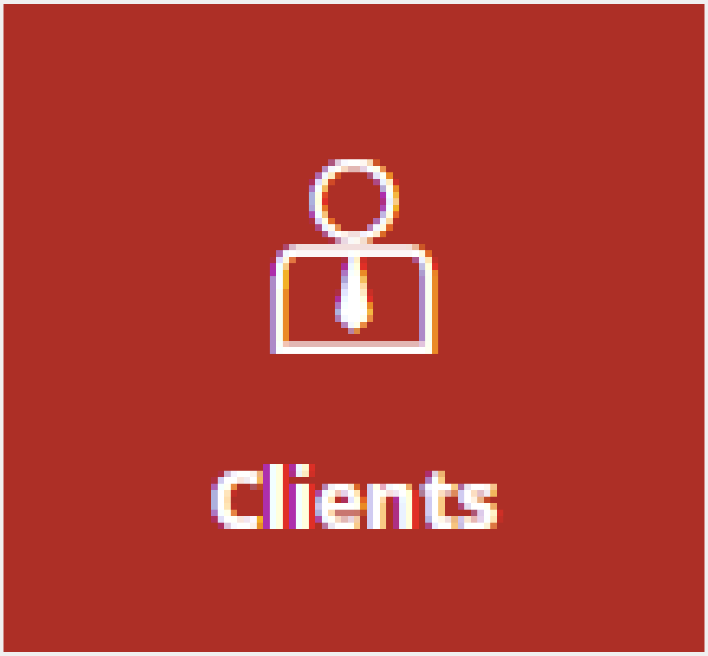
Clients Module

What's here?



In the Clients menu, you can manage your client's information, which includes their price profiles and contact persons. In addition, you can also create and configure price lists which you can apply to clients who do not have their own price profiles.

Clients Module Elements

Smart Views - Clients

Create - Customer

You can create a customer by manually entering the customer's information into the XTRF system.

Contacts - Browse - Customer

The Customer Contacts Browse is where you can search your database for your customers' contact persons. Here you can also create, edit or delete contacts.

Price Lists - Browse - Customer

The Browse Customer Price List page is where you can search the database for the price lists applied to your customers.

Search Sections