ERM User Manual

A customer with the same first and last name has been found on the system when adding a new customer (Add New Customer)

If you receive the following system message when adding a new customer into the ERM system, after pressing the **Add New Customer** or **Add Customer To Company** button.

A customer with the same first and last name has been found on the system.
Scroll down to the results below and confirm/check or select the correct customer.

It means that a customer with that same name is already on the ERM system database.

Here is what you do when this system message comes up.

1. Scroll down and check the search results to see if this customer is already in our database. You may find that they are and they are connected to the same customer account.
    1. If this is the case, then press the **OK** button and click on the customer account that is already displayed.
        1. If the customer name is the same but it is a different company, check with the customer if they have worked at that company before.
            1. If the customer says NO, then proceed to point 2. (add new customer) section below.
            2. If the customer says YES and no longer work at that company, then click on the customer account name, the account page will open and change the status to ***No Longer Working at Company***. Press the **SAVE CHANGES** button. Close the window and return the last page you were on and continue to Add the Customer Name in the **Add New Customer** page.
            3. If the customer says YES and stills works there, this is acceptable. Move to point 2. (add new customer) section below.
        2. If the customer name is the same as the search results you are about to add and the customer is with the company as displayed in the search results, click on the customer name in the search results and there is no need to add the customer name again. Use the current account that is already on the ERM system database.

    2. If the name that you are adding is a generic name such as ***Dear Sir Madam, or Admin Email or Principal Email***, you will find many names that match. All you need to do here is continue with adding the new generic name and put an extra word. For example, you can write Dear Sir Madam in the first name field and the last name field enter the first word of the Company Name.
        1. Move to point 2. (add new customer) section below.

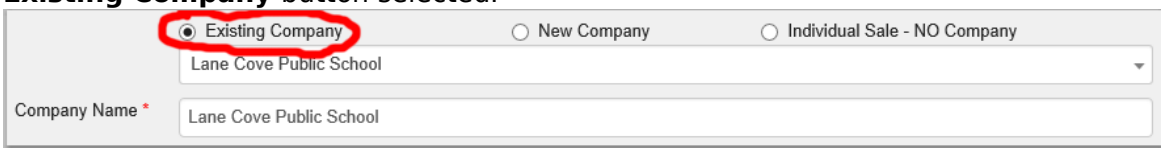
2. Add New Customer

1. All that needs to be done is to add the customer details, answering most fields especially the **mobile** and **work email**.
    1. You do not need to confirm the **website**, **Yr Num** or **Total Num** fields.
2. Select if the customer is part of the existing company account or whether it is a new Company.
3. Fill in all the related customer details. Where a * is displayed, this means it is a required field and is required.
    1. The phone number fields are divided into two parts. One is for the **Contact (customer's) phone numbers**. The Other is specific to the **Company phone numbers.**

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2. Always try to obtain the mobile number of a customer. If not press the n/a checkbox.
3. Always enter an email address. This is very important and is required to create an account. An Account should not ever have an empty work email address and you can inform the customer that to create an account we do require the best email address. If they refuse press the n/a.
    1. If the ERM system informs you that there is another account with the same email address, click on the link and check if that email address belongs to the right customer. If not seek assistance from @eventmanagers or press n/a and try to obtain the email at a later time when you call the customer.
4. Mobile phone numbers and email addresses are important data for the company and the accounts. We always try to get these details.

4. Check that the correct company name is displayed in the Company section with the **Existing Company** button selected.



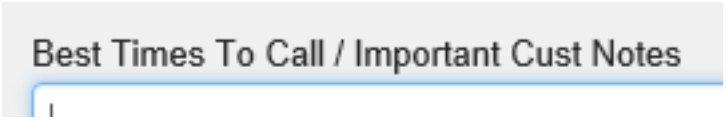
IMPORTANT: if the company name is not correct. Click the **Cancel** button and try again or use Option 2.

1. If you are adding the customer to a New Company press the **New Company** button and complete the details for the New company.

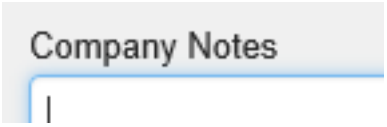
5. The Company Address details should be displayed. Please confirm with customer. If they are not displayed correctly or the customer provides updated details, please change the address details.

6. The **Region / Zone** field should automatically be displayed. If it does not, or n/a is written in the field click on the 

button and it will calculate the correct region.

7. The 

field box should have details that are specific to the best times to call the customer or Important Customer Notes. This field is only visible to Iconic Staff. It is not a required field.

8. The 

field box should have details that are specific to the Company. This field is only visible to Iconic Staff. It is not a required field.

9. When all details are completed click on the 

button.

Attached files:

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