

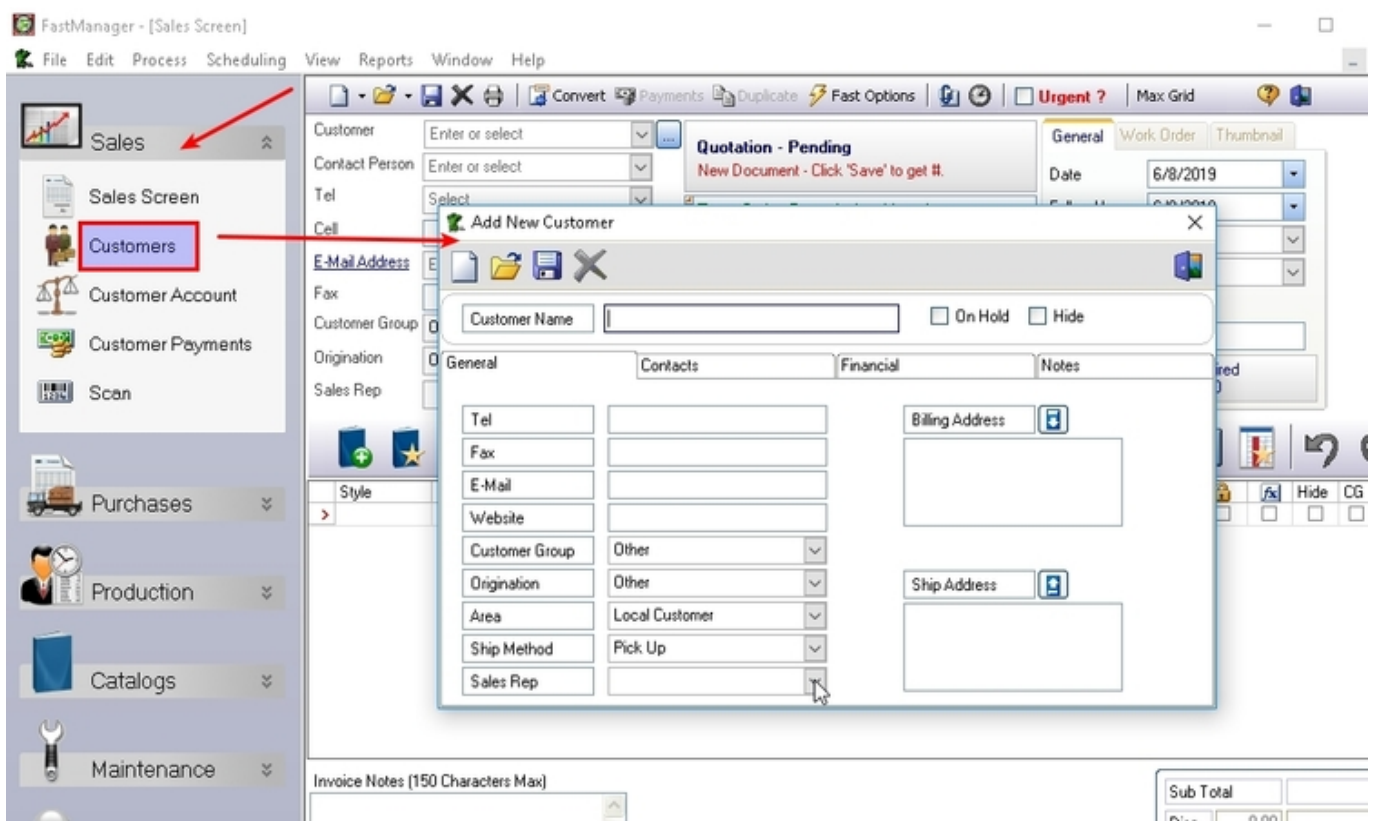
Managing Customers



It is always easier to simply create customers “on the fly” via the [Sales Screen](#),

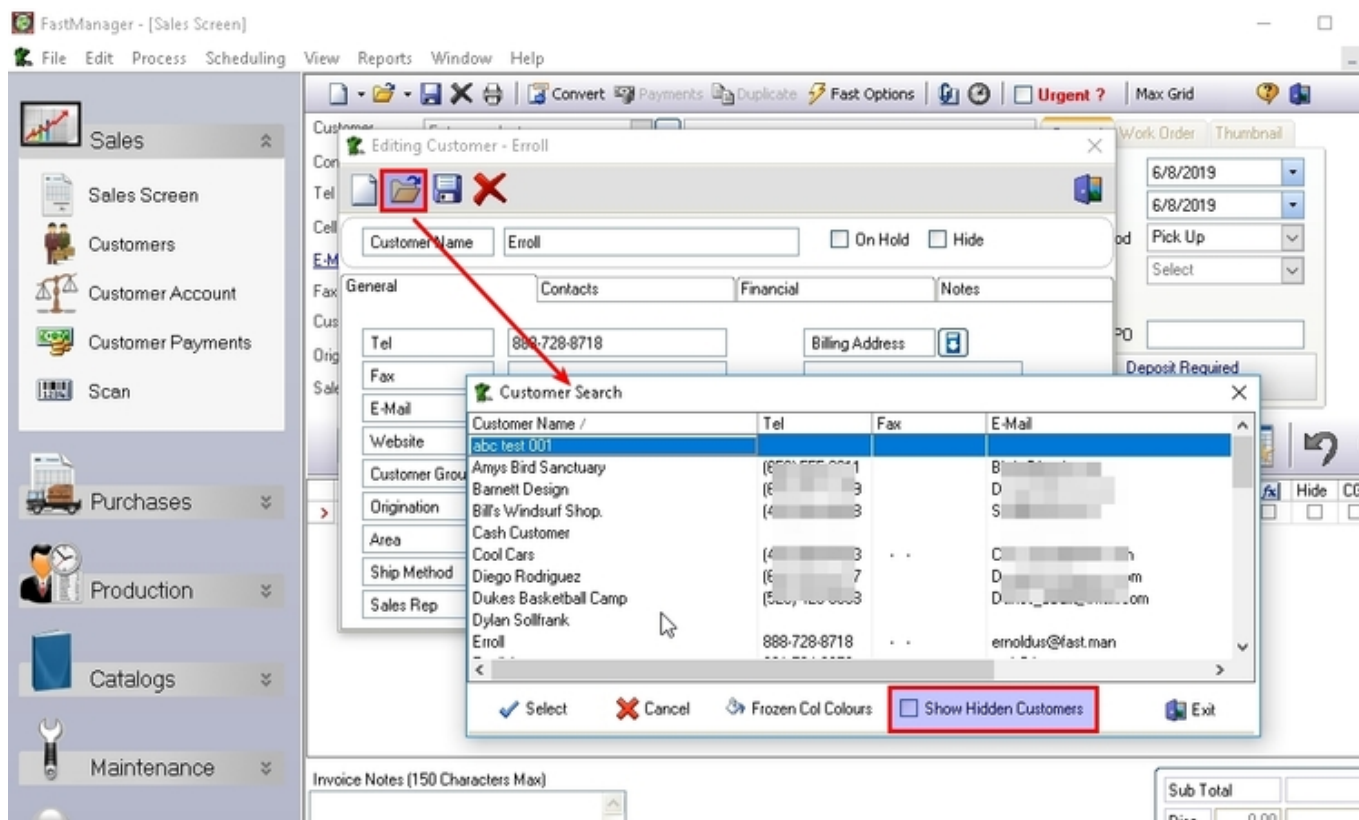
- However you may want to record more detail on your customer, or even have to update address changes etc for an existing customer.

To maintain and update customer information, expand the section: **Sales** on the navigation pane and click on: Customers



To edit or delete an existing customer, you need to open the customer record first by clicking on the Open icon.

- If the customer you are trying to open is a hidden customer, then you need to check the Show Hidden Customers option from the search screen.



The customer maintenance screen has 4 tabs:

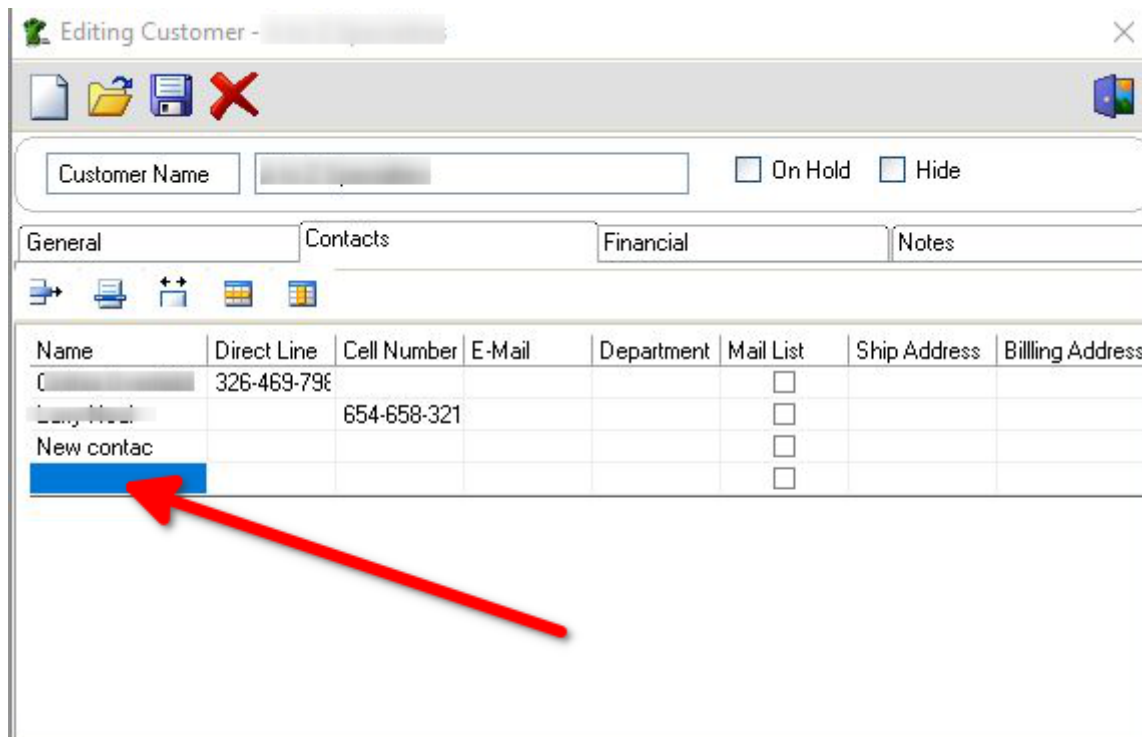
General

On this tab you will update general contact and grouping information.

Contacts

FastManager allows you to have an unlimited number of contact persons linked to a customer. Each contact person can also have it's own shipping and billing address.

- To add a new contact person simply enter the person's first name in the last open row of the list:



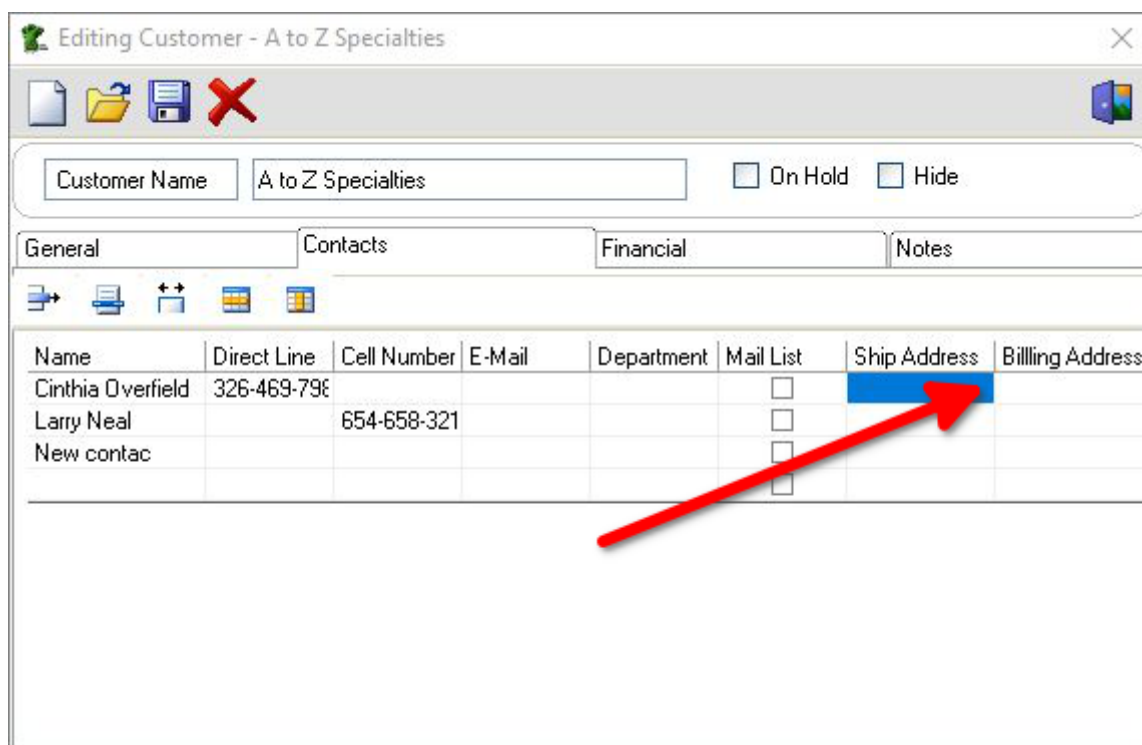
Editing Customer - [Customer Name]

Customer Name: [Text Box] ☐ On Hold ☐ Hide

General | **Contacts** | Financial | Notes

Name	Direct Line	Cell Number	E-Mail	Department	Mail List	Ship Address	Billing Address
[Customer Name]	326-469-796				<input type="checkbox"/>		
Larry Neal		654-658-321			<input type="checkbox"/>		
New contac					<input type="checkbox"/>		

- To edit the shipping and billing address you need to click on the small *Edit* button which will appear as soon as your cursor enters the relevant cell:



Editing Customer - A to Z Specialties

Customer Name: A to Z Specialties ☐ On Hold ☐ Hide

General | **Contacts** | Financial | Notes

Name	Direct Line	Cell Number	E-Mail	Department	Mail List	Ship Address	Billing Address
Cinthia Overfield	326-469-796				<input type="checkbox"/>		
Larry Neal		654-658-321			<input type="checkbox"/>		
New contac					<input type="checkbox"/>		

- To delete a contact, click on the contact name and then click on 'Delete Row':

Editing Customer - [Customer Name]

Customer Name: [Text Field] ☐ On Hold ☐ Hide

General | Contacts | Financial | Notes

Open | Print | Add | Edit | Delete

Name	Direct Line	Cell Number	E-Mail	Department	Mail List	Ship Address	Billing Address
[Customer Name]	326-469-796				<input type="checkbox"/>		
[Customer Name]		654-658-321			<input type="checkbox"/>		
					<input type="checkbox"/>		

Financial Tab:

Here you would assign default financial information for your customer.

- You can also tell FastManager what this customer's account number in QuickBooks is.



If you leave the field: *QB Acc Ref* blank, then FastManager will try and create the customer in QuickBooks when sending an invoice or payment to QuickBooks.

The contact name and phone number on this tab is what will appear in collection reports.

Notes Tab:

Here you can enter important notes about a customer.

- The pop-up notes will appear every time you select the customer in the sales screen.

Example:



After click on Open - simply immediately start typing the name of the Customer you're after. FastManager will drill-down to whatever you type

[edit_customer.mp4](#)

About Hiding Customers:



You cannot delete a customer if you have any transactions such as quotations, work orders, invoices and payments linked to that customer.

If the customer no longer exists you need to *hide* the customer.

If you mark a Customer as *Hidden*, you will no longer see them in other screens.

In order to see this customer again, you will need to open the customer from the customer maintenance screen by clicking on the Open button, then check the Show hidden customers check box and un-hide the customer.

Printing Mailing Labels

You can print mailing labels from FastManager.

- You will need a label printer in order to print address labels.
- We have tested the label printing using a Dymo Labelwriter 400 which you can buy at any Staples or Office Depot.
- Before you can print labels you need to set up your label layout.

From the “View” menu, select “Customer List”

- Click on the Print Options button.
- From the Pop-Up menu, first select your label printer.
- Next select your label orientation. In most cases it should be Landscape. It all depends on your label size.
- Next choose a font size

!!! tip First print a single label, to see what it looks like.

You can then go back and change the X and Y position as well as the font size, until you are satisfied with the way your label looks.

- To print a single label Click on any one row in your list of customer below.
- Click on the Print button
- From the Pop-Up menu, select Print Selected Rows Only then Master Address Only
- This will print the Master Billing Address for the selected customer.

!!! tip To print multiple labels you can select to print all rows or you can select multiple rows by holding down your SHIFT or CTRL key.

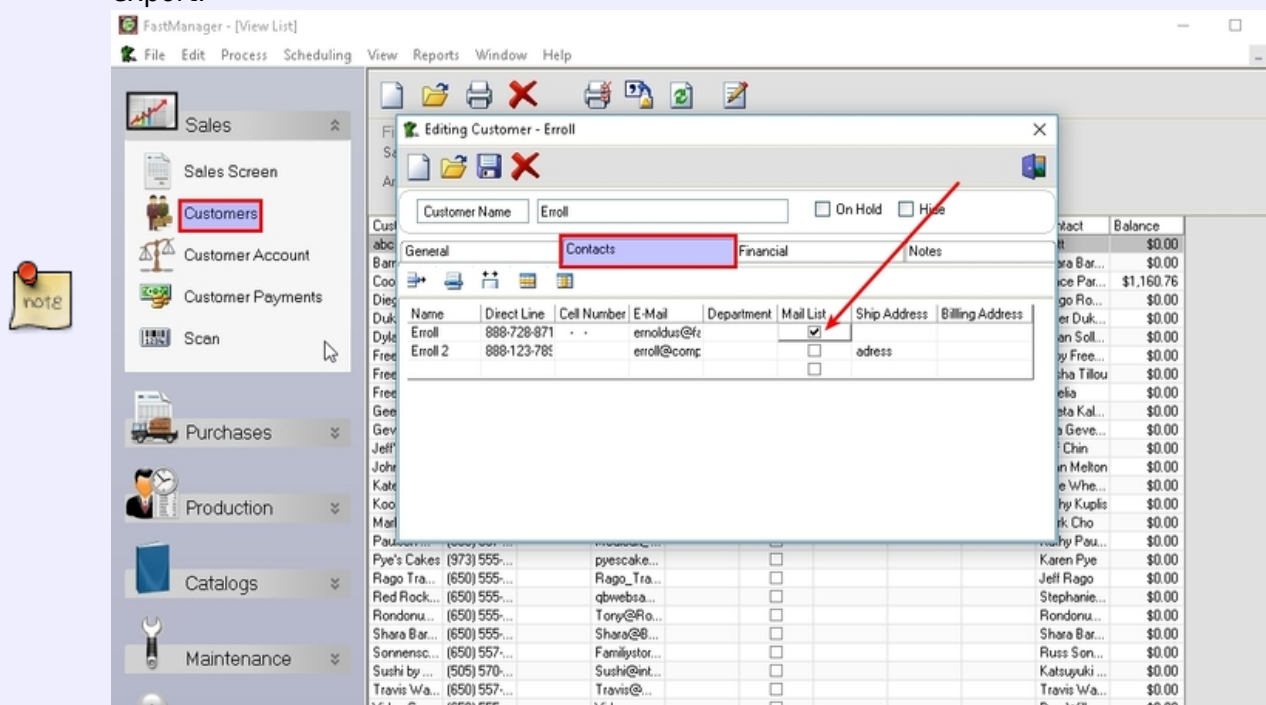
Exporting Email addresses

You can export a list of your customers' E-Mail addresses to a CSV spreadsheet.

- From the View menu, select Customer List
- Use the filter options to narrow down the list of customers you want to extract addresses for.
- Click on the Export button
- Select E-Mail addresses from the pop-up menu

[export_mailing_list.mp4](#)

If the “Mail List” option of a contact person in your customer master file is **unchecked**, then the E-Mail address for that person will NOT be included in the export.



You can export a more comprehensive mailing list at: File -> Export -> Customer Mailing List

[← Sales: Overview](#)[Getting Paid ⇒](#)

From:

<https://docs.fastmanager.com/> - **FastManager Help Manual**

Permanent link:

<https://docs.fastmanager.com/sales/customers>

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