



# Creating a new Customer

1. Go to the Customer overview, to find this go to the General Data field and select Customer. Once the Customer Overview is displaying on your screen. In the tool bar on the left-hand side of the page select **Create New Customer**.

The screenshot shows the 'Customer Overview' window. On the left, a toolbar contains buttons for 'Create New Customer', 'Copy', and 'Delete'. The main area has a search bar with a 'Keyword' field and a 'Filter' dropdown set to 'Only Active Customers'. Below this is an 'Advanced Search' section with fields for 'Contact Name', 'Feature 1', 'Feature 2', and 'Text in address', along with 'AND' connectors and dropdowns for 'Industry Type', 'Account Manager', and 'Country'. A table at the bottom lists customer data with columns: Customer Number, Name, Additional Name, Address line 1, Post Code, City, Country, Main Contact Pe..., Tel., Action Owner, End Date, Customer Action, and Account Manager. A message at the bottom says 'Please Click on "Search" or Enter a Search Term and Click on "Search"'. The table contains one row of data with red 'x' marks in the Name, Additional Name, Address line 1, Post Code, City, Country, Main Contact Pe..., Tel., and Customer Action columns.

2. The next step is to complete the fields in Promotional Office with the Customer Details making sure all sections with a red x symbol have been filled in otherwise the system will not allow you to move forward with the process. Once all relevant information has been inputted select **Save**.

The screenshot shows the 'Customer Details' form. The 'Company Details' section is active, showing fields for 'Customer Number', 'Company Name', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Post Code', 'Country', 'City', and 'Contact Person'. The 'Additional Information' section shows fields for 'Language', 'Feature 1', 'Industry Type', 'Additional Info', 'Telephone', 'Skype', 'E-Mail', 'Currency', 'Feature 2', 'Discount', 'Price Group', 'Fax', 'Credit Limit', and 'Website'. The 'Contact Person' section shows fields for 'Name', 'Address', and 'Contact Information'. The 'Notes' section is empty. The form has a 'Save' button at the bottom right.

