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Navigation boxes

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Actions Box (a)

The Actions box contains links to Edit a customer and to perform various actions on to the customer account like: Adding Order, Ticket, Document, Contact and Notes. In this screen, users can add subscription, charge, product and payment details to the customer's account profile. We can also define tax exemptions on the customer, based on the tax jurisdiction.

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View Box (b)

The links in this box allow users to view lists of Orders and Tickets linked to the customer. Users can also view, add and edit customer service address, service contracts, portal user accounts, subaccounts (if the customer is a parent account), budgets and schedules to present for each customer.

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Inventory box(c)

The links in this box allow users to view lists of all subscriptions, product and charges attached to the customer

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Accounting Box(d)

The links in this box allow users to view the different accounting transactions for the customer. Users can view lists of invoices, credit notes, manual and pre-authorized payments; they can also view the payment schedules and disputes that have been raised and/or negotiated with the customer.

250px

http://wiki.smartbilling.ca/index.php/File:Customer_Demographic_info.mp4

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