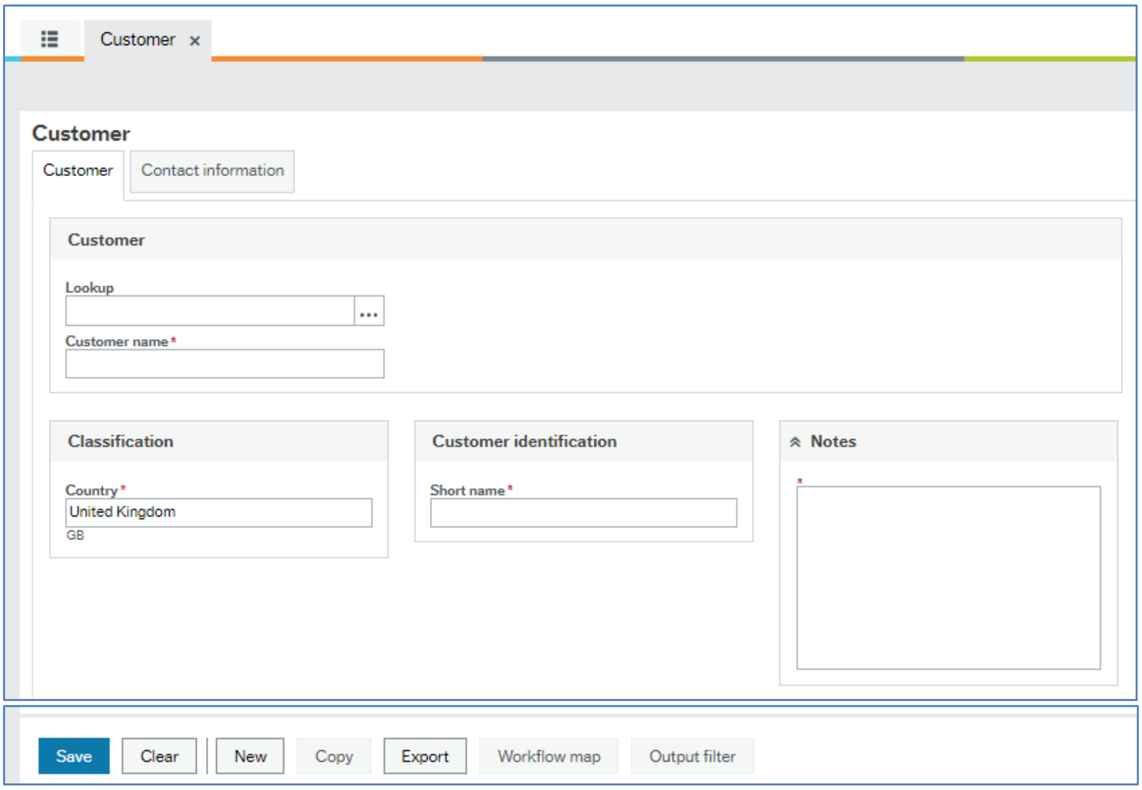
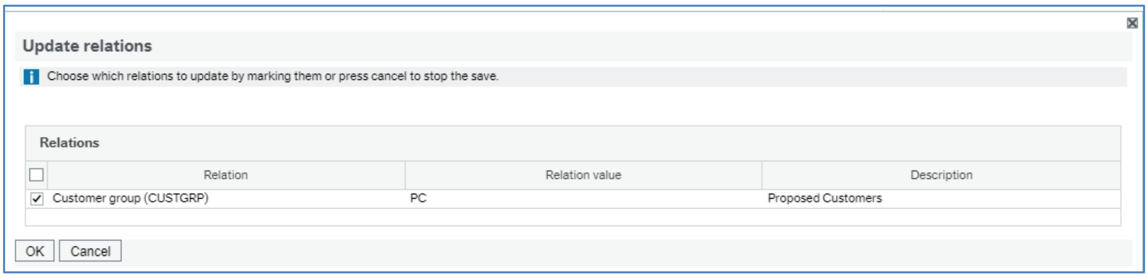
Request a new customer

Enter details

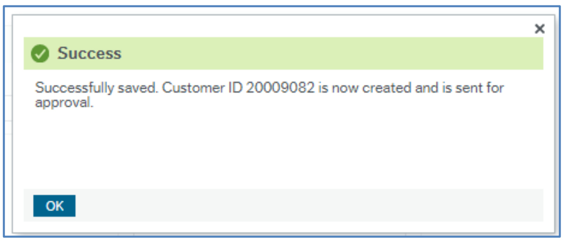
Customers and sales > Customer information > Customer



- 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.***



- 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.