My Dashboard – My Customers Bullets

- Click “ My Dashboard”
- Click “My Customers”
- All customers entered into the database will be displayed
    - Customers with E-W before their name are customers that you entered manually, into the system
- Click on the Customer’s name to view, add to or edit their info
- Address Info Tab
    - View company/customer info
    - Enter Bill To/Ship To info
    - Save to return to the Customer Manager page
- Additional Info Tab
    - Assign a sales rep
    - Enter preferred shipping method and account number
- Payment Info Tab
    - Enter payment information like credit limit, payment methods and payment terms
    - Enter Sales Tax info
    - Add Billing Instructions for this particular customer
    - Save
- Order History Tab
    - View a list of all past orders for a particular client
- ESP Websites Info Tab
    - View customer’s username for your ESP Website
    - Reset your customer’s password
    - Activate/Deactivate your customer
    - Save