Update or Retire a Customer

How to Update or Retire a Customer in Muhasib ERP

Overview

This guide will help you correct customer data or retire access while preserving transactions, balances, and audit history.

Source says related transactions remain after deletion, but selection, soft-delete, ledger, and report behavior are not yet fully proven.

Who can do this

You need access to Customer Update; Customer Delete plus explicit business approval for removal.

Before you start

Review open sales/orders/quotations/appointments, balance, payments, credits, cheques, loyalty, contacts, integrations, and legal retention.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Manage Customers.

Update or Retire a Customer

Step 1: Select the exact customer by stable ID/contact

Step 2: Update approved identity/contact/address/group/credit fields and save

Step 3: Prefer disabling/retiring when supported

Step 4: Settle/correct open operational items through their own workflows

Step 5: Delete only with explicit approval after reading the retained-transaction warning

Check your work

Confirm historical sales/payments/ledger remain attributable and the retired customer cannot be selected for unintended new work.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not delete to clear a balance or duplicate-contact error.
- Merge behavior is not assumed; escalate duplicates.

Related guides

- Create a Customer
- Review the Customer Ledger Report
- Update, Disable, or Retire a System User

What to do next

Create a Customer.

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