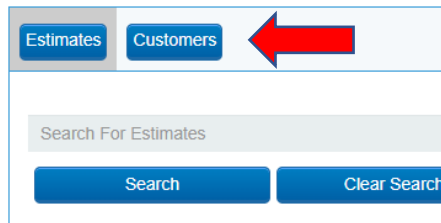


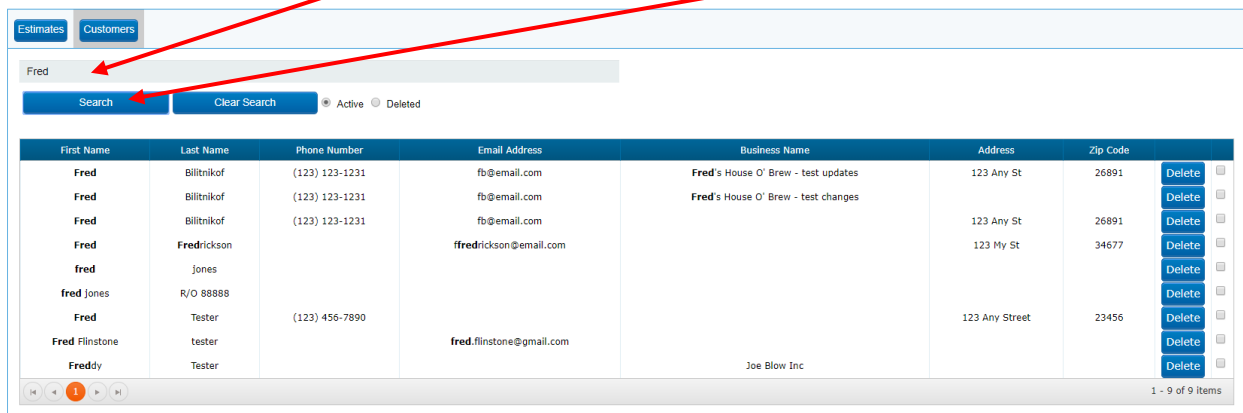
Saved Customer List

Web-Est is excited to give you more control of your **Save Customer information**.



When you log in you will see the **Customer** option on the top of your **Manage Estimate Screen**. Click on the **Customers Button** to go to your **Saved Customer List**.

You can search for a specific customer by entering something simple into the **Search field** and selecting **Search**.



You may have more than one saved Customer under the same name and you can delete the multiples by selecting delete next to the line. ***This will **NOT** delete any estimates you have written for that customer.***

You can click on a **Saved Customer line** to populate the **Saved Customer Information** below the **Customer** grid.

* First Name: Fred * Last Name: Blitnikof * Business Name: Fred's House O' Brew - test updates

* Email: fb@email.com * Address 1: 123 Any St * Address 2: Unit B & C

* City: Sometown * State: South Carolina * Zip: 26891 * Time Zone: Eastern

Save Customer View Details Create New Estimate Show Estimates

The **Customer Information** can be edited or updated by entering the correct information in the fields and clicking the **Save Customer Button**.

A screenshot of a web form for customer information. The form contains fields for First Name (Fred), Last Name (Biltnikof), Business Name (Fred's House O' Brew - test updates), Email (fb@email.com), Address 1 (123 Any St), Address 2 (Unit B & C), City (Sometown), State (South Carolina), Zip (26891), and Time Zone (Eastern). At the bottom, there are four buttons: Save Customer, View Details, Create New Estimate, and Show Estimates. A red arrow points from the text 'Save Customer Button' in the paragraph above to the Save Customer button.

To view additional Customer Information, click on the **View Details** Button.

All of the **customer information** will open.

A screenshot of the expanded customer information form. It includes all the fields from the previous form, plus additional fields for Phone 1, Phone 2, and Phone 3, each with a type dropdown and an extension field. A red box highlights the entire form area. A red arrow points from the text 'Save Customer button' in the paragraph below to the Save Customer button at the bottom of the form.

You can edit or update any fields and then click the **Save Customer button**.

To view or open estimates written for the customer click on **Show Estimates**.

A screenshot of the four action buttons: Save Customer, View Details, Create New Estimate, and Show Estimates. The Show Estimates button is circled in red.

To begin a **New Estimate** for that Customer you can select **Create New Estimate**.

A screenshot of the 'Estimates' section. At the top, there are four buttons: Save Customer, Hide Details, Create New Estimate, and Hide Estimates. The Create New Estimate button is circled in red. Below the buttons is a table with the following columns: Open, Vehicle, Estimate #, Description, Total Cost, Status, Date Created, and Last View. The table contains two rows of data. At the bottom right, it says '1 - 2 of 2 items'.

Open	Vehicle	Estimate #	Description	Total Cost	Status	Date Created	Last View
6876584	None	2033		\$0.00		06/28/2019	06/28/2019
6876583	None	2032		\$0.00		06/26/2019	06/26/2019