

# Create, Edit, or Update the Customer Profile

Clients are essential assets of any business. IndusTrack gives you a single platform to help you organize complex customer information and it starts with creating or importing their profile into the system.

There are multiple ways to add a new customer to the Industrack System.

- Manually create a client profile from the Customer Module.
- Sync customers from QuickBooks using the [IndusTrack-QB integration](#).
- Import your list of customers.

## Sync with Quickbooks

If you use the accounting software **QuickBooks**, you can [sync your customer information](#) directly into IndusTrack. You can also set it up in such a way that if a customer is added to QuickBooks, it is automatically downloaded into IndusTrack.

## Import the List of Customers

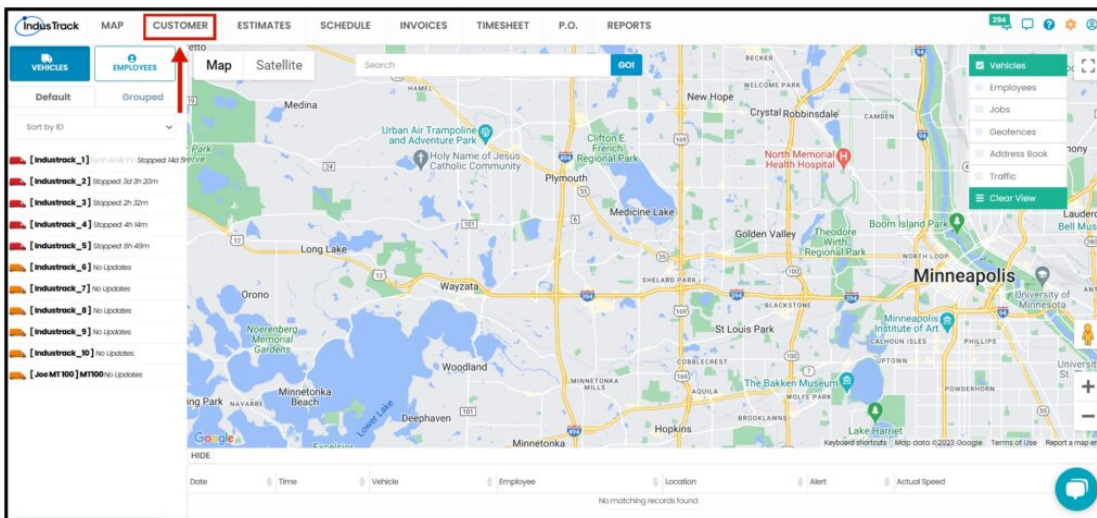
If you are new to IndusTrack and have thousands of customer data from your previous system, you can easily import the Customer List. No need to manually create each and every client's profile in IndusTrack. You just need to export the data from your previous system, save it as an Excel file and import it into IndusTrack.

## Create a Client Profile from the Customer Module

As you win new clients, add them into the system individually. This article shows you how to add a new client via Industrack's Customer module and create their profile.

Before creating a new client, do a search first to determine if your customer has not been previously added to the system. If there is already a profile for them, go ahead, review, update, and complete their information.

Go to **Customer** on the module header. If the header is greyed out, you do not have any access to the module. If it does not appear on the header, your company account does not have access to it.



By default, the list of current Active Customers, in a table format, will be shown on the page.

Create a customer profile using the **Add New** function. You can access the Add a Customer page 2-ways. Click the **Add New** button or the **More Actions** one and select **Add New Customer** from the drop-down.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industrack.com	Expiration Date: May 2024
14	Anderson Lawn Maintenance Inc	Mike	Anderson	5605 Town Hall Drive Loretto MN 55357	(763) 477-3320		Mike@Andersonlawn.com	Expiration Date: Mar 27, 2024 COD
17	BAY TO BAY BOAT CLUB	Tom	JACOBS	135 Lakeview Ave Excelsior MN 55331 USA	(952) 401-3880		torjw@industrack.com	Expiration Date: May 31, 2024 Collection, COD
	Brush Hill Plaza	Ben		1232 W. Ogden Ave. Naperville IL 60563				Expiration Date: Mar 29, 2024 Key investment property
12346	Camp Rock	Denny	Mayol	400 S 4th Street, Unit 1000M, Minneapolis Minnesota 55415 United States	(454) 657-6763	(445) 565-7678	denmayol@gmail.com	
12123	Chirs company	Chris	Smith	10700 west highway 55 270 270 270 270 270	(612) 765-3456		chris-smith@gmail.com	Yearly maintenance Evaluation

Add the new client's details on the **Add Customer** page.

**Fields with (\*) are required the save button will be greyed out if the field with an asterisk is not filled.**

The page has 2 tabs, the **General** and the **Tax & Payment Terms**.

**Add Customer**

General | Taxes & Payment Terms

**General Info**

Customer Number: Auto increment

Company Name: Company Name

**Contact details**

First Name: First Name

Last Name: Last Name

Company Website: Company Website

Phone: Phone number

Email: Email

Mobile: Phone number

**Service Location**

Location Name: Location Name

Street \*: Street

Unit number: Unit number

City \*: City

State \*: State \*

ZIP \*: ZIP

Country: Country

Validate address

Latitude: Latitude

Longitude: Longitude

Billing address is the same as company address

MASS INACTIVE | CLOSE | SAVE

### General Tab Info

Customer Number – There are 2 possibilities for this field: the Customer Number Auto Increment is either set up or not.

**If the Auto Increment is Not Set Up**, Key in the Customer Number on the field.

The screenshot shows the 'Add Customer' form with the 'General' tab selected. A red box highlights the 'Customer Number' field, which contains the text 'Customer Number'. A red arrow points to this field. Other fields include 'Company Name', 'First Name', 'Last Name', 'Company Website', 'Phone', 'Email', 'Mobile', 'Location Name', 'Street', 'Unit number', 'City', 'State', 'ZIP', 'Country', 'Latitude', and 'Longitude'. There are 'MAKE INACTIVE', 'CLOSE', and 'SAVE' buttons at the bottom.

### If Auto Increment is Set Up

The field will be disabled. The Customer Number will be automatically assigned when the new client profile is saved.

This screenshot shows the 'Add Customer' form where the 'Customer Number' field is disabled and contains the text 'Auto increment'. A red box highlights this field, and a red arrow points to it. The rest of the form fields and layout are identical to the previous screenshot.

### Company Name

Key in the client's Company Name. If the customer is a private person and not a company, key in their full name on the field.

This screenshot shows the 'Add Customer' form with the 'Company Name' field highlighted by a red box and containing the text 'Acai Super Malls'. The 'Customer Number' field is disabled and shows 'Auto increment'. The rest of the form fields and layout are identical to the previous screenshots.

### CONTACT DETAILS

The Contact Details section is where you will add the data of the company's contact person. This will be the person you will be communicating with in regard to their account.

Key in the First Name and Last Name of the contact person on the corresponding fields.

The screenshot shows the 'Add Customer' form with the 'Contact details' section highlighted. The 'First Name' field is filled with 'Georgio' and the 'Last Name' field is filled with 'Jenkins'. Other fields in the 'Contact details' section include 'Company Website', 'Phone', 'Email', and 'Mobile'. The 'Service Location' section is also visible, containing fields for 'Location Name', 'Street', 'Unit number', 'City', 'State', 'ZIP', 'Country', 'Latitude', and 'Longitude'. A 'Validate address' button is located below the 'Country' field.

## Company Website

Key in the URL of the company's website.

**Contact Information**, The **email**, **phone**, and **mobile** numbers refer to the contact person's work details and not necessarily the company's.

The screenshot shows the 'Add Customer' form with the 'Contact details' section highlighted. The 'Company Website' field is highlighted with a red box. The 'Phone' field contains '(340)350-0040'. The 'Email' field contains 'hello@acaisupermails.com'. The 'Mobile' field is empty. The 'Service Location' section is also visible, containing fields for 'Location Name', 'Street', 'Unit number', 'City', 'State', 'ZIP', 'Country', 'Latitude', and 'Longitude'. A 'Validate address' button is located below the 'Country' field.

## SERVICE CONTRACT

Upload a copy of the Service Contract that you have with your customer in this section using the **Choose File** button.

The screenshot shows the 'Add Customer' form with the 'Service Contract' section highlighted. The 'Upload Document' field contains 'HVACQuarterlyServiceContract.png'. The 'Choose File' button is visible next to the field. The 'Contact details' section is also visible, containing fields for 'Last Name', 'Company Website', 'Phone', 'Email', and 'Mobile'. The 'Service Location' section is also visible, containing fields for 'State', 'ZIP', 'Country', 'Latitude', and 'Longitude'. A 'Validate address' button is located below the 'Country' field.

## Service Location

The Service Location Address is the first of 2 addresses that have to be filled out.

The **Service Address** is the one that will show up on your field employees' IndusTruck mobile app when a job is scheduled for them for the customer. This is also the address where a virtual geofence will be drawn around for use on the **GPS tracking devices** to create the customer activity report and some entries in the daily activity report. If the customer has more than one service address, you will be able to create additional locations for the customer when you manage the customer's Address Book.

Key in the service location details. Fields with \* are required fields.

- Location Name – This refers to the name of the building/structure/fairground where the business is set up in.
- Street\*
- Unit Number
- City\*
- State\*
- ZIP\*
- Country

The screenshot shows the 'Add Customer' form with the 'Service Location' section highlighted. The form includes the following fields:

- Customer Number: Auto Increment
- Company Name: Acai Super Malls
- Contact details:
  - First Name: Georgio
  - Last Name: Jenkins
  - Company Website: Company Website
  - Phone: (340)350-0040
  - Email: hello@acaisupermalls.com
  - Mobile: Phone number
- Service Contract:
  - Upload Document: HVACQuarterlyServiceContract.png
  - Choose File: HVAC Quart... Contract.png
- Service Location (highlighted):
  - Location Name: Acai Super Malls
  - Street\*: Clifford Highway
  - Unit number: Unit number
  - City\*: Waldorf
  - State\*: MN
  - ZIP\*: 30104
  - Country: USA
  - Latitude: Latitude
  - Longitude: Longitude
  - Billing address is the same as company address
  - Street\*: Street

### Validate the Address

Go to the **Validate Address** hyperlink. The service address will be located and shown on the map. Review the location and click **OK**.

The screenshot shows the 'Add Customer' form with the 'Service Location' section highlighted. The map view shows the location of the service address in Minneapolis, MN, with a red pin. The map is titled 'Validate address' and includes a 'Map' button and a 'Satellite' button. The map shows the Mississippi River and surrounding areas.

The **longitude** and **latitude** will be automatically filled in once the address is validated.

The screenshot shows the 'Add Customer' form with the following details:

- Customer Information:** Last Name: Jenkins, Company Website, Phone: (340)-350-0040, Email: hello@acaisupermalls.com, Mobile: Phone number.
- Service Contract:** Upload Document: HVACQuarterlyServiceContract.png (Choose File).
- Billing Address Section:** State: MN, ZIP: 30104, Country: USA. Latitude: 43.9349639, Longitude: -93.69744659999999. A checkbox labeled 'Billing address is the same as company address' is checked. Below this are fields for Street, Unit number, City, State, ZIP, and Country.

### Billing Address

If the billing address and the service address are the same, tick the checkbox for the Billing address is the same as the **company address**. The fields for the billing address will be disabled. You don't need to fill these. But if the addresses are not the same, leave the check box unticked and fill in the details of the billing address fields.

The screenshot shows the 'Add Customer' form with the following details:

- Customer Information:** Company Website, Phone: (340)-350-0040, Email: hello@acaisupermalls.com, Mobile: Phone number.
- Service Contract:** Upload Document: Choose File (No file chosen).
- Billing Address Section:** ZIP: 30104, Country: USA. Latitude: 43.9349639, Longitude: -93.69744659999999. A checkbox labeled 'Billing address is the same as company address' is unchecked. Below this are fields for Street (Clifford High Way), Unit number (Suite 401), City (Waldorf), State (MN), ZIP (30104), and Country (USA).

### TAXES & PAYMENT TERMS TAB

The screenshot shows the 'Add Customer' form with the 'Taxes & Payment Terms' tab selected. The fields are:

- General:** Taxes & Payment Terms (highlighted with a red box).
- Select a tax rate:** Not selected.
- Select a payment term:** Not Selected.
- Default Discount (only %):** (Empty field).

### Tax Rate

Select the applicable **tax rate** for the customer. This will be automatically applied to all of the client's estimates and invoices.

Add Customer

General Taxes & Payment Terms

Select a tax rate:

- None
- MN Sales Tax: 6.875%
- Sales Tax: 10%
- Vat: 10%

Select a payment term:

Default Discount (only %):

### Payment Term

Select the [terms of payment](#). This will also be automatically applied to all of the client's estimates and invoices.

Add Customer

General Taxes & Payment Terms

Select a tax rate:

Select a payment term:

- Not Selected
- FROMQT
- FromQB new
- OT terms fixed days 10
- 1% 10 Net 30
- FROMQB
- net 30 real
- 56
- Net 10
- edited 7/30 term OT
- Net 15
- 45 days
- Due on Receipt
- OT term2
- 7/30 term from OT
- Test3/27
- Net 30
- FromOT new
- ??????
- DayOffDueDate17.7

Default Discount (only %):

### Default Discount

If applicable, add a percentage (%) discount that will be automatically applied to all of the client's estimates and invoices.

Add Customer

General Taxes & Payment Terms

Select a tax rate:

Select a payment term:

Default Discount (only %):

Once done, do a quick run-through of the details and click **Save**. If any of the required fields have not been filled, the **Save** button will not be enabled. You will have to fill in all the required fields before the profile can be saved.

**Add Customer**

**General** | Taxes & Payment Terms

**General Info**

Customer Number: Auto increment  
 Company Name: Acal Super Malls

**Service Location**

Location Name: Acal Super Malls  
 Street \*: Clifford High Way  
 Unit number: Unit number  
 City \*: Waldorf  
 State \*: MN  
 ZIP \*: 30104  
 Country: USA

**Contact details**

First Name: Georgio  
 Last Name: Jenkins  
 Company Website: Company Website  
 Phone: (340)-350-0040  
 Email: hello@acalsupermalls.com  
 Mobile: Phone number

**Service Contract**

MASS INACTIVE

**CLOSE** **SAVE**

The new client will be added to your [Customer List](#). You can now go and manage the [Customer Profile](#) so other data can be added or updated.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
101	395 Bangor Brewer, LLC	Poliza	Brewster	P.O. Box 020783 Miami FL 33102-0783	(306) 647-4540		info@bangorbrewer.com	electrical System Upgrade Expiration Date: Oct 17, 2022	
102	5 Dollar Pizza	Diana	Bloomer	2331 108th Lane Blaine MN 55449	(218) 327-2223		tqmajeed@5dollarpizza.com		
109	A&D LTD	Alistaire	Vogel	Kropotkina 51 Minsk Minsk 21000	(244) 573-5346		davydenkoa@dana-net.com		
113	Abalte Construction	Ronald	Abalte	2354 Crossway Deer River MN 56636	(218) 327-2200		info@abalte.com		geofences
114	ABBC Properties LLC	Chuck	Welk	ABBC Properties LLC Grand Rapids MN 55744	(218) 256-5288				
105	ABC Software	Frie	Spokane	10700 W Highway 55 Plymouth MN 55441	(366) 546-3542		hello@abcsoftware.org		
108	ABM Apartments	Robert	Austrie	Clifford Ave Fredericksburg MD 20304	(218) 326-4312		info@abmapartments.com		
110	Absolute Fire Protection	Rozy	Lambert	Crain Hi Way Waldorf MN 31098	(218) 326-2280		info@absolute.com		
103	Abstract Plumbing Services	Abe	Munsk	Calle Ave Grand Rapids MN 55744	(218) 326-9010		munsk@gmail.com		
132	Acal Super Malls	Georgio	Jenkins	Clifford High Way Waldorf MN 30104 USA	(340) 350-0040		hello@acalsupermalls.com		
111	Acalzon Recycling	Fred & Jeanne	Adams	Causeway Warba MN 55793	(243) 867-8685				
112	Access North	John	Palmer	Access North Hibbing MN 55746	(218) 262-6675		jpalmers@gmail.com		

### Edit Customer Profile

To work on a client's Address Book – update their profiles, deactivate, upload files and documents, send a message, create estimates, jobs and/or invoices, and many others – go to the **Customer Module**. Find the client from the Address Books List. Click on the name. This will open their **Address Book in edit mode**.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
101	395 Bangor Brewer, LLC	Poliza	Brewster	P.O. Box 020783 Miami FL 33102-0783	(306) 647-4540		info@bangorbrewer.com	electrical System Upgrade Expiration Date: Oct 16, 2022	
102	5 Dollar Pizza	Diana	Bloomer	2331 108th Lane Blaine MN 55449	(218) 327-2223		tqmajeed@5dollarpizza.com		
109	A&D LTD	Alistaire	Vogel	Kropotkina 51 Minsk Minsk 21000	(244) 573-5346		davydenkoa@dana-net.com		
113	Abalte Construction	Ronald	Abalte	2354 Crossway Deer River MN 56636	(218) 327-2200		info@abalte.com		geofences
114	ABBC Properties LLC	Chuck	Welk	ABBC Properties LLC Grand Rapids MN 55744	(218) 256-5288				
105	ABC Software	Frie	Spokane	10700 W Highway 55 Plymouth MN 55441	(366) 546-3542		hello@abcsoftware.org		
108	ABM Apartments	Robert	Austrie	Clifford Ave Fredericksburg MD 20304	(218) 326-4312		info@abmapartments.com		
110	Absolute Fire Protection	Rozy	Lambert	Crain Hi Way Waldorf MN 31098	(218) 326-2280		info@absolute.com		
103	Abstract Plumbing Services	Abe	Munsk	Calle Ave Grand Rapids MN 55744	(218) 326-9010		munsk@gmail.com		
132	Acal Super Malls	Georgio	Jenkins	Clifford High Way Waldorf MN 30104 USA	(340) 350-0040		hello@acalsupermalls.com		
111	Acalzon Recycling	Fred & Jeanne	Adams	Causeway Warba MN 55793	(243) 867-8685				



Acaci Super Malls Tags: Assign

**Contact Info:**  
 Customer Number: 132  
 Contact name: Georgio Jenkins  
 Phone: (340) 350-0040  
 Email: hello@acacisupermalls.com

**Billing Address:**  
 Clifford Highway, Suite 401  
 Waldorf, MN 30104

**Service Location:**  
 Clifford High Way  
 Waldorf, MN 30104

Awaiting Payments: \$0.00  
 Invoice overdue: \$0.00  
 Pending Quotes: \$0.00

Location Estimates Jobs Invoices Equipment Reminders Notes Attachments Geofences Messaging Contracts

Filters: CLEAR FILTER

Location name	Contact Name	Location	Phone Number	Email
Acaci Super Malls	Georgio Jenkins	Clifford High Way Waldorf MN 30104	(340) 350-0040	hello@acacisupermalls.com

Items per page: 20 1 - 1 of 1

## Edit the Customer Profile

Keep your client's profile updated and complete.

To update the client's profile, go to the **Edit Contact** button at the upper right-hand corner of the [customer profile](#) page.

This will open the **Edit Customer page**. Update the information, both from the [General](#) and [Taxes & Payment Terms](#) tabs as needed. **Save** the revisions.

Add Customer

General Taxes & Payment Terms

**General Info**

Customer Number: Auto increment  
 Company Name: Acaci Super Malls

**Contact details**

First Name: Georgio  
 Last Name: Jenkins  
 Company Website: Company Website  
 Phone: (340)-350-0040  
 Email: hello@acacisupermalls.com  
 Mobile: Phone number

**Service Location**

Location Name: Acaci Super Malls  
 Street \*: Clifford High Way  
 Unit number: Unit number  
 City \*: Waldorf  
 State \*: MN  
 ZIP \*: 30104  
 Country: USA

Latitude: 43.9349639  
 Longitude: -93.69744659999999

Validate address

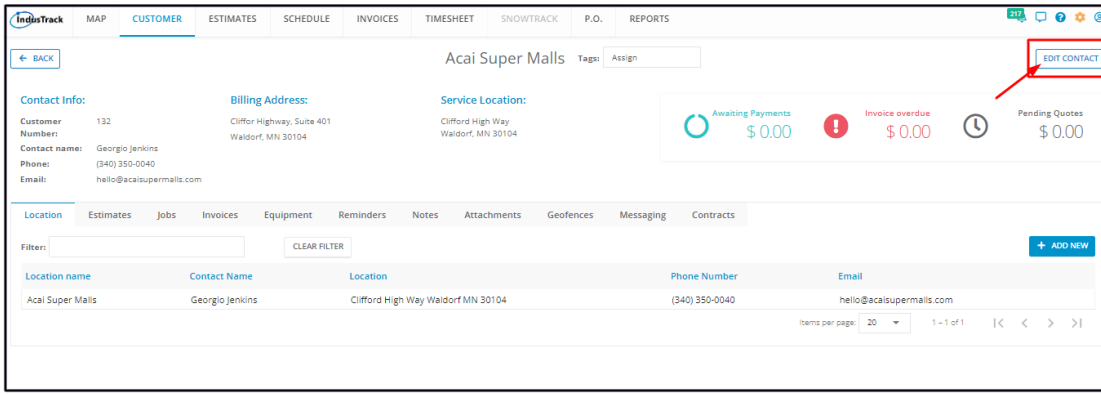
Billion address is the same as company address

MAKE INACTIVE CLOSE SAVE

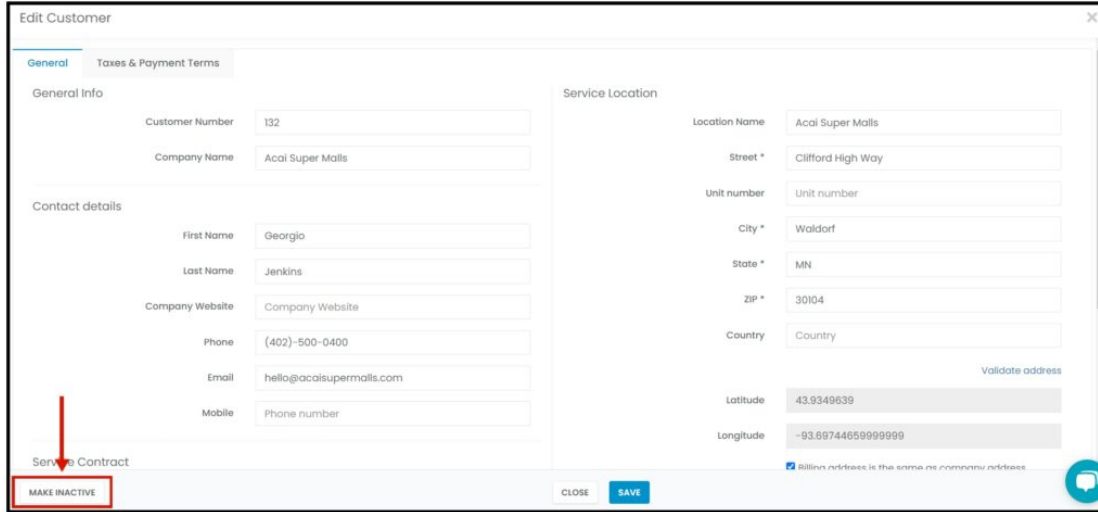
## Deactivate a Customer's Address Book

Identify and deactivate customer accounts that have had no interactions with your company for quite some time. This way, you can try and understand why they have not engaged. With a better understanding, there's an increased chance that these clients will re-engage. This is an extra step you may want to take before Deleting them from your system.

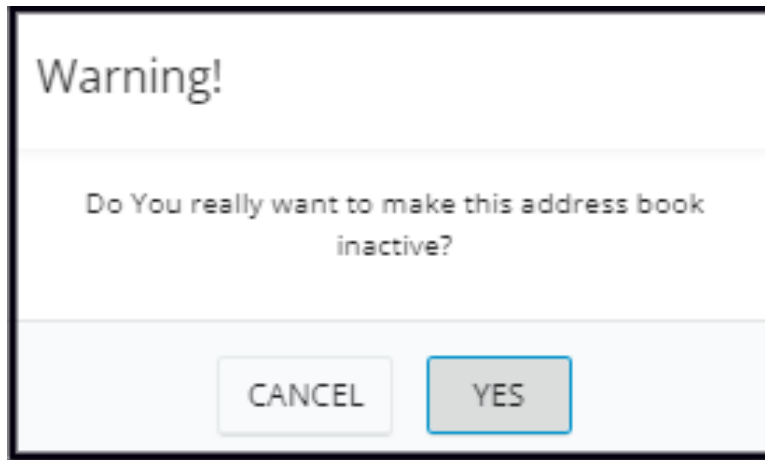
To **Deactivate** a customer, open the **profile in edit mode**.



At the lower left-hand corner of the Edit Customer page, click **Make Inactive**.



From the Warning window that will come up, select **Yes** to continue with the deactivation. Select **Cancel** to abandon the action.



The customer's address book will be moved from the Active Customers List to the Inactive Customers list.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	116	2 Wheels Club	Joshian	Aligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676	josh@radtimes.com		
<input type="checkbox"/>	132	Acai Super Malls	Georgio	Jenkins	Clifford High Way Waldorf MN 30104 USA	(340) 350-0040	hello@acaisupermails.com		
<input type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460	dave@aol.com		
<input type="checkbox"/>	118	Castiliani Construction	Franco	Consehal	praspieci Haczy Prauda Minsk Minskaja voblastc 22008	(437) 658-7643			
<input type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665	mp@dragon.com		
<input type="checkbox"/>	122	Espesyal Juice	Olivia	Rodrigo	111 Mcinnis Pky San Rafael CA 94903	(864) 839-9772	oliviaespesyal@gmail.com		
<input type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645	grandairesoins@aol.com		
<input type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888	granthelwig@gmail.com		
<input type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081	granthelwig@gmail.com		

## Activate/Re-Activate a Customer's Address Book

The deactivated client's profile can be reactivated at any time.

Go to the [inactive customer list](#).

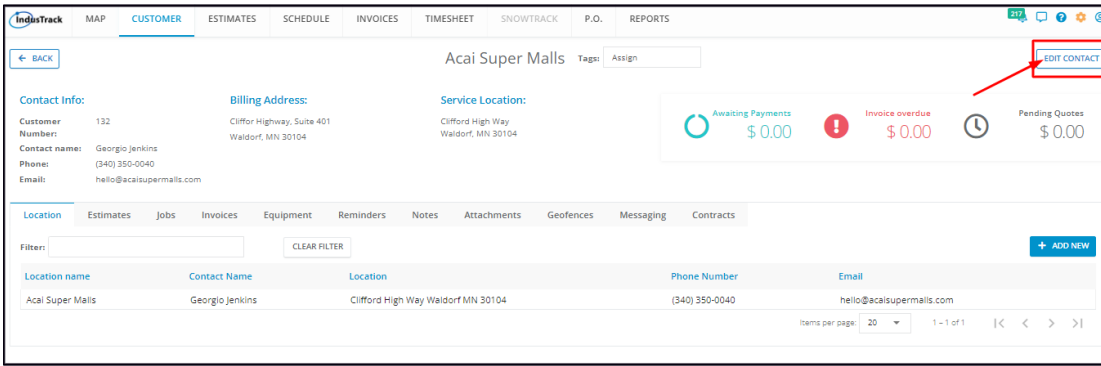
- When Clients are deactivated, their profiles are moved to the **Inactive (Deactivated) Customers** table. To go to this table from the Customer default page, click the **More Actions** button and select **Show Inactive Customers**.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
101	395 Bangor Brewer, LLC	Poliza	Brewster	P.O. Box 020783 Miami FL 33102-0783	(306) 647-4540		info@bangorbrewer.com	electrical System Upgrade Expiration Date: Oct 16, 2022	
102	5 Dollar Pizza	Diana	Bloomer	2331 108th Lane Blaine MN 55449	(218) 327-2223		tqmajeed@5dollarpizza.com		
109	A&D LTD	Alistaire	Vogel	Kropotkina 51 Minsk Minsk 21000	(244) 573-5346		davydenkoa@dana-net.com		
113	Abalte Construction	Ronald	Abalte	2354 Crossway Deer River MN 56636	(218) 327-2200		info@abalte.com	geofences	
114	ABBC Properties LLC	Chuck	Weik	ABBC Properties LLC Grand Rapids MN 55744	(218) 256-5288				
105	ABC Software	Frie	Spokane	10700 W Highway 55 Plymouth MN 55441	(366) 546-3542		hello@abcsoftware.org		
108	ABM Apartments	Robert	Austrie	Clifford Ave Fredericksburg MD 20304	(218) 326-4312		info@abmapartments.com		
110	Absolute Fire Protection	Rozy	Lambert	Crain HI Way Waldorf MN 31098	(218) 326-2280		info@absolute.com		
103	Abstract Plumbing Services	Abe	Munsk	Calle Ave Grand Rapids MN 55744	(218) 326-9010		munski@gmail.com		

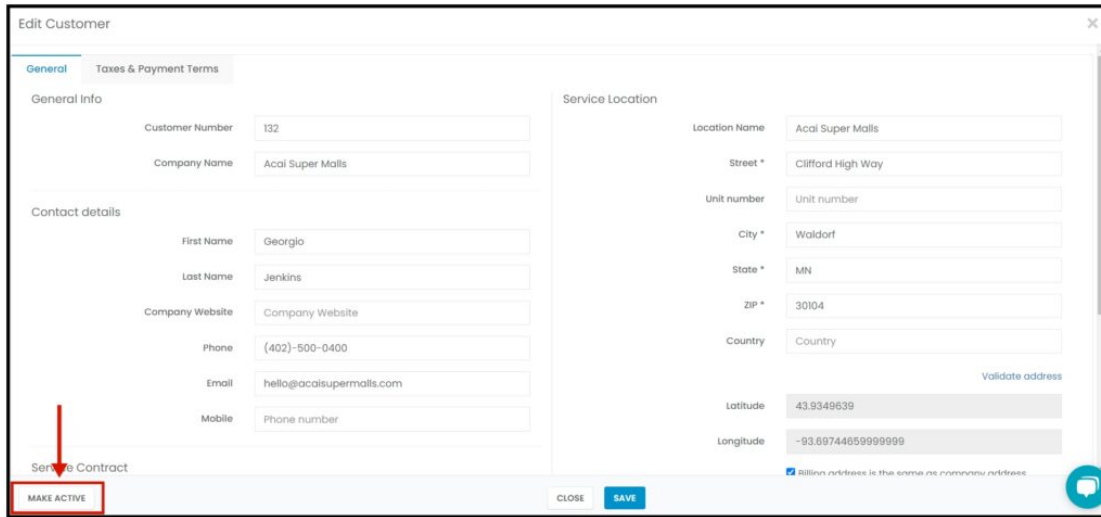
Select the customer and open their Address Book in edit mode.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	116	2 Wheels Club	Joshian	Aligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676	josh@radtimes.com		
<input type="checkbox"/>	132	Acai Super Malls	Georgio	Jenkins	Clifford High Way Waldorf MN 30104 USA	(340) 350-0040	hello@acaisupermails.com		
<input type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460	dave@aol.com		
<input type="checkbox"/>	118	Castiliani Construction	Franco	Consehal	praspieci Haczy Prauda Minsk Minskaja voblastc 22008	(437) 658-7643			
<input type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665	mp@dragon.com		
<input type="checkbox"/>	122	Espesyal Juice	Olivia	Rodrigo	111 Mcinnis Pky San Rafael CA 94903	(864) 839-9772	oliviaespesyal@gmail.com		
<input type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645	grandairesoins@aol.com		
<input type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888	granthelwig@gmail.com		
<input type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081	granthelwig@gmail.com		

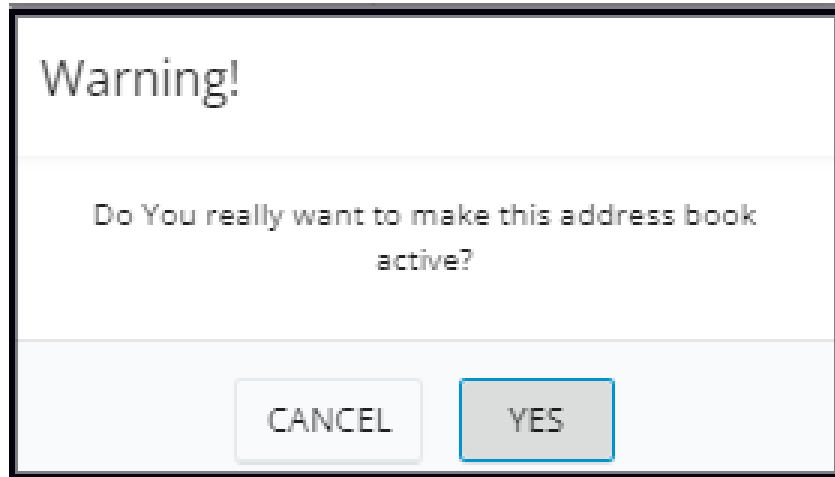
Go to **Edit Contact**.



At the lower left-hand corner of the page, click **Make Active**.



From the **Warning window** that will come up, select **Yes** to continue with the reactivation. Select **Cancel** to abandon the action.



The customer's address book will be moved from the Inactive Customers List to the Active Customers list.

- When Clients' Address Books are reactivated, their profiles are moved back to the **Active Customers** table. To go to this table from the Inactive Customers page, click the **More Actions** button and select **Show Active Customers**.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	116	2 Wheels Club	Joshian	Aligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676	josh@radtimes.com		
<input type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460	dave@aol.com		
<input type="checkbox"/>	118	Castillani Construction	Franco	Consehal	praspiekt Hazlety Prauda Minsk Minskaja vobiasc 22008	(437) 658-7643			
<input type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665	mp@dragon.com		
<input type="checkbox"/>	122	Espesyal Juice	Olivia	Rodrigo	111 Mcinnis Pky San Rafael CA 94903	(864) 839-9772	oliviaespesyal@gmail.com		
<input type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645	grandairesolns@aol.com		
<input type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888	grant.helwig@gmail.com		
<input type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081	grant.helwig@gmail.com		

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	101	395 Bangor Brewer, LLC	Poliza	Brewster	P.O. Box 020783 Miami FL 33102-0783	(306) 647-4540	info@bangorbrewer.com		electrical System Upgrade Expiration Date: Oct 16, 2022
<input type="checkbox"/>	102	5 Dollar Pizza	Diana	Bloomer	2331 108th Lane Blaine MN 55449	(218) 327-2223	tqmajeed@5dollarpizza.com		
<input type="checkbox"/>	109	A&D LTD	Alistaire	Vogel	Kropotkina 51 Minsk Minsk 21000	(244) 573-5346	davydenkoa@dana-net.com		
<input type="checkbox"/>	113	Abalte Construction	Ronald	Abalte	2354 Crossway Deer River MN 56636	(218) 327-2200	info@abalte.com		geofences
<input type="checkbox"/>	114	ABBC Properties LLC	Chuck	Weik	ABBC Properties LLC Grand Rapids MN 55744	(218) 256-5288			
<input type="checkbox"/>	105	ABC Software	Frie	Spokane	10700 W Highway 55 Plymouth MN 55441	(366) 546-3542	hello@abcsoftware.org		
<input type="checkbox"/>	108	ABM Apartments	Robert	Austrie	Clifford Ave Fredericksburg MD 20304	(218) 326-4312	info@abmapartments.com		
<input type="checkbox"/>	110	Absolute Fire Protection	Rozy	Lambert	Crain HI Way Waldorf MN 31098	(218) 326-2280	info@absolute.com		
<input type="checkbox"/>	103	Abstract Plumbing Services	Abe	Munsk	Calle Ave Grand Rapids MN 55744	(218) 326-9010	munsk@gmail.com		
<input type="checkbox"/>	132	Acal Super Malls	Georgio	Jenkins	Clifford High Way Waldorf MN 30104 USA	(340) 350-0040	hello@acalsupermalls.com		
<input type="checkbox"/>	111	Acalzon Recycling	Fred & Jeanne	Adams	Causeway Warba MN 55793	(243) 867-8685			

## Delete a Customer's Address Book

Delete a Customer's Address Book that will no longer be used/updated or the profile was created in error. It is wise to exercise caution when using this function. Deleting a client may have an effect on other functions, settings or data. This action can not be undone.

*If a Client has an active status, deactivate this first. An Active customer can not be deleted.*

Move to the **Inactive Customers** table. Find the client to be deleted from the list and tick the checkbox to its left.

Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	116	2 Wheels Club	Joshian	Aligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676	josh@radtimes.com		
<input type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460	dave@aol.com		
<input type="checkbox"/>	118	Castillani Construction	Franco	Consehal	praspiekt Hazlety Prauda Minsk Minskaja vobiasc 22008	(437) 658-7643			
<input type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665	mp@dragon.com		
<input type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645	grandairesolns@aol.com		
<input type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888	grant.helwig@gmail.com		
<input type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081	grant.helwig@gmail.com		
<input checked="" type="checkbox"/>	122	Over Heated Kitchen	Olivia	Rodrigo	111 Mcinnis Pky San Rafael CA 94903	(864) 839-9772	oliviaespesyal@gmail.com		

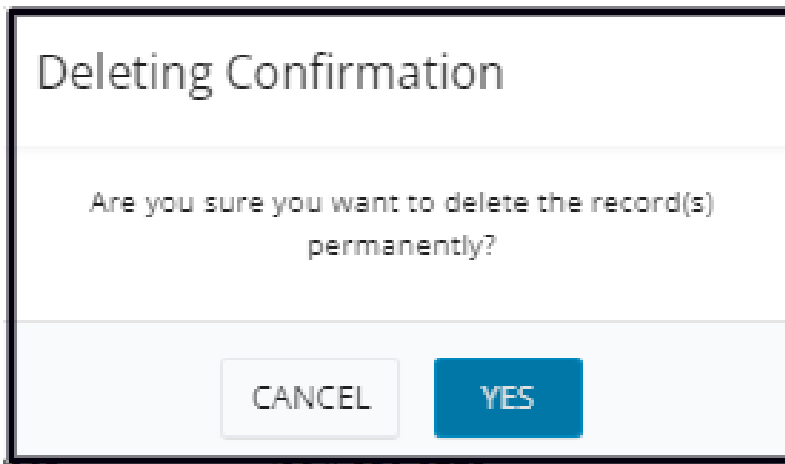
*To delete multiple Customers, tick the checkboxes to the left of all the address books to be deleted. If all of those on the list will be deleted, just tick the checkbox of the Name header.*

<input checked="" type="checkbox"/>	Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input checked="" type="checkbox"/>	116	2 Wheels Club	Joshian	Alligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676		josh@radtimes.com		
<input checked="" type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460		dave@aol.com		
<input checked="" type="checkbox"/>	118	Castillani Construction	Franco	Consehal	praspiekt Hazlety Prauda Minsk Minskaja vobiasc 22008	(437) 658-7643				
<input checked="" type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665		mp@dragon.com		
<input checked="" type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645		grandairesolns@aol.com		
<input checked="" type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888		grant.helwig@gmail.com		
<input checked="" type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081		grant.helwig@gmail.com		
<input checked="" type="checkbox"/>	122	Over Heated Kitchen	Olivia	Rodrigo	111 Mcinnis Ply San Rafael CA 94903	(864) 839-9772		oliviaespeyal@gmail.com		

Go to the **Actions** button and select **Delete**.

<input type="checkbox"/>	Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	116	2 Wheels Club	Joshian	Alligato	405 45th Hwy S Hamilton MS 39746	(662) 369-2676		josh@radtimes.com		
<input type="checkbox"/>	121	Boots HVAC and Heating Services	Dave	Pascale	Clifford Waldorf MD 23040	(249) 003-1460		dave@aol.com		
<input type="checkbox"/>	118	Castillani Construction	Franco	Consehal	praspiekt Hazlety Prauda Minsk Minskaja vobiasc 22008	(437) 658-7643				
<input type="checkbox"/>	123	Dragon Center	Mary	Proppen	61157 Timberlane Dr Jones MI 49061	(269) 244-8665		mp@dragon.com		
<input type="checkbox"/>	120	Grand Aire Solutions	Von	Gubstret	Jordan Ave Plymouth MN 55441 USA	(342) 354-7645		grandairesolns@aol.com		
<input type="checkbox"/>	117	Innovations Air Solutions	Grant	Helwig	Professor's Lane minneapolis MN 55405 USA	(218) 888-8888		grant.helwig@gmail.com		
<input type="checkbox"/>	119	JG Plumbing	Julianne	Inga	3542 washburn ave n minneapolis MN 55412	(218) 851-3081		grant.helwig@gmail.com		
<input checked="" type="checkbox"/>	122	Over Heated Kitchen	Olivia	Rodrigo	111 Mcinnis Ply San Rafael CA 94903	(864) 839-9772		oliviaespeyal@gmail.com		

From the **Warning** window that will come up, select **Yes** to continue with the deletion. Select **Cancel** to abandon the action.



The customer's address book will be removed from the Inactive Customers list.