INTERFACE USER GUIDE

[US] CRM Interface Guide

Step-by-step operating instructions for the TailorMed Airtable CRM Interface.

CLIENT

TailorMed International Courier LTD.

AUDIENCE

All Interface Users — including sales representatives and field personnel.

VERSION

v1.0

DATE

March 2026

CHAPTER 1

System Overview

> The TailorMed CRM is built on Airtable Interface and serves as the central hub for managing quotations, partners, shippers, consignees, and contact records. All data is saved in real time — no manual saving is required.

Accessing the System

After logging in, you will land on the **Overview** page. This is the main entry point for all CRM operations. You can navigate to any section either by clicking the arrow cards on the Overview page, or by using the left-hand sidebar at any time.

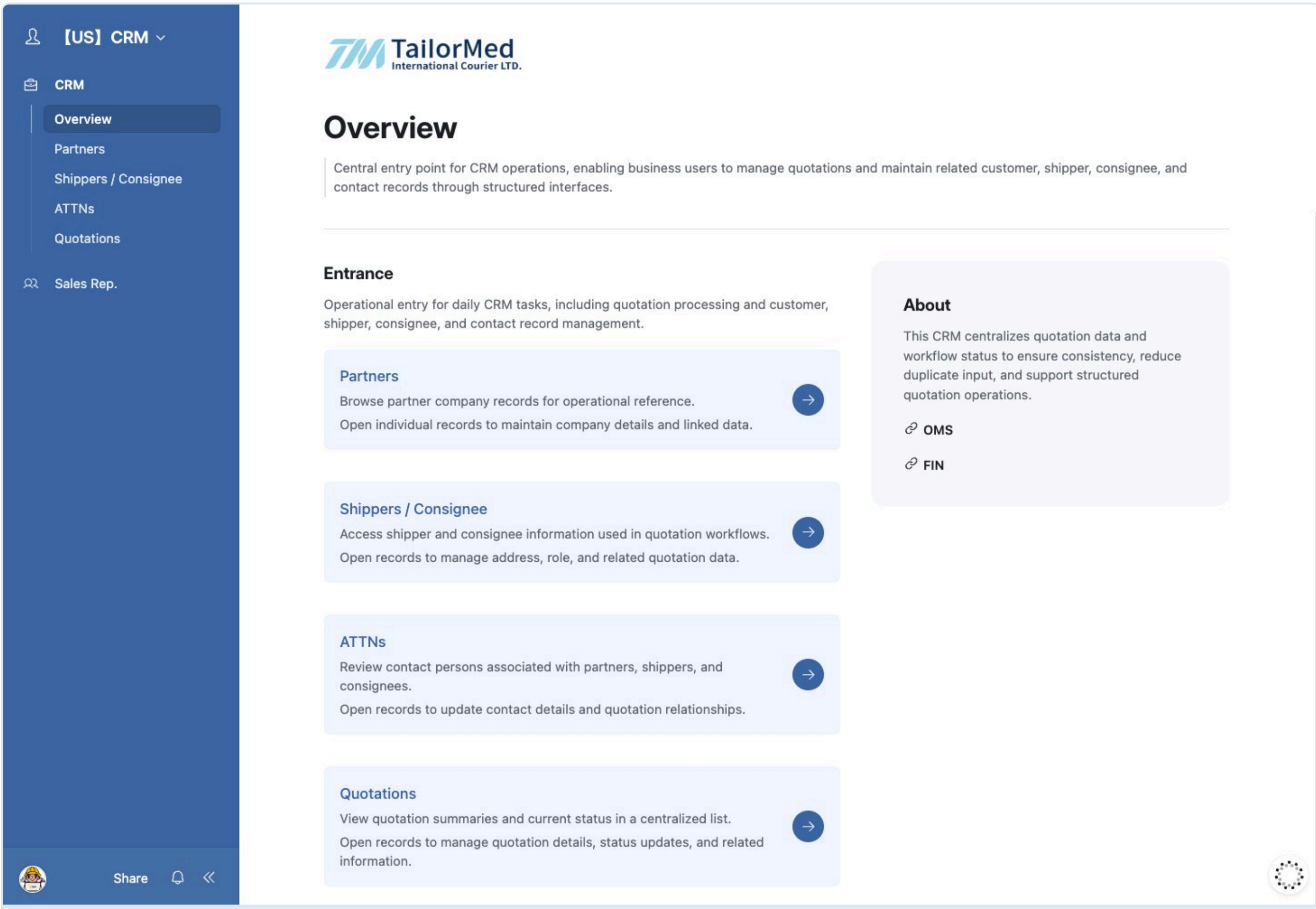


Fig 1.1 — Overview page. The sidebar (left) and navigation cards both provide access to all modules.

Navigation Modules

Module	Purpose
Partners	Manage client and agent company records, including contact details, financial terms, and linked quotations.
Shippers / Consignee	Access shipper and consignee records used in quotation workflows.
ATTNs	Review and update contact persons linked to partners, shippers, and consignees.
Quotations	Create, view, and manage quotation records and their current workflow status.

💡 **TIP**

You can switch between modules at any time using the left sidebar — you do not need to return to the Overview page each time.

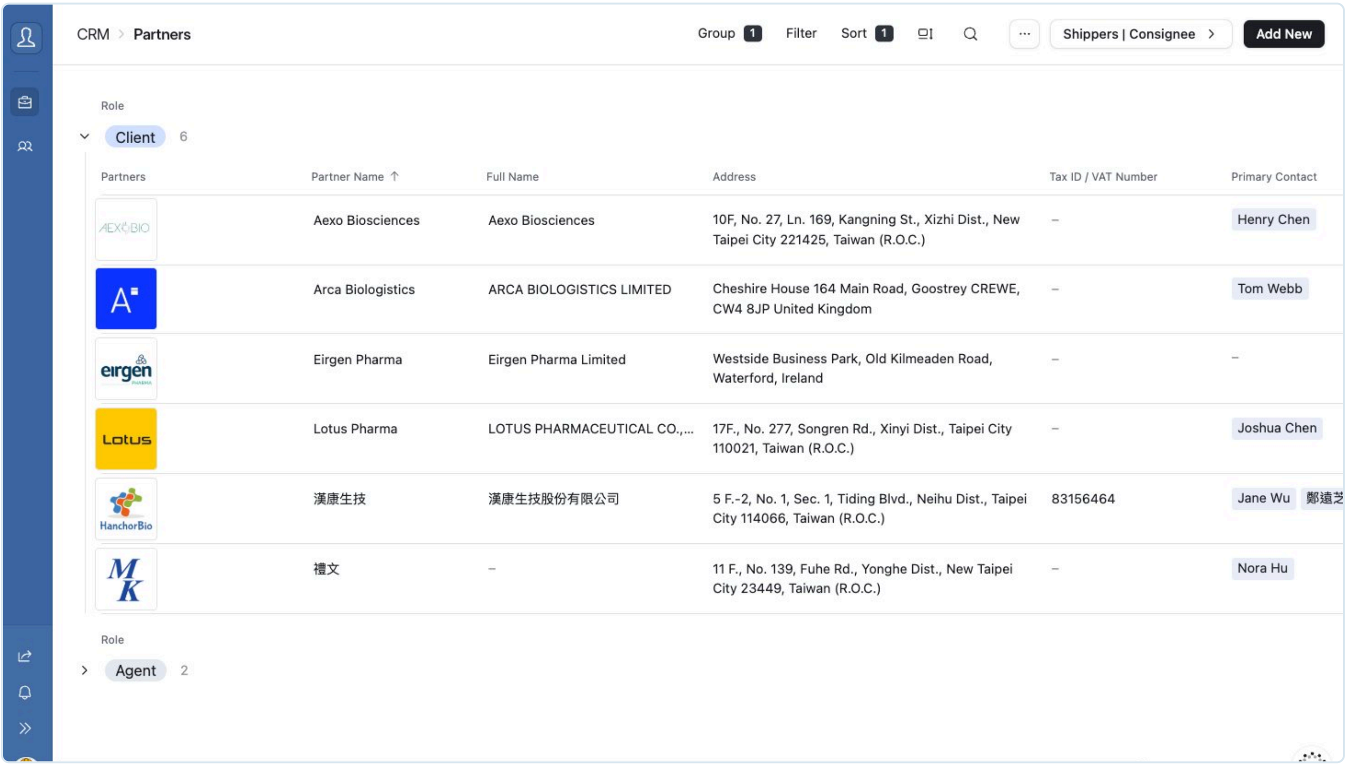
CHAPTER 2

Partners

> The Partners module stores records for all client companies and agents. Each record holds basic company information, financial details, linked contacts (ATTNs), and related quotations.

2.1 — Viewing the Partner List

Click **Partners** in the sidebar to open the list view. Records are grouped by **Role** (Client or Agent). The list displays key columns including Partner Name, Full Name, Address, Tax ID, and Primary Contact.



2.2 — Adding a New Partner

1. Click the **[Add New]** button in the top-right corner of the list page.
2. A **New Partner** form will slide in. Fields marked with a **red** * are required.
3. Fill in all relevant fields (see field reference table on the next page).
4. Click **[Create]** at the bottom-right to save the new record.

> ⚠ **FORM AUTO-SAVE BEHAVIOUR**
> If you navigate away mid-form (e.g. to check the list), your draft is preserved. Clicking [Add New] again will restore your unsaved entries. However, refreshing the page or closing the browser tab will permanently discard all unsaved input.

2.3 — New Partner Form Field Reference

Basic Information

Field	Required	Notes
Partner Name	REQUIRED	Short name used for system identification.
Full Name	OPTIONAL	Official registered company name.
Profile Pic	OPTIONAL	Company logo. Drag and drop or click Browse to upload.
City / Country	OPTIONAL	Location of the company.
Role	OPTIONAL	Defaults to *Client*. Change to *Agent* if applicable.
Active	OPTIONAL	Defaults to *Active*.
Address	REQUIRED	Full company address.
Main Phone	OPTIONAL	Primary company phone number.
Main Email	OPTIONAL	Primary company email address.

Financial Information

Field	Required	Notes
Payment Terms	OPTIONAL	Select from dropdown.
Closing Date	OPTIONAL	Select from dropdown.
Tax ID / VAT Number	OPTIONAL	Company tax registration number.

Primary Contact (ATTNs)

Field	Required	Notes
Primary Contact	OPTIONAL	Click **[+ Add contact]** to link an existing ATTN record.

2.4 — Viewing & Editing a Partner Record

Click any row in the list to open the **Detail view**. All fields can be edited directly — changes are saved automatically in real time.

The top of the Detail page displays the partner name and tab navigation:

- **Basic** — Core company info
- **Financial Info** — Payment & tax details
- **Related ATTNs** — Linked contacts
- **Related Quotations** — Associated quotes

> **DATA LEVELS**
>
> The Detail page is editable (Level 1). Linked records shown here — such as Related ATTNs — are read-only (Level 2). To edit them, navigate to the ATTNs module directly.

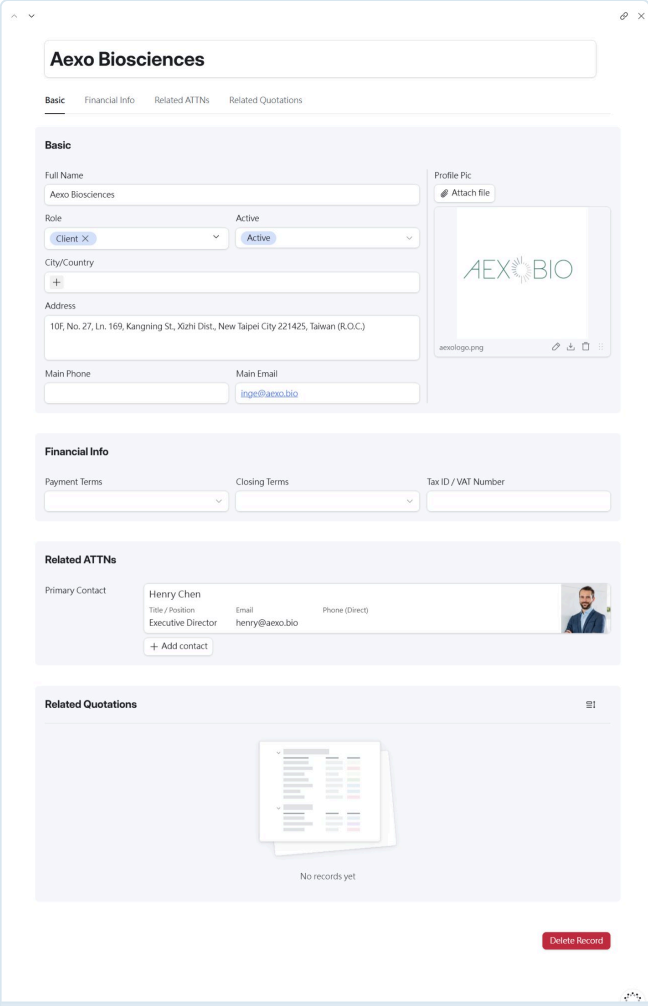


Fig 2.2 — Detail view with tab navigation.

2.5 — Deleting a Record

A red **[Delete Record]** button appears at the bottom of every Detail page.

> ⚠ **WARNING — IRREVERSIBLE ACTION**
>
> Deleted records cannot be recovered. Always verify you have selected the correct record before clicking Delete.