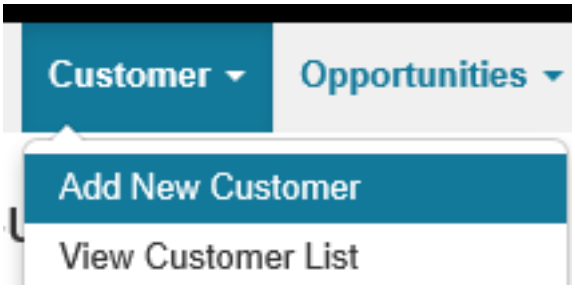
Customer

Add a New Customer with a New Company

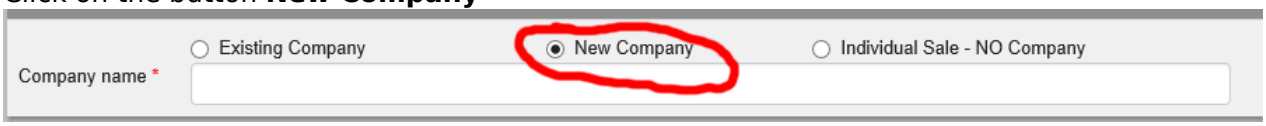
To **ADD a NEW CUSTOMER** and a NEW COMPANY follow these steps.

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**



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.

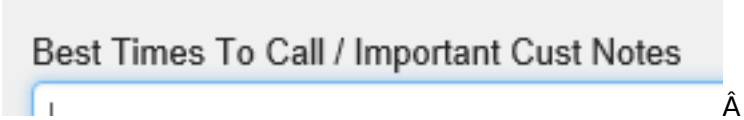
5. Complete the Company based fields.

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



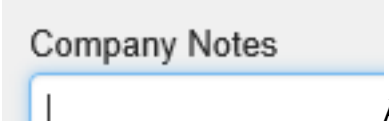
   Â button and it will calculate the correct region.

7. The



   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



   Â field box should have details that are specific to the

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URL: https://staff.iconic.productions/KB/content/0cat=41/167/en/add-a-new-customer-with-a-new-company.html

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

9. When all details are completed click on the 

Â button.

IMPORTANT: The 

Â 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 theÂ entire list of customers.Â It will open the List in a new TAB.Â 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

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