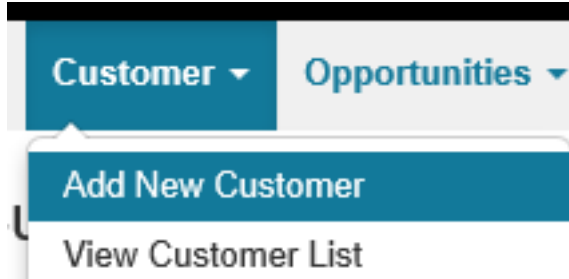


Customer

Add a New Customer with a New Company

To **ADD a NEW CUSTOMER** and a **NEW COMPANY** follow these steps.

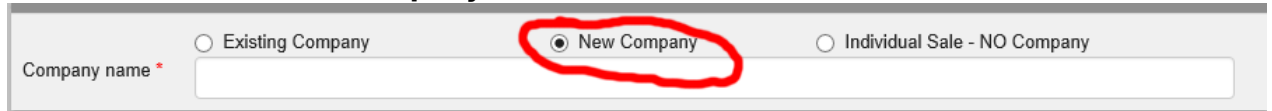
1. Click on the menu **Customer** then **Add New Customer**.



2. Fill in all the related customer details.Â Where a * is displayed, this means it is a required field and is required.

1. The phone number fields are divided into two parts.Â One is for the **Contact (customer's) phone numbers**.Â The Other is specific to the **Company phone numbers**.

3. Click on the button **New Company**

A screenshot of a form with three radio buttons: 'Existing Company', 'New Company', and 'Individual Sale - NO Company'. The 'New Company' radio button is selected and circled in red. Below the radio buttons is a text input field labeled 'Company name *'.

4. Enter the name of the Company as the customer tells you.Â Ask the customer for the spelling if unsure.
IMPORTANT: the Company Name field does not allow for special characters like , ' () +.Â It only allows spaces - or numbers.

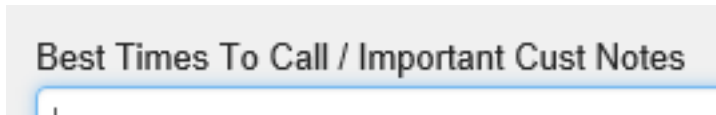
5. Complete the Company based fields.

6. The **Region / Zone** field will automatically calculate the Region.Â If it does not, write N/A in the field and when the customer details are saved, click on the

Get Region / Zone

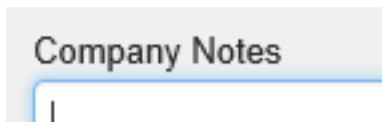
Â button and it will calculate the correct region.

7. The

A screenshot of a text input field with the placeholder text 'Best Times To Call / Important Cust Notes'. The field is highlighted with a blue border.

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

8. The

A screenshot of a text input field with the placeholder text 'Company Notes'. The field is highlighted with a blue border.

Â field box should have details that are specific to the
Page 1 / 2

Customer

Company. This field is only visible to Iconic Staff. It is not a required field.

9. When all details are completed click on the

Add New Customer

button.

IMPORTANT: The

List View

button will show you the list of all customers on the Iconic System and should only be pressed on this page if you need to view the entire list of customers. It will open the List in a new TAB. Your information entered in the **Add New Customer Page** will still be available on the previous TAB.

Attached files:

Unique solution ID: #1166

Author: event.managers

Last update: 16-Jan-2017 02:29