

# Customers

## Description

The Customers application allows you to manage your client base within SaltOS4. It centralizes all information related to customers, such as identification, contact details, tax code, address, and classification. It also serves as a hub to link customers with other modules like quotes, invoices, meetings, and emails.

## List view

SaltOS Dashboard Applications Admin				
+ New Search Search Reset				
Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓
Zimmerman LLC	H56239107	Port Thomasborough	Ecuador	✓
Nelson-Miller	N76364551	West Jessica	Barbados	✗
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓
Roy-Baker	C88230980	Krystallfort	Chile	✗
Meyer Ltd	W54018822	East Ashleychester	Italy	✗
Howell, Allen and Willis	G12891772	Calinside	Kazakhstan	✓
Sims and Sons	N21390769	North Billy	Lesotho	✗
Chen-Williams	D94642272	North Raymond	Togo	✓
Watts, Perez and Gutierrez	W34760995	Nataشافort	Zimbabwe	✗
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗
Ayala-Chan	F74988143	Christophermouth	Chad	✗
Hurley-Blair	S42250566	Hardyburgh	India	✗
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓
Goodman Group	E72358094	Jenniferland	Mexico	✓
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗
Francis Group	P49542024	Ericside	Latvia	✗
Estes and Sons	A51066336	Annetown	Mozambique	✓

The following fields are displayed in the list view:

- Name: Full name or business name of the customer.
- CIF: Customer's tax identification code (NIF, CIF, VAT, etc.).
- City: City or locality of the customer.
- Country: Country where the customer is legally registered or operates.
- Active: Indicates if the customer is active in the system.

## Form view

This view is used for creating, editing or viewing a customer record.

In **create** mode, the form is empty and ready to enter new data.

SaltOS

Dashboard Applications

Admin

+ New

Search

Search

Reset

Active

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓
Zimmerman LLC	H56239107	Port Thomasborough	Ecuador	✓
Nelson-Miller	N76364551	West Jessica	Barbados	✗
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓
Roy-Baker	C88230980	Krystallfort	Chile	✗
Meyer Ltd	W54018822	East Ashleychester	Italy	✗
Howell, Allen and Willis	G12891772	Cainside	Kazakhstan	✓
Sims and Sons	N21390769	North Billy	Lesotho	✗
Chen-Williams	D94642272	North Raymond	Togo	✓
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗
Ayala-Chan	F74988143	Christophermouth	Chad	✗
Hurley-Blair	S42250566	Hardyburgh	India	✗
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓
Goodman Group	E72358094	Jenniferland	Mexico	✓
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗
Francis Group	P49542024	Ericside	Latvia	✗
Estes and Sons	A51066336	Annetown	Mozambique	✓

Name

CIF

Address

City

Province / State

Zip

Country

Email

Phone

Website

Notes

Type

New files

New note

Create

Cancel

In **view** mode, the fields are filled with the selected record and cannot be edited.

SaltOS

Dashboard Applications

Admin

+ New

Search

Search

Reset

Active

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓
Zimmerman LLC	H56239107	Port Thomasborough	Ecuador	✓
Nelson-Miller	N76364551	West Jessica	Barbados	✗
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓
Roy-Baker	C88230980	Krystallfort	Chile	✗
Meyer Ltd	W54018822	East Ashleychester	Italy	✗
Howell, Allen and Willis	G12891772	Cainside	Kazakhstan	✓
Sims and Sons	N21390769	North Billy	Lesotho	✗
Chen-Williams	D94642272	North Raymond	Togo	✓
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗
Ayala-Chan	F74988143	Christophermouth	Chad	✗
Hurley-Blair	S42250566	Hardyburgh	India	✗
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓
Goodman Group	E72358094	Jenniferland	Mexico	✓
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗
Francis Group	P49542024	Ericside	Latvia	✗
Estes and Sons	A51066336	Annetown	Mozambique	✓

Name

CIF

Address

City

Province / State

Zip

Country

Email

Phone

Website

Notes

Type

New files

New note

Edit

Delete

Close

In **edit** mode, the form is pre-filled and allows modifications.

Dashboard Applications
Admin

+ New

Search

Search

Reset

☒ Active

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓
Zimmerman LLC	H56239197	Port Thomasborough	Ecuador	✓
Nelson-Miller	N76364551	West Jessica	Barbados	✗
Oliver, Woods and Cruz	P18446996	East Jonathan	Turkmenistan	✓
Roy-Baker	C88230980	Krystallfort	Chile	✗
Meyer Ltd	W54618822	East Ashleychester	Italy	✗
Howell, Allen and Willis	G12891772	Calnside	Kazakhstan	✓
Sims and Sons	N21396769	North Billy	Lesotho	✗
Chen-Williams	D94642272	North Raymond	Togo	✓
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗
Ayala-Chan	F74988143	Christophermouth	Chad	✗
Hurley-Blair	S42265666	Hardyburgh	India	✗
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗
Clements, Martinez and King	J75956655	North Jeffrey	Gambia	✗
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓
Goodman Group	E72358094	Jenniferland	Mexico	✓
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗
Francis Group	P49542624	Ericside	Latvia	✗
Estes and Sons	A51066336	Annetown	Mozambique	✓

Name

Hudson, Noble and Andrews

CIF

D79421459

Address

41964 David Mission

City

Lake Thomasview

Province / State

Florida

Zip

44644

Country

Liechtenstein

Email

latoya88@armstrong.com

Phone

627-863-9109

Website

https://scott.org

Notes

Enhanced background moderator

Type

Distributor

New files

Choose Files No file chosen

New note

Save

Cancel

The form includes the following fields:

- **Active:** Enables or disables the customer visibility.
- **Name:** Full name or business name of the customer.
- **CIF:** Customer's tax identification code.
- **Address:** Main physical or billing address.
- **City:** City or locality of the customer.
- **Province / State:** Province or state of the customer.
- **ZIP:** Postal code corresponding to the address.
- **Country:** Country of registration.
- **Email:** Email for notifications or invoices.
- **Phone:** Primary contact phone number.
- **Website:** Website of the customer
- **Notes:** Internal notes related to the customer.
- **Type:** Category the customer belongs to (e.g., regular, VIP).
- **Files:** Attachments such as documents or images related to the job.
- **Notes:** Internal observations or customer-specific instructions.

## Delete

Records can be deleted from the list view via the delete action. A confirmation prompt will appear before the operation is executed.

This action is irreversible and requires specific permissions.