

New Customer Tab Let's explore the new look

How is the New Customer Tab going to help you?

- Infinite scrolling
- Merge Duplicated Customers
- User Assignment Management
- New filtering design

1. Access your "Customers" tab

*	Timeline	Calendar	Products	Customers	Contacts	Forms	Users	Reports	٠	2 9	
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2. What are the differences?

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		BER001	Berryland Office Supplies								
	~	CHE047	Checkers Balfour Park								
		CHE042	Checkers Braamfisher								
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- 1. Import customers and Add new customer (if permitted)
- 2. Filtering options
- 3. Total number of customers and download all icon
- 4. Viewing options Map and List View

3. When you select a customer profile a list of icons will be visible

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		Code	Name ↑	Order ite	ems since	e 28 Feb 2022	Sale items since 28 Feb 2022	Days since last interac	tion
_		BER001	Berryland Office Supplies						
[CHE047	Checkers Balfour Park						



4. What are the icons that appear when one or more customer profiles are selected?

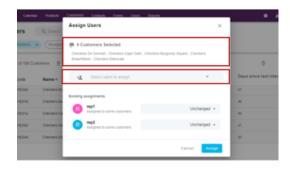
1 selected of 183 Customers

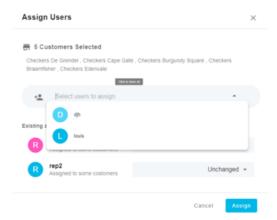


- 1. Download and export the entire customer database
- 2. Activate inactive customers
- 3. Deactivate customer profile
- 4. Assign customer to you (if permitted)
- 5. Manage Assignments (bulk user assignment)
- 6. Merge (duplicated customer profiles)

Manage assignments

Step 1: Select the customers that you want to bulk assign to any of your users. The selected customer names will be listed. You will also be able to see users already assigned to some if not all customers selected, now you can proceed to select a user/s from your list of users

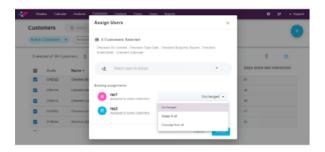




Step 2: You can now start typing the username and or select the drop-down arrow to expand your list as shown below

If you want to make any changes on the Existing assignment, select the user then click the dropdown arrow. From the options presented you can now make any changes.

Assign



Step 3: After selecting the user/s select Assign





How to merge duplicated customers?

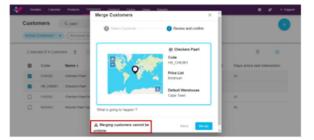
NB: You cannot undo this function. Before merging profiles, please ensure that you have selected the correct duplications.

Search and select the duplicated customer profiles, then select the Merge icon.

At this stage you can still cancel if you selected the incorrect profiles to merge. If you're happy with your selection proceed to select Review

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NB: Please note which customer will be retained and which one will be deleted



After reviewing proceed to select Merge, and this will conclude the merger.

Please note:

You cannot undo a merger. Before merging profiles, please ensure that you have selected the correct duplications

