

Customer Details

On this page, the user can click the light blue “Update Customer” to update or delete client details. New inquiries can be created by clicking the dark blue “Create Inquiry” button under Customer Details. Specific contact details for actual persons at the company can be accessed from the “Contact Details” menu bar shown at the bottom of the image below.

The “Go To Customers” button in the top left under the name Allied Waterproofing will take you back to the Customers table. Clicking the “Help” button at the top right will open a separate help file with additional information for that specific page.

Allied Waterproofing

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General Contractor ABC

Click To View Details

Customer Details

Address	City	State	ZIP
123 Address	Maryland Heights	MO	65165

[Update Customer](#)

[Create Inquiry](#)

Contact Details

Contact Details

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General Contractor ABC

Click To View Details

Customer Details

Contact Details

Click To Update Or Delete

Title	Name	Phone	Email
Manager	Bill	(324)123-4123	email@email.com

Create Contact

Under “Contact Details”, you can enter specific contact information for persons at the company by clicking the “Create Contact” button. Contacts in the table can be edited by clicking anywhere on their row.

Note: You may not delete a customer that has an inquiry attached to it. This prevents unexpected data loss.

Note: The top Navigation Menu is present here as well. You can click to go to any of those pages at any time. It will always be at the top of the page, regardless of the page you are on.