Customer List

To access the Customer List, navigate to Accounts Receivable > Customers.
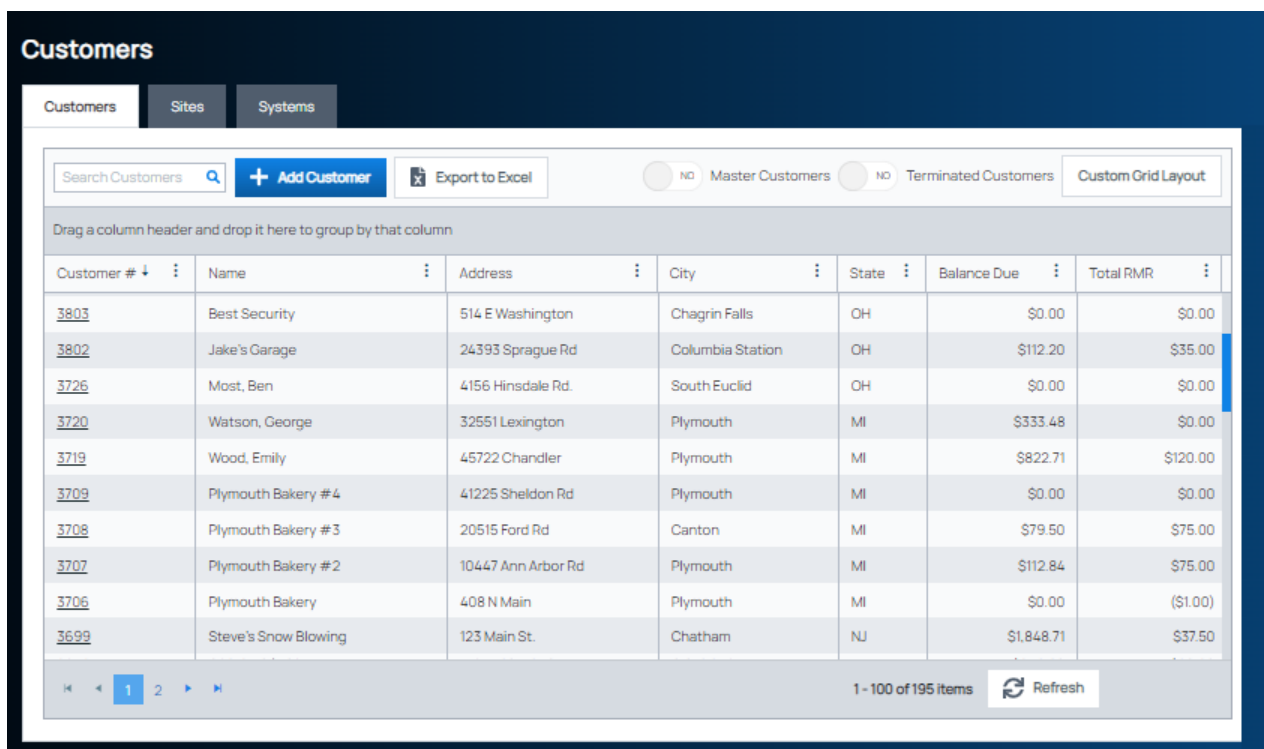
The Customer List is comprised of three tabs: Customers, Sites, and Systems.

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.
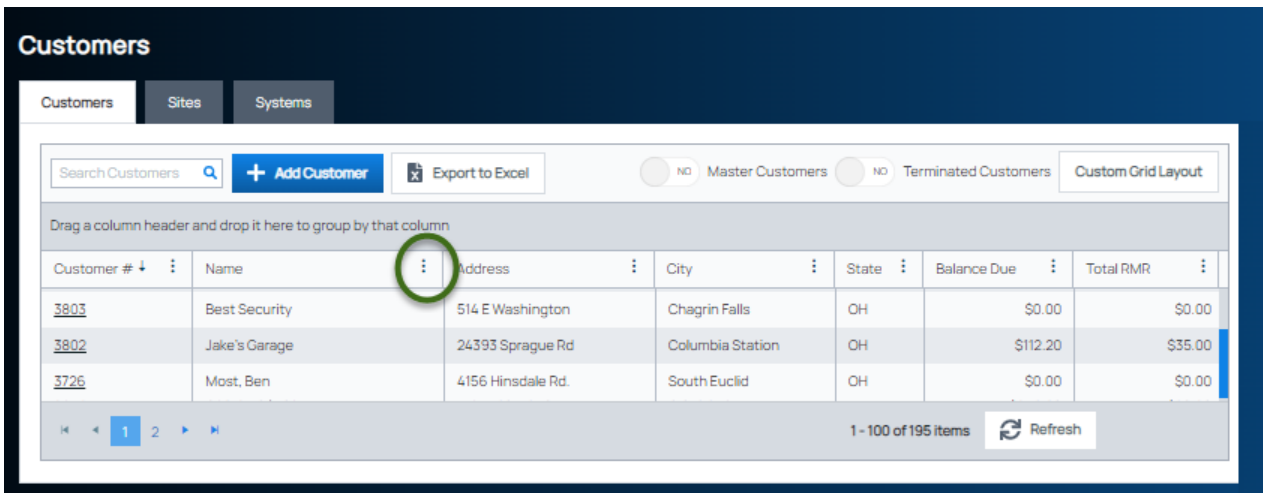

Custom Grid Layout

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.
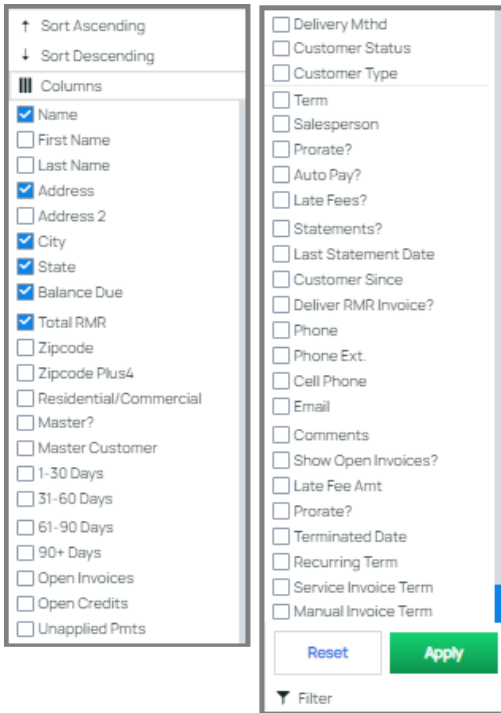
On the Customers List, the options are Sort Ascending, Sort Descending, Columns, and Filter.
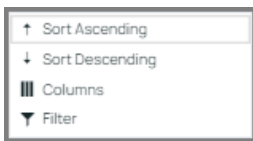
Clicking on the Columns option will display a list of all the available columns to display in the grid.

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.

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.

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.
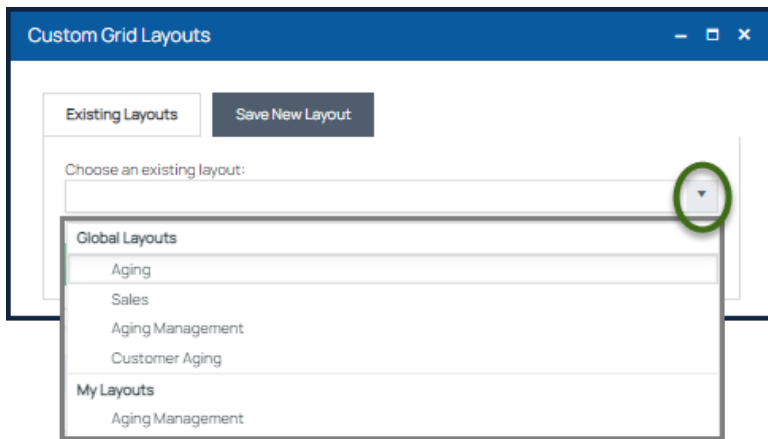
Customer Search

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.
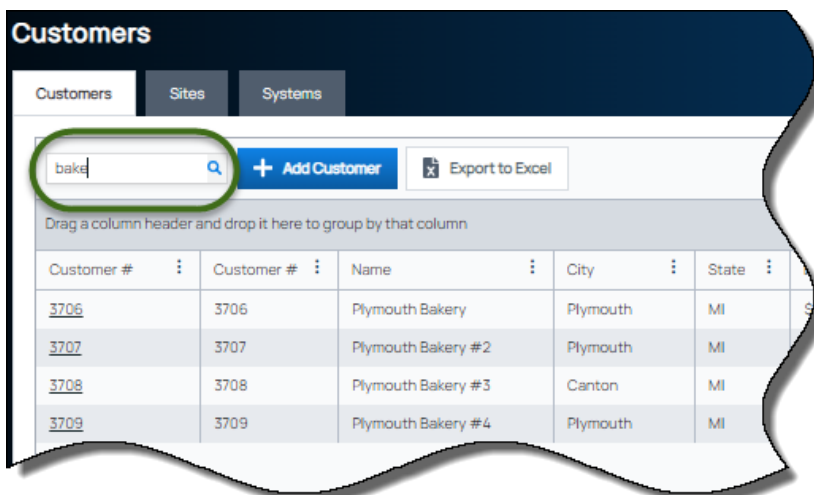
Customers List Function Buttons

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.