

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

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

- Select the phone number or email area on the account.
- Add a new entry or edit the existing information.
- Identify the person connected to the phone number or email when applicable.
- Associate the information with the correct location when the screen asks for it.
- Save the change.
- Confirm the updated information appears on the account.
- Mark the primary email as the default for email communications, so invoices, payment receipts, and budget, quote, and fuel-contract messages reach the customer.

Account and Location Settings

Use the gear icon beside the relevant customer or location area to review settings such as customer or location information, labels, tax status, promotions, notes, or addresses. The exact choices depend on permissions and company configuration.

Want me to go back and apply this same numbers-to-bullets, no-letters change to the Logging In and Customer Search articles too, so all three stay consistent?

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