

Easily Manage Customer Information with Customer Settings

Executive Summary

The Customer Settings module helps you manage all your customer-related information in one place, ensuring accurate records and improved communication. This means better service and a more organized workflow for you. You can easily update company profiles, logos, location maps, and even customize the platform with your own branding. This leads to a more professional look and feel and improved customer satisfaction.

Title & Purpose

Title: Take Control of Your Customer Data with Customer Settings

Purpose: This guide will help you understand and use the Customer Settings module to efficiently manage customer information, customize your platform, and improve your overall customer experience. This is important because accurate and up-to-date customer data is essential for providing excellent service and maintaining a professional brand image.

Introduction

Are you struggling to keep customer information organized and up-to-date? Do you want to customize your platform to better reflect your brand? The Customer Settings module addresses these pain points by providing a centralized location to manage customer data and customize various aspects of the system.

What is Customer Setting? Customer Setting allows you to add, edit, or manage customer-related information in the system. Think of it as your central hub for all things customer-related.

Why is this important? Accurate customer records lead to better service, improved communication, and a more professional brand image.

Main Content (User-Focused Sections)

What This Means for You

- **Improved Organization:** Keep all your customer information in one easy-to-access location.
- **Enhanced Customization:** Tailor the platform to reflect your brand with custom logos and settings.
- **Better Customer Service:** Accurate and up-to-date information leads to faster and more effective customer support.
- **Streamlined Workflows:** Quickly access and update customer details, saving you time and effort.
- **Role-Based Access Control:** Assign specific permissions to fleet managers based on their region or role.

How It Works

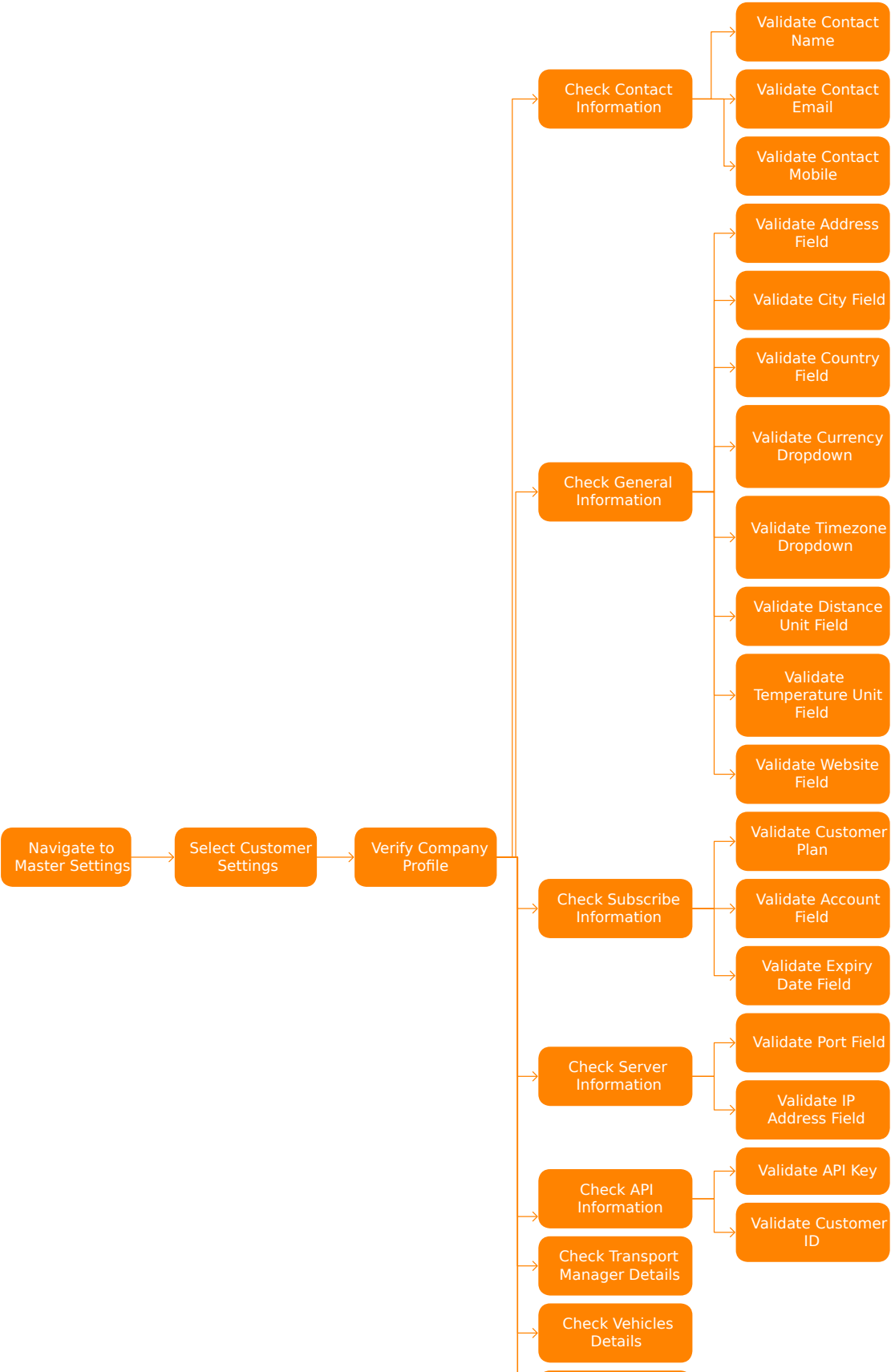
The Customer Settings module, found within the Master Settings, provides a central hub for managing customer-related data. You can view and update profiles, company information, logos, location maps, subscription details, server information, and API information, all in one place. The system also supports features like multi-level access for fleet managers and vehicle grouping for better organization.

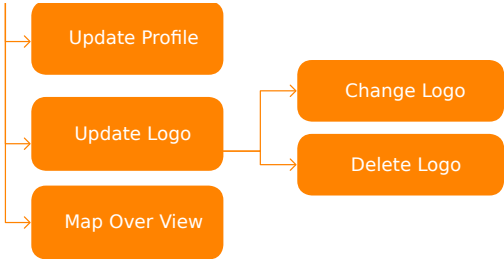
Here's a simple breakdown:

1. Navigate to **Master Settings** then select **Customer Settings**.
2. Choose the section you want to manage (e.g., Company Profile, Customer Location Map).

3. **Click the three dots** to see available actions like "Update Profile" or "Change Logo."
4. **Follow the on-screen instructions** to make your changes.

Customer Settings Verification Flowchart





Flow Chart Diagram Explanation:

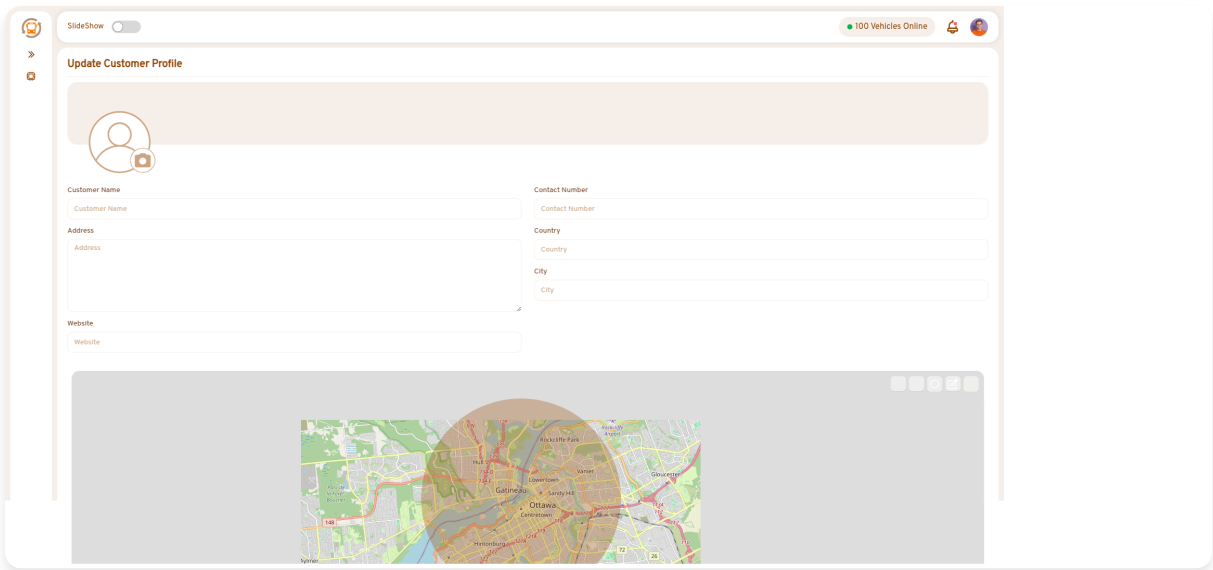
This flow chart visually represents the process of accessing and managing customer settings. It starts with navigating to the "Master Settings" module, then selecting "Customer Settings." From there, you can manage various aspects of the customer profile, company profile, location map, and more. The chart highlights that actions like "Update Profile" or "Change Logo" can be performed within these sections. This diagram reinforces that the customer setting module has comprehensive coverage for managing customer information

Getting Started

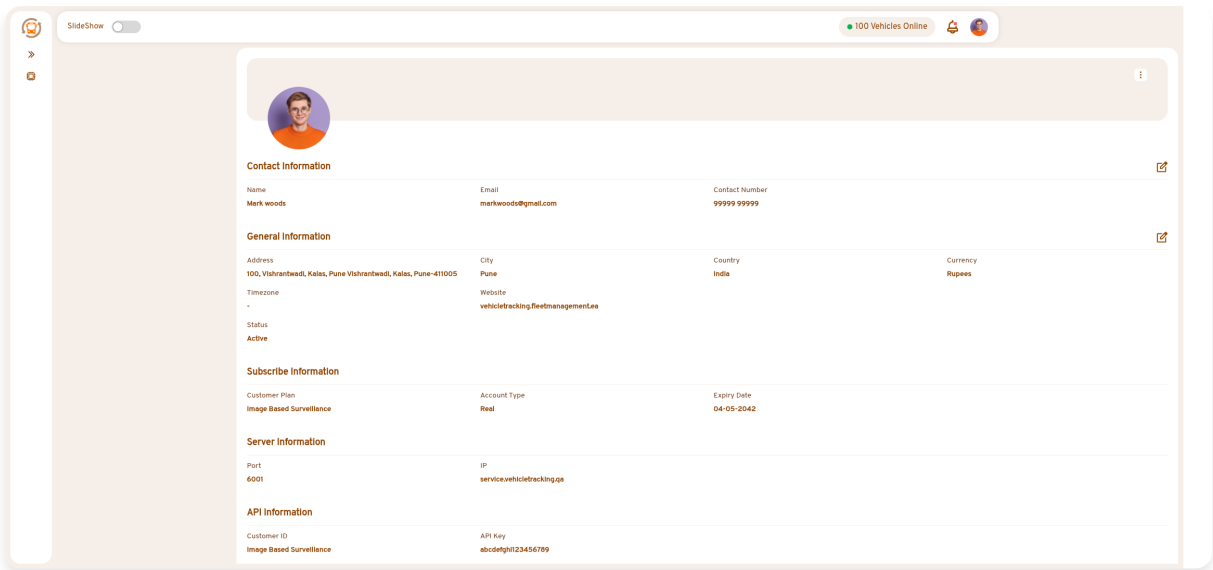
- 1. **Log in** to your account.
- 2. Go to the **Master Settings** module.
- 3. **Click** on **Customer Settings**.
- 4. **Select** the area you want to manage (e.g., Customer Profile, Company Profile).
- 5. **Click the three dots** next to the setting you want to modify.
- 6. **Choose** the appropriate action (e.g., Update Profile, Change Logo).
- 7. **Follow** the on-screen instructions to complete the update.

Key Features You'll Use

- **Update Profile:** Modify customer contact information, addresses, and other key details.

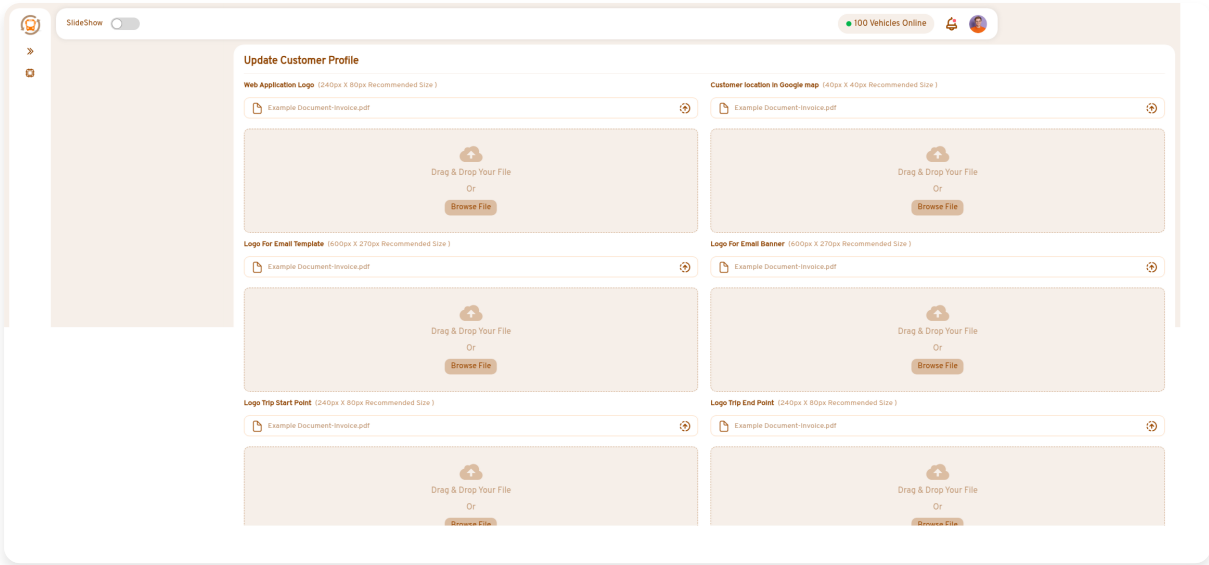


- **View Company Profile:** Access and review company-specific details.

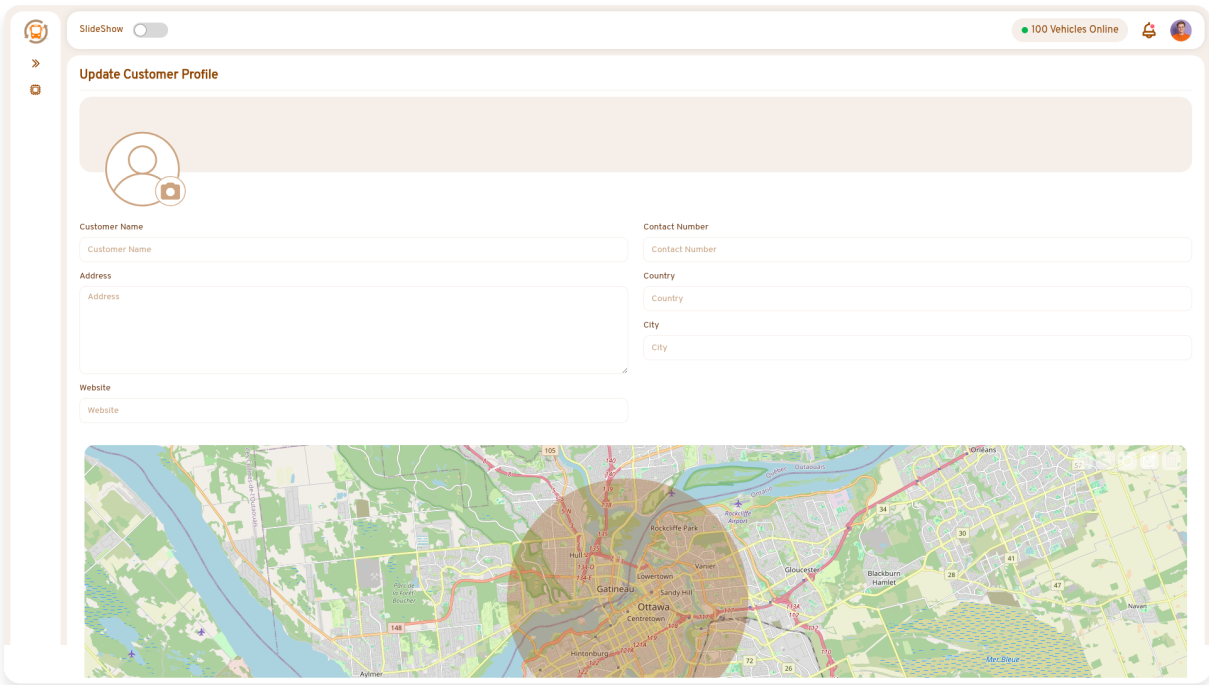


- **Update Logo:** Customize the platform with your company logo for a branded experience. This includes logos for email banners and trip start

points.



- **Update Customer Location Map:** Modify the displayed location map for accurate tracking and visualization.



- **View Subscription Information:** Review details about your current subscription plan.

SlideShow

100 Vehicles Online

Contact Information

Name

Email

Contact Number

Mark woods

markwoods@gmail.com

99999 99999

General Information

Address

City

Country

Currency

Timezone

Website

-

Status

100, Vishrantnagar, Kalyan, Pune-411005

Pune

India

Rupees

vehicletracking_fleetmanagementLda

Active

Subscribe Information

Customer Plan

Account Type

Expiry Date

Image Based Surveillance

Real

04-05-2042

Server Information

Port

IP

6001

service.vehicletracking.ga

API Information

Customer ID

API Key

Image Based Surveillance

abcdefghij23456789

- **View Server Information:** Access server details for troubleshooting and verification.

SlideShow

100 Vehicles Online

Contact Information

NameMark woodsEmailmarkwoods@gmail.comContact Number99999 99999

General Information

Address100, Vishrantwadi, Kales, Pune Vishrantwadi, Kales, Pune-411005CityPuneCountryIndiaCurrencyRupeesTimezone-Websitevehicletracking.fleetmanagement.coStatusActive

Subscribe Information

Customer PlanImage Based SurveillanceAccount TypeRealExpiry Date04-05-2042

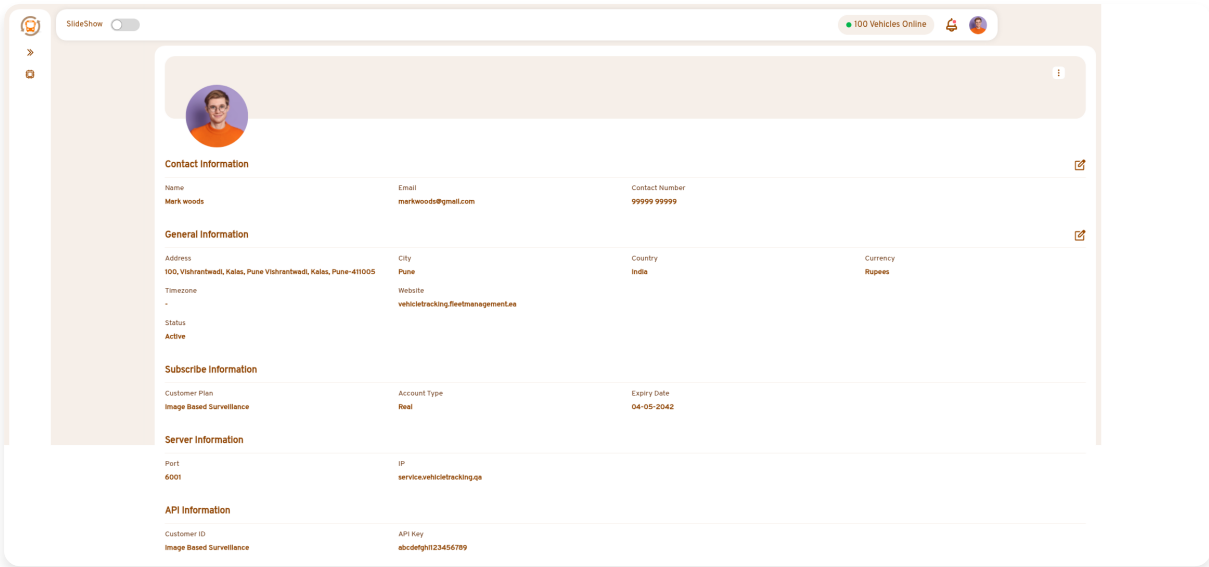
Server Information

Port6001IPservice.vehicletracking.ga

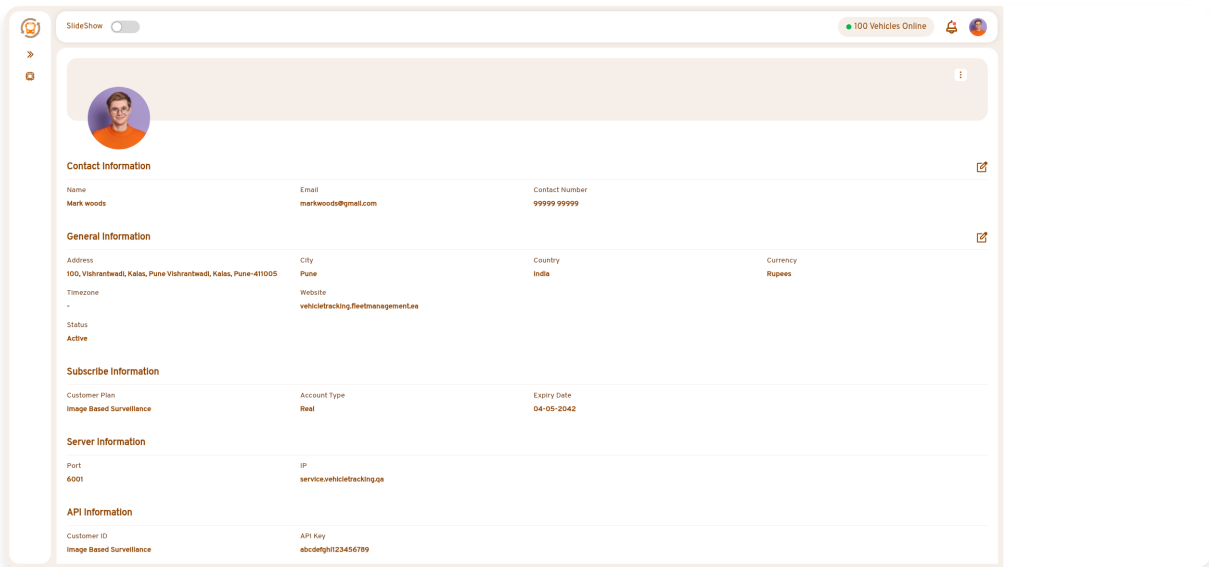
API Information

Customer IDImage Based SurveillanceAPI Keyabcdefghit23456789

- **Manage Field Visibility:** Control which address fields are visible to users.



- **View API Information:** Access API keys and settings for integration purposes.



- **View Customer Vehicles:** See a list of vehicles associated with the customer.

SlideShow

● 100 Vehicles Online

Contact Information

Name

Mark woods

Email

markwoods@gmail.com

Contact Number

99999 99999

General Information

Address

100, Vishrantwadi, Kalas, Pune Vishrantwadi, Kalas, Pune-411005

City

Pune

Country

India

Currency

Rupees

Timezone

-

Website

vehicletesting.fleetmanagementLea

Status

Active

Subscribe Information

Customer Plan

Image Based Surveillance

Account Type

Real

Expiry Date

04-05-2042

Server Information

Port

6001

IP

service.vehicletesting.qe

API Information

Customer ID

Image Based Surveillance

API Key

abcdefghij123456789

- **Set up Multi-Level Access:** Configure different access levels for regional and national fleet managers.

SlideShow

100 Vehicles Online

Contact Information

Name	Email	Contact Number
Mark woods	markwoods@gmail.com	99999 99999

General Information

Address	City	Country	Currency
100, Vishrantwadi, Kales, Pune Vishrantwadi, Kales, Pune-411005	Pune	India	Rupees
Timezone	Website		
-	vehicletracking.fleetmanagement.ae		
Status			
Active			

Subscribe Information

Customer Plan	Account Type	Expiry Date
Image Based Surveillance	Real	04-05-2042

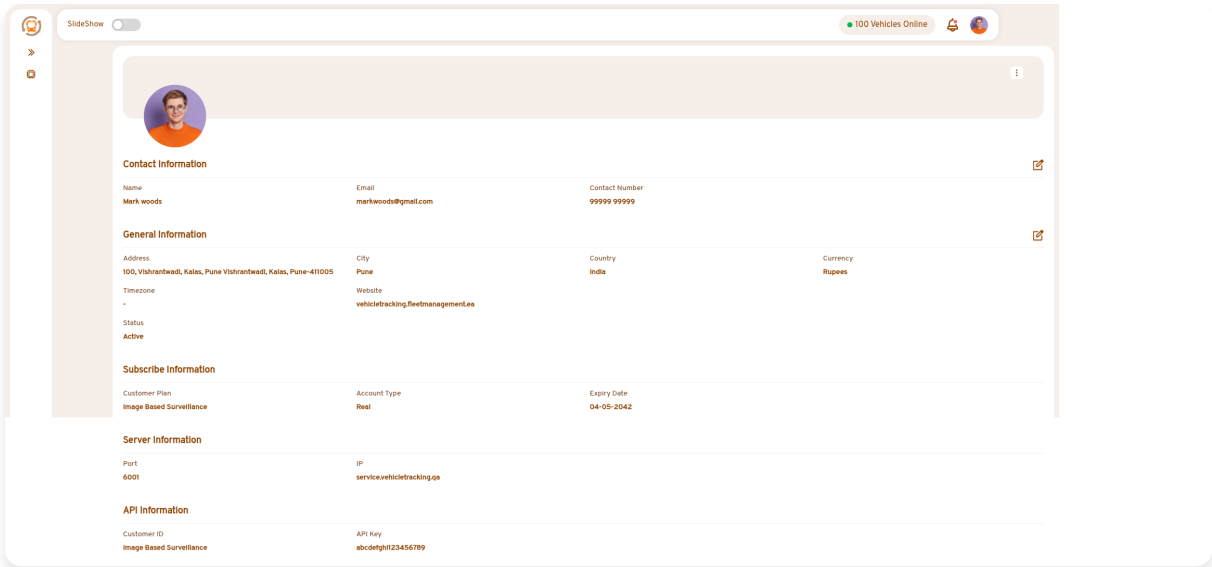
Server Information

Port	IP
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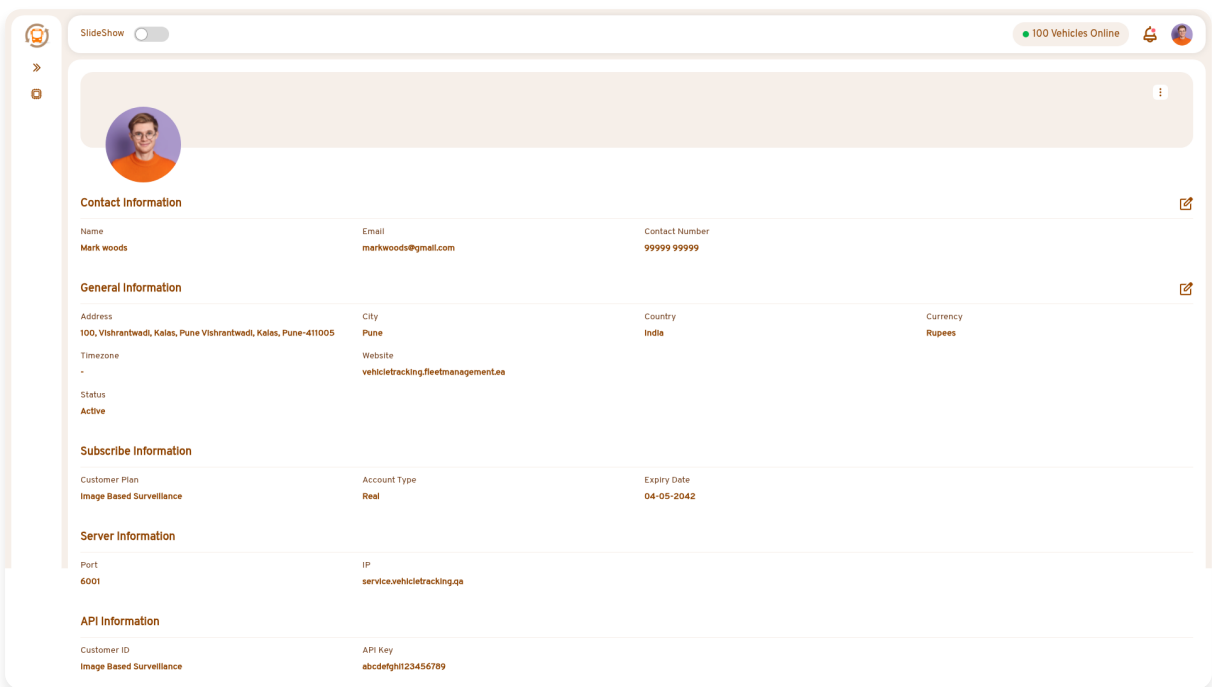
API Information

Customer ID	API Key
Image Based Surveillance	abcdefghijkl23456789

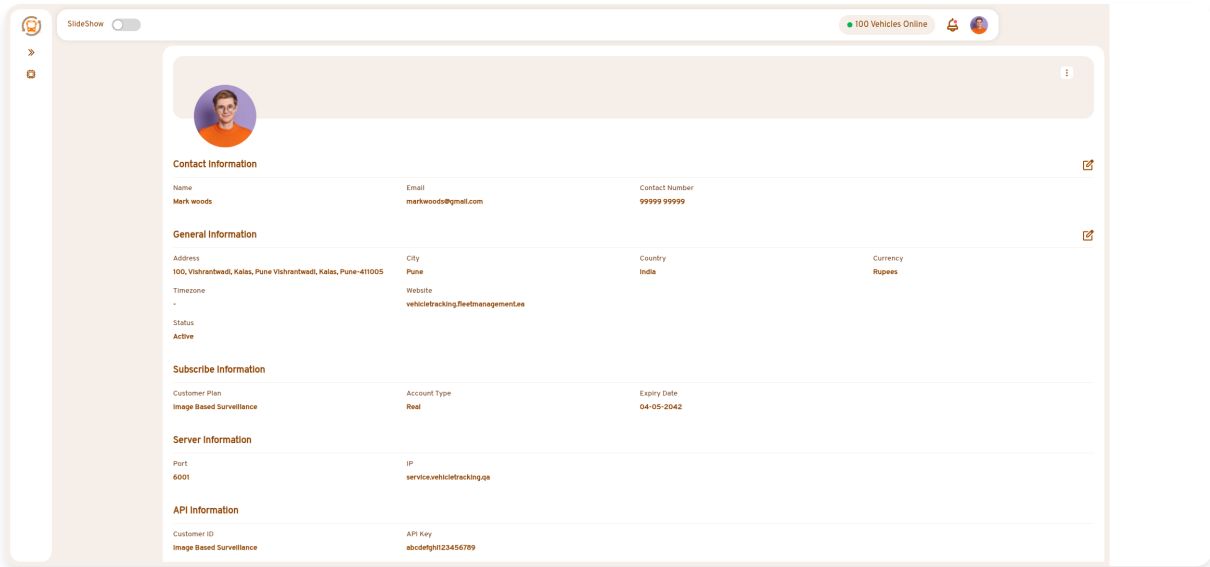
- **Vehicle Grouping:** Group vehicles by branch, department, or purpose for better organization.



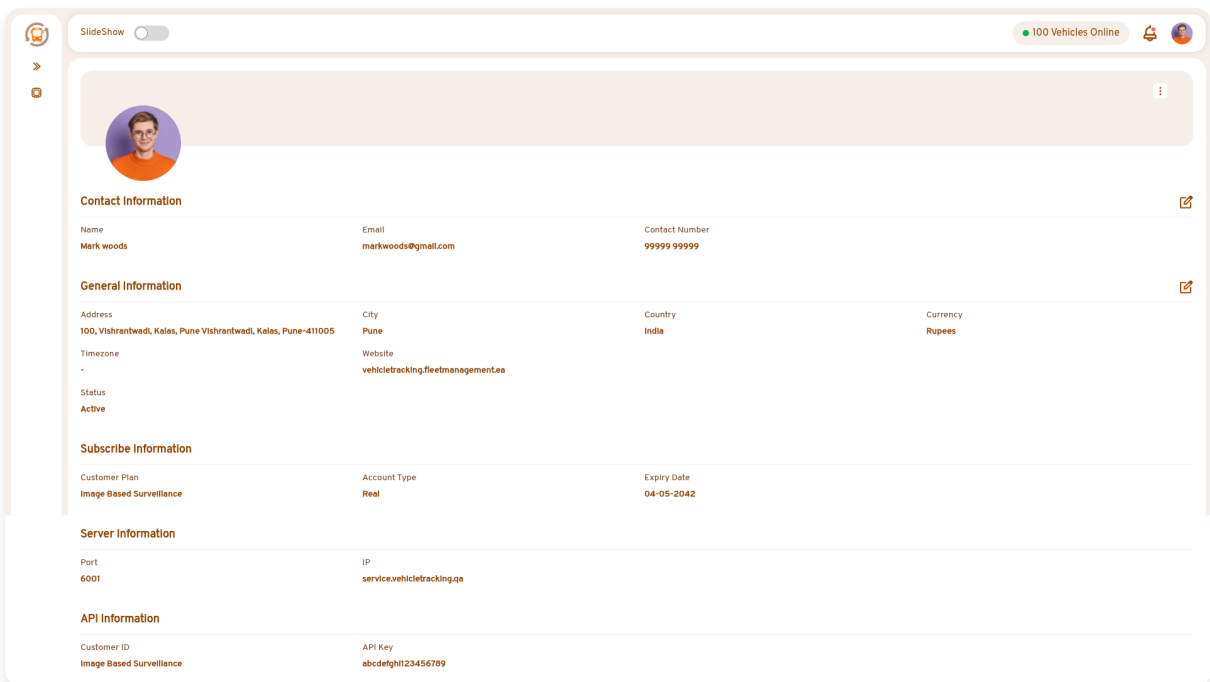
- **Geofence Radius Selection:** select a geofence radius for a customer using a dropdown menu.



- **Temperature Unit visibility:** Choose which temperature unit to display on the system



- **Info Field display:** Customer information display



Common Scenarios

- **Updating a Customer's Address:** A customer moves locations. You can quickly update their address in the Customer Profile section.
- **Changing Your Company Logo:** You've rebranded. Update the logo in the Company Profile to reflect your new brand.

- **Setting up a New Fleet Manager:** You hire a new regional fleet manager. Configure multi-level access to give them access only to their region's vehicles.
- **Grouping Vehicles for Reporting:** You want to see reports for your delivery vehicles separately. Group your vehicles by purpose to generate targeted reports.
- **Selecting Geofence Radius:** You need to adjust the size of the geofence area. Select the appropriate radius from the dropdown menu in Customer Settings.

What to Expect

When you use the Customer Settings module, expect a more organized and efficient way to manage customer information. You'll be able to quickly update details, customize your platform, and improve your overall customer experience. Changes you make are typically reflected immediately, ensuring that everyone on your team has access to the most up-to-date information. The visible address, email and mobile number will match exactly what the user has entered.

Summary & Benefits

The Customer Settings module empowers you to take control of your customer data, customize your platform, and improve customer service. By using this module, you'll experience:

- **Time Savings:** Quickly access and update customer information in one central location.
- **Improved Accuracy:** Maintain accurate and up-to-date customer records.
- **Enhanced Branding:** Customize the platform to reflect your brand identity.
- **Better Customer Service:** Provide faster and more effective support with accurate customer data.
- **Streamlined Workflows:** Simplify your customer management processes and improve overall efficiency.

