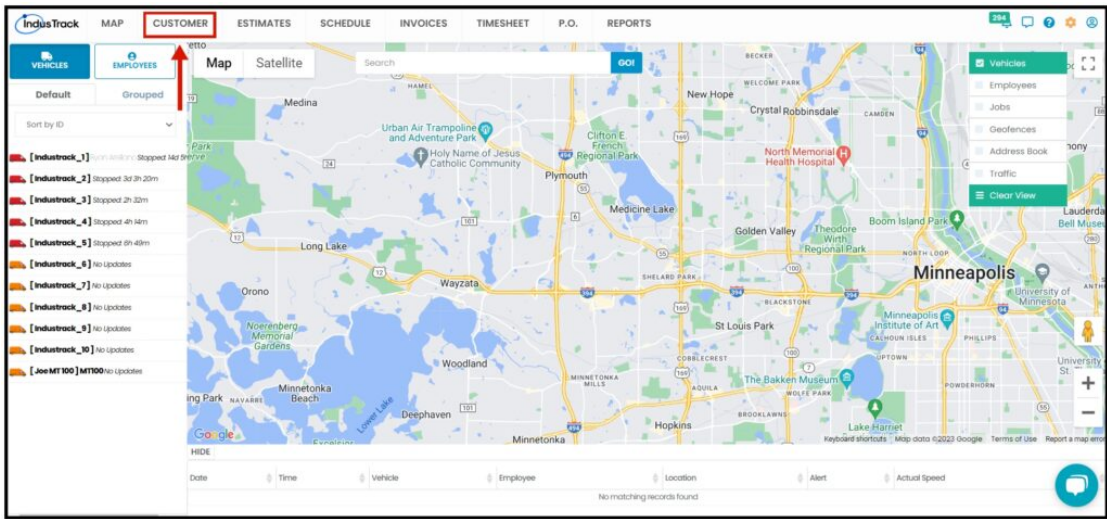


Navigate Customer Module

Customers are essential assets of any business. Knowing your customer is critical to providing quality service that will keep them coming back to you. With its multiple features, IndusTrack wants to help you easily manage all of your customer relationships in a way that helps your business grow faster.

IndusTrack gives you a single platform to help you organize complex customer information. Its centralized fully integrated **Customer Resource Manager** will allow you to see everything about your transactions with your customer in one place. IndusTrack makes customer records retrieval easy. Each customer has an address book that contains their profile and records.

To work on Customer Profile in IndustrackTrack, 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.



The Customer Module defaults to the **Active Clients** table which contains all of the customers that are active. This is also the page where customer profiles are created and deactivated.

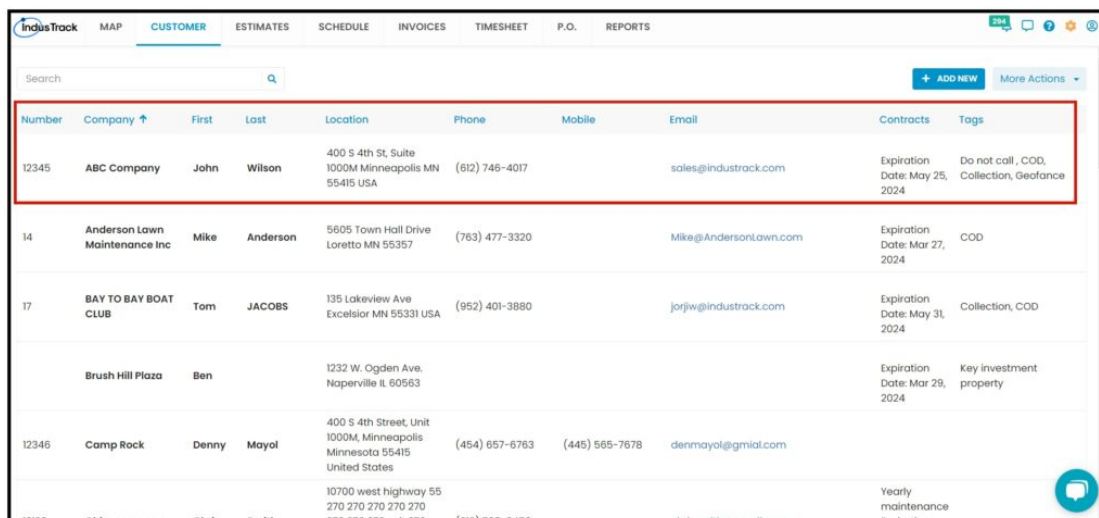
Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
14	Anderson Lawn Maintenance Inc	Mike	Anderson	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		
				10700 west highway 55 270 270 270 270				Yearly maintenance	

Using the Customers Tables

Both the Active and Inactive tables have 10 columns:

- **Number** – This refers to the Customer number.
- **Company** – This refers to the client's business name.
- **First / Last** – This refers to the first and last names of the owner or the contact person.
- **Location** – This refers to the customer's main service location.
- **Phone** – This refers to the contact person's phone detail.

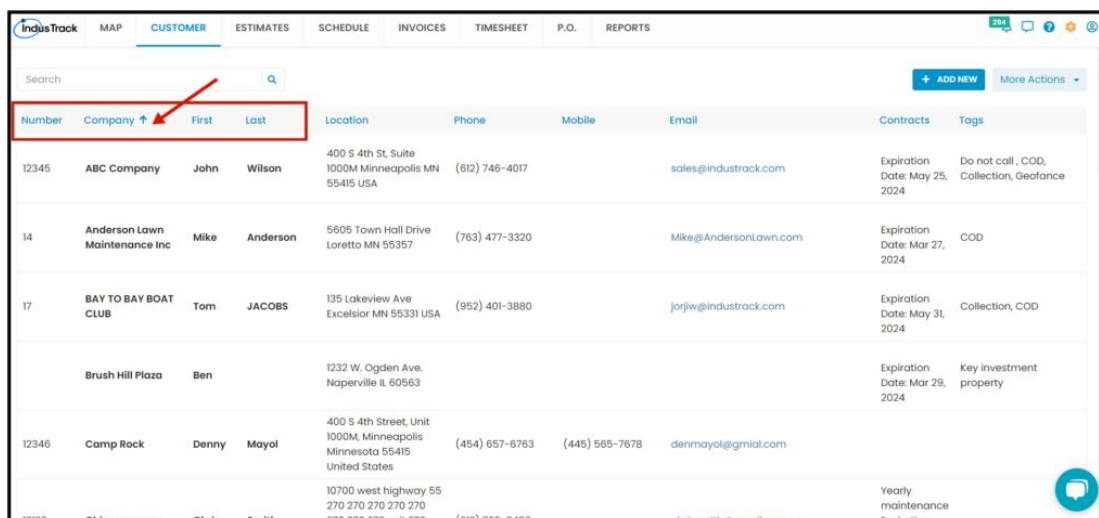
- **Mobile** – This refers to the contact person's mobile number.
- **Email** – This refers to the contact person's email address.
- **Contracts** – If applicable, this refers to either a Service Agreement or Membership.
- **Tags** – This refers to the list of tag/s that have been associated with the customer.



Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
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		lorjw@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		
12322	Chloe company	Chloe	Smith	10700 west highway 55 270 270 270 270 270	(612) 366-3456		chloe.smith@gmail.com	Yearly maintenance	Expiration

Sort the Customers list

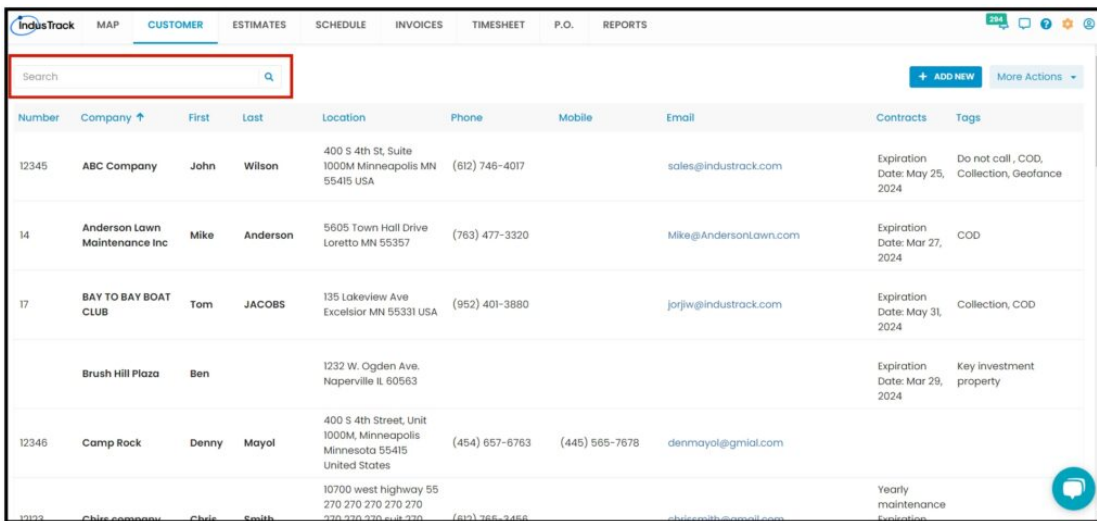
The list gives basic information about the customers. Sort the list according to the **customer number, company name, or the first/last name of the contact person**. Click on the table header to sort the list alphabetically according to the selected header. This works for both tables.



Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
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		lorjw@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		
12322	Chloe company	Chloe	Smith	10700 west highway 55 270 270 270 270 270	(612) 366-3456		chloe.smith@gmail.com	Yearly maintenance	Expiration

Search for a Client

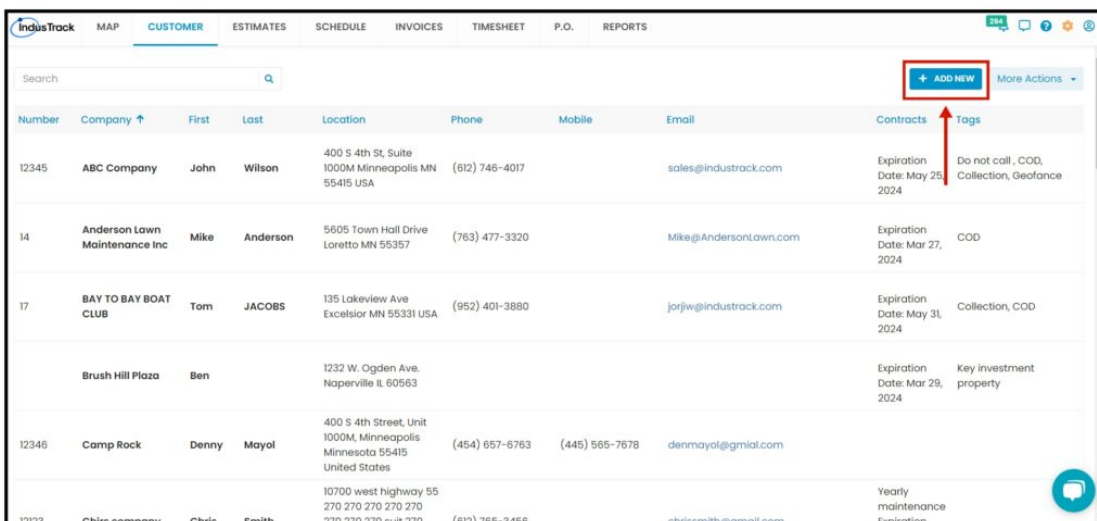
Use the **search bar** to quickly find a customer or simply **scroll down** the list. In the search bar, you can search for a **Client by Number, Company Name, Contact first/last name, and Main Service Location**. Once you find the client you are looking for, click on their name to open their profile. You can view and update the customer's records and profile from this page. This works for both tables.



Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industtrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
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@industtrack.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		
12323	Chirs company	Chirs	Smith	10700 west highway 55 270 270 270 270 270	(612) 765-3456		chirs.smith@gmail.com	Yearly maintenance Expiration	

+ Add New Button

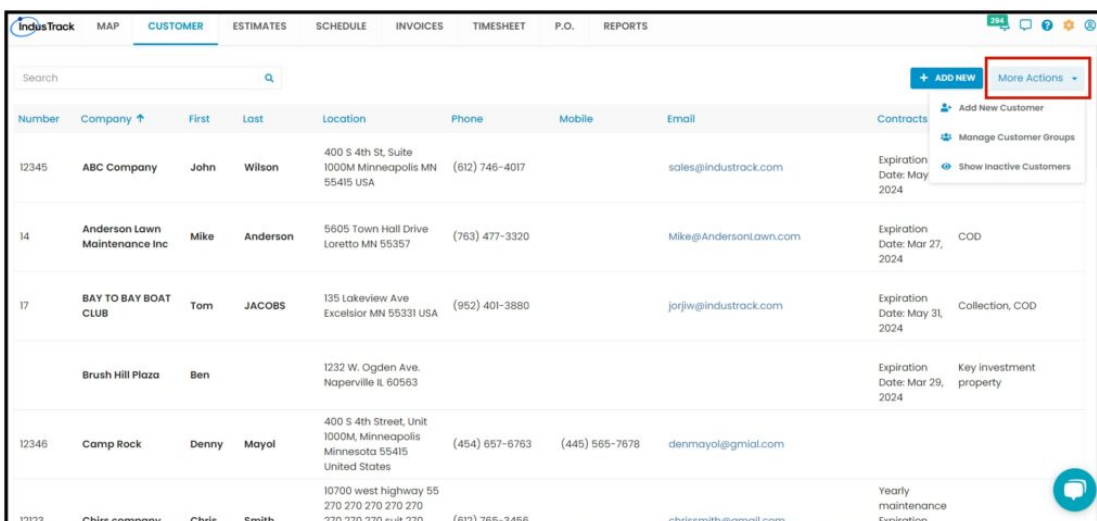
Used to create a new client profile. This works for both tables.



Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industtrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
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@industtrack.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		
12323	Chirs company	Chirs	Smith	10700 west highway 55 270 270 270 270 270	(612) 765-3456		chirs.smith@gmail.com	Yearly maintenance Expiration	

More Actions Button

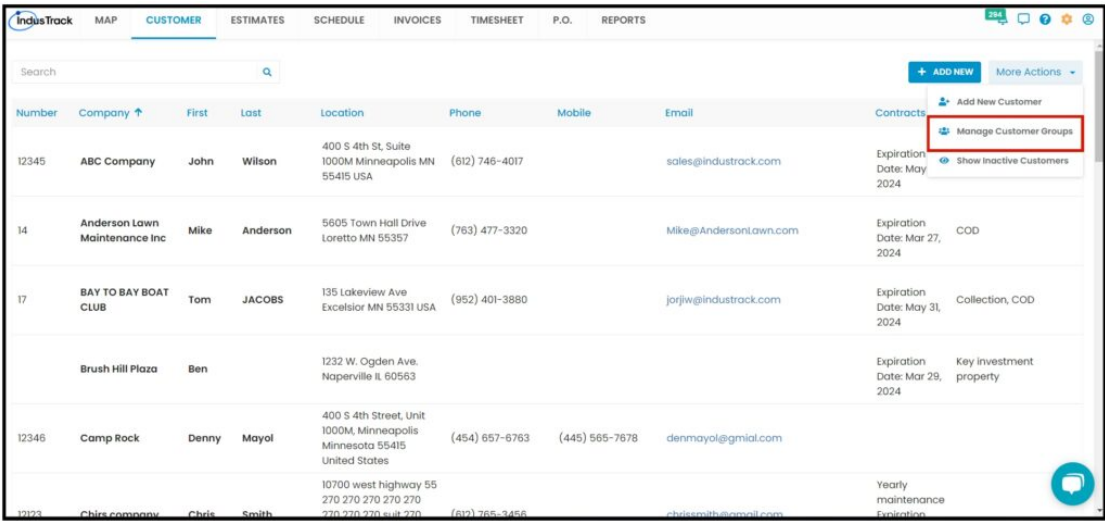
- Create a new client Profile. – An Add New Customer Window will pop up.
- Create and manage Customer Groups. – Will redirect you to Customer Groups List.
- See the Inactive Customers table. – Will redirect you to the List of Inactive Customers.



Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
12345	ABC Company	John	Wilson	400 S 4th St, Suite 1000M Minneapolis MN 55415 USA	(612) 746-4017		sales@industtrack.com	Expiration Date: May 25, 2024	Do not call, COD, Collection, Geofence
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@industtrack.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		
12323	Chirs company	Chirs	Smith	10700 west highway 55 270 270 270 270 270	(612) 765-3456		chirs.smith@gmail.com	Yearly maintenance Expiration	

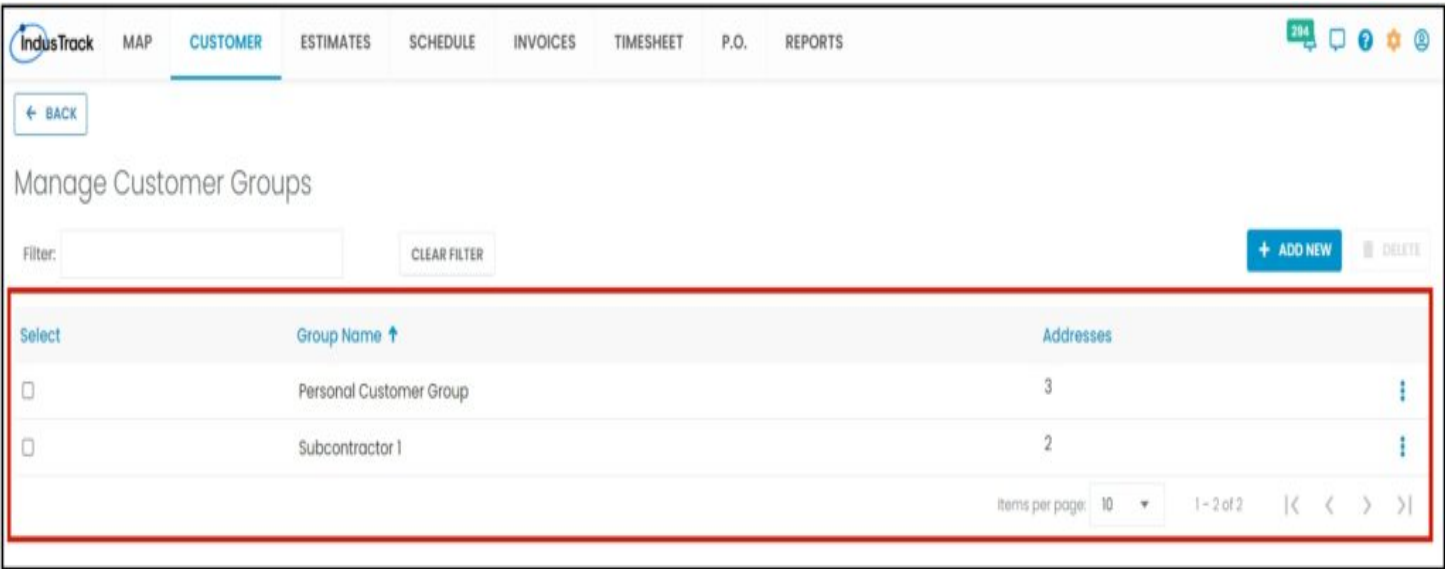
Manage Customer Groups

Clicking on the Manage Customer Groups will redirect you to the list of customer groups.



From this list, you will be able to **Add a new customer group, edit an existing customer group, or delete an existing customer group.**

- **Filter Bar** – Search for the Customer Group Name.
- **Add New** – Add a new Customer Group.
- **Delete Group** – Check the boxes in the Select Column and click on Delete beside the Add New button to Delete a Group. The Delete button will be greyed out if you do not select a group to delete.
- **Three-Dot** – Click on the Three-dot menu to Edit a Customer Group.



Show Inactive Customers List

When Clients are deactivated, their profiles are moved to the **Inactive (Deactivated) Customers table**. To switch tables, click the **More Actions button** and select View the other table **Show Inactive Customers**.

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SCHEDULE

INVOICES

TIMESHEET

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REPORTS

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Search

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+ ADD NEW

More Actions

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
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
	Brush Hill Plaza	Ben		1232 W. Ogden Ave. Naperville IL 60563				Expiration Date: Mar 29, 2024
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	Key investment property
12123	Chirs company	Chris	Smith	10700 west highway 55 270 270 270 270 270	(612) 765-3456		chris.smith@gmail.com	Yearly maintenance Evaluation

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After clicking on Show Inactive Customers, It will show you the Inactive Customers List.

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Search

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Inactive Customer List

+ ADD NEW

More Actions

<input type="checkbox"/>	Number	Company	First	Last	Location	Phone	Mobile	Email	Contracts	Tags
<input type="checkbox"/>	Rabeea 2	Rabeea Job House	Rabeea	Mirza	House no. 24, Street 10, St. Louis Missouri Missouri 63850 USA	0412758248		rabeeaa@industrack.com		
<input type="checkbox"/>	Rabeea	RabeeaJobs	Rabeea	Anwaar	House no. 133 block H4 Wapda Town Lahore Lahore, Punjab Punjab 54000 Pakistan	0332758248		rabeeaa@industrack.com		

Items per page: 50

1 - 2 of 2

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To go back to the Active Customer List View, click on More Actions again and select Active Customers.