

# Customer Wizard - Name and Address (Step 2)

Last Modified on 07/17/2024 4:17 pm EDT

This is where you will enter the name, type of customer, and location information of the customer.

- Customer Type: Use the drop-down to choose whether this is a commercial or residential customer.
- Customer ID: Manually fill with alphanumeric characters or leave blank if your organization is set to auto-generate Customer IDs
- Name and Search By: Enter the name of the customer and the Search By field will auto-populate.
- Account Type: Use the drop-down to choose a type
  - Normal Account: Common singular account
  - Main Account: A parent account that has child accounts
  - Sub Account: Child account of a Main Account
  - System Account: A master admin account
- Related Type: This field is used to clarify the Account Type. Usually "Normal", this can give another level of organization of "Master" or "Related to Master".

The rest of this screen provides fields for address, time zone, and different ways to communicate the location of the customer. Dealer, Timezone and Country are inserted from the previous page.

