

# 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

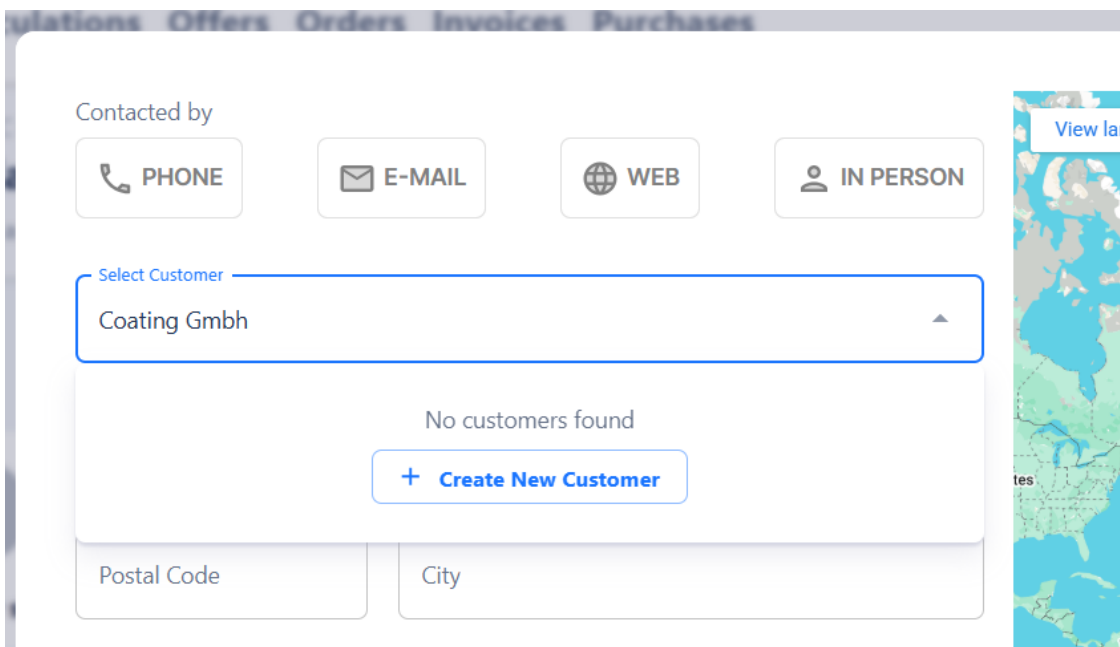
The customer overview displays all registered customers in a tabular format. Using the search function, you can quickly find customers and open them with a click to view or edit their data. With the **“Add Customer”** button, you can create new customers and enter their master data.

## 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.



The screenshot shows a user interface for managing customers. At the top, there are navigation tabs for 'Calculations', 'Offers', 'Orders', 'Invoices', and 'Purchases'. Below these, there is a section titled 'Contacted by' with four buttons: 'PHONE' (with a phone icon), 'E-MAIL' (with an envelope icon), 'WEB' (with a globe icon), and 'IN PERSON' (with a person icon). Below this is a search dropdown menu with the text 'Select Customer' and 'Coating Gmbh'. Below the dropdown, it says 'No customers found' and there is a blue button with a plus sign and the text '+ Create New Customer'. At the bottom, there are two input fields: 'Postal Code' and 'City'. On the right side, there is a vertical map widget with a 'View lar' button at the top.

*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.

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