminate a Customer

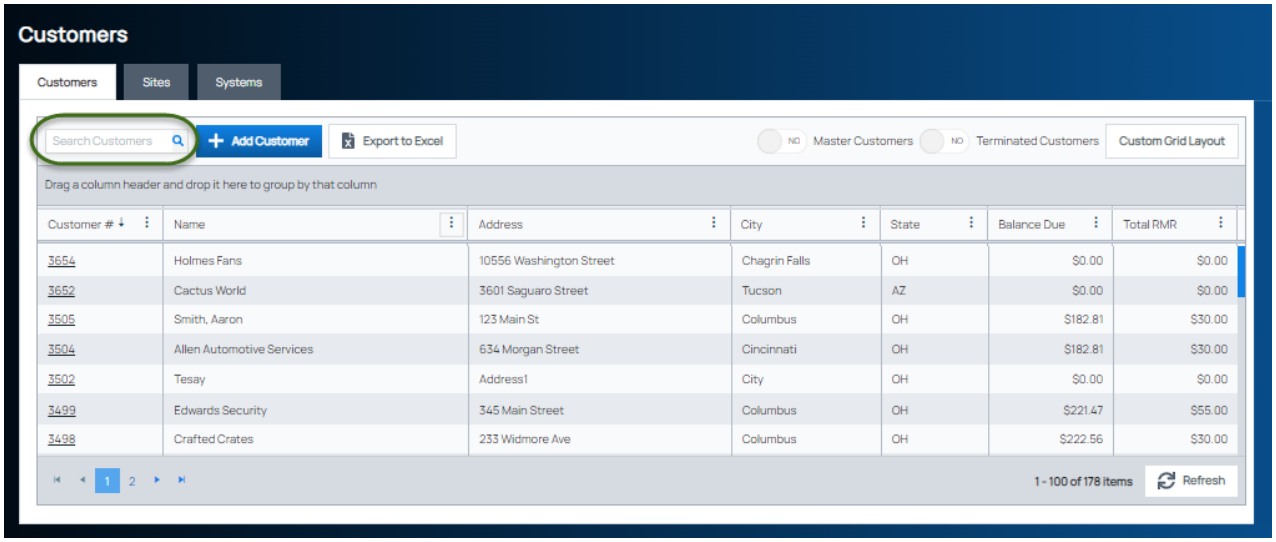
Last Modified on 05/14/2025 4:21 pm EDT

If your company will no longer be doing business with a customer, you can set the customer status to terminated, which makes them inactive. Before doing this, cancel any active RMR for the customer. Once a customer is terminated, all their historical data remains in the database.

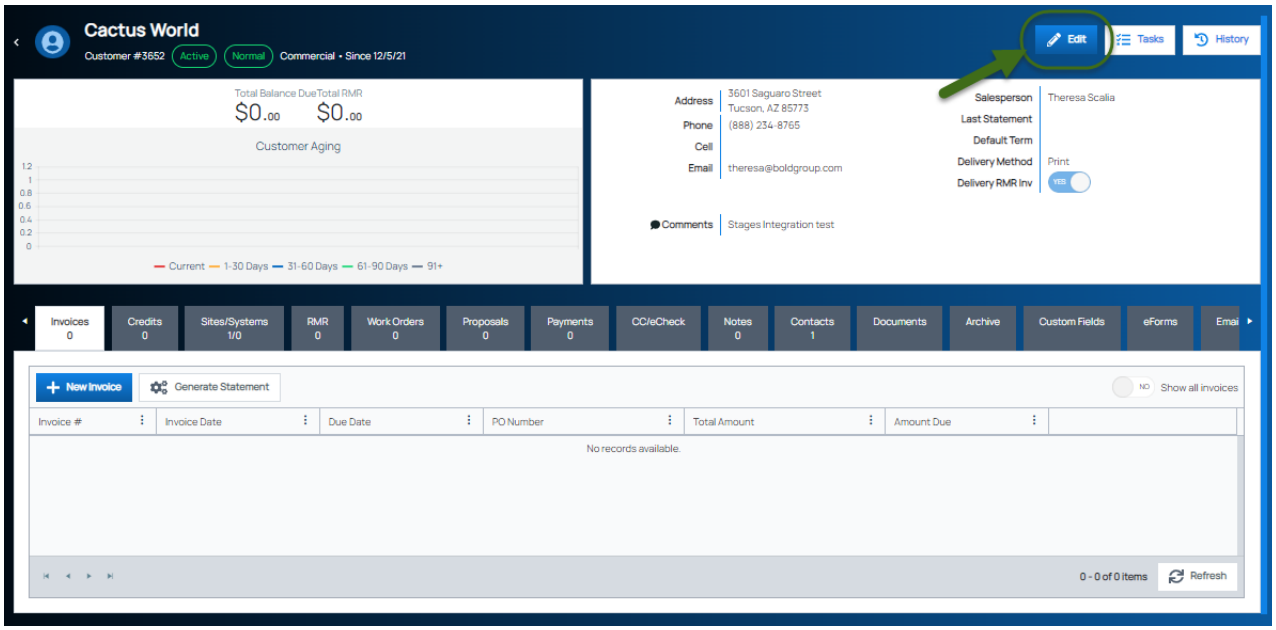
To terminate a Customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

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.

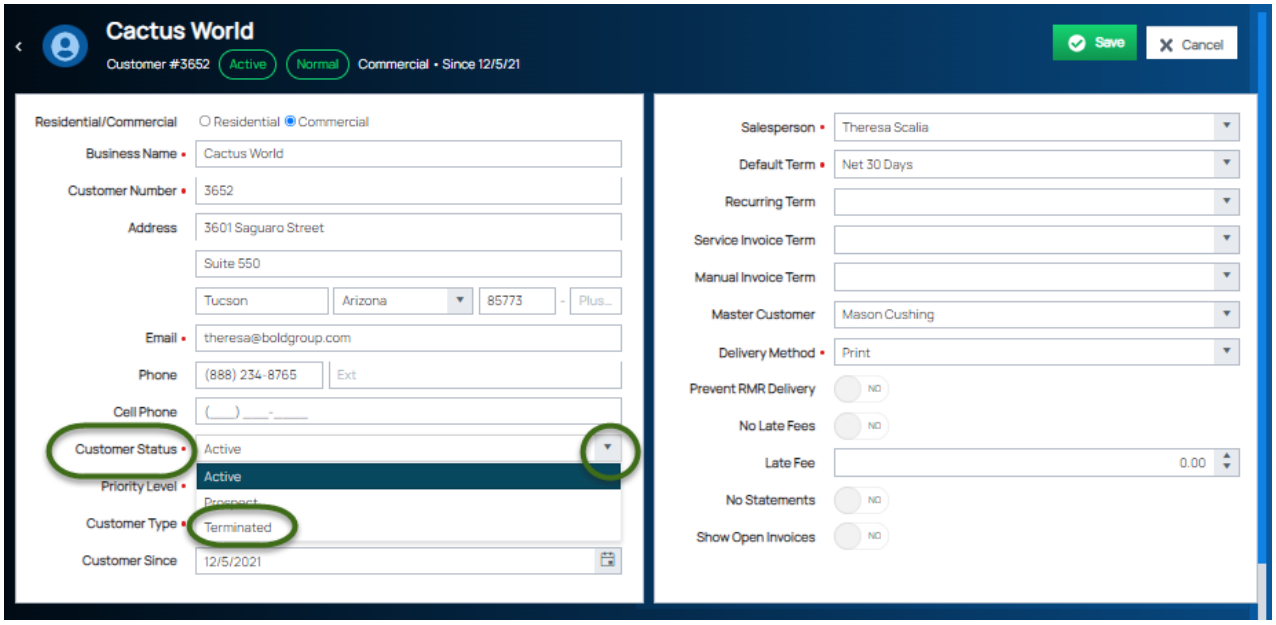
At the upper left of the page is a search field. You can type in the first four characters of either the customer number or the customer name to locate the record faster.



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



The Customer is displayed in edit mode. In the **Customer Status** field, click on the drop-down arrow and select the Terminated option. When finished, click the **Save** button at the upper right of the page.


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
Active
Priority Level •
Customer Type •
Terminated
Customer Since
12/5/2021
Salesperson •
Theresa Scalia
Default Term •
Net 30 Days
Recurring Term
Service Invoice Term
Manual Invoice Term
Master Customer
Mason Cushing
Delivery Method •
Print
Prevent RMR Delivery
NO
No Late Fees
NO
Late Fee
0.00
No Statements
NO
Show Open Invoices
NO