

How to Find Terminated Customers

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Customers that are inactive in Managely do not appear on the main search at the top, making it only prospects or active customers to show there.

Inactive customers in Managely are called terminated customers. Follow the steps below to find the terminated customers:

Access CRM > Customers.

Enable the option for terminated customers as shown below and the results will display:



This list can be exported to Excel, by clicking the Export to Excel button:

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