

CSR

After a customer account is created, you can change which staff user is the Customer CSR.

1. If necessary, open the Edit Customer window:
 - a. On the home page, click **Administration**.
 - b. In the **Administration** area, click **Customers**.
 - c. In the **Customers** area, right-click a customer row, and from the menu that appears, select **Edit Customer**.
2. In the Edit Customer window, in the left pane, select **Customer CSR**, and perform the following steps:
 - a. Clear the check box beside the staff user who should *not* be the Customer CSR.
 - b. Select the check box beside the staff user who should be the Customer CSR.
3. Click **Update**.

The new Customer CSR name appears under the customer name.