

# Customer List

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

To access the Customer List, navigate to CRM > Customers.

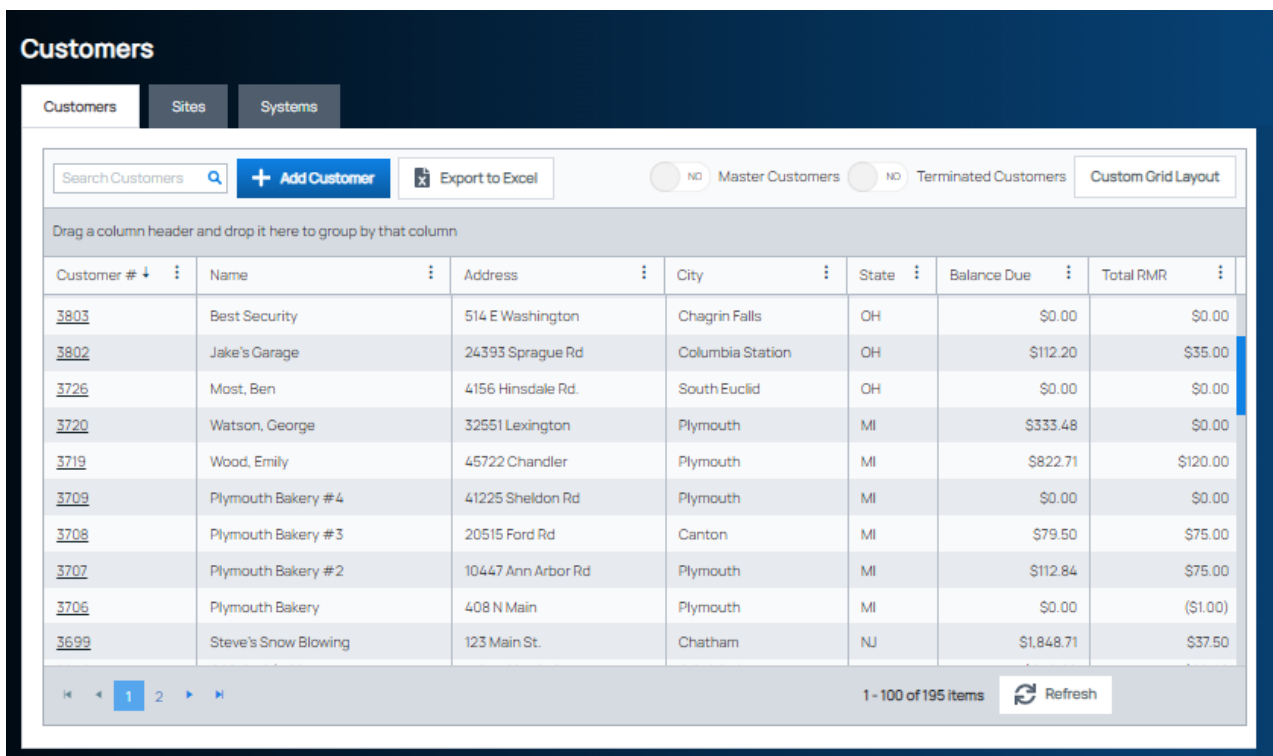
The Customer List is comprised of three tabs: Customers, Sites, and Systems.

These three tabs are available to locate and open a customer record, based upon the information you have available. If your customer is calling and provides their customer number, the easiest way to locate the customer is from the Customers tab.

At the top of each tab are function buttons, and will be discussed within this article.

## Customers Tab

The default view in the grid area of the Customers tab displays the customer number, customer name and address, the total balance due on their account and the total monthly RMR for all sites and systems. There are many other columns available to include in the grid area.

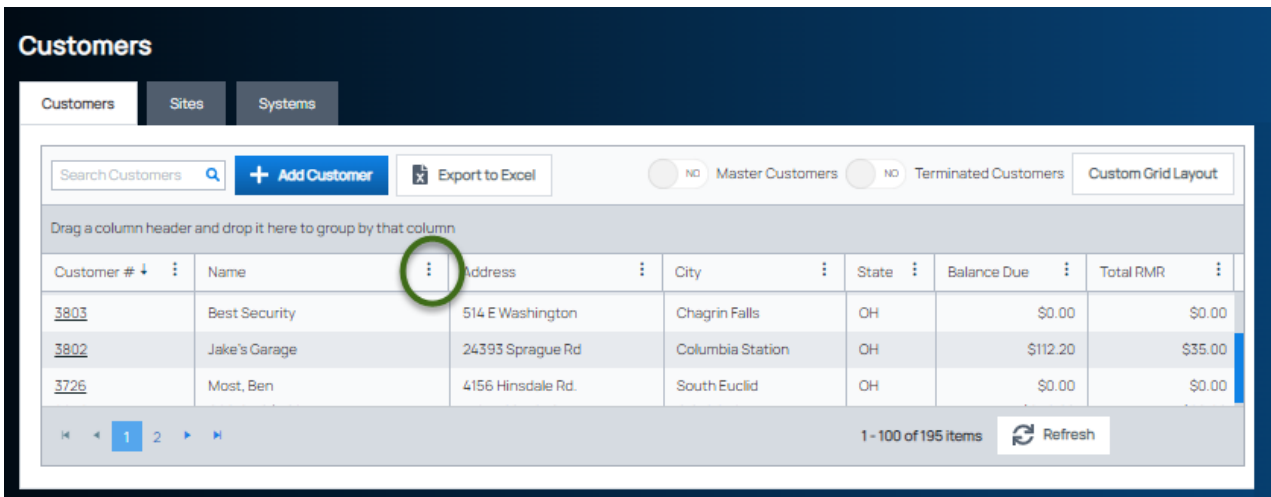


The screenshot shows the 'Customers' tab interface. At the top, there are three tabs: 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon. To the right of the search bar are two buttons: '+ Add Customer' and 'Export to Excel'. Further right are two toggle switches: 'Master Customers' (set to 'NO') and 'Terminated Customers' (set to 'NO'). To the far right is a button labeled 'Custom Grid Layout'. Below these elements is a text prompt: 'Drag a column header and drop it here to group by that column'. The main area is a table with the following columns: 'Customer #', 'Name', 'Address', 'City', 'State', 'Balance Due', and 'Total RMR'. The table contains 11 rows of customer data. At the bottom of the table, there is a pagination bar showing '1 - 100 of 195 items' and a 'Refresh' button.

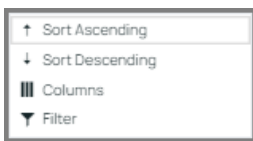
Customer #	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3803</a>	Best Security	514 E Washington	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3802</a>	Jake's Garage	24393 Sprague Rd	Columbia Station	OH	\$112.20	\$35.00
<a href="#">3726</a>	Most, Ben	4156 Hinsdale Rd.	South Euclid	OH	\$0.00	\$0.00
<a href="#">3720</a>	Watson, George	32551 Lexington	Plymouth	MI	\$333.48	\$0.00
<a href="#">3719</a>	Wood, Emily	45722 Chandler	Plymouth	MI	\$822.71	\$120.00
<a href="#">3709</a>	Plymouth Bakery #4	41225 Sheldon Rd	Plymouth	MI	\$0.00	\$0.00
<a href="#">3708</a>	Plymouth Bakery #3	20515 Ford Rd	Canton	MI	\$79.50	\$75.00
<a href="#">3707</a>	Plymouth Bakery #2	10447 Ann Arbor Rd	Plymouth	MI	\$112.84	\$75.00
<a href="#">3706</a>	Plymouth Bakery	408 N Main	Plymouth	MI	\$0.00	(\$1.00)
<a href="#">3699</a>	Steve's Snow Blowing	123 Main St.	Chatham	NJ	\$1,848.71	\$37.50

## Custom Grid Layout

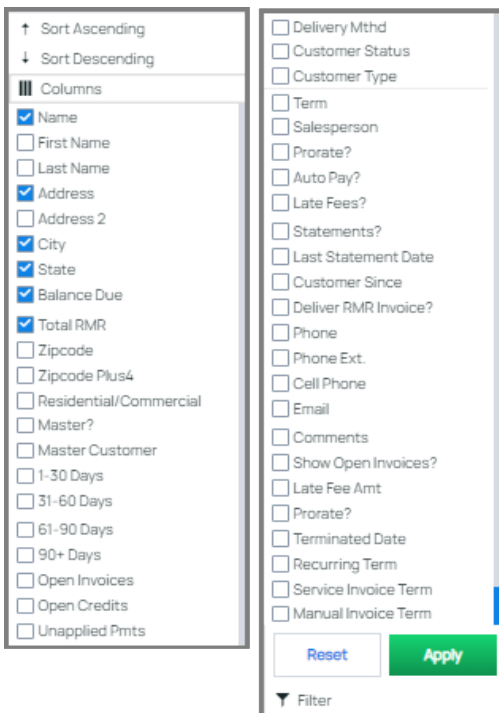
Users have the ability to customize the grid layout. Clicking on the ellipse button on any of the column headers will display a list of options.



On the Customers List, the options are Sort Ascending, Sort Descending, Columns, and Filter.



Clicking on the Columns option will display a list of all the available columns to display in the grid.



Once you have made selections, you may save the layout so that you do not have to repeat this process every time you open the Customers List.

In the example below, we want a view of the Customers List that shows the customer aging by each aging bucket, and want to save this layout for future use.

To save this layout, click on the Custom Grid Layout button at the upper right of the page.

**Customers**

Customers Sites Systems

Search Customers  [+ Add Customer](#) [Export to Excel](#)  Master Customers  Terminated Customers [Custom Grid Layout](#)

Drag a column header and drop it here to group by that column

Customer #	Name	City	State	Balance Due	1-30 Days	31-60 Days	61-90 Days	90+ Days	Open Credits	Unapplied Pmts
3501	A Business Company	Columbus	OH	\$31713	\$361.85	\$0.00	\$0.00	\$0.00	\$0.00	(\$44.72)
3438	Aacott, Alice	Columbus	OH	\$1,257.33	\$613.33	\$32.57	\$338.69	\$272.74	\$0.00	\$0.00
3393	Aaron's Rentals	Columbus	OH	\$500.69	\$0.00	\$0.00	\$0.00	\$500.69	\$0.00	\$0.00
1044	Adams, Justin	Chagrin Falls	OH	\$9,692.91	\$54.28	\$3,421.94	\$0.00	\$4,899.46	\$0.00	(\$91.27)
2553	Adaora, Sub	Rocky River	OH	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1038	All Electronics	New York	NY	\$15,348.48	\$3,069.45	\$231.25	\$13,000.88	\$6,546.90	\$0.00	(\$7,500.00)
3504	Allen Automotive Services	Cincinnati	OH	\$568.58	\$130.27	\$32.57	\$247.93	\$157.81	\$0.00	\$0.00
1065	Amon, Bill	Wall	AK	\$86.40	\$0.00	\$0.00	\$0.00	\$86.40	\$0.00	\$0.00
3456	Auto Warehouse	Dallas	TX	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
1571	Banin, Bucky	Chagrin Falls	OH	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3497	Barry's Bicycles	Columbus	OH	\$2,326.41	\$450.27	\$112.57	\$994.34	\$769.23	\$0.00	\$0.00

1 - 100 of 195 items [Refresh](#)

A dialog box will be displayed to enter the Name of the layout. There are two options for saving:

- Save Layout – If this option is selected, the custom layout will only be available to the logged in user that created the layout.
- Save As Global Layout – Selecting this option will make the layout available to all users. Keep in mind, if other users have access to this layout, they are able to make changes to the original layout.

**Custom Grid Layouts**

Existing Layouts [Save New Layout](#)

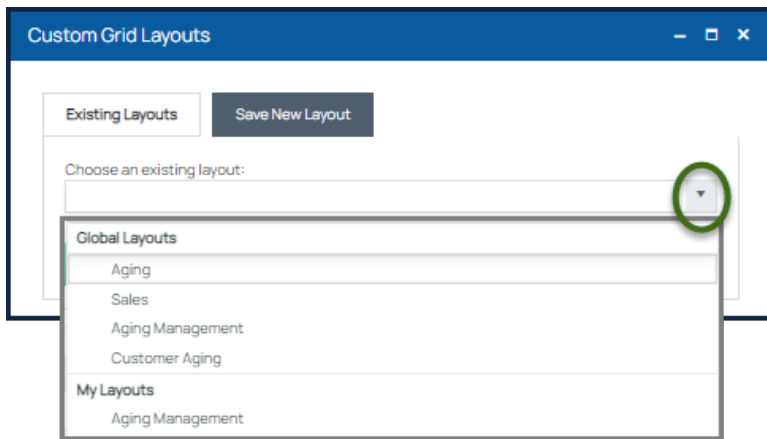
Name:

[Save Layout](#) [Save As Global Layout](#)

If the user leaves the page displaying the Custom Grid Layout, and then returns, the default grid view will be displayed. To open a Custom Grid Layout, click on the Custom Grid Layout button at the upper right of the page.

The Custom Grid Layouts dialog box will be displayed. Click on the drop-down arrow in the “Choose an existing layout” field to locate the desired layout for viewing, and then click the Apply Layout button.

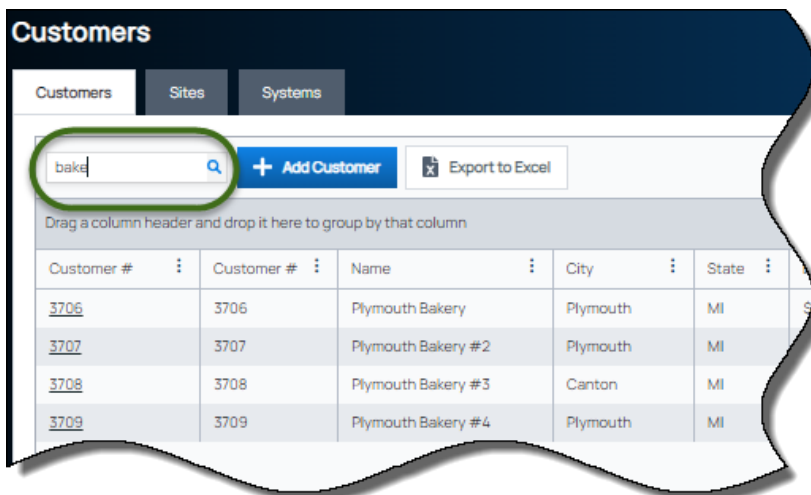
Once the grid is loaded, click on the Refresh button at the lower right of the page to refresh the data within the grid.



## Customer Search

At the upper left of the Customers List is a search field. Users can search by any criteria available. Type in your criteria for the search into the search box. You must enter at least four characters to trigger the search engine. The search engine will look for the criteria entered in any of the columns displayed in the grid.

In our example below, we typed the word `bake` into the Search Customers box. The software found four customers containing that string of characters. To open the customer record, click on the hyperlink in the Customer # column.



## Customers List Function Buttons

At the top of the Customers List are five function buttons, each of which is described below.

- **Add Customer** – Clicking this button opens the New Customer Wizard. This topic is covered in a separate article.
- **Export to Excel** – Clicking on this button will export the current page of data displayed in the grid area. An Excel file icon will be displayed on your task bar to open the file for viewing.
- **Master Customers** – Setting this toggle button to Yes will display a list of Master Customers only.
- **Terminated Customers** – Setting this toggle button to Yes will display a list of all customers where the customer status has been set to Terminated.
- **Custom Grid Layout** – Allows users to create, update, and retrieve custom grid layouts. See the topic on this feature earlier in this article.

# Customers

Customers

Sites

Systems

Search Customers

**+ Add Customer**

Export to Excel

NO Master Customers

NO Terminated Customers

Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer # ↓	Name	Address	City	State	Balance Due	Total RMR
<a href="#">3803</a>	Best Security	514 E Washington	Chagrin Falls	OH	\$0.00	\$0.00
<a href="#">3802</a>	Jake's Garage	24393 Sprague Rd	Columbia Station	OH	\$112.20	\$35.00
<a href="#">3726</a>	Most, Ben	4156 Hinsdale Rd.	South Euclid	OH	\$0.00	\$0.00

1 2

1 - 100 of 195 items

Refresh