Edit Customer Setup

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Selecting the Edit Customer Setup option will display the Customer Setup Information. The User may make changes to the Setup Information, Custom Fields information, Bill To's, and Customer Items. Once all changes have been made, click the Save button located at the lower right of the form.

Important Note: If the Branch is changed on the Customer Setup Information form and the Customer has more than one Site record, the Branch on the Site records will not be updated with the Customer Branch change. If the Branch on the Site needs to be changed, the User will have to manually edit the appropriate Site records. If the Customer has only one Site record, the application will automatically update the Site branch to the branch selected and saved on the Customer.