

Terminate a Customer

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

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.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	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

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

Cactus World
Customer #3652 Active Normal Commercial • Since 12/5/21

Total Balance Due: \$0.00 Total RMR: \$0.00

Customer Aging

Address: 3601 Saguaro Street, Tucson, AZ 85773
Phone: (888) 234-8765
Cell:
Email: theresa@boldgroup.com

Salesperson: Theresa Scalia
Last Statement
Default Term
Delivery Method: Print
Delivery RMR Inv: YES

Comments: Stages Integration test

Invoices: 0 Credits: 0 Sites/Systems: 1/0 RMR: 0 Work Orders: 0 Proposals: 0 Payments: 0 CC/eCheck: 0 Notes: 0 Contacts: 1 Documents: Archive Custom Fields eForms Email

+ New Invoice Generate Statement Show all invoices

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due
No records available.					

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.

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 • Active

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

