



Adding a new customer

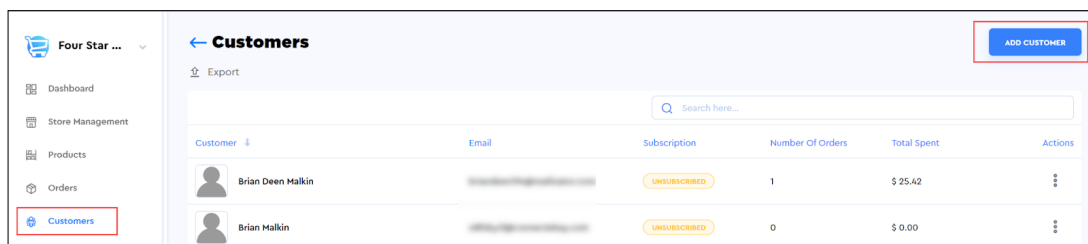
Syeda Khadija Phool - 2023-11-10 - Managing Customers

In a dropshipping business model, the customers usually sign up on the store themselves for order placement. However, there can be cases where the sales or the support agents have to add a customer record to the system from the admin panel.

Adding a new customer manually to the Cartzy store through the **admin panel** is a very straightforward process as explained with the help of steps below.

Path: Left side menu > Customers.

1. On the **Customers** page, click on the **Add Customer** button at the top right corner of the page.



2. The **Add Customer** page will open where you can add the following information to the customer record:

a. Customer Details: The following fields are available to input customer basic information:

- Name
- Email
- Mobile Number

b. Address: The following fields are available to input the complete address details of the customer.

- Name
- Business Name
- Address
- Apartment, suite, etc.
- City

- State/Province
- Zip code
- Country

C. Email Marketing Permission: You can checkmark this option with the consent of the customer whether they want to receive the marketing/promotional emails or not.

d. Tags: You can add different tags here to categorize your customers. For example, for manually added customers, you can use the tag **"manually added."**

e. Notes: This section can be used to write some information about the customer for future reference. This is private to the admin or whoever has access to the customers' records in the system.

Add Customer

Customer Details

SAVE CUSTOMER

Contact Details

Name

First Name

Last Name

Email

Email Address

Mobile Number

Mobile Number

Email Marketing Permission

Customer agreed to receive marketing emails.

You should ask your customers for permission before you subscribe them to your marketing emails.

Tags

Tags can be used to categorize customers into groups.

Type and create tags

Address

The Primary Address Of This Customer

Name

First Name

Last Name

Business Name

Enter your business name

Address

Enter your address

Apartment, Suite, etc.

Enter your apartment or suite

City

Enter your city

State/Province

Select or search state

Zip/Postal Code

Enter your zip code

Country

United States

Notes

Add notes about your customer.

3. Once you have added the customer details, click on the **Save Customer** button at the top right corner of the page.

support

notification popup containing the success message will appear at the top right corner of the page.

load the main **Customers** page where the newly added customer is listed. If the checkbox **“Email Marketing Permission”** was checked for the customer, then the customer record will have the status **“Subscribed”** as shown in the image below.

...