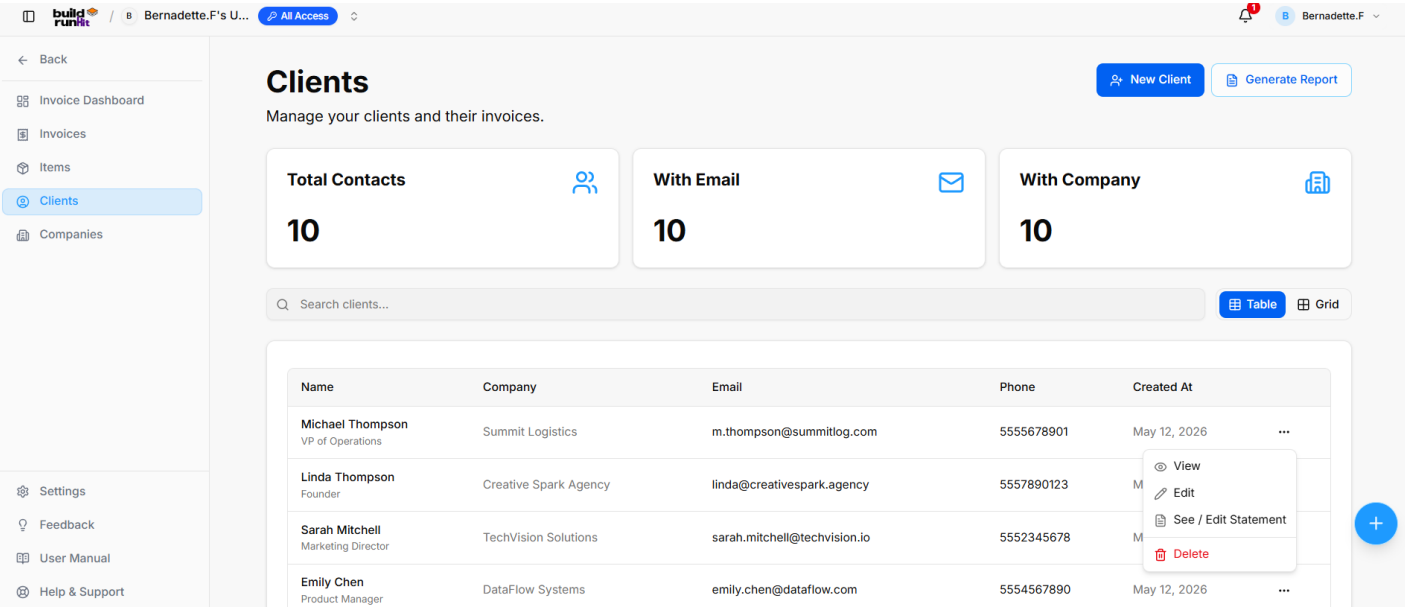


BuildRunKit Invoices: Clients Sub-Section

BuildRunKit Invoices: Clients Sub-Section



The **Clients** sub-section provides central directory management for client profiles, contact information, associated companies, and billing accounts.

Client Summary Metrics

Top KPI cards display key directory breakdown totals:

- **Total Contacts:** Tracks the overall number of registered client profiles (e.g., 10).
- **With Email:** Displays total count of client profiles with attached email addresses (e.g., 10).
- **With Company:** Highlights client profiles linked to specific company records (e.g., 10).

Directory Controls & Search Bar

- **Search clients...**: Global filter input for locating clients by name, company, email, or details.
- **View Switcher**: Toggle viewing modes between **Table** (list layout) and **Grid** (card layout).

Clients Table Data Columns

- **Name**: Primary contact name and title/role.
- **Company**: Associated organization or business entity (e.g., *Summit Logistics, Creative Spark Agency*).
- **Email**: Primary contact email address.
- **Phone**: Contact phone number (e.g., *5555678901, 5557890123*).
- **Created At**: Date when the client profile was created (e.g., *May 12, 2026*).

Row Actions Menu ()

Clicking the three dots icon on any client row displays quick record management actions:

- **View**: Opens full client profile and details.
- **Edit**: Opens the setup editor to update contact information or company assignment.
- **See / Edit Statement**: Opens the billing statement management interface for the client.
- **Delete**: Removes the client profile from the directory.

Header & Action Buttons

- **+ New Client**: Direct action button to open the client creation modal.
- **Generate Report**: Opens the **Invoice Clients Report** export modal:
 - **Export Count**: Displays total targeted client records (e.g., *Exporting 10 records*).
 - **Export Format Options**: Allows instant downloads via **Export as PDF** or **Export as CSV**.

 **Invoice Clients Report** ×

Generate a report for the Invoice Clients data.

Exporting **10** records

Export format

 **Export as PDF**

 **Export as CSV**

BuildRunKit Invoices: Creating a New Client

New Contact

Details

Contact

Custom Fields

Tags

First Name *

Last Name *

Email

Company

Select or search company

+

Position

Website

Owner

No owner

Billing Info

Notes

Cancel

Save

The **New Contact** modal provides a multi-tab interface for adding customer profiles to the Clients directory.

Details Tab

- **First Name ***: Required field to enter the client's first name.
- **Last Name ***: Required field to enter the client's last name.
- **Email**: Text field for primary email address.
- **Company**: Dropdown menu (*Select or search company*) to assign an existing company, or click + to quick-add a new organization.
- **Position**: Text field to enter job title or role.
- **Website**: Text field for organization URL.

- **Owner:** Dropdown menu to assign an internal account manager (*No owner*).
- **Billing Info:** Text area for client-specific invoicing instructions or billing addresses.
- **Notes:** Text area for general internal account comments.

Contact Tab

New Contact

Details

Contact

Custom Fields

Tags

Address

Phone

Mobile Phone

Other Phone

Additional Contact Methods

+ Add Contact Method

Social & External Links

+ Add Social / External Link

Cancel

Save

- **Address:** Text area for primary physical or mailing address.
- **Phone:** Numeric text field for landline contact.
- **Mobile Phone:** Numeric text field for cell phone contact.
- **Other Phone:** Numeric text field for secondary contact numbers.

- **Additional Contact Methods:** + **Add Contact Method** button to record alternate communication channels.
- **Social & External Links:** + **Add Social / External Link** button to attach online profiles (e.g., LinkedIn, X).

Custom Fields Tab

The screenshot shows a 'New Contact' modal window with a close button (X) in the top right corner. Below the title bar, there are four tabs: 'Details', 'Contact', 'Custom Fields' (which is highlighted in blue), and 'Tags'. Under the 'Custom Fields' tab, there is a section labeled 'Manual' followed by a large, empty text input field. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Save'.

- **Manual:** Configured text input field generated from global Custom Field settings (e.g., *Manual*).

Tags Tab

New Contact

×

Details

Contact

Custom Fields

Tags

Tags

Select existing tags or create new tags on the fly.

Type a new tag name...

+ Add Tag

☐ Hot Lead

☐ Cold Lead

☐ Customer

☐ Prospect

☐ Partner

☐ Vendor

☐ Lead

☐ Investor

☐ VIP

Cancel

Save

- **Type a new tag name...:** Input field with + **Add Tag** button to create new tags on the fly.
- **Pre-set Tag Selection:** Checkbox toggles to assign color-coded client categories (*Hot Lead, Cold Lead, Customer, Prospect, Partner, Vendor, Lead, Investor, VIP*).

Header & Action Buttons

- **Close (x):** Top-right button to exit overlay without saving.
- **Cancel:** Outline button to discard entries and close the modal.
- **Save:** Primary blue button to create the client record.

Revision #4

Created 2026-05-12 10:52:47 UTC by Bernadette F

Updated 2026-09-15 12:19:42 UTC by Bernadette F