



## Adding a new customer

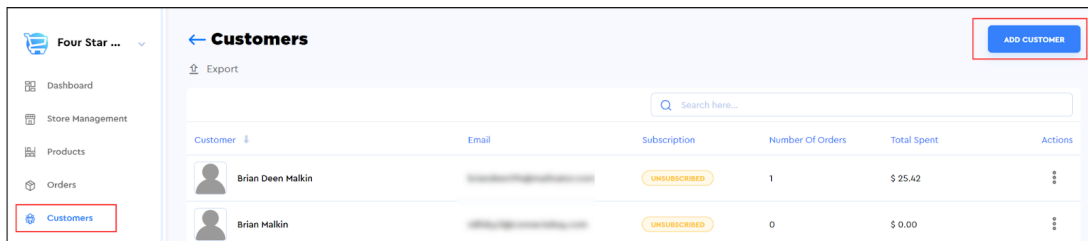
Syeda Khadija Phool - 2023-11-10 - Managing Customers

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.

The screenshot shows a web form for adding a customer. At the top left, there is a back arrow and the text "Add Customer". Below this is a header bar with "Customer Details" and a "SAVE CUSTOMER" button on the right. The form is divided into several sections:

- Contact Details:** Includes fields for "Name" (First Name and Last Name), "Email" (Email Address), "Mobile Number" (Mobile Number), and "Email Marketing Permission" (a checkbox with the text "Customer agreed to receive marketing emails. You should ask your customers for permission before you subscribe them to your marketing emails.").
- Address:** Labeled "The Primary Address Of This Customer", it includes fields for "Name" (First Name and 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), and "Country" (United States).
- Tags:** A section with the text "Tags can be used to categorize customers into groups." and a text input field labeled "Type and create tags".
- Notes:** A section with the text "Add notes about your customer." and a large text area for input.

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

**← Add Customer**

**Customer Details** SAVE CUSTOMER

**Contact Details**

**Name**

**Email**

**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.

South America

**Address** The Primary Address Of This Customer

**Name**

**Address**

**City**

**Zip/Postal Code**

**Notes**

Add notes about your customer.

4. The customer will be added to the system and their details will be saved. A **notification** popup containing the success message will appear at the top right corner of the page.

**← Add Customer** ✔ Customer has been added

**Customer Details** SAVE CUSTOMER

5. When a new customer is added to the system, the page automatically refreshes to 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.

**← Customers** ADD CUSTOMER

Export

Customer	Email	Subscription	Number Of Orders	Total Spent	Actions
Alex Weasley	alex@mailinator.com	SUBSCRIBED	0	\$ 0.00	⋮