Customer

I have been given new details for a customer account. Do I change the existing customer's details?

The answer is NO!.Â Do not change the details of an existing customer account, unless that specific customer is asking you to change their specific details.Â If the details you are given or about to be changed relate to a different customer or refer to a completely different person or customer, then you MUST CREATE A NEW CUSTOMER for that company and fill in the related details for the new customer.

To create a new customer to an existing company go to Add a New Customer to an Existing Company

To create a new customer with a new company go to Add a New Customer with a New Company

We **MUST NEVER CHANGE** an existing customer's details unless that specific customer has asked to change her name, because it is spelt wrong, or they have a new mobile number or they have a new email address.

If the specific customer is not the person who is telling you to change the details or the details the specific customer is talking about is not about themselves specifically but about someone else you **MUST NEVER CHANGE** the specific customers details, but rather **ADD THE NEW DETAILS** of the related information as a **NEW CUSTOMER**.

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If the customer or secretary or someone else provides you with information about a new customer - **we do not change** the existing customer's details at all.

We first check to see if that customer is on our system and if not then you create a new customer account for that customer with the customer details.

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Examples:

1. If Customer A, says that the best person to speak to is Customer B and gives you Customer's B email address ...
    1. You **DO NOT CHANGE** customer's A email address or First and Last Name and type in the Customer's B email address or First and Last NameÂ in replace of customer account.
        1. You create a new customer for Customer B email address and you add customer B email address and name in the new customer account you created.

2. If Customer C (a secretary), says that the best person to speak to is Customer B and gives you Customer's B email address ...

    1. You **DO NOT CHANGE** customer's A email address and type in the Customer's B email address in replace.

        1. You create a new customer for Customer B email address and you add customer B email address in the new customer account you created

3. If Customer A, says that you should call Customer B on her mobile and gives you Customer's

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BÂ mobile numberÂ ...

1. You **DO NOT CHANGE** customer's A mobile number and type in theÂ mobile you were given for Customer BÂ in replace.
    1. You create a new customer for Customer B and you add customer B moble number in the new customer account you created

4. If Customer A, says
    1. that they have a new mobile number
    2. or that they have changed their email address
    3. or that their name is spelt wrong
    4. or that company address is wrong or incorrect
    5. or that the company Work Phone number is wron
        1. You then **can CHANGE** the details the customer isÂ referring to because it directly refers to them.Â

5. If Customer A, says
    1. I have changed companies and my new company is XYZ
        1. You then **can CHANGE** the company details of the Customer A and attach them to an existing company or if it is a new company, create a new company with the new company details.

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Remember that **we do not CHANGE CUSTOMER DETAILS** if the information we get is about another customer.

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Attached files:

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