

1.4 My Customers

The **My Customers** section displays a list of customers assigned specifically to the logged-in user. This feature helps sales representatives and account managers focus on their own portfolio of customers without browsing through the entire database.

The screenshot displays the 'My Customers' interface. At the top, there's a search bar and a date indicator '14/08/2025 (GMT+05:30)'. The user is logged in as 'user@gmail.com'. The main content area shows two customer cards. Each card displays the following information:

Company Name	Email	Phone	Channel Name
Johnwick	johnwick@gmail.com	93 - 1234567811	OMS
Company100	mail@gmail.com	93 - 12345678890	OMS




Below the table headers, the 'Type' is listed as 'company'. The status is shown as 'Pending' (with a shield icon) for the first customer and 'Approved' (with a checkmark icon) for the second. A 'Number of Sales Rep' indicator is present at the bottom right of each card, showing '1' for the first and '2' for the second. The interface also includes a sidebar with navigation icons, a 'Showing 2 of 2' indicator, and a pagination control set to 'Items per page: 10'.

Displayed Information

For each customer, the following details are shown:

- **Company Name** - The registered business name of the customer.
- **Email** - The customer's primary contact email address.
- **Phone** - The registered phone number.
- **Channel Name** - The sales or operational channel to which the customer is linked (e.g., OMS).
- **Type** - Customer classification (e.g., company, individual).
- **Status** - Indicates the current approval state of the customer:





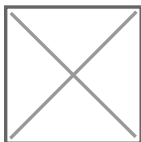
•	ICON	Status	Overview
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	Pending	The customer's details are under review and awaiting approval.
	Approved	The customer has passed verification and is authorized for transactions.
	Rejected	Compliance requirements not met.

- **Number of Sales Representatives** - Shows how many sales reps are assigned to the customer.

Features and Actions

- **Search Bar** - Quickly find customers by name, email, or other details.
- **Filter Option** - Apply filters to narrow down the customer list based on criteria such as status or channel.
- **Action Buttons (per customer record):**

ICON	NAME	Action
	Edit	Modify existing customer details such as name, contact information, and channel.
	Manage Address	Add, edit, or update the customer's billing and shipping addresses.
	Update NS Internal ID	Update the customer's NetSuite Internal ID for system integration purposes.
	Delete Customer	Permanently remove the customer record from the system.
	Create Customer	Add a new customer by entering relevant details and compliance information.

Revision #1

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