

Customer Wizard - Complete New Customer Record (Step 8)

Last Modified on 04/02/2024 5:02 pm EDT

After clicking Finish, the new customer record is committed to the database. This is the best opportunity to review for accuracy. Remember:

- We did not add any passwords or permissions to contacts on the Contact List.
- We did not put any custom action patterns in place.
- We did not define any reports for the customer.
- We did not place any plans on the customer record.

Note that if you start entering a customer record and walk away, the timeout in Manitou could cause you to lose your work. If you are unsure if you will be completing your work in a timely fashion, save the record after you have the Name and Address in place so that you don't lose your progress.

