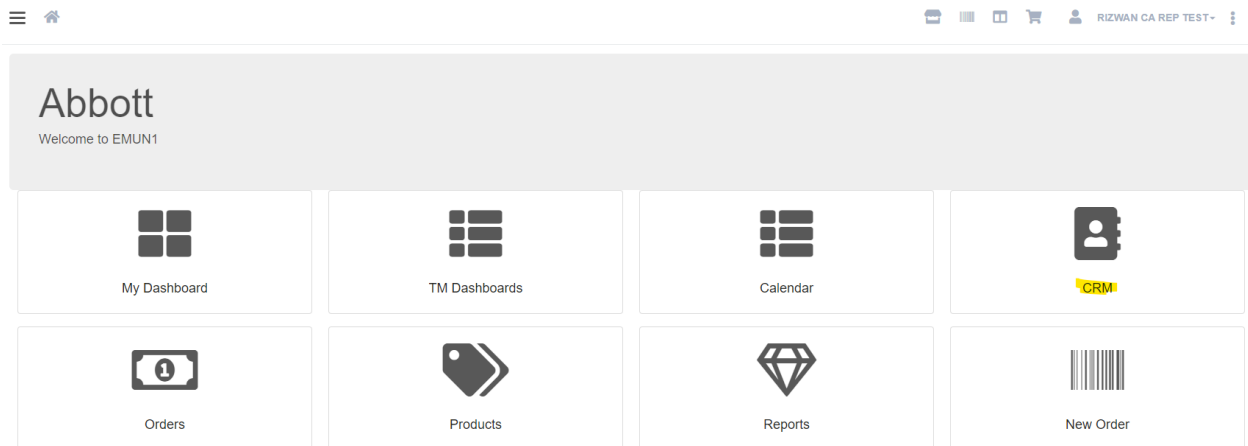
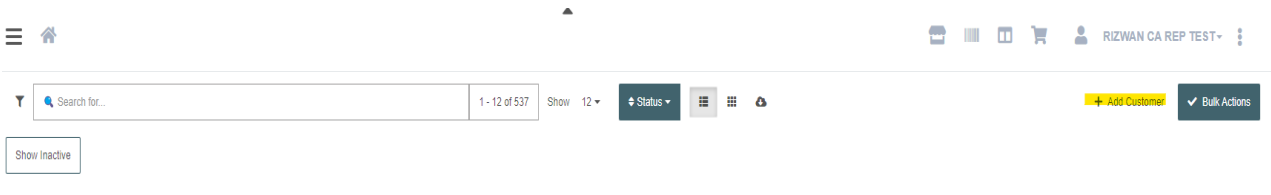


# Create a New Customer

1. From the home screen, click on the CRM icon



2. Click on the '+ Add Customer' icon on the top right side of the screen



3. Fill in the Company Info and Primary Contact sections

### Create retailer...

Company Info	Primary Contact
<p>Company *</p> <input type="text" value="Company"/>	<p>Name</p> <input type="text" value="Name"/>
<p>Email *</p> <input type="text" value="Email"/>	<p>Title</p> <input type="text" value="Title"/>
<p>Phone *</p> <input type="text" value="Phone"/>	<p>Email</p> <input type="text" value="Email"/>
<p>Fax</p> <input type="text" value="Fax"/>	<p>Phone</p> <input type="text" value="Phone"/>
<p>Price List *</p> <input type="text" value="CA"/>	<p>Extension</p> <input type="text" value="Extension"/>
	<p>Mobile</p> <input type="text" value="Mobile"/>
<p>Billing <input type="button" value="Copy to Shipping"/></p>	<p>Shipping</p>
<p>Address</p> <input type="text"/>	<p>Ship Name *</p> <input type="text" value="Ship Name"/>
	<p>Phone</p> <input type="text" value="Phone"/>

# Create a New Customer

## Notes:

Anything with an asterisk is mandatory	You only need Name and Email for the contact information
The default price list is CA, make sure to select the correct price list before creating the customer	If you forget to pick the correct price list, you will have to create a new customer and assign the correct price list

4. Click on the pencil icon beneath the Billing Header to enter in the billing information

### Address Input

Country \*  
Canada

Address Line 1 \*  
Search for an address...

Address Line 2  
Address Line 2

City \*  
City

State/ Province/ Region \*

Zip/Postal Code \*  
Zip/Postal Code

Continue

5. If the Billing and Shipping are the same, you can select Copy to Shipping, otherwise click on the pencil icon under the Shipping Header to enter the shipping information
6. Click on Create once you have all the information completed
7. You will be taken to the customer page once it has been created. You can click on the '+ New Order' button to start the order for the customer

 00 \* Test Customer\*\*\*  [+ New Order](#) QUICK REPORTS ▾

[Overview](#) [Profile](#) [Ship To](#) [Orders](#) [Invoices](#) [Payment Details](#) [Item History](#)

ID: 00TEST  
Billing:

Account Type: CUS  
Sales Ren: Test And Ren Accts