

# Using the Customer Management Center

Available in Sage 50 Premium Accounting and Higher

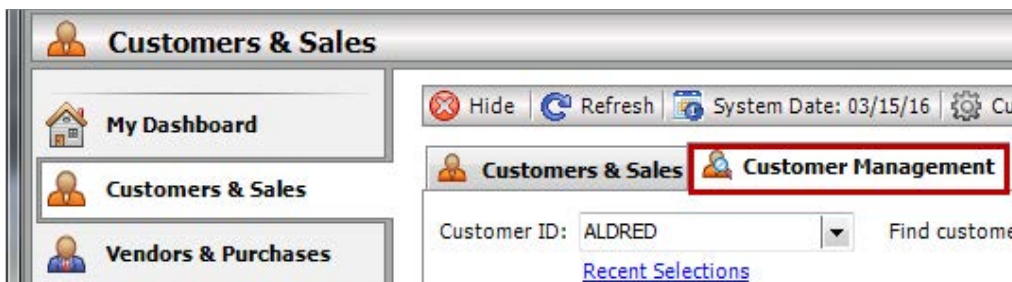
## Quick Reference Guide

### What is the Customer Management Center?

The Customer Management Center is an **all-in-one snapshot** of your customer information. You can create a customizable view of current and historical information and drill down to see the details of customer transactions.

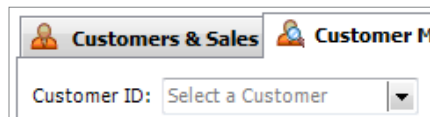
### How do I get there?

Customers & Sales > **Customer Management tab**



### How do I find my customer information?

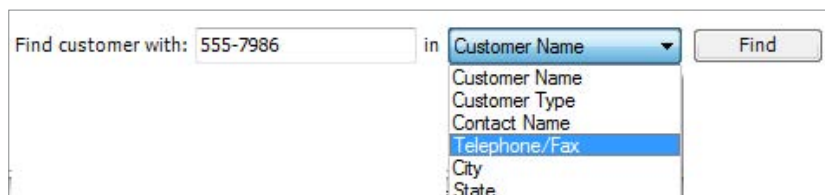
- **Select the Customer ID**



or

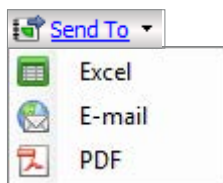
- **Search for the customer**

Can't remember the customer ID?  
Just enter the information you do remember and click **Find**.



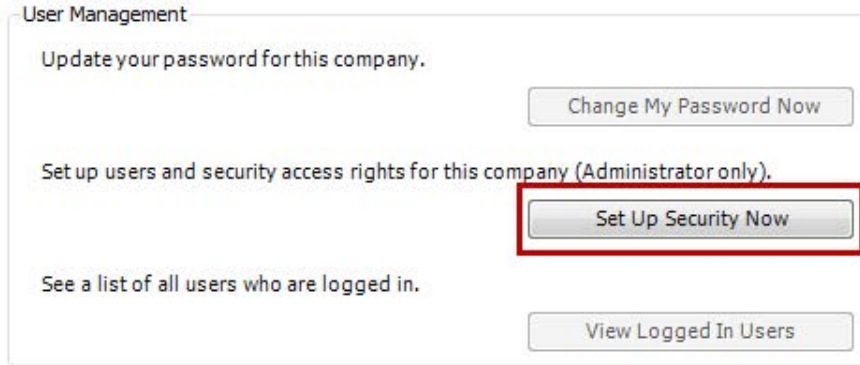
### Print, E-mail, and Export

- **Print** individual **sections** directly to your printer.
- **Send** to Excel, E-mail, or PDF.



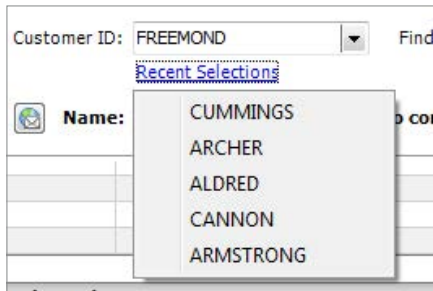
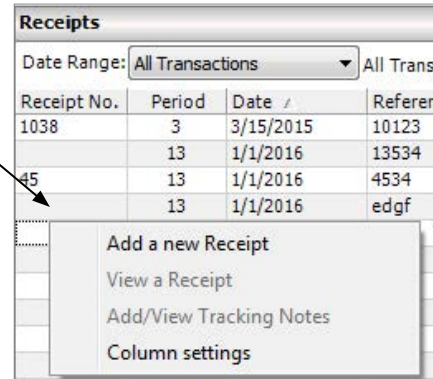
**Security**

- Control the information that users see by going to the **System** navigational area > **User Management** section > **Set Up Security Now**.



**Did you know?**

- You can **right-click** a section for **shortcut** options such as adding a new transaction or customizing column settings.
- Double-click** a transaction to open it.
- Recent Selections** gives you quick access to customer information you have recently viewed. This link appears below the Customer ID field once you have selected at least two customers.



For more info, visit: [Sage.com](http://Sage.com)  
or contact us at 866-996-7243