Do we have to create a new account even if the customer asks to talk to someone else or do we need to create it after at least having single communication with the new person?

Yes, you would need to create a new customer.

steve.baltzoisÂ 16:11
Â @nash.sharma: What you need to do is create a history note on the account of the customer who said to you to speak to the other person.

16:11
Â

Then create a new account for the new customer if you will be dealing with that new customer from this point forward.

Â

nash.sharmaÂ 16:13
Â @steve.baltzois: ok

Â

steve.baltzoisÂ 16:14
Â @nash.sharma: don't forget to create an activity to call the new customer you have created as well under their account.

Â

Â

Attached files:

Unique solution ID: #1200
Author: n/a
Last update: 15-Mar-2016 06:45

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:07