Customer Explorer Overview and Topics

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The Customer Explorer was designed to be a one-stop customer service tool that displays customer information and transactions related to a customer, its sites, and systems.

The Customer Explorer is divided into four panes of information:

Customer Tree

The Customer Tree is used to locate and display setup information and transactional data related to the customer.

Billing Information

This pane will always display the Customer Name and the primary billing address and phone number for the Customer.

Financial Summary

This pane displays the accounts receivable balance and other financial statistics for the customer.

Active Pane (Grid)

When clicking on an option within the Customer Tree, any information available for that option is displayed within the Active Pane. This area is also referred to as the Grid area.

Customer Explorer records are accessed by using one of the Customer Search options on the main application toolbar; the Text Box search or clicking on the Quick Search button (binoculars icon). Once the customer is located and selected, the Customer Explorer record will be displayed.

When the Customer Explorer record is first opened, the Active Pane will display several pieces of information related to the customer:

- Active Billing Contact Names & Phone Numbers
- Open Invoices
- Unapplied Payments and Credits
- Open Service Tickets
- Open Jobs

Users with appropriate permissions can double-click on any of these open items to view the details of that item.

Customer Explorer Topics

Follow the links below for detailed information about the Customer Explorer.

Customer Tree Definitions and Functions

Customer Structure and Functions

Customer Tree Options and Activities

Customer Explorer Active Pane Functions

Site Copy

Central Station Tracking

RMR Management