

6.2. How to edit or delete Customer's data

In order to open the Customers table click "Customers" in the navigation pane and take the following steps:

1. In the table the user can see all Customers. Click the one you would like to edit or delete (click on the text).

Clients

Main > Clients

Delete Export Add Customer

Search

<input type="checkbox"/>	No	Name, surname / Company name	Type	Active projects	Last project deadline	Projects	Invoices
<input type="checkbox"/>	105	Ланта банк	Leg. ent.	0		Projects	Invoices
<input type="checkbox"/>	96	Мегафон Татарстан	Leg. ent.	0		Projects	Invoices
<input type="checkbox"/>	95	МТИ	Leg. ent.	0		Projects	Invoices
<input type="checkbox"/>	94	Ward James	Indiv.	0		Projects	Invoices

2. The system will open "Main information" window, where the user can see some of the main data about the Customer. Edit the information in fields and click "Save".

Manager Add

Comment Edited contact information

Save Delete

If you would like to remove the Customer's record, click "Delete".

Manager

Add

Comment

Edited contact information

Save

Delete

! Please remember that Customer's deletion will not incur project related data deletion. It means that any projects that were created under this Customer before the deletion will be stored in the system.