

Icon Map:

The following icons are used in this template. They are available in the Google Cloud Folder on this Trello Card: <https://trello.com/c/z2j1yyVR>

While icons may look different in this template, the ones in the Google Drive folder are always the most up-to-date. Almost all icons have a complementing line version. The name is the same with the addition of an “-l” added to the end. If an icon is missing, please let me know—chances are it is in the process of being created!

- 1) Edit: [system-edit](#)
- 2) Delete: [system-trashcan](#)
- 3) View: [system-view](#)
- 4) Customer Contacts: [users-customer-information](#)
- 5) Customer: [users-customer](#)
- 6) Business Card [vendor-business-card](#)
- 7) Notes and Files [system-notes-and-files](#)
- 8) Pictures: [system-pictures](#)
- 9) Invoices and Payments: [finance-invoice-other](#)
- 10) Paperclip: [system-paperclip](#)



Add/Edit Customer

Enable Portal:

☐

Send Notifications:

☐

Only available if portal is activated. Default is On.

Company*:

Category:

Dropdown from
OWNER Editable
List. More
than one can
be selected!

Account #:

Auto-Generate:

☐

If yes, system generates an account#

Tags:

Tags can be entered to further define Vendor

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Number 1:

Type

OFFICE

Number 2:

Type

OFFICE

Number 3:

Type

OFFICE

E-mail:

Website:

☐

Licensed

☐

Bonded

☐

Insured

As these are checked, a text field will appear for each to allow them to enter their License/Bond/Insurance Info

Certifications:

Social Media:

LinkedIn:

Facebook:

Twitter:

Instagram:

WhatsApp:

YouTube:

Reddit:

Skype:

Snap Chat:

Discord:

Etsy:

Pinterest:



Logo:

Upload Logo



Customer Contacts:

NEW TAB

This would show the table overview of the contacts with the "Add Contact" above it. When the button is clicked, this form would show above the table.

Add Contact

First Name*: Middle Name: Last Name*:

Title:

Number 1: Type **OFFICE** ▼

Number 2: Type **OFFICE** ▼

Number 3: Type **OFFICE** ▼

E-mail:

Upload Picture

This would be a multiple image upload for the Customer's Contact's Headshot/etc.



Upload Business Card

This would be a multiple file upload for the Customer's Contact's Business card(s)

Contact Notes:

HTML EDITOR

Save

A table of saved contacts would appear under the form that would allow them to "Edit", "View", or "Delete" the contact.



Notes and Files:

NEW TAB

**THIS WOULD BE THE NOTES AND FILES TOOL
FOR THIS CUSTOMER**



Interactions:

NEW TAB

**THIS WOULD BE THE INTERACTIONS TOOL
FOR THIS VENDOR**



Invoices & Payments:

NEW TAB

Add Invoice

THIS WOULD BE THE INOVICES FOR THIS CUSTOMER. THE ABILITY TO ADD AN INVOICE WOULD BE HERE AS WELL. IT WOULD BE AN “OTHER” INVOICE IN THE SYSTEM.