The Customer List

Customers · https://mountainstream.co/docs/customer-list-order-management/

Add new customers and customer attributes

[A screenshot of a customer list interface displays annotated tips on filtering orders, setting visibility options, checking customer status, and color coding for order status; instructions appear in purple callout boxes.]

Dashboard

1. Use the Customer List as a dashboard to:
    a. Go to any page of any customer’s account:
        i. Ordering
        ii. Finance
        iii. Item Catalog
        iv. Calendar
        v. Addresses
        vi. Contacts
        vii. Settings
        viii. Audit Trail
        ix. CRM Events

2. Add new customers
    a. Using the interface
    b. Import CSV
    c. You may also import customers from QuickBooks and Xero in their respective Dashboard

3. Add Customer Attributes: use to filter reports in Streamline
4. Import Customer SKUs
5. Toggle a customer status between live/not live/on hold
6. Switch system emails on and off to a specific customer: click the mail icon

Viewing and Filtering Customers with Orders

- View at a glance customers with and without orders for the date selected, by default, tomorrow.
- Filter the list by Sales Rep
- Filter by column or order status using the summary numbers at the top.
  - Total Number of Customers
  - Total Number of Addresses – a customer may have multiple addresses
  - Addresses with Orders – total number of addresses with orders for the selected date
  - Addresses without Orders – total number of addresses without orders for the selected date

[Screenshot of a customer management software showing a streamlined customer list, with columns for name, company, telephone, and email. A popup highlights customer statistics and order management filtering instructions.]

- Color coded rows show order status:
  - **White**: All addresses have orders
  - **Blue**: Some addresses have orders
  - **Grey**: No orders placed
  - **Red**: Orders cancelled
  - **Burgundy**: Account on hold

Customize the interface

- Click on the blue eye to to show/hide columns

- Use the **Status/Action** column to keep daily notes when calling customers to take orders .
  - Sort and filter the list by status
  - Sort call backs chronologically

Get Started