



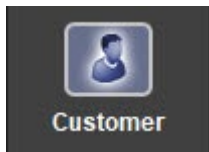
**PST**

DESIGN WITHOUT LIMITS

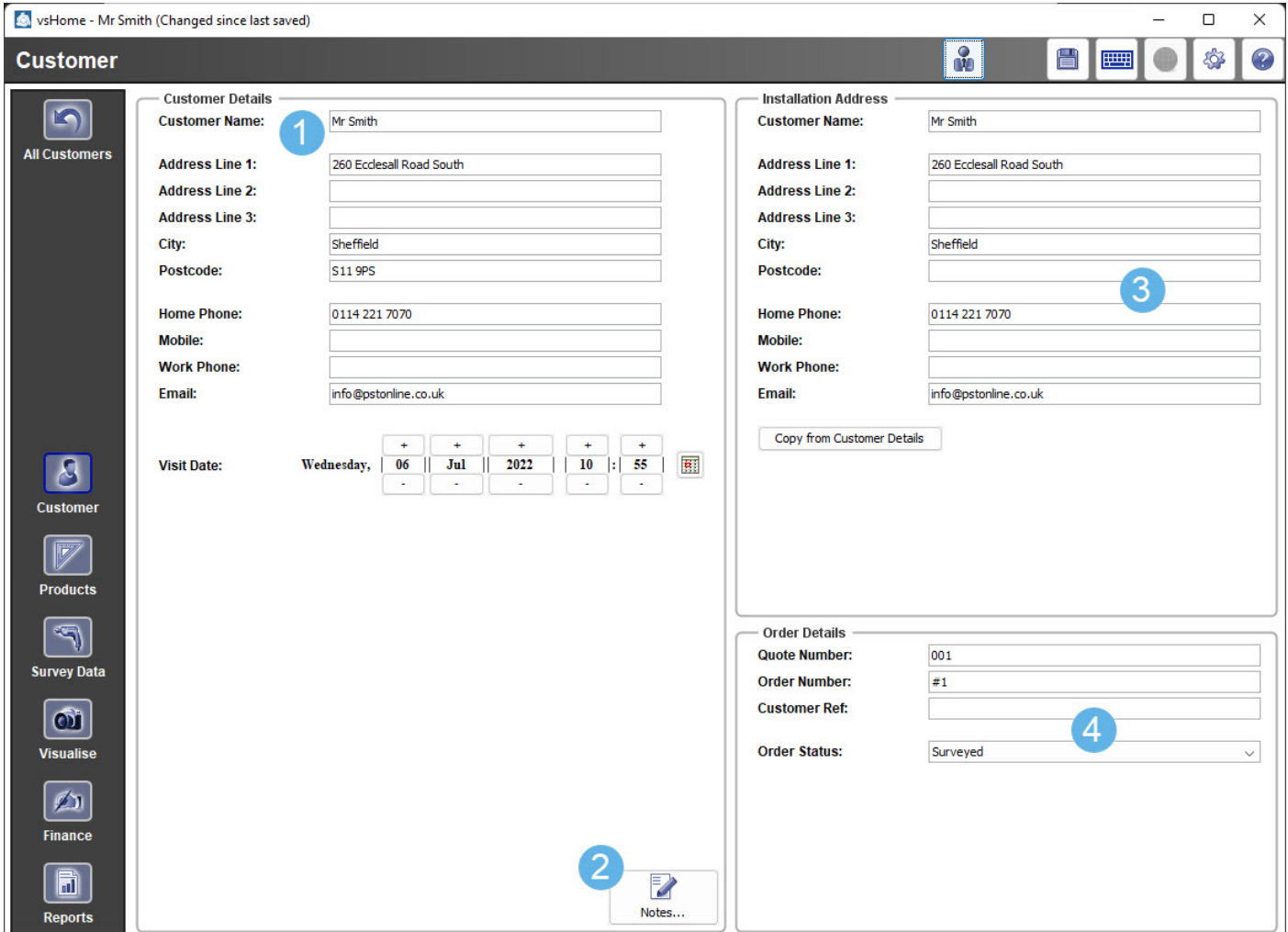
## Advanced Software Solutions for the Glazing & Home Improvement Industry

vsHome Overview - Customer Screen

## Customer Screen



Having opened a customer contract from the All Customer screen, you will be taken to the Customer screen to add or edit the current customer details. The screen layout for the Customer screen is outlined below;



vsHome - Mr Smith (Changed since last saved)

### Customer

**Customer Details**

Customer Name: **1** Mr Smith

Address Line 1: 260 Ecclesall Road South

Address Line 2:

Address Line 3:

City: Sheffield

Postcode: S11 9PS

Home Phone: 0114 221 7070

Mobile:

Work Phone:

Email: info@pstonline.co.uk

Visit Date: Wednesday, 06 Jul 2022 10:55

**2** Notes...

**Installation Address**

Customer Name: Mr Smith

Address Line 1: 260 Ecclesall Road South

Address Line 2:

Address Line 3:

City: Sheffield

Postcode: **3**

Home Phone: 0114 221 7070

Mobile:

Work Phone:

Email: info@pstonline.co.uk

Copy from Customer Details

**Order Details**

Quote Number: 001

Order Number: #1

Customer Ref: **4**

Order Status: Surveyed

- Customer Details** – Fill out the details for the current customer including visit date.
- Notes** – Opens up the notes dialog box where you can add/edit or delete any number of separate notes for the current customer.
- Installation Address** – Supply an installation address for the current customer. You can select 'Copy from Customer Details' to use the same address.
- Order Details** – Fill in the quote number, order number and customer reference. You can also set the order status using the drop down menu. You can choose to use the quote/order number control option within [preferences > project admin](#) to automate and control the way in which the quote and order numbers are generated.