

Request a new customer

Enter details

Customers and sales > Customer information > Customer

The screenshot shows a web-based form for creating a new customer. The form is titled 'Customer' and has two tabs: 'Customer' and 'Contact information'. The 'Customer' tab is currently selected. It contains several input fields: a 'Lookup' field with a dropdown arrow, a 'Customer name *' field, a 'Country *' field with a dropdown menu showing 'United Kingdom' and 'GB', a 'Short name *' field, and a 'Notes' section with a text area. At the bottom of the form, there is a row of buttons: 'Save', 'Clear', 'New', 'Copy', 'Export', 'Workflow map', and 'Output filter'.

- Click on **New** and enter:
 - Customer Name and Short Name
 - A brief reason why the customer is needed (in **Notes**)
- Click on the **Contact Information** tab
- Click on **Add** and enter:
 - Address (in street address)
 - Postcode, Town/City, County
 - A phone number, email address and contact person may also be entered if known.
- Click on **Save** when done.
- An 'update relations' box will appear, click **OK**.

The screenshot shows a dialog box titled 'Update relations'. It contains a table with three columns: 'Relation', 'Relation value', and 'Description'. The first row is 'Customer group (CUSTGRP)' with 'PC' as the relation value and 'Proposed Customers' as the description. There are 'OK' and 'Cancel' buttons at the bottom.

Relation	Relation value	Description
<input checked="" type="checkbox"/> Customer group (CUSTGRP)	PC	Proposed Customers

- If the customer is successfully saved the customer ID will be displayed.
- Make a note of the **Customer ID** and click OK.

The customer will not be 'active' until the request has been approved.

The screenshot shows a success message box with a green header and a close button. The text inside says 'Successfully saved. Customer ID 20009082 is now created and is sent for approval.' and there is an 'OK' button at the bottom.