

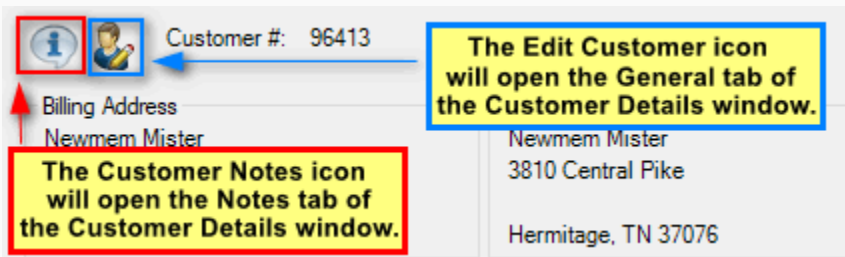


Editing Customer Information in AMS

There are several ways to edit a customer's contact information.

If the customer has already been selected on the AMS screen:

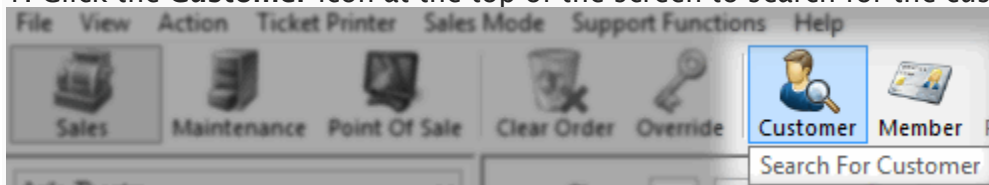
At the top of the AMS screen, there are two icons beside the Customer #: The **Customer Notes** icon  and the **Edit Customer** icon.  Selecting the **Customer Notes** icon will open the **Customer Details** window on the **Notes** tab, where you can then make any internal notes about the customer which the customer will not see. Selecting the **Edit Customer** icon will open the **Customer Details** window on the **General** tab.



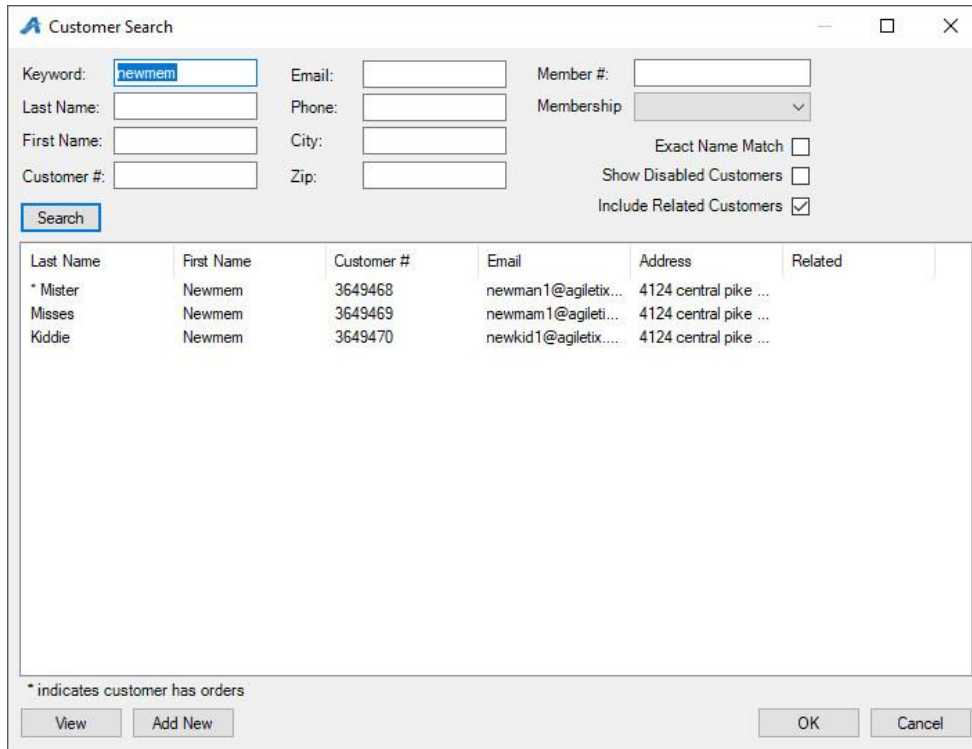
After clicking either icon, you may make edits as described by Steps 4 through 11 of the following section.

If the customer record has not already been selected on the AMS screen:

1. Click the **Customer** icon at the top of the screen to search for the customer's account.



2. A **Customer Search** window will appear. Type a **Keyword** to search for the customer (e.g. last name, phone number, email, customer #, etc.) and click the **Search** button.



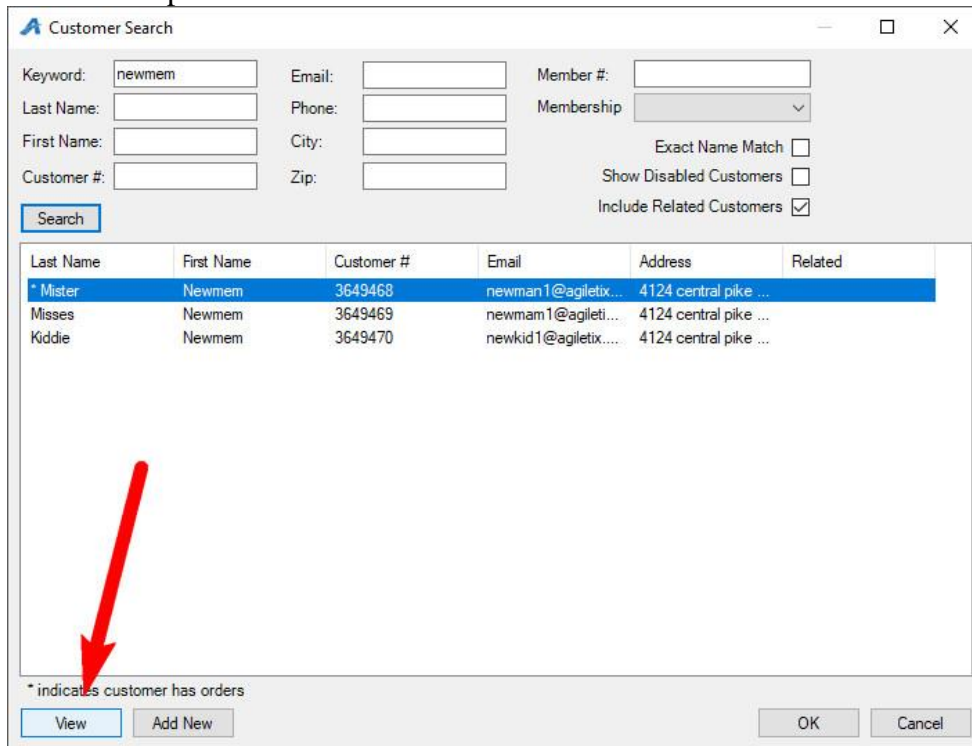
The screenshot shows the 'Customer Search' window with the following search criteria: Keyword: newmem, Last Name: (empty), First Name: (empty), Customer #: (empty), Email: (empty), Phone: (empty), City: (empty), Zip: (empty), Member #: (empty), Membership: (dropdown menu), Exact Name Match: , Show Disabled Customers: , and Include Related Customers: . The search results table is as follows:

Last Name	First Name	Customer #	Email	Address	Related
* Mister	Newmem	3649468	newman1@agiletix...	4124 central pike ...	
Misses	Newmem	3649469	newmam1@agileti...	4124 central pike ...	
Kiddie	Newmem	3649470	newkid1@agiletix....	4124 central pike ...	

* indicates customer has orders

Buttons: View, Add New, OK, Cancel

3. A list of customer records will appear in the search window. Click **View** at the bottom of the window to open the customer record.



The screenshot shows the 'Customer Search' window with the same search criteria as above. The first result, '* Mister Newmem', is highlighted in blue. A red arrow points to the 'View' button at the bottom left of the window.

Last Name	First Name	Customer #	Email	Address	Related
* Mister	Newmem	3649468	newman1@agiletix...	4124 central pike ...	
Misses	Newmem	3649469	newmam1@agileti...	4124 central pike ...	
Kiddie	Newmem	3649470	newkid1@agiletix....	4124 central pike ...	

* indicates customer has orders

Buttons: View, Add New, OK, Cancel

4. In the **General** tab, you can make changes to the customer's contact information and any answers to the customer question prompt. You are also able to add and edit customer images. To learn more about customer images, see [Adding an Image to a Customer Record](#).

Customer Details

General | Related | Memberships | Web Login | Sales Info | Account Benefits | Notes

General Info

Business Enabled Customer # 3649468

Prefix:

First *: Email:



Middle: Receive email related to TicketsNashville.com...

Last *: Receive email related to Tickets Nashville (Q...

Suffix: Web:

Credit Limit:

Addresses

Country: Enabled Primary  


Address 1:

Address 2:

City: Note:

State / Province:

Zip / Postal Code:

 Add Address

OK Cancel Apply

Customer Details


General | Related | Memberships | Web Login | Sales Info | Account Benefits | Notes

Address 2: Note:

City:

State / Province:

Zip / Postal Code:

 Add Address

Phone Numbers

Primary:

Secondary:

Reg Group

Regional Question *

Tax Info

Tax Exempt Federal Tax ID: State Tax ID:

OK Cancel Apply

5. The **Related** tab allows you to add customers that need to be associated with this customer record to complete a household (i.e. Mrs. Newmem can be added as Mr. Newmem's wife).

First Name	Last Name	Customer #	Relationship
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- To add a relationship to a customer record, click the **green plus sign**.
- Click the drop-down and select the type of relationship the customer has with the other customer (business, contact, sold for).

Relationship: Contact

Customer #:

Name:

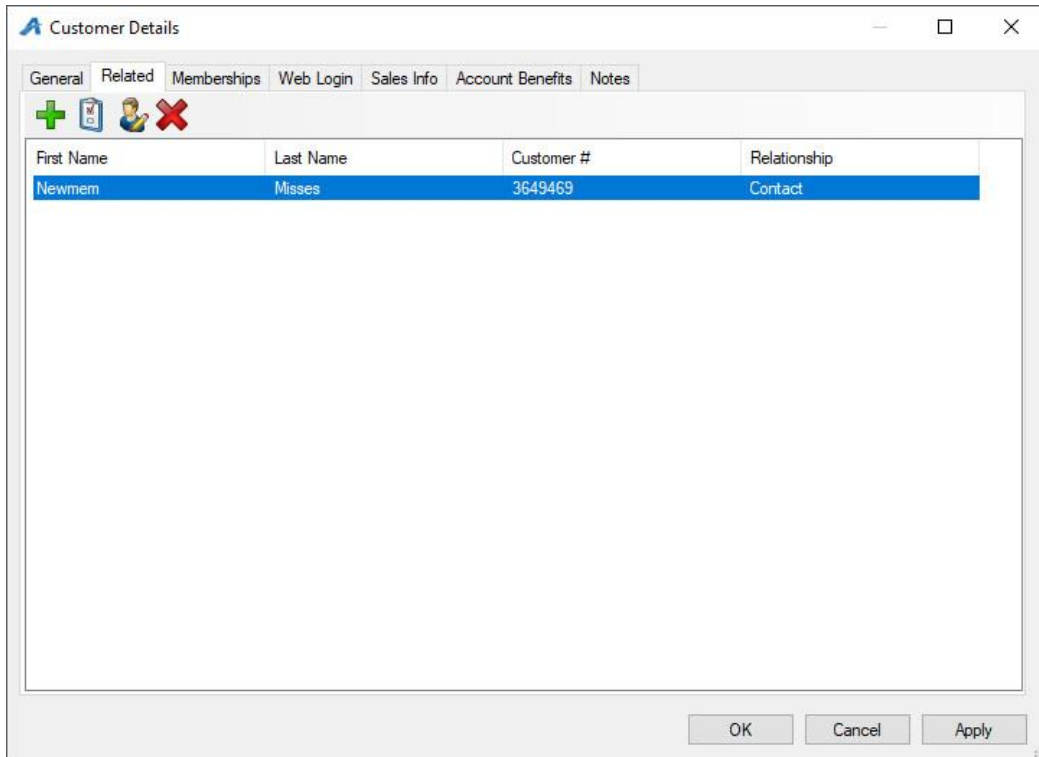
- Type in the related **Customers' Number**, or search for the related customer by clicking the **Magnifying Glass**.

Relationship: Contact

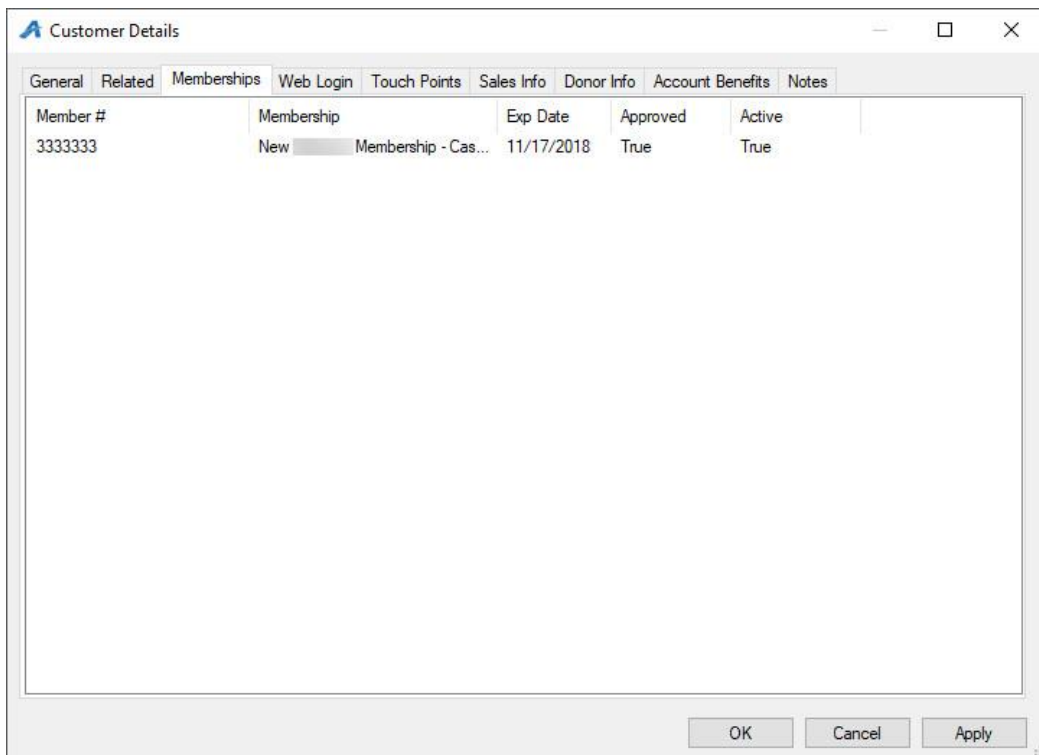
Customer #: 3649469

Name: Newmem Misses

- Once you see the related customer's name in the **Name** field, click **OK**.



6. The **Membership** tab allows you to manage a customer's membership. You are able to manually edit a member's expiration date as well as additional member benefits. Click to learn how to [Manually Add Membership Benefits to an Existing Member.](#)



7. The **Web Login** tab is where you create and manage that customer's login information.

The screenshot shows a window titled "Customer Details" with several tabs: General, Related, Memberships, Web Login (selected), Touch Points, Sales Info, Donor Info, Account Benefits, and Notes. Below the tabs are icons for a globe, a document, an envelope, and a red X. The main area contains a table with the following data:

Username	Security Question	Answer	Last Logged In
newman1	What is your mother's maiden ...		11/17/2017 12:08 PM

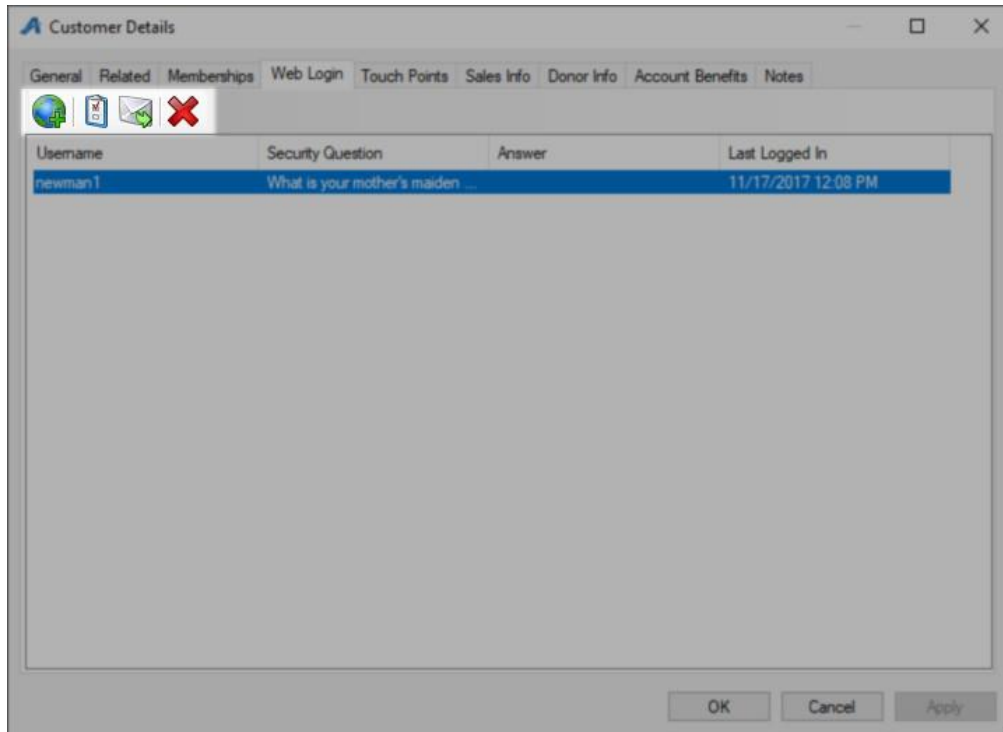
At the bottom of the window are buttons for "OK", "Cancel", and "Apply".

- To create a new username and password for the customer, click the Globe icon.
- Enter the username, and generate a random password.
- If a customer has forgotten their password, click the Random Password button to generate a new temporary password for them.

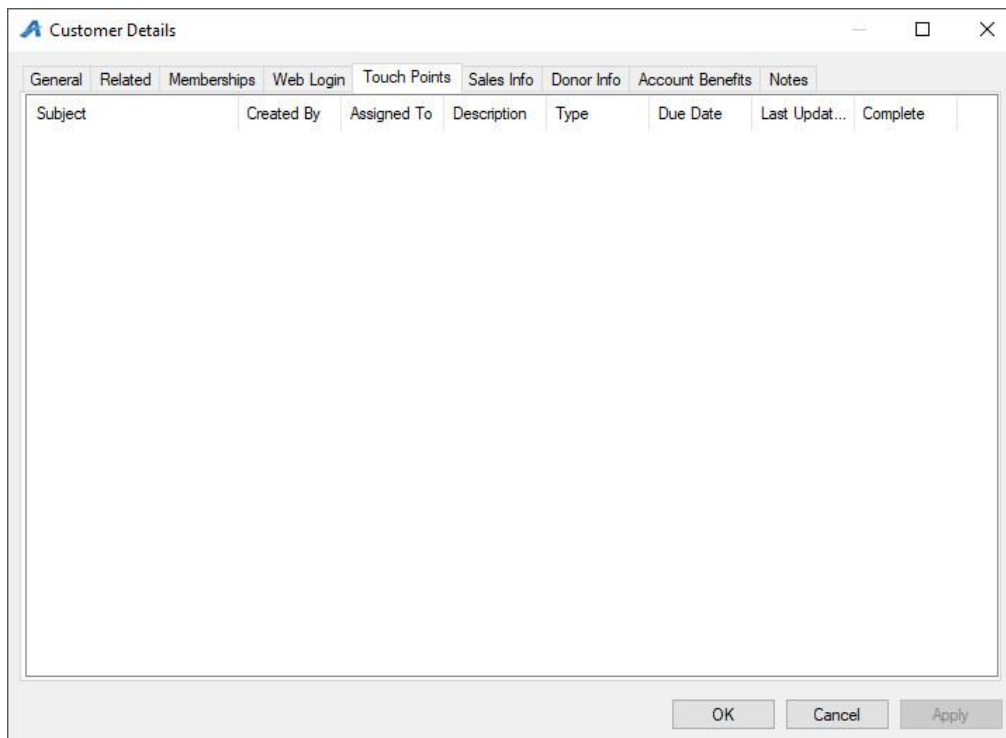
The screenshot shows a "Web Login" dialog box with the following fields and buttons:

- User Name:
- Password:
- Confirm password:
- Security question:
- Answer:
- Buttons:

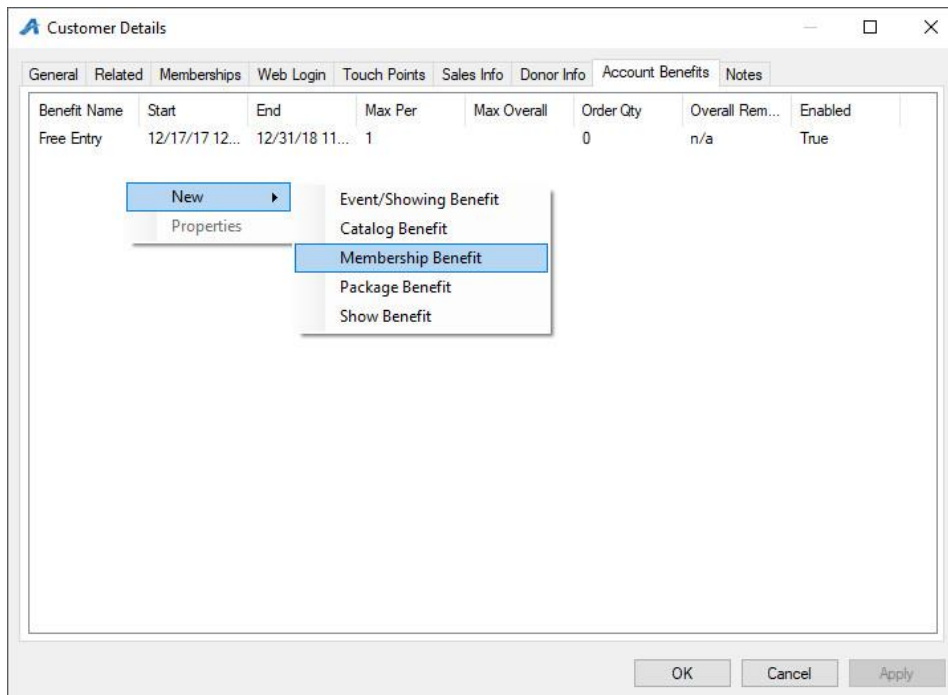
- Clicking the **Envelope** icon will send a reset password email that allows the customer to change their own password.



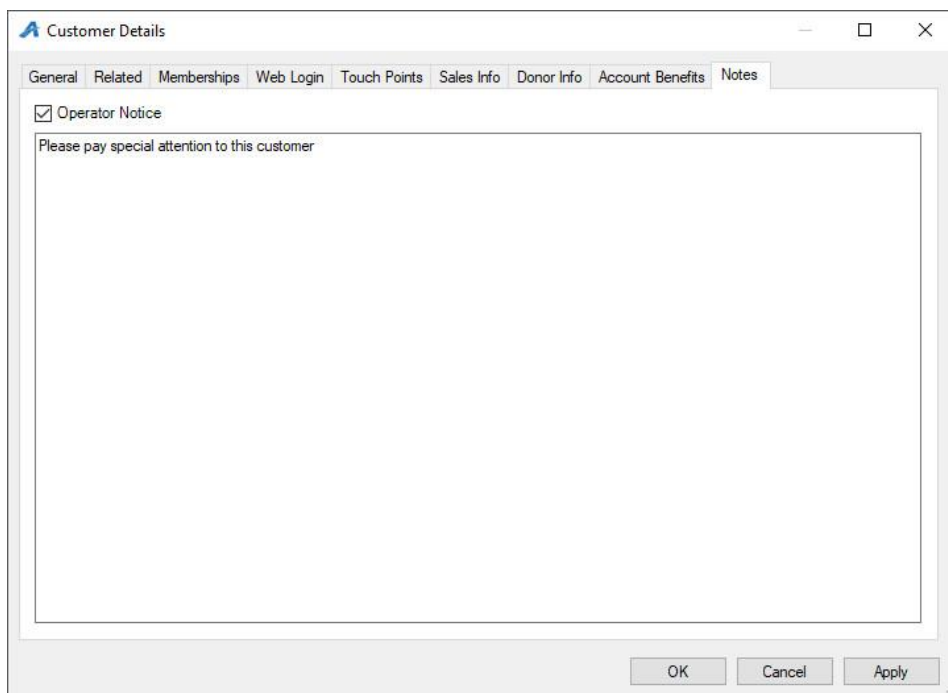
8. In the **Touchpoints** tab, you can add and manage touchpoint tasks for this customer. (Click here to learn more about [touch points](#).)



9. The **Account Benefits** tab is where you will be able to manage any benefits associated with this customer's account. To add a new benefit, right-click and hover over new. Then, select the type of benefit that you are adding. To edit an existing benefit, right-click the benefit and select **Properties**.



10. The **Notes** tab is where you can keep internal notes about this customer. The **Operator Notice** checkbox tells the system that when this customer record is pulled, the note will appear to your staff (i.e This is a Board Member. Please pay special attention to him).



11. Click **Apply** to save your changes and **OK** to close the window.