

How to Add a New Customer

- #1** You must first search for the customer in the Customers Dashboard, this helps prevent duplicate customers. Start by searching the customer by name. If the search returns multiple results, ask the customer for further information to select the correct profile. The search results can then be sorted to locate them quickly. If the search does not return results, you may search using a partial name to broaden the search, to locate misspellings or nicknames (search M Wazowski instead of Mike Wazowski this will locate Mike and Michael).
#2 Select **Search**.

The screenshot shows the 'CUSTOMERS' dashboard with a search form. The search form includes fields for Customer Class, Identifier Type, Identifier#, ZIP/Postal, Last Name, First Name, Date of Birth, and Business Name. A red circle highlights the 'SEARCH' button, and a blue box highlights the entire search section. Blue arrows point to the 'Customer #', 'Last Name', and 'First Name' fields. The 'ORDERS' section below has a search field with 'All' selected and a 'SEARCH' button. The 'VEHICLES' section has a 'QUICK RENEWAL' button and a 'SEARCH' button. The 'VENDORS & AGENTS' section is partially visible at the bottom.

- #1** If the correct customer is not found, select the **Add Customer** button.

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 No results found matching the search criteria. Please re-enter.

The screenshot shows the 'FIND CUSTOMER: Customer Search/List' interface. The 'Customers' tab is selected. The search form includes fields for Identifier/Cert/Edu Type, Identifier/Cert/Edu #, State, Harvest #, Inventory Type, Inventory #, Customer Class, Status (Active), Receipt #, Order #, TAN, Permit #, Last Name (Holland), First Name (Xan), Middle Name, Business Name, Date of Birth Match (Exact Match), Date of Birth, Phone Number, Address Type (Physical), Street Address, Supplemental Address, and City/Town. The 'Sort Order' is set to 'Last Transaction Date then Customer Name'. The 'ADD CUSTOMER' button is highlighted with a blue box and labeled '#1'. The table below shows columns for CUSTOMER #, STATUS, CUSTOMER / BUSINESS NAME, CUSTOMER CLASS, DATE OF BIRTH, and PHONE.

Customer Type

- #1** Select Customer Class – Individual or Business, with radio button.
- #2** Select **OK**.

Please Select Customer Class

#1 Individual Business

#2

- #1** Fill out required information for customer.
- #2** Select **APPLY**. If you select OK, this will save and close the customer profile page.

FIND CUSTOMER: [Customer Search/List](#) » [Customer Details](#)

Customers | **Permits**

Customer Info Customer # Customer Class Tax Exempt
NEW Individual No

Name/DOB #1 Salutation First Name Middle Name Last Name Suffix Date of Birth Override
Gertrude Hensel Sat Jan 01 2000

Phone/Email At least one Phone Number is required
Home Phone: 208-874-1235 Business Phone Mobile Phone Text (SMS) Phone Use Mobile Phone

Contact Preferences Phone Contact Preference Phone Contact Time
No Preference No Preference

Physical Address Address Supplemental Address ZIP/Postal Country Status
555 B Street 83709 United States Zip Only **VALIDATE** Unusable

City/Town State County
Boise Idaho Ada

Mailing Address Mailing Address same as Physical Address

Identifiers Identifier Type Identifier # REMOVE REMOVE

#2

Tip - Input street number and name. Then, click Validate. This autofills the rest of the address for you.

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