## **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.

Customers										
Customers Sites Systems										
Search Customers	Search Customers Q + Add Customer 🔯 Export to Excel									
Drag a column heade	Drag a column header and drop it here to group by that column									
Customer #↓ :	Name	:	Address :	City :	State :	Balance Due	Total RMR			
3654	Holmes Fans		10556 Washington Street	Chagrin Falls	ОН	\$0.00	\$0.00			
3652	Cactus World		3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00			
3505	Smith, Aaron		123 Main St	Columbus	ОН	\$182.81	\$30.00			
3504	Allen Automotive Services		634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00			
3502	Tesay		Address1	City	ОН	\$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			
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The Customer record opens. At the upper right of the page, click the Edit button.

< 😟	Car	ctu: omer#	<b>s Wc</b> ≠3652	Active Normal Co	ommer	cial - Since 12/5/21										C	/ Edit	Tasks	History
	Total Balance Due Total RMR \$0.00 \$0.00							Address 3601 Seguero Street Tucson, AZ 85773 Phone (888) 236-8765				Salesperson Last Statement				Theresa Scalia			
1.2 1 0.8	Customer Aging						Cell Email theresa@boldgroup.com					Default Term Delivery Method Delivery RMR Inv							
0.6 0.4 0.2 0			- 0	Current — 1-30 Days — 3	51-60 C	ays — 61-90 Days — 91+			● Com	ments	Stages Inte	gration test							
	oices O	Cr	edīts O	Sites/Systems 1/0	RN C	R Work Orders 0	Prop	oosals Paymen 0 0	nts CC/eCheck	c	Notes 0	Contacts 1	Do	cuments	Archive	C	ustom Fields	eForms	Emai 🕨
+	New Invoi	ice	¢°	Generate Statement													(	NO Sho	w all invoices
Invoice	e #		i In	voice Date	÷	Due Date	÷	PO Number	:	Total	Amount		÷	Amount Du	e	÷			
	No records available.																		
н	< > >	H															0 - 0 of 0	items 🕄	Refresh

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.

Customer #36	Save X Cancel		
Residential/Commercial	O Residential 🖲 Commercial	Salesperson •	Theresa Scalia 💌
Business Name •	Cactus World	Default Term •	Net 30 Days
Customer Number •	3652	Recurring Term	·
Address	3601 Saguaro Street	Service Invoice Term	
	Suite 550	Manual Invoice Term	
	Tucson Arizona 💌 85773 - Plus	Martar Customer	Magan Guebian
Email •	theresa@boldgroup.com	Master Customer	Masurreusning
Phone	(888) 234-8765 Ext	Delivery Method •	Print
Cell Phone	[]	Prevent RMR Delivery	NO
Customer Status •	Active	No Late Fees	NO
Priority Level •	Active	Late Fee	0.00 🗘
Customer Type	Prospect	No Statements	NO
Customer Since	19/EU0001	Show Open Invoices	NO