Customer

Add a New Customer to an Existing Company

To **ADD a NEW CUSTOMER** to an **EXISTING COMPANY** there are two options.

Quick Reference Page Contents:

- Option 1: Add New Customer to Existing Company if Search/Lookup function was used.
- Option 2: Add New Customer to Existing Company in Customer Detail Page.

OPTION 1: (use only if you have used the Search / Lookup page for the company and have the correct company result displayed)

1. In the **Search / Lookup** page (FAQ: How do I search for a customer on the Search / Lookup a customer?) you would have already searched for the company.
2. Place a tick in the check-box of the correct company the New Customer is part of.
3. Click on the **Add Customer** button
4. 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.**
   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.
5. 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.
6. 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.
7. 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.

8. 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.

9. 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.

10. When all details are completed click on the
    button.

IMPORTANT: The

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.

OPTION 2: (add New Customer to Existing Company in Customer Detail Page)

1. In the **Search / Lookup** page (FAQ: [How do I search for a customer on the Search / Lookup a customer?]) you would have already searched for the company.
2. Click on any contact name that is connected with the company.
3. When the Customer Detail Page opens click on the button

4. 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.**
   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.
5. 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.
6. 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.

7. 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.

8. 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.

9. 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.

10. When all details are completed click on the
    button.

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