

Customer Tree Definitions and Functions Overview

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The Customer Tree consists of two main sections: The Customer Structure and The Customer Tree Options and transaction History.

Depending on the permissions of a User, many activities may be performed directly from the Customer Explorer record, from editing customer-related information to creating invoices, jobs, service tickets, etc.

The examples provided within this topic section are shown where the User has Administrative privileges; and full access to all options within the Customer Explorer.

This topic section is divided into two areas; [Customer Structure](#) and [Customer Tree Options & Activities](#). Follow the Links for each section of the Customer Tree Functions.

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