Customer

Overview

The **Customer Management** feature in **Surface Solutions** serves as the central hub for maintaining and organizing all customer information.
Here, master data is managed, new customers are created, and existing data is updated or exported.

Customer data forms the foundation for calculations, offers, orders, and invoices — making it a central part of the entire workflow.

With Customer Management, you can:

- Record and edit customer master data
- Create new customers directly in a calculation or via the customer overview
- View and search all customers in a clear list
- Export, edit, and re-import customer data via CSV files

The Customer Management section is divided into two main areas:

1. **Manage Customers**
   In the customer overview, you can see all existing customers of your company.
   Here, you can add new customers, edit or delete existing records.
   Each customer record can include key information such as company name, address, VAT ID, contact person, phone number, email address, notes, and preferred contact methods.
   New customers can also be created directly within a calculation — Surface Solutions automatically detects when a company name does not yet exist and offers the option to create a new customer record.
2. **Import and Export Customers**
   Using the import and export functions, customer data can conveniently be backed up or updated via CSV file.
   The export creates a file in system format containing all relevant fields, including the unique customer number.
   This file can be modified as needed and then re-imported.
   Customers with existing customer numbers are updated, while new records are created automatically.
   Importing from other systems is also possible, provided the data is converted into the appropriate CSV format.

Manage Customers

In Surface Solutions, you can centrally manage, edit, and create new customers.
You can access the customer page via **Tools and Settings → Customers**. There, you will find an overview of all existing customers in your organization.

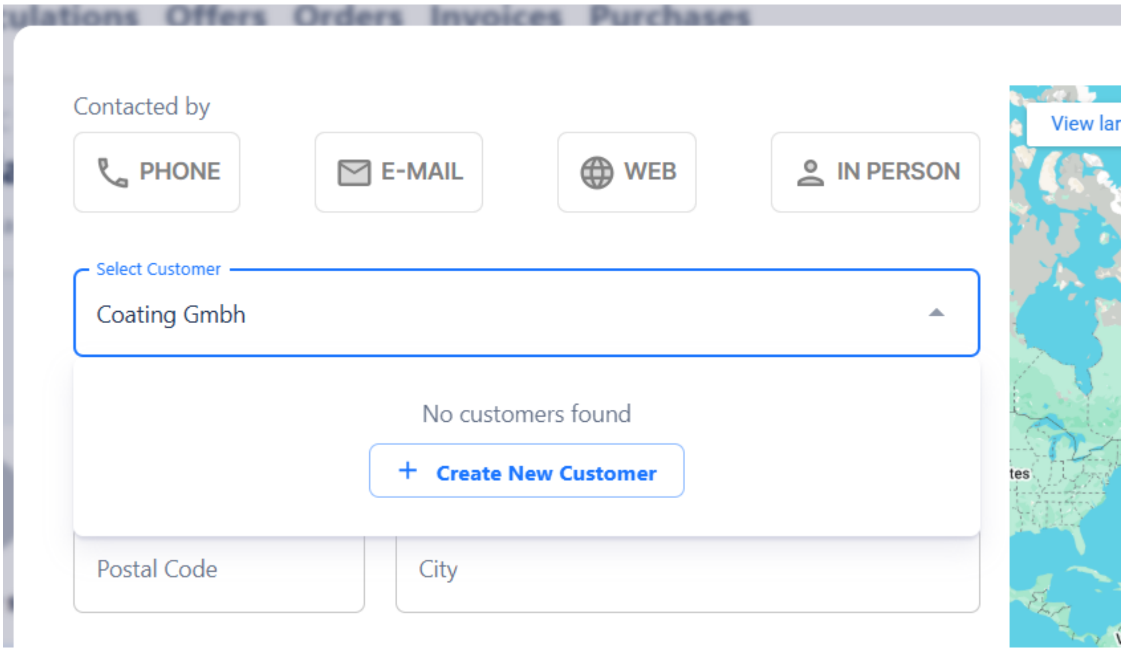
Customer Overview

The customer overview displays all registered customers in a tabular format. Using the search function, you can quickly find customers and open them with a click to view or edit their data.
With the **"Add Customer"** button, you can create new customers and enter their master data.

Create a Customer

A new customer can be created either directly through customer management or within a calculation.

If you enter a new name in the **Company** field during a calculation that does not yet exist in the system, the button **"Create New Customer"** will automatically appear.
After clicking it, a new customer with the specified name will be created, and you can add additional information directly within the calculation.



By clicking "+ Create New Customer," you can create a new customer directly within the calculation.

Customer Data

For each customer, you can record and manage the key master data, including:

- Company name
- Address
- VAT number
- Contact person
- Email address
- Phone number
- Notes
- Preferred contact method (e.g., email, phone, web, in-person)

Edit and Delete

Customers can be edited at any time to update or add information.
Customers that are no longer needed can be deleted.

Customers Import and Export

> Depending on your version, this function may not yet be activated. Please contact your account manager for more information.

In Surface Solutions, customer data can easily be exported and re-imported using a **CSV file**.
This allows both the backup of existing customer data and the simple transfer of customers from other systems.

Export Customers

Through customer management, you can export all existing customers as a **CSV file**.
This file contains all relevant information for each customer, including the **customer number**, which serves as a unique identifier. The CSV export is especially useful for backing up data or making bulk changes outside the system.

Edit and Reimport Customers

The exported CSV file can be opened and edited in a spreadsheet program.
When making changes, ensure that the **customer number** remains unchanged — it serves as the link between existing records and the updated information.

After editing, you can upload the file again in the same format.
During import, existing customer data will be updated based on the customer number.
If an entry contains a **new customer number** that does not yet exist in the system, a **new customer** with that number will be automatically created.

Import Customers from Other Systems

If you want to import customer data from another system, it must first be converted into the **Surface Solutions CSV file format**.
Only in this way can the system correctly match the fields.
Customers without a customer number will automatically receive the **next available customer number** during import, ensuring continuous numbering.