How to…

Add, View, and Edit Customer Details

To make the customer record more useful, you can add a wide variety of additional information types to the record. The Customer Details screen also provides a series of shortcut links that enable you to see all outstanding work orders that involve a customer; both On-Demand and Recurring Work.

To add additional information to the customer record, complete the following steps:

1. Navigate to the Active Customer Sites screen. If you have just logged into the system, this is the default screen that is displayed. Otherwise, go to Customer tab > Customer Site Search option.

2. Use the Scope selection field in the top-right corner of the screen to select the Work Zone Property, Portfolio, or Customer Group that the customer is associated with.

3. Use the search fields on the screen to locate the customer. Then, click the View/Edit link for that customer in the Actions column of the results table.

A Customer Details screen appears, displaying all of the information you entered for the customer during the “Add a New Customer” process and providing access to a range of additional fields through the drop-down menu at the bottom of the screen.

Note: By default, the customer’s Contacts information is displayed when you first land on the screen, but you can view and/or add any of the following details by clicking the down arrow beside the Contacts heading and selecting a different information type from the drop-down list that appears.
Although the drop-down list contains links to a range of different information types, the following are the most commonly used and the most important:

**Contacts**— The Contacts option displays the direct contact or contacts for the selected customer location as well as the contacts for all of the customer groups to which the customer belongs. This provides a wider range of contacts to choose from in the event that the primary location contact is unavailable.

**Customer Groups**—The Customer Groups option is important because it not only shows which Customer Groups the current customer belongs to, but also allows you to add and remove the customer from different customer groups, which has a direct impact on the list of names that appears in the Contacts field, discussed above.

**Notes**—The Notes option allows you to make notations about minor issues that are ongoing with a customer and to track the progress toward a resolution of those issues. This is a fast and easy alternative to the more detailed and involved process of creating a separate work order and monitoring developments that way.

When a note is created, the system automatically records the name of the note creator and date and time that he or she created the note and displays it on the Edit Note screen (#1 in the screenshot below). The system then keeps track of each change made to the note, displaying the name of the most recent user to make changes and the time and date those change was made (#2 below).
A Resolved check box on the Edit Note screen allows any authorized user to mark the issue as resolved (#3 above), which adds a corresponding check mark in the Resolved column on the default Notes screen (shown below). This enables users to tell at a glance which notes still need to be addressed and which are no longer active.

![Notes Table](image)

**Work Orders**—The Work Orders option lists all of the customer’s outstanding work orders in the system and provides clickable links that open each work order directly, saving you from having to do a general search to find and view a particular work order. The Work Order list also displays the name of the technician assigned to each work order, so you can tell at a glance who is in charge of completing each order.

![Work Orders Table](image)

**PMRM Schedules**—The PMRM Schedules option works much like the Work Orders option in that it lists all of the customer’s PMRM schedules in the system and provides clickable links that open each schedule directly, saving you from having to do a general search to find and view a particular one.

![PMRM Schedules Table](image)
**Custom Fields**—The Custom Fields option displays all of the custom fields that your company has defined in order to capture customer data beyond that which is collected from the standard customer details fields that are provided by the system.

**Sites/Locations** – The Customer may have multiple locations/sites/stores that you are performing services for. All of the Customer locations being serviced should be added here. Click the “Add Service” link and complete the pop-up window information.

**Tip:** As you add information on each of the options screens, an icon appears in the table heading, providing you with one-click access to the related options screen. If you hover your mouse over an icon, a popup label appears, telling you which of the options that icon relates to.