The Customer Record Overview

Last Modified on 09/13/2024 1:44 pm EDT

The Customer Record

The Customer record is designed to be a one-stop customer service tool which displays customer information and transactions related to a customer, its sites and systems. Users with the appropriate permissions may add, edit or delete information as well as enter new transactions related to the customer.

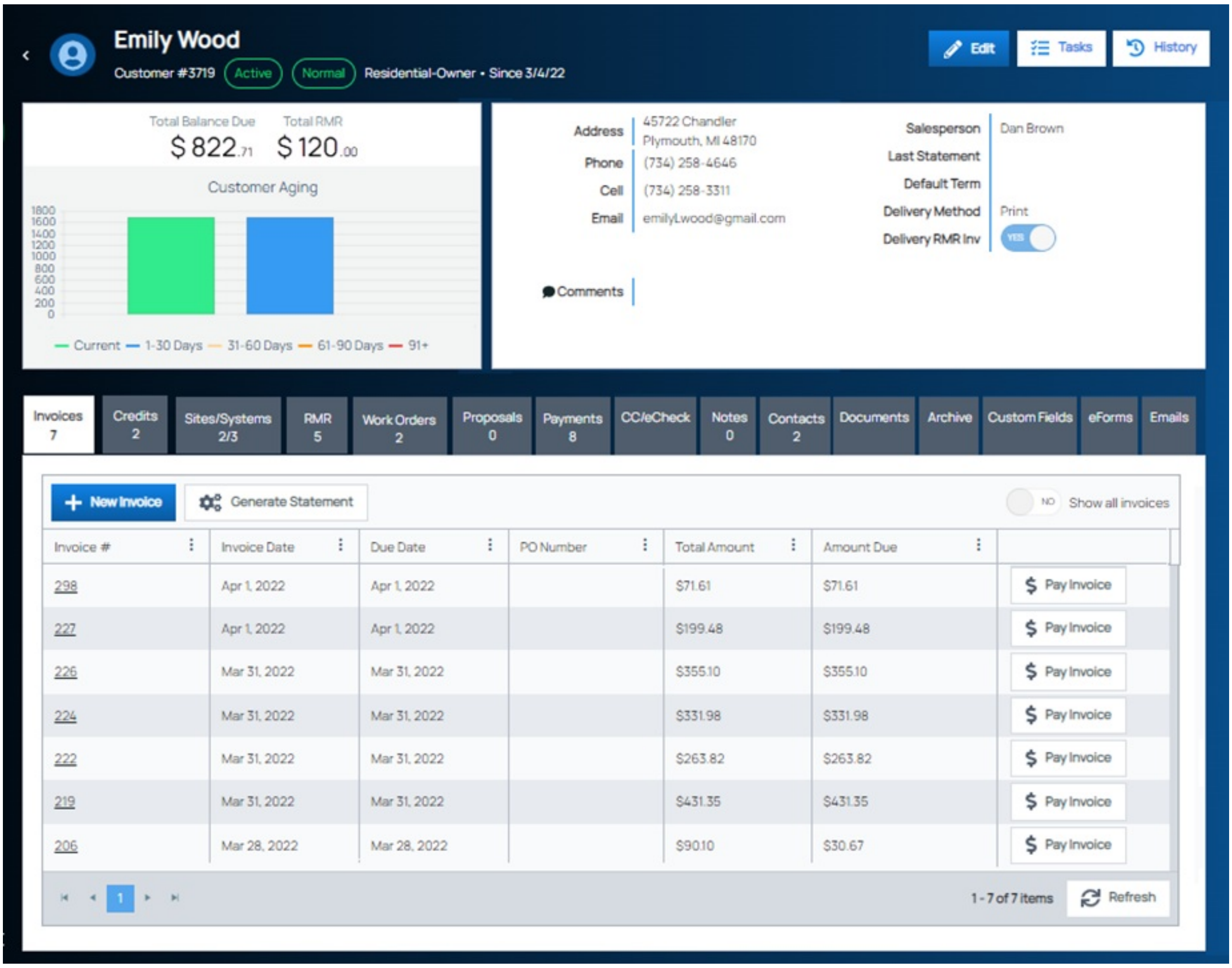
The Customer record is divided into three main areas:

- The upper left panel displays a graph of the Customer Aging including the net balance due and the total monthly RMR.
- The upper right panel displays summary information from the customer setup.
- The lower panel contains several tabs with data related to the customer. Clicking on each tab displays any existing data. On each tab, if there is a number greater than zero, indicates the number of records for that tab item.

At the upper right of the page are three function buttons:

- Edit: Clicking on the edit button opens the customer setup form where users may update any information as needed.
- Tasks: Users may create tasks for themselves or assign to another user.
- History: Displays a list of all edits made to the customer, and shows which user made the change and what was changed.

When accessing the Sites/Systems tab and opening a site or system record, each of these entities display a new page with multiple tabs similar to the customer record. For more information, refer to the Sites and Systems topics.


Emily Wood
Customer #3719
Active
Normal
Residential-Owner • Since 3/4/22
Edit
Tasks
History
Total Balance Due
$ 822.71
Total RMR
$ 120.00
Customer Aging
1800
1600
1400
1200
1000
800
600
400
200
0
Current
1-30 Days
31-60 Days
61-90 Days
91+
Address
45722 Chandler
Plymouth, MI 48170
Phone
(734) 258-4646
Cell
(734) 258-3311
Email
emilyLwood@gmail.com
Comments
Salesperson
Dan Brown
Last Statement
Default Term
Delivery Method
Print
Delivery RMR Inv
YES
Invoices 7
Credits 2
Sites/Systems 2/3
RMR 5
Work Orders 2
Proposals 0
Payments 8
CC/eCheck
Notes 0
Contacts 2
Documents
Archive
Custom Fields
eForms
Emails
New Invoice
Generate Statement
NO
Show all invoices
Invoice # | Invoice Date | Due Date | PO Number | Total Amount | Amount Due
298 | Apr 1, 2022 | Apr 1, 2022 | | $71.61 | $71.61 | Pay Invoice
227 | Apr 1, 2022 | Apr 1, 2022 | | $199.48 | $199.48 | Pay Invoice
226 | Mar 31, 2022 | Mar 31, 2022 | | $355.10 | $355.10 | Pay Invoice
224 | Mar 31, 2022 | Mar 31, 2022 | | $331.98 | $331.98 | Pay Invoice
222 | Mar 31, 2022 | Mar 31, 2022 | | $263.82 | $263.82 | Pay Invoice
219 | Mar 31, 2022 | Mar 31, 2022 | | $431.35 | $431.35 | Pay Invoice
206 | Mar 28, 2022 | Mar 28, 2022 | | $90.10 | $30.67 | Pay Invoice
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Refresh