

# Customer Tree Options and Activities Overview

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Once a new Customer has been created, the Customer Explorer form is displayed containing the structure of the customer and other information related to the customer, its sites, and systems. As activities are performed and transactions are posted that pertain to the Customer, its Sites, or Systems, the information is viewable from the Customer Tree within the Customer Explorer record. The Activities & Options area of the Customer Tree is organized alphabetically beginning with the Activity Ledger option and ending with the Systems option; each Tree Option is described by clicking on one of the links below. Some Options have right-click functionality which is discussed within each Option topic.

- [Activity Ledger](#)
- [Aging](#)
- [Collections](#)
- [Contacts](#)
- [Credit Memos](#)
- [Credit Auto](#)
- [Deferred Income](#)
- [EFT History](#)
- [Inner Office Message](#)
- [Invoices](#)
- [Jobs](#)
- [Journal Detail](#)
- [Journal Summary](#)
- [Notes](#)
- [Payments](#)
- [Prospects](#)
- [Recurring](#)
- [Recurring History](#)
- [Refunds](#)
- [Sedona Event Log](#)
- [Service](#)
- [Systems](#)

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