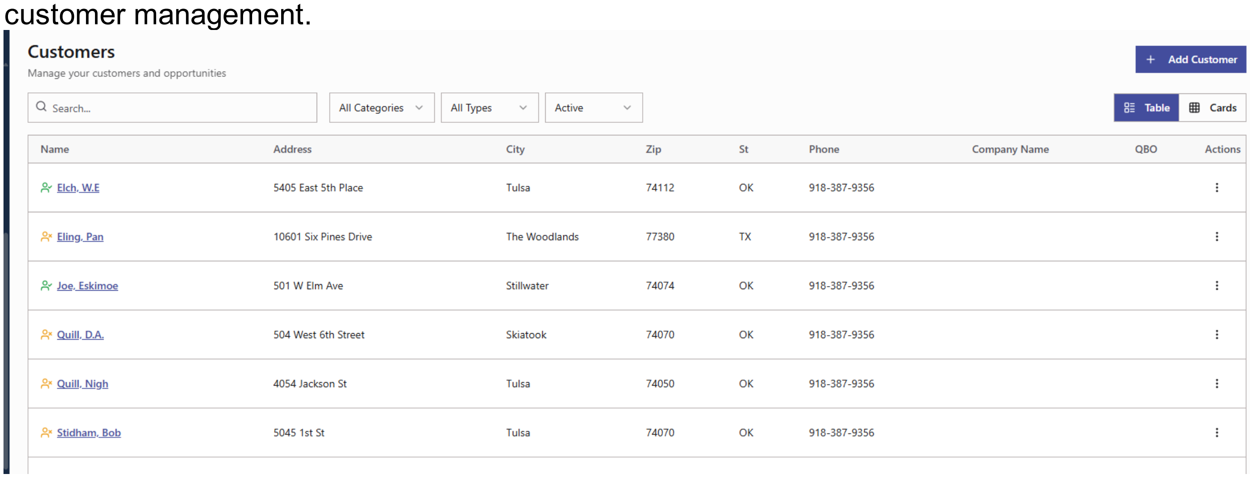
Phase 4: Customers

If you need assistance with a bulk import of customers, please email support with your business name and info along with your customer database in excel or .csv format.

Dashboard Overview

The primary table displays a comprehensive list of your customers with the following key details:

- **Name**: The client's name, which often functions as a clickable link to their full profile.
- **Address Information**: A quick reference for the client's location, including their **Street Address**, **City**, **Zip Code**, and **State**.
- **Phone**: The primary contact number for the customer.
- **Company Name**: Identifies if the customer is associated with a specific business entity.
- **QBO**: Displays the synchronization status with QuickBooks Online for financial tracking.
- **Actions**: A three-dot menu on the far right of each row provides options for individual customer management.

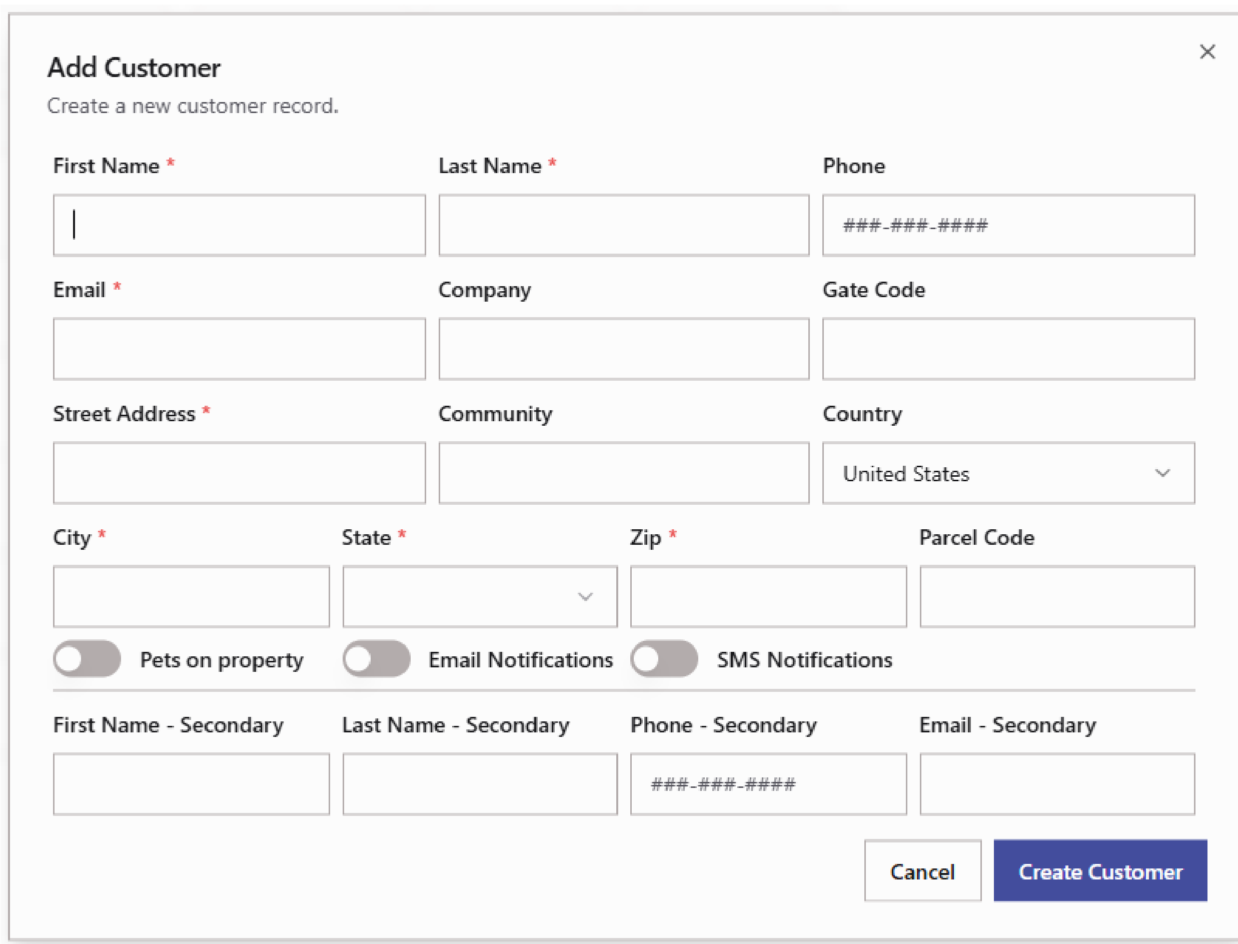


Name	Address	City	Zip	St	Phone	Company Name	QBO	Actions
Elch, W.E	5405 East 5th Place	Tulsa	74112	OK	918-387-9356			⋮
Eling, Pan	10601 Six Pines Drive	The Woodlands	77380	TX	918-387-9356			⋮
Joe, Eskimoe	501 W Elm Ave	Stillwater	74074	OK	918-387-9356			⋮
Quill, D.A.	504 West 6th Street	Skiatook	74070	OK	918-387-9356			⋮
Quill, Nigh	4054 Jackson St	Tulsa	74050	OK	918-387-9356			⋮
Stidham, Bob	5045 1st St	Tulsa	74070	OK	918-387-9356			⋮

Navigation and Filtering Tools
To help you manage a growing database, the dashboard includes several powerful search and organization features:

- **Search Bar**: Quickly locate a specific client by typing their name or identifying other details.
- **Dropdown Filters**: Narrow your view using multiple criteria:
  - **All Categories**: Filter by customer classification.
  - **All Types**: Filter by the type of project or lead.
  - **Active Status**: Toggle between active, inactive, or archived customers.
- **View Toggle**: Switch between the detailed **Table** view (currently active) and a more visual **Cards** view.
- **Sortable Columns**: You can click on column headers to sort your customer list alphabetically or by location for better organization.

Add Customer: Click the blue **+ Add Customer** button in the top-right corner



Primary Contact Information

This section gathers the identity and direct contact details of the lead or client:

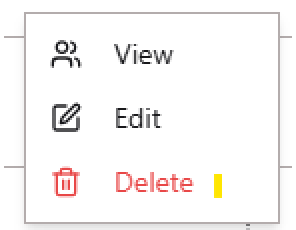
- **First and Last Name:** Required fields for the primary individual.
  Email: A required field used for project communication and portal access.
  Phone: The primary contact number for the customer.
  Company: Captures the business entity if the customer is a commercial lead.
  Full Address: Includes required fields for **Street Address**, **City**, **State**, and **Zip**.
  Community: An optional field for neighborhood or subdivision names.
  Gate Code: A specific field for secure site access.
  Parcel Code: For recording legal land identifiers or property tax IDs.
  Pets on Property: A toggle to alert field teams of animals on-site.
  Email/SMS Notifications: Toggles to opt the customer into automated project updates.

Secondary Contact
This section allows for the entry of a second individual (such as a spouse or co-owner) with their own **Name**, **Phone**, and **Email** fields.

Management Actions

- **Create Customer:** Saves the record and adds the individual to the master **Customers** dashboard.

Editing a Customer Record



To open this menu, locate the **three-dot vertical icon** on the far right of any customer row in the dashboard table.
Menu Options

- **View:** Selecting this option opens the full customer profile.
  Edit: This allows you to update the customer's existing record, such as changing contact information, updating an address, or modifying notification preferences.
  Delete: A quick action to remove the customer record from your active database.
