Adding a New Customer Record

- 1. Log in to Sales.
- 2. Select the **Customer** Icon. (Image 2)



Image 2

3. At the bottom of the **Customer Search** window, click the **Add New** button. (Image 3)

| eyword: | | Email: | Membe | er#: | | |
|------------|------------|------------|-------|----------------------|---------|---|
| ast Name: | | Phone: | Membe | ership | ~ | |
| irst Name: | | City: | | Exact Name | Match 🗹 | |
| ustomer #: | | Zip: | | Show Disabled Cust | omers | |
| Search | | | | Include Related Cust | omers 🗹 | |
| ast Name | First Name | Customer # | Email | Address | Related | _ |
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Image 3

4. In the **Quick Add Customer** page, the fields that have an asterisk are required customer information. (Image 4)

| - Rusingen | | | | |
|---------------------|---------|---------------------------------|--------------------|---|
| | l Maria | | C.# | 1 |
| Prefix First | Middle | Last | Suffix | |
| Email | Rec | eive email related to TicketsN | ashville.com (QA). | |
| | Rec | eive email related to Tickets N | lashville (QA). | |
| lling Address | | | | |
| Central U.S. 10 | | | | |
| Country United St | ates ~ | | | |
| Address 1 | | | | |
| Address 2 | | | | |
| City | | | | |
| State / Province | Ş. | | | |
| Zip | | | | |
| | | | | |
| hone Number | | | | - |
| Primary ~ | | | | |
| | | | | |
| eg Group | | | | - |
| Regional Question * | | | | |
| | | | | |
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Image 4

5. Some customer information is optional, such as the customer's phone number and email. (Image 5)

| Business | | | | | | |
|---------------------|---------------|--------|----------------------|---------------------|-----------------|--|
| Prefix | First* | Middle | | Last* | Suffix | |
| Email | | | 🗹 Receive email rela | ited to TicketsNasl | hville.com (QA) | |
| | | | Receive email rela | ited to Tickets Nas | hville (QA). | |
| ng Address | | | | | | |
| Country | United States | ~ | | | | |
| Address 1 | | | | | | |
| Address 2 | | | | | | |
| City | 2 | | | | | |
| State / Province | | ~ | | | | |
| Zip | | | | | | |
| no Numbor | | | | | | |
| Primary | | | | | | |
| | | | | | | |
| Group | | | | | | |
| Regional Question * | • | | | | | |
| | | | | | | |
| | | | | | | |

Image 5

6. Once you have filled in the customer's information, select **OK** to finish creating the new customer record.