

## **Waste Vantage Training Guide: How to Manage Customers**

This section will provide a step-by-step guide on effectively managing customers within the system. It covers all the essential tasks and functionalities you will need to handle customer information.

 Payment Module

 Bin Management

 Service Area

 Customers & Organisations

Customers

Customer Locations

Organisations

## Customers

All Status	All Xero Status	Show: 10	Customer name, email, phone, etc.	Filter		Add New Customer	Import Customer	Export Customer			
<div><input type="checkbox"/></div>	Name	Email	Phone Number	Organisation	Street Number	Street Name	Suburb	State	Postal Code	Status	Tag
<input type="checkbox"/>	Dacey Christian	dezopi@mailinator.com	+1 (434) 186-3527	-	-	-	AWARUA	SOUTHLAND	9877	Active	
<input type="checkbox"/>	Tina Rosa	hytesuqyba@mailinator.com	+1(637)468-2822	-	441	Gray Solomon	AWARUA	SOUTHLAND	9877	Active	

### Step 1:

1. On the left sidebar menu, click on Customers and Organisations and select "Customers".
2. This page will display a list of all your customers with their details.
3. To add a new customer, click the "Add New Customer" button.
4. To export or download your customer list, click the "Export Customer" button.
5. Click on a customer's name to view and edit their details.

## Customer: Dacey Christian

[Billings](#)[Credits](#)[Statements](#)[Back](#)

Customer Name:  
Dacey Christian

Email Address:  
[dezopi@mailinator.com](mailto:dezopi@mailinator.com)

Phone Number:  
[+1 \(434\) 186-3527](tel:+14341863527)

Address:  
, AWARUA SOUTHLAND 9877

Billing Address:  
, AWARUA 9877,

Created By :

Customer Type:  
LAYTON HOMES

[✎ Edit customer](#)[✖ Deactivate](#)

### Dacey Christian's Comments

[Add New Comment](#)

### Dacey Christian's Addresses



Contact Name	Phone	Street Number	Street Name	Suburb	Postcode
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## Step 2:

### How to Edit Customer Details:

1. On this page, you can see all the customer's information, including site details, comments, and order history.
2. To edit customer details, click the "Edit Customer" button.
3. To deactivate a customer, click the "Deactivate" button.

## Dacey Christian's Addresses

Contact Name	Phone	Street Number	Street Name	Suburb	Postcode
Clark Blair	+1 (728) 648-3891	963	Dahlia Yang	WAIMATUA	9877



Create

×

Contact Name \*

Contact Phone \*

Street Number \*

Street Name \*

Suburb \*

Postcode \*

Close

Save

### Step 3:

#### How to Edit and Add Customer Sites:

1. To add a customer site, click the (+) button.
2. Complete the mandatory form to add a new site, then click "Save".
3. To edit an existing customer site, click the pencil icon next to the selected site.
4. Click the eye icon to view the order history for that site.
5. Click the trash icon to delete the site.

Credit Customer Manager

Invoices

Credit Notes

Running Balance

Payment Reports

## Credit Customer

Total Credit	\$0
Remaining Credit	\$0
Balance	\$0
Limit Pay with Cash	0x
Billing Cycle	
Create By	unknown
Status Credit	<span>Not Active</span>

 Edit

## Credit History

Total Credit	Add Credit	Pay Cash Limit	Billing Cycle	Update Date	Created By
Data not found...					

**Step 4:****How to Manage Your Customer Credit Account:**

1. To view and edit a customer's credit account, click the "Credit" button in the top right corner.
2. This page will display the customer's credit account details and credit history.
3. To modify the customer's credit details, click the "Edit" button.
4. You can also view the customer's invoice history, credit notes, running balance, and payment report by selecting the relevant option from the header menu.

Billings

Credits

Statements

Back

Dacey Christian's Comments

 Add New Comment