Customer

I have a new customer name with me when i called an Admin account, with this new name i have to add new customer which is not in database but email address is same as that of Admin account and I have to send an email to new customer. Secretary told mean the name of the person I should talk to and asked to send the email to school email address that is linked to Admin account already on database, now admin account is also active but i cant use the same admin email to the new person. What to do here?

If this occurs do the following:

1. Press the Add New Customer to Company .
2. Fill in the first name and last name and any other details of the new customer name you have including the customer's role/position as coordinator or whatever it was.
3. In the work email address press the n/a tick box.
4. Press the Add Customer button to add the customer to the account.
5. In the new customer accout you created, Press Send Email button.
6. Copy and paste the email address of the admin email into the Recipient box of the new customer.
7. Select the email template you are going to use.
8. Write what you need to write in the email body - make sure you put a sensible subject heading.
9. Press Send Email button.
10. Create the follow up activity for and with the new customer account you created.
11. And on the next call try to ask for the email address of this new person you have created an account for.

Attached files:

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