Customer Account Overview / Editing

Customer Account Overview

The customer account brings together contact, location, service, system, equipment, activity, and billing information. Not every employee will see or be permitted to change every item.

Main Information to Review

Account area	What to confirm
Identity	Customer or company name and account number
Contact	Phone numbers and email addresses, including who they belong to
Location	Service address, selected location, and location photo
Labels and status	Account labels, active/good-standing indicators, balances, and holds
Services	The active services connected to the customer or location
Systems and equipment	Fuel system, tank or other equipment, ownership, and related setup
Activity	Account notes and recorded events that help staff understand prior contact
Tabs	**Overview** plus other areas such as **Systems**, **Service**, **Communications**, and **Billing**, based on permissions and company setup

Review the Customer Header

The customer header shows the account number with the payment terms, brand, relationship, email and mail preferences, contact details, and a count when the customer has more than one location. Service plans, fuel services, budget plans, taxes, promotions, and autopay are listed on the right, and labels appear along the bottom.

Confirm the Correct Customer

- Review the customer or company name.
- Check the account number.
- Confirm the service address.
- If multiple locations are available, select the correct location.
- Confirm the contact information before making changes or creating work.

Add or Update a Location Photo

- Open the image or photo area on the account.
- Select **Upload Images**.
- Choose an appropriate photo of the property or building.
- Enter a simple image name or caption.
- Upload the image.
- Set the image as the default when appropriate.
- Return to the account overview and confirm that the photo belongs to the selected location.

A clear location photo helps drivers and technicians identify the correct property and reduces the risk of going to the wrong site.

Update Contact Information

- Use the add action beside **Phone** or **Email**, or edit the existing entry.
- Enter the contact information and identify the person's name or role in the description.
- Associate the information with the correct location when the screen asks for it.
- Set the default contact when appropriate.
- Flag every email address that should receive mail. Receipts, statements, and invoices go to every flagged address.
- Save the change and confirm the updated information appears on the account.

Saved phone numbers and email addresses can also be used to find the account in Search.

Account and Location Settings

Select the gear to the left of **Overview** to review and update settings such as payment terms, customer or billing information, location information, labels, tax status, promotions, notes, addresses, and preferences. Update only the information that changed. The exact choices depend on permissions and company configuration.

Internal Notes and Operational Notes

- For a private internal note, open **Events** or **Activity**, choose the appropriate event type, enter a concise factual note, and save it.
- For information needed by field or routing staff, open the applicable system settings and use **Driver Alert**, **Router Notes**, or **System Notes**. Keep private internal remarks out of operational notes.

> **Know the difference:** The billing address belongs to the customer and is used for billing. The service location is the physical address where fuel is delivered or service is performed. Operational notes may appear in driver, router, ticket, or other customer-facing workflows; use Events or Activity for private internal notes.

What Else You Will See

- **Fuel services:** an icon beside each fuel service shows will-call (a phone) or automatic delivery (a sync arrow).
- **Overdue amount:** the customer dashboard leads with the overdue amount, then the current balance.
- **Blocked email:** a red warning triangle beside Email means an address bounced or reported spam. In the contact list, that address shows a red **Blocked** tag with the reason and date. After the customer confirms the address is good, select the check icon on that row to clear the block. Retyping a corrected address clears it automatically.
- **Activity feed:** invoices, payments, and deliveries appear in the timeline beside notes. Choose which record types to show.
- **Change history:** a system's audit shows who changed what and when, with before and after values. Viewing it takes its own permission.

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