

Updating Customer Info

To update your customer information, you will need go to Customers and select Customer Shipping or Customer Billing depending which needs to be updated. Our example will be updating Customer Shipping information.

The screenshot shows the iPromote dashboard. The 'Customers' menu item is highlighted with a red box, and its dropdown menu is open, showing 'Customer Shipping' and 'Customer Billing' also highlighted with a red box. Below the dashboard, there is a table titled 'OPEN ORDER STATUS' with columns: Job #, Customer, Job Title, Status, Order, Requested Ship, In Hands, Recent Tracking #, Shipping Vendor, Draft Invoice, and Dispute. The table contains several rows of order data.

Upon choosing, you will come to your customer list, choose or search for the Customer you would like to update.

The screenshot shows the 'Customer Shipping' page. At the top, there is a search bar with a red box around it, containing the text 'Search:'. Below the search bar, there are radio buttons for search criteria: 'All words (AND)', 'Exact phrase', 'Allow partial matches' (checked), and 'Include inactive'. Below this is a table with columns: Customer, Master Customer, Company Name, City, St., Zip, Phone Num., and Contact. The row for '2341' is highlighted with a red box. At the bottom, there is a 'Rows/Page: 10 Rows: 36' indicator and a 'Page 1' dropdown menu.

Customer	Master Customer	Company Name	City	St.	Zip	Phone Num.	Contact
AAA	AAA	AAA Specialty Wholesale, Inc	Murrayville	GA	30564	770-534-8114	Jerry Abercrombie
2341	2341	Gainesville First United Methodist Churc	Gainesville	GA	30506	770-536-2341	
4673	4673	Hope Crossings Assembly of God	Jefferson	GA	30549	706-654-4673	Chris Stephens
2265	2265	Chestatee State Bank	Dawsonville	GA	30534	706-216-2265	Stephanie Womack
7701	7701	State Farm Insurance	Oakwood	GA	30566	770-536-7701	Rick Jackson
3220	3220	Midway Fuel & Shine, Inc.	Alpharetta,	GA	30004	770-605-3220	Marty Williams
5351	5351	Ward's Funeral Home	Gainesville,	GA	30501	770-534-5351	Jimmy Brewer
3159	3159	Bearden Funeral Home	Dawsonville	GA	30534	706-265-3159	Ted Bearden
2050	2050	Georgia Association of Edu. Leaders	Flowery Branch,	GA	30542	770-967-2050	Jon Smith
2388	2388	Karen Peck & New River	Dahlonega,	GA	30533	678-316-2388	Susan Jackson

From here, you can now update address information, add contacts, or remove them from the record. When you're done, hit Close.

Customer Shipping View / Edit

Ship Code: 2341
Affiliate: AAA Sales Rep: AAA
Bill Code: 2341

Company Name: Gainesville First United Methodist Church
Address Line 1: 2780 Thompson Bridge Road
Address Line 2:
Address Line 3:
City: Gainesville
ST / Zip / Country: GA 30506 USA
Email: msmith@gfumc.com

Phone #: 770-536-2341
Phone Ext.: 143
Fax #: 770-534-7914
Master Customer: 2341
Tax Code: GA2
Tax Exempt:

Edit any necessary information

+ Add Contacts ?

Default	Name	Summary	De-link
<input type="radio"/>	Jerry Abercrombie	Email: wabercro@bellsouth.net Phone: 770-534-8114 Links: 2341, AAA Notes: AAA Specialty Wholesale, Inc	

Permanently remove a contact from the record.

Close