

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.

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