Terminate a Customer

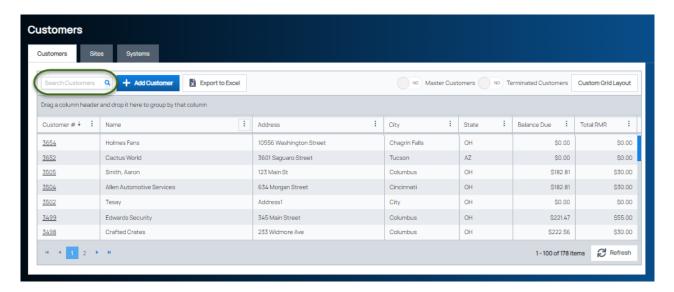
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If your company will no longer be doing business with a customer, make certain to cancel any active RMR prior to the termination. Once a customer is terminated, all their historical data remains in the database.

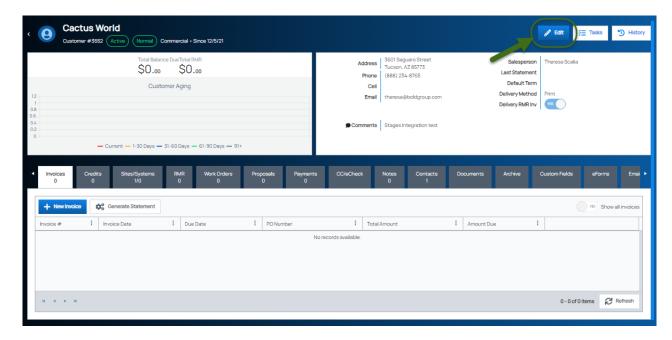
To terminate a Customer, from the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list 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. In the Customer Status field, click on the drop-down arrow and select the Terminated option. When finished, click on the Save button at the upper right of the page.

