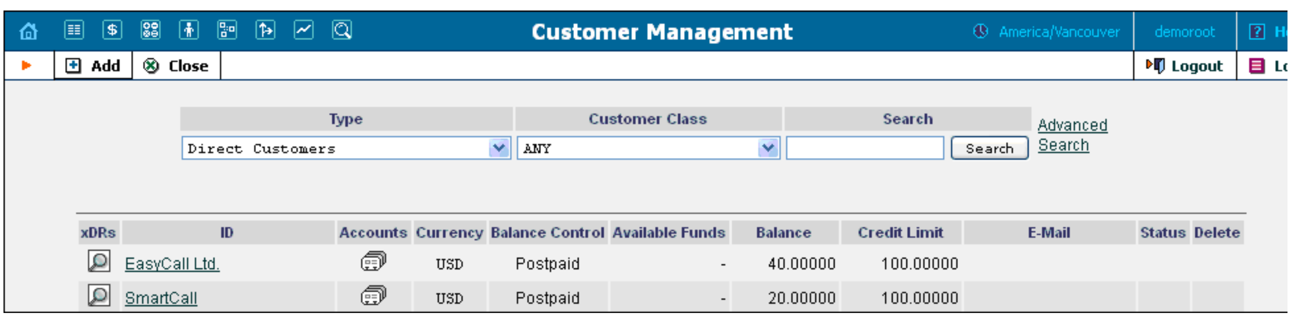
The **Distributor**, **Reseller** and **Customer Management** screens are almost identical. Below we give an example for the **Customer Management** screen containing descriptions of all fields.

Customer Management

On the **Customer Management** screen, you can view a list of all registered customers, or use search filters to display a specific set of customers only.

Filter value	Description
Direct Customers	Customers directly owned by your company (who have a business relationship with you, receive bills from you, and pay to your accounts).
All Customers	All customers; this includes your own customers and those of your resellers.
Sub-customers of Reseller NNN	All sub-customers of a specific reseller.
Customers of Distributor NNN	All customers of a specific distributor.
Search	Filter by name and contact details. When you enter a value in the search field, all customers who have the search string in their customer name, company name, first / last name or contact info (e.g. state, city, country, zip code, phone, email, login) will be displayed.
Advanced Search	Allows you to specify complex search conditions (see more info below)
The following search filter is only available for Resellers:	
All Resellers	Only customers of the reseller type.
The following search filter is only available for Distributors:	
All Distributors	Only customers of the distributor type.
Distributors of Reseller NNN	All distributors of a specific reseller.

The screen provides the following information and activities:

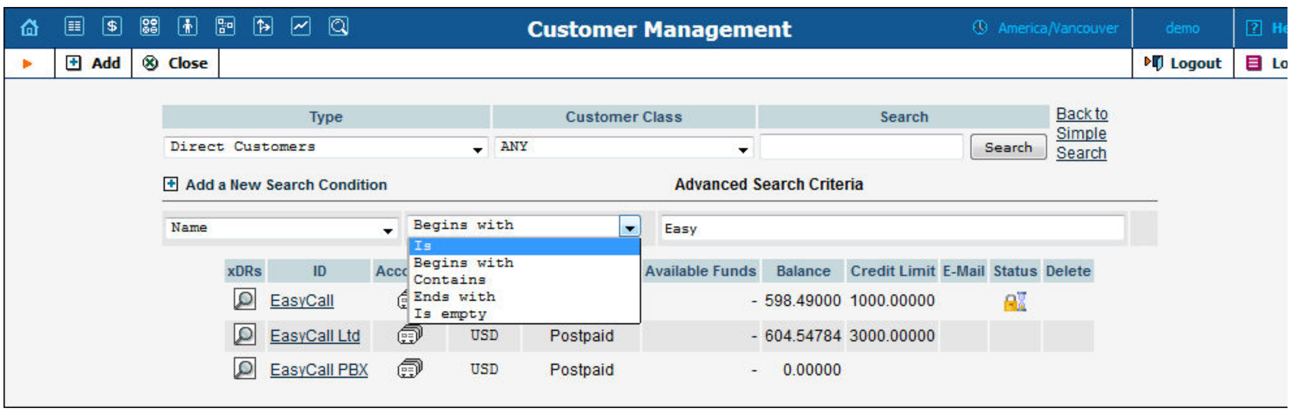


Column	Description
xDRs	Click the **View** icon to go to the xDR view page.
ID	The customer's name.
Owned By	The name of the reseller owning the customer (none are displayed if the **Direct Customers** filter is applied).
Accounts	Click the **Accounts** icon to go to the Account Management screen (for retail customers). If there are no accounts under the customer, the icon changes accordingly to , so that you can easily see this.
Currency	The currency in which the customer's account is maintained and billed.
Balance Control	The customer category: either prepaid or postpaid, depending on the way their balance is controlled.
Available Funds	The amount of funds available for the user to spend on services.
Credit Limit	The credit limit applicable to the customer's account (if any.)
Balance	The customer's current balance.
E-mail	E-mail contact for this customer.
Status	The status of the customer's account.

	The icon will appear if the customer's credit has been exceeded. The customer blocked icon means that all accounts of this customer have been administratively blocked. The icon means all services to this customer have been suspended because of an overdue invoice, and the icon means that this customer was closed. The frozen icon means that periodic payments for this customer have been suspended due to repeated errors (for instance, the customer canceled his credit card and did not enter the information for his new card in PortaBilling®.)
Delete	Click the **Delete** icon to remove the customer. The delete icon will only appear if there are no xDRs, accounts or sub-customers owned by the customer, or other entities (products, tariffs, etc.) managed by the customer.

Advanced Search

In advanced search mode, you can specify an unlimited number of search conditions. Every condition applies to a particular field (e.g. customer ZIP code). Click on **Add a new search condition** to add another condition.



Operation	Description
Is	The value of the field in the customer information must match the search criteria exactly.
Begins with	The value of the field in the customer information must start with the specified value (e.g. if you enter the filter value "John", customers with the names "John" and "Johnny" will be selected).
Contains	The value of the field in the customer information must contain the specified value somewhere (e.g. if you enter the filter value "Eric", customers with the names "Eric", "Erica", "Maverick" and "American" will be selected).
Ends with	The value of this customer information field must end with the specified value (e.g. if you enter the filter value "smith", customers with the last names "Smith" and "Hammersmith" will be selected).
Is empty	The corresponding field in the customer information must be empty.

All search operations are case-insensitive, so you can enter "Eric" as a search criteria and, even if the customer's name was originally entered as "eric" or "ERIC", you will still see him in the list.

All conditions work in conjunction, so in the case of multiple search criteria the customer's record must satisfy all of them in order to appear in the result list.

During a search operation using auxiliary fields (e.g. fax) or the "contains" comparison, the database cannot use indexes. This will result in a full table scan, meaning an increased load on the server and a longer time to produce the final result. Please avoid using such search operations if nc necessary.

By clicking on **Back to simple search** you can switch the form to its original mode.