

2. Customers: Use Cases

Use Case 1: Managing External Partners

An organization uses the Clients section to manage external partners by creating profiles for each partner company. They store contact details, access credentials, and custom dynamic fields (e.g., partnership type, contract status) in the Properties section. This enables quick reference and efficient communication.

Use Case 2: Custom Data Storage for Client Projects

A project-based business stores project-specific data (like project ID, start/end dates, or assigned teams) in the Properties field of each client. This allows administrators to manage client projects directly within the system without needing an external tool.

Use Case 3: Secure Access for VIP Clients

The admin creates client profiles for VIP users who need access to certain modules or content. These profiles are password-protected, and the Active toggle is used to enable or suspend access as needed, maintaining tight security.

Use Case 4: Notes and History Tracking

Support teams use the **Comments** field to log key interactions or notes about client requests and feedback. This gives the team a quick overview of past communication without switching systems.

Use Case 5: Cleanup and Data Maintenance

Periodically, the admin reviews inactive or outdated client profiles and uses the **Delete** feature to remove them, keeping the database clean and focused only on current clients.

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