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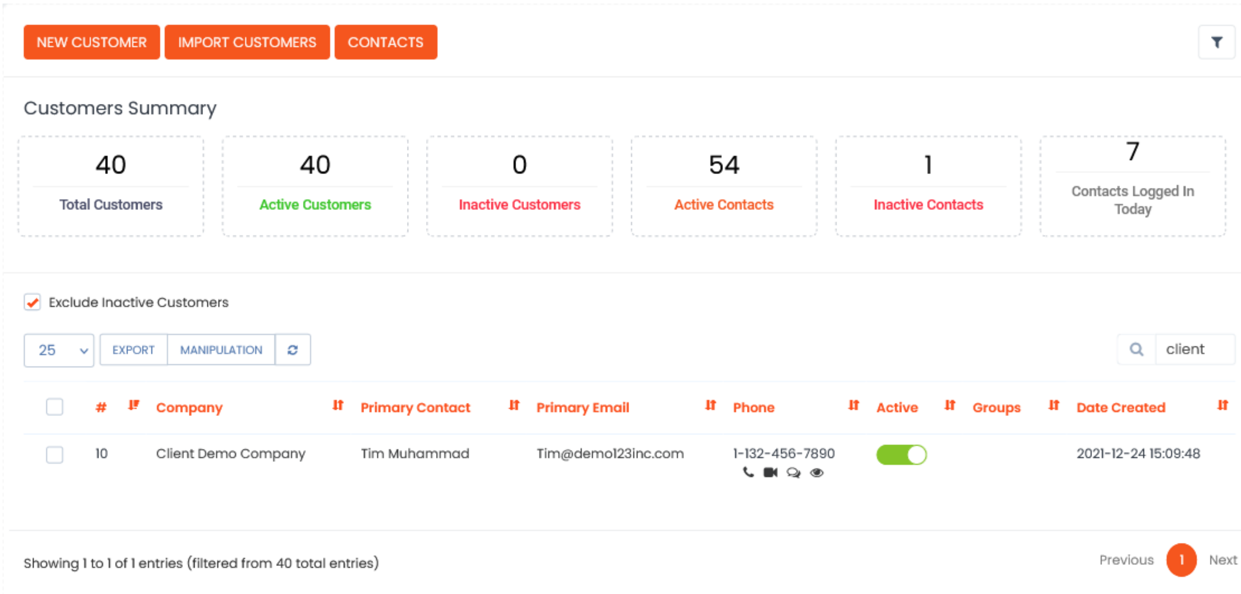
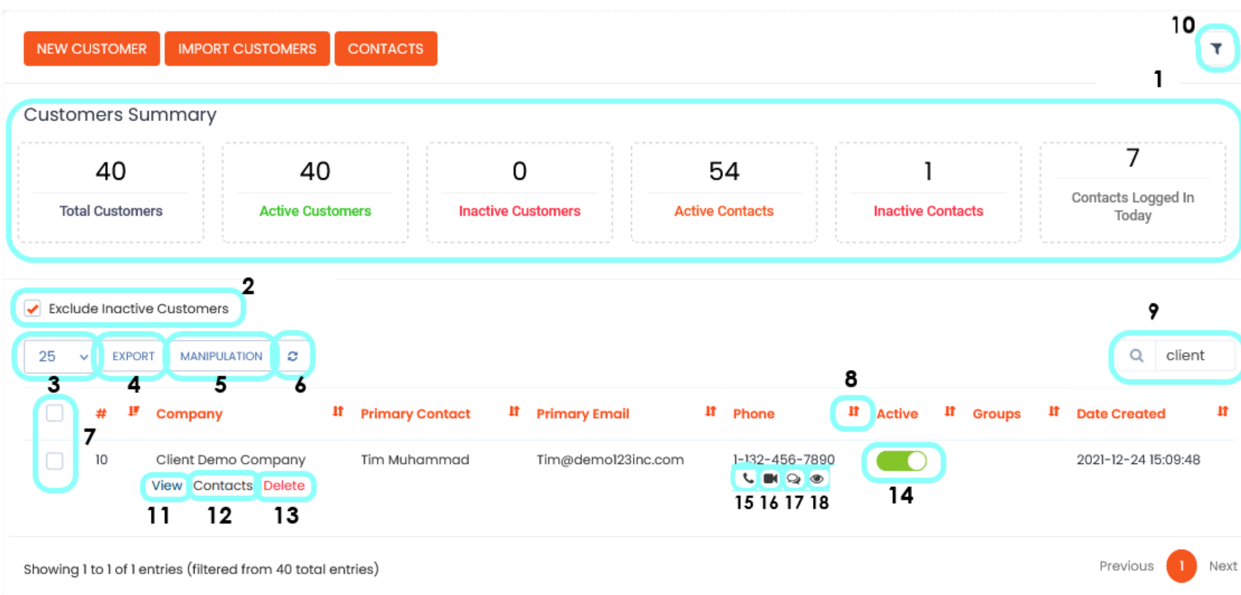
The “Customer” module will consist of all your customer data. The following UI will be shown when the “Customer” module is clicked on.

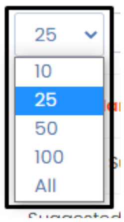


CUSTOMER TABLE

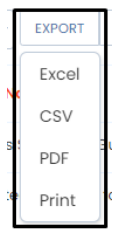


1. The dashboard shows a summary of the customer status, categorized in quantity.

2. Admins can include or exclude inactive customer in the table according to their choice.
3. The dropdown represents the number of data which can be selected to show on the table using the scroll down for that page.

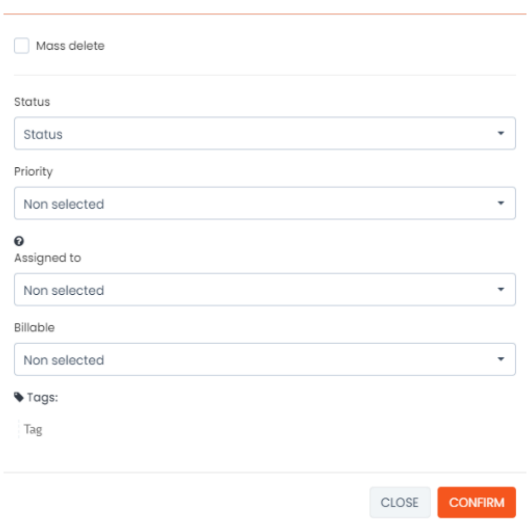


4. The data can be exported into excel, csv and pdf format and this system also has the option to print the data - when clicked upon the Export button.

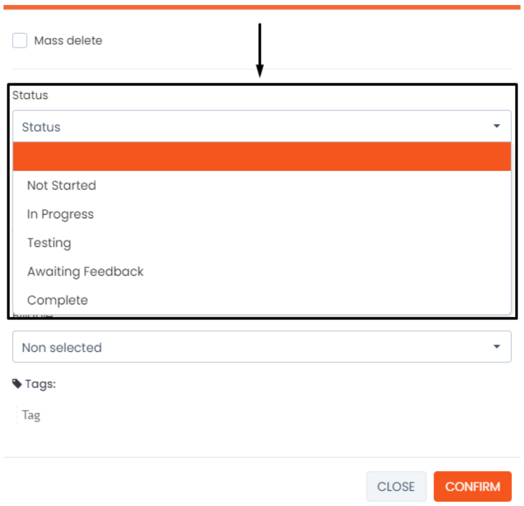


5. The

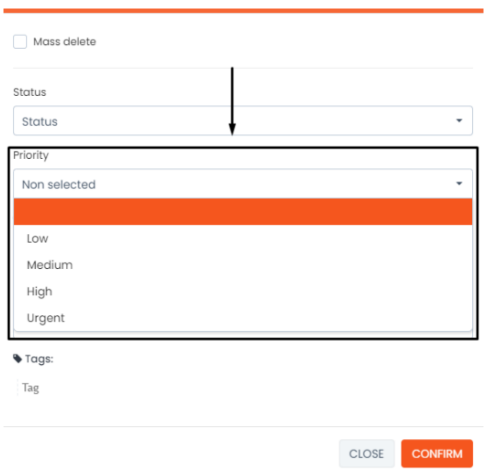
button works when the user selects multiple tasks and the following UI shown below is shown when this button is clicked.



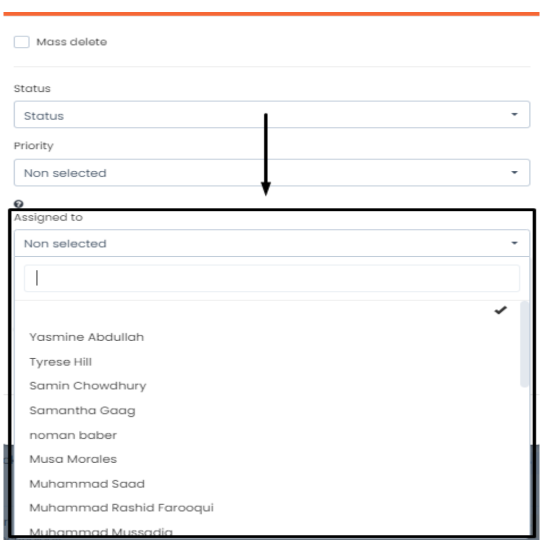
If the Admin user wants, he/she can delete the selected data by checking onto the “Mass Delete” box.



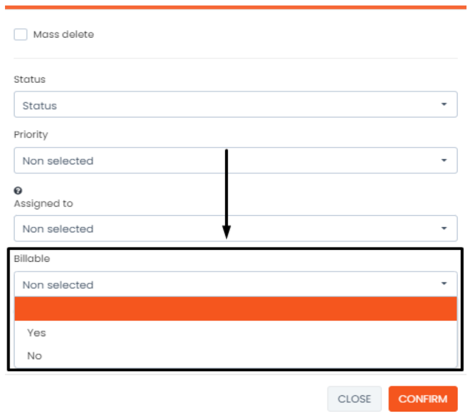
Admin user can select the priority of the selected tasks. All the selected tasks will have the same priority.



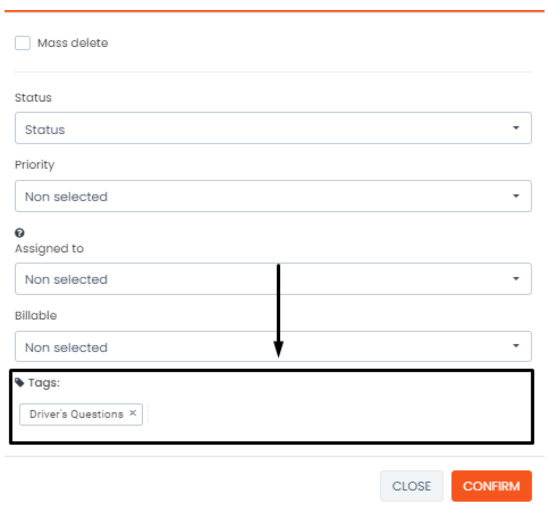
Admin user can select the status of the selected tasks. All the selected tasks will have the same status.



The admin user has the liberty to assign the selected tasks to one or multiple staffs.



Admin user can choose if the selected tasks are billable or not. The selected option will leave impact on all the selected tasks.



Tags can be provided by the admin for the selected tasks. They are given to describe the task in short terms.

Afterwards the admin must press the "Confirm" button if he/she wants to save the data. If not, the admin can select the "Cancel" button to dismiss the changes.

6. The button will help the Admin User refresh the table.
7. Admin can select one or multiple contacts from the table.
8. The button helps the user to order the set of data from its highest to lowest or from its lowest to highest order.
9. A search bar is present at the top on the table, which helps the user to search for any data instantly.
10. This filter icon will allow the admin to view data on the table according to their choice.
11. Admin will be able to view customer details through this option.
12. Admin can view the contact details through this option.
13. Admin can delete any data from the table through this option.

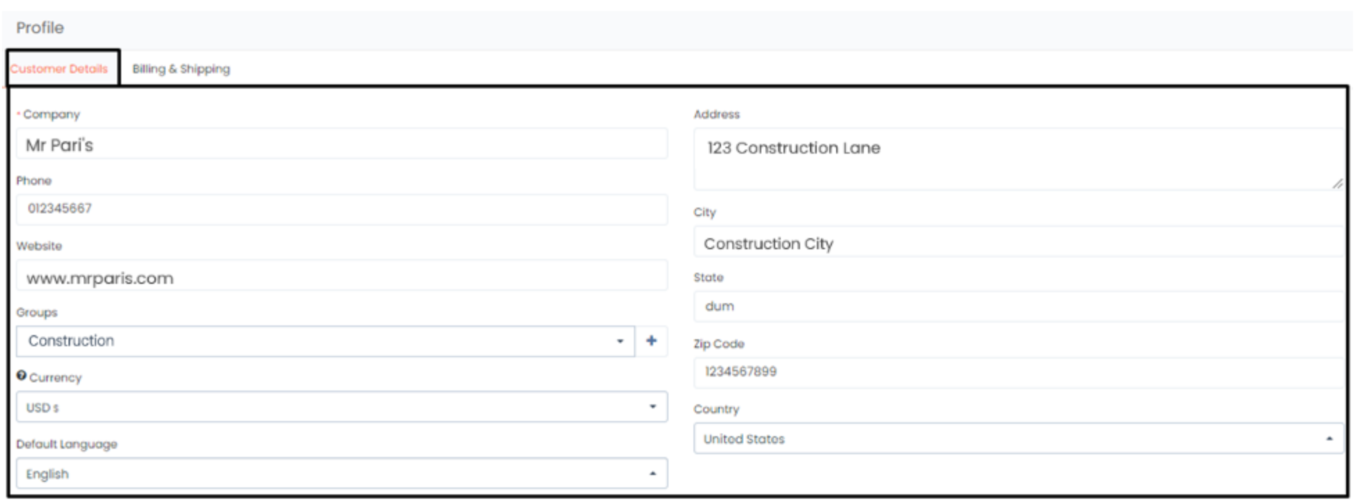
14. Make a client inactive by clicking the green bar. Click the bar again to reactivate the customer.
15. Make a call directly from the system by clicking this button. If this icon has a red line through it, this indicates that you do not have a twilio number set up to complete the call through the system. You can check your twilio settings by going to Setup/Settings/Lead Manager. If this icon is not visible, this indicates you are missing a number for your contact.
16. Click the camera button to schedule a zoom call.
17. Click the chat icon to send an SMS directly to your client contact. If this icon is not visible, this indicates you are missing a number for your contact.
18. Click the eye icon to view your interactions with your client contact.

NEW CUSTOMER

The "New Customer" button will allow the admin to create new customers by providing all the detail.

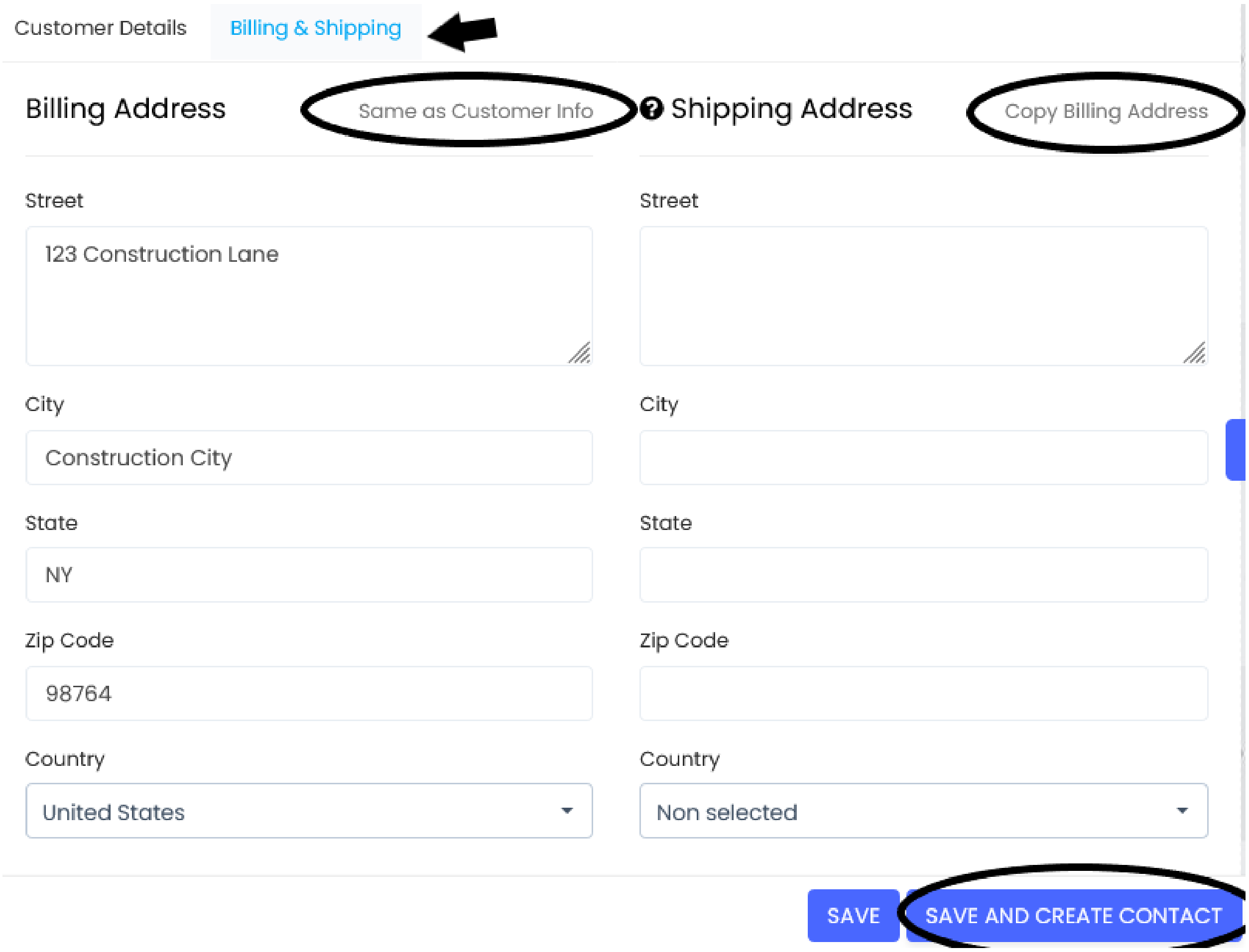
CUSTOMER DETAILS

The following UI shown below is shown, where the admin will input all the data related to the customer information. Admin can add groups under which the customer's service will fall into by clicking on + icon under the Group's section.



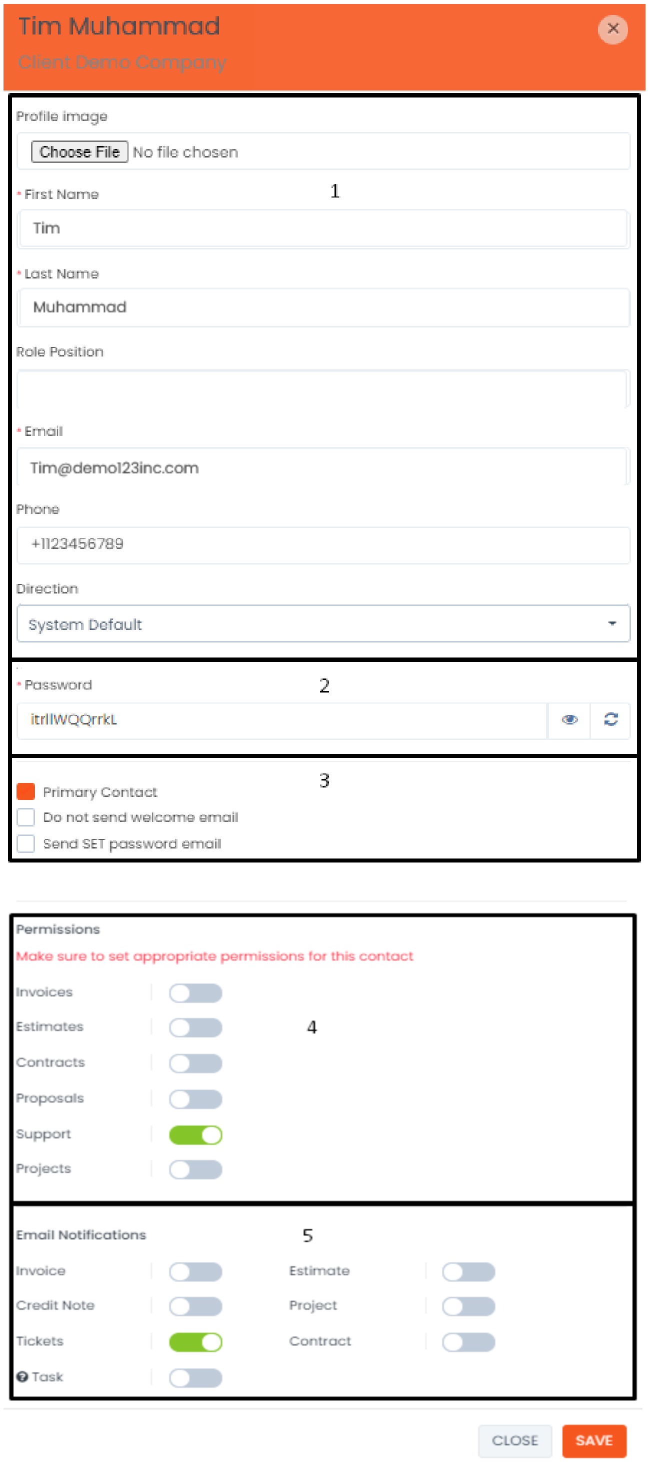
BILLING & SHIPPING

The bill address is where the billing is done, and the shipping address is to know in which address shall the product be delivered. Admin can fill up the billing address fields by clicking on "Same as Customer Info" option. Admin can fill up the shipping address field by clicking on "Copy Billing Address".



SAVE AND CREATE

The "Save And Create" button allows admin to add the customer as a new contact.



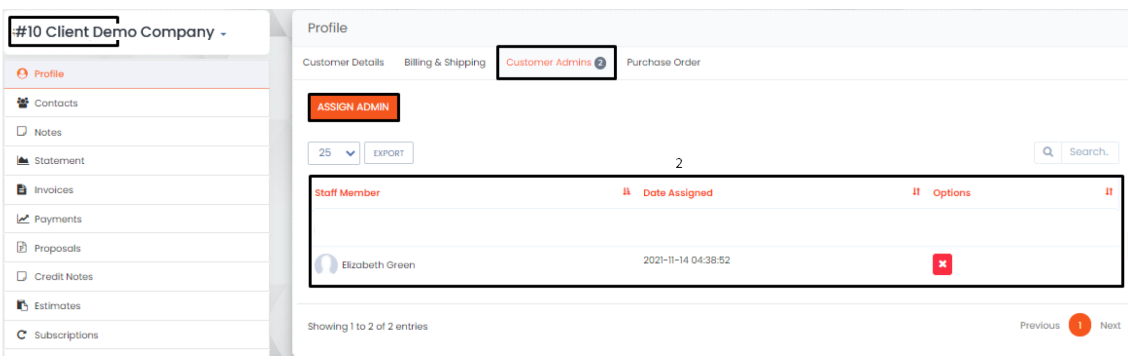
1. Details for the employee from the customer company needs to be inputted here.
2. The password is automatically generated by the system. Using this icon, admin can generate passwords multiple times. This icon allows the admin to view the password.
3. Admin has the authority to add primary contact and send welcome and SET password email.
4. Admin provides permission to avail specific features to the customer.
5. The permission for email notifications is provided by the admin.

The "Save" button saves the data and redirects to another UI.

Here, new contacts can be created by clicking on the "New Contact" button. The name of the company is "#33 dummy", name of the person appointed from the customer company is provided under the "Full Name" column of the contact's table. Admin can edit the customer company's employee information by clicking on the "Edit" option. Admin can delete the contact data from the table through the "Delete" option. The contact's email and phone are used to reach out the company. Admin can set the active status for the contact.

CUSTOMER ADMINS

The company which takes service from your company are the customers. You can assign one of your staff members to make adjustments to your client company details as the "Customer Admin", which them access to the system.

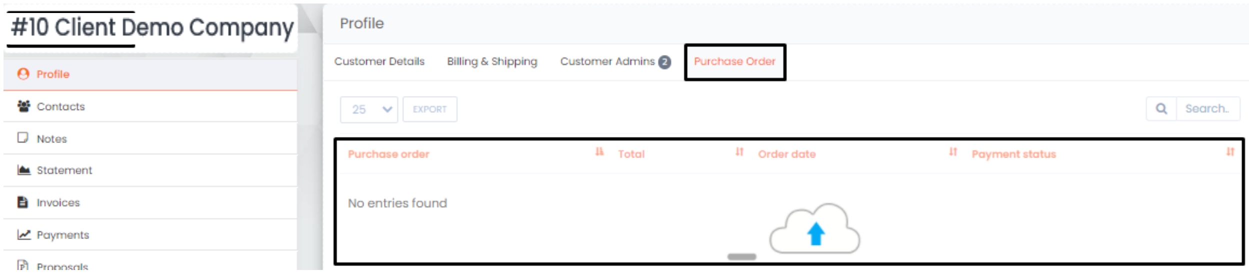


This table will consist of all the customer admin data. You can add admins by the "Assign Admin" button. The picture shown above demonstrates that :

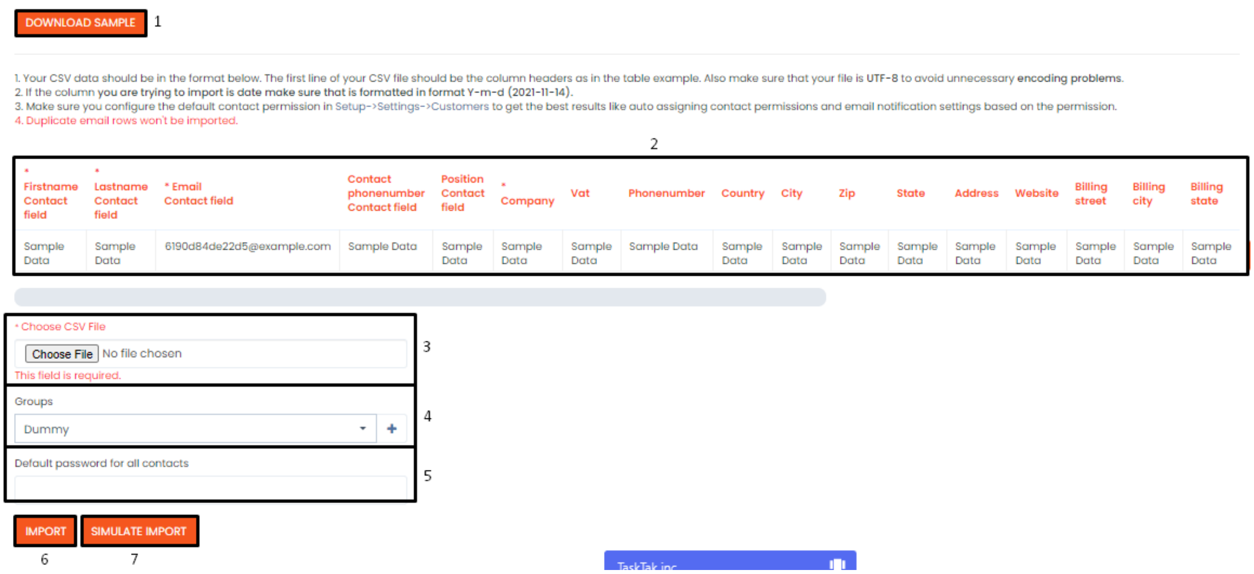
1. The company name.
2. The name of the customer admins for that company. Admin can delete the customer admin by clicking on the icon.

PURCHASE ORDER

This table will consist of all the purchase done by the company.



IMPORT CUSTOMER



1. The sample of the table, that is categorized in columns in excel format, can be downloaded from "Download Sample" button.
2. This is the format of the excel file for storing data, which can be downloaded using the "Download Sample" button.
3. After downloading the sample and inputting the data, the excel file can be attached using "Choose File" option.
4. The file of customers can be categorized in groups. Admin can create or choose group from the dropdown.
5. Default passwords for all the contacts can be set in this field.
6. The "Import" button will help the admin to import the file of the customers with their information.
7. "Simulate Import" button helps the user to simulate the imported file.