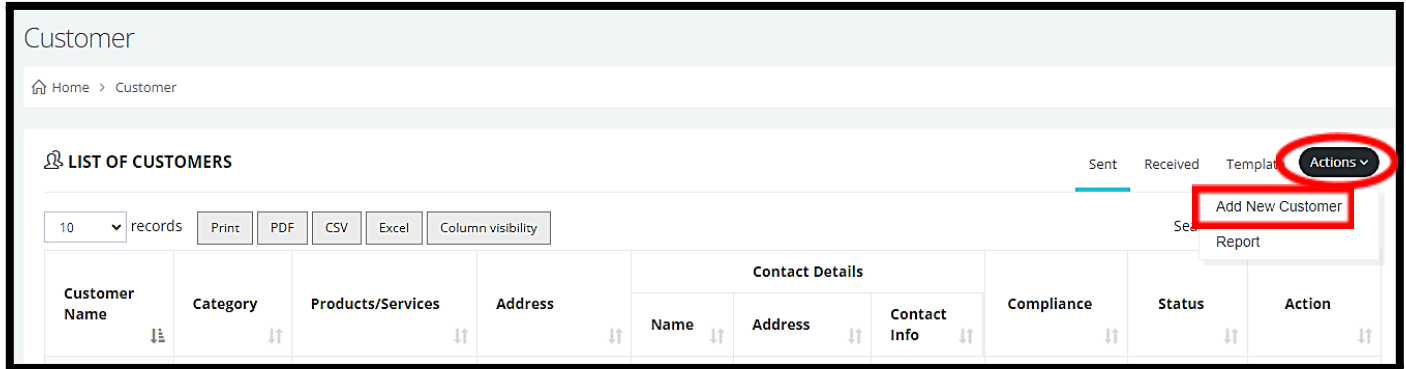


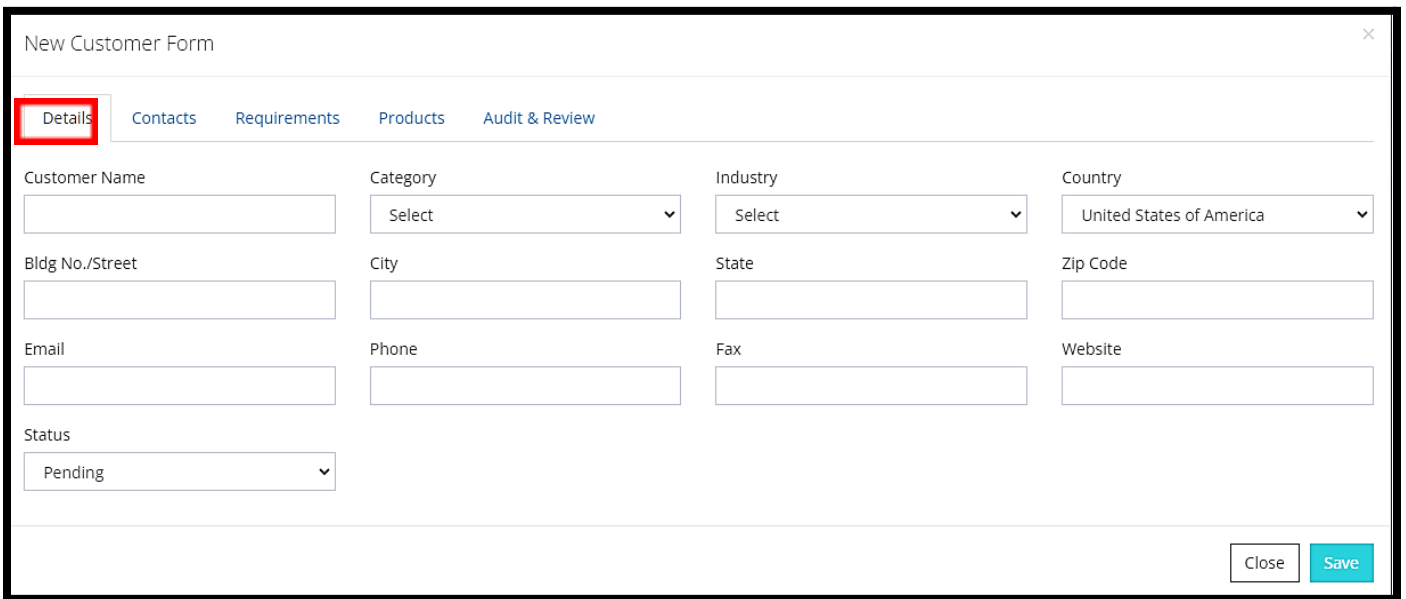
CUSTOMER

HOME > ACTIONS > ADD NEW CUSTOMER > Details



The screenshot shows the 'Customer' dashboard. At the top, there is a breadcrumb trail: Home > Customer. Below this is a section titled 'LIST OF CUSTOMERS'. On the right side of this section, there are tabs for 'Sent', 'Received', 'Template', and 'Actions'. The 'Actions' dropdown menu is open, showing options like 'Add New Customer' and 'Report'. The 'Add New Customer' option is highlighted with a red box. Below the menu is a table with columns: Customer Name, Category, Products/Services, Address, Contact Details (Name, Address, Contact Info), Compliance, Status, and Action. There are also filters for '10 records' and buttons for 'Print', 'PDF', 'CSV', 'Excel', and 'Column visibility'.

1. New Customer Form: Details – Fill-out the following:



The screenshot shows the 'New Customer Form' with the 'Details' tab selected. The form contains the following fields:

- Customer Name: Text input field
- Category: Dropdown menu (Select)
- Industry: Dropdown menu (Select)
- Country: Dropdown menu (United States of America)
- Bldg No./Street: Text input field
- City: Text input field
- State: Text input field
- Zip Code: Text input field
- Email: Text input field
- Phone: Text input field
- Fax: Text input field
- Website: Text input field
- Status: Dropdown menu (Pending)

At the bottom right, there are 'Close' and 'Save' buttons.

Customer Name	Input the customer’s legal or official business name.
Category	This describes the type of business or service of the customer. Select from the dropdown list in the system.
Industry	This refers to the line of products or services the customer is providing. Select from the dropdown list in the system.
Address	Input the Country, Building No./Street, City, State, and Zip Code.
Contact Details	Input Email, Phone, Fax, and Website (if any.)
Status	Select the current status of the customer. (e.g., Pending, Active, and Inactive)