

MANAGING ACCOUNTS

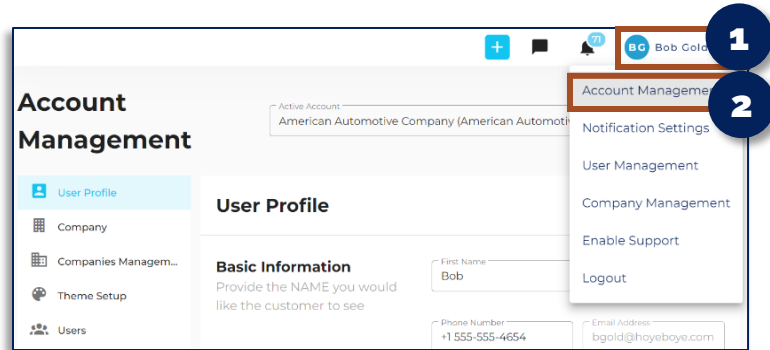
CUSTOMER ACCOUNTS JOB AID

This job aid shows how to add, edit, and deactivate a customer account from the customer account drop down menu located on the Account Management page.

FROM THE HITCH DASHBOARD

1. At the top right corner, click your **username**
2. From the dropdown list, click **Account Management**

The Account Management screen will display.



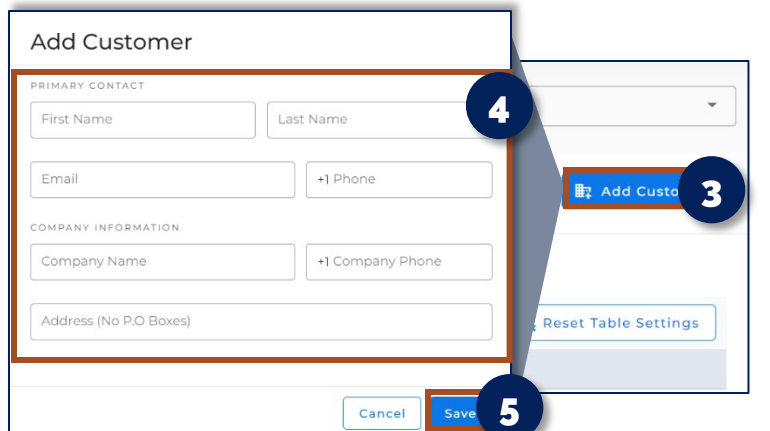
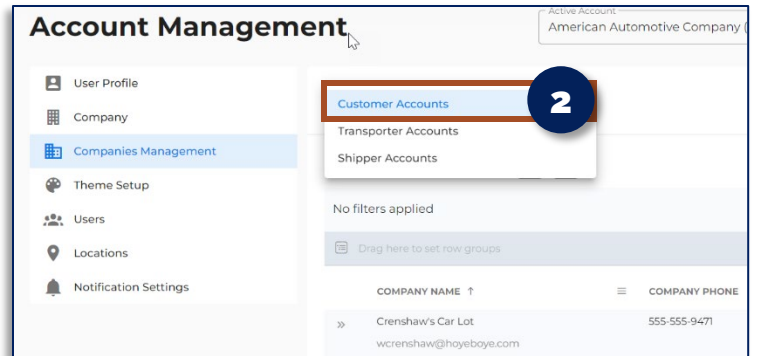
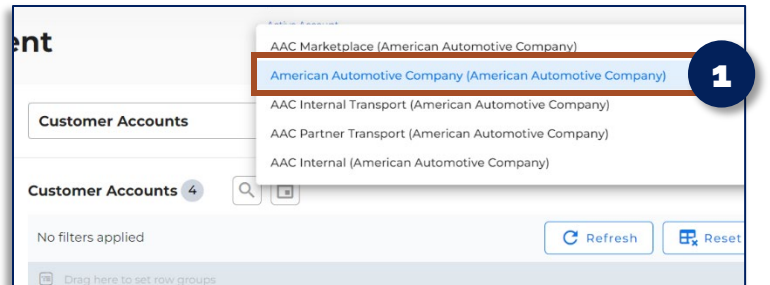
TO ADD A CUSTOMER ACCOUNT

1. **Select parent account** to manage the TMS account from the drop down list
2. **Select Customer Accounts** from the dropdown menu
3. **Click Add Customer**

An Add Customer pop-up box will appear.

4. **Enter** Customer accounts, contact, and information
5. **Click Save** to save customer information

A **green box** will appear when additions made successfully.



MANAGING ACCOUNTS


CUSTOMER ACCOUNTS JOB AID

This job aid shows how to add, edit, and deactivate a customer account -continued.

TO EDIT A CUSTOMER ACCOUNT

1. **Select parent account** to manage the TMS account from the drop down list
2. **Select** a customer account to edit from the customer account list

The customer account selected will display.

3. Click the edit icon  to edit the customer account information
4. Edit the information that is not grayed out



NOTE: Contact a RunBuggy Administrator to change information that is grayed out on screen.

5. Click **Save** to save your edits

Frank's First Class Auto CUSTOMER

OVERVIEW

Company Information

Company Name: Frank's First Class Auto Company Phone: 555-555-6461

Shipper Id: 636c9243-03ef-4d08-b05f-0076b69554be

PRIMARY CONTACT

Contact Name: Frank Paul Contact Email: fpaul@hoyeboye.com

Contact Phone: 555-555-6616

Company Information

Company Name: Frank's First Class Auto Company Phone: +1 555-555-6462

Address (No P.O. Boxes): 4180 Stockton Hill Rd, Kingman, AZ 86409, USA

Save

TO DEACTIVATE A CUSTOMER ACCOUNT

1. From the customer account row, you would like to deactivate and scroll to the right
2. Toggle to the left to deactivate



NOTE: The customer account will immediately be deactivated once toggle turns white.

STATUS	CREATED DATE	LAST UPDATED	ACTIVATED
ACTIVE	02/06/2023 06:46 AM	02/06/2023 07:13 AM	<input checked="" type="checkbox"/>
DEACTIVATED	02/06/2023 07:21 AM	02/06/2023 07:22 AM	<input type="checkbox"/>
ACTIVE	02/06/2023 06:49 AM	02/06/2023 06:49 AM	<input checked="" type="checkbox"/>