

## How to add new customer

In this guide you will learn how to create a new customer or link existing one to your shop's registry.

To add a new customer Go to Customers & Vehicles and click on Add/Find Customer & Vehicle.



- Appointments
- Quotes & Repairs
- Customers & Vehicles**
- Auto Parts
- Reports
- Configuration
- Logout



| Second Name          | Phone#               | Make                 | Model                | Year                 | VIN                  | License              | Repairs              |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> |
| Doe, John            | (408) 333-2211       |                      |                      |                      |                      |                      | < [icon] >           |
| Doe, John            | +380 (50) 975-2243   |                      |                      |                      |                      |                      | < [icon] >           |
| Malchione, Laurie    | (408) 268-0468       | Lexus                | IS 250               | 2015                 | 1HGBH41JXMN109186    | F3451HJ              | < [icon] >           |
| Doe, John            | (000) 222-3333       | Audi                 | A5                   | 2015                 |                      |                      | < [icon] >           |
| Newport, Nance       | (999) 999-9999       | Volkswa...           | Golf                 | 2010                 |                      |                      | < [icon] >           |
| *Not specified yet   | +123 (09) 128-0980   |                      |                      |                      |                      |                      | < [icon] >           |



In appeared card enter your customer's phone number in the left upper corner (1) and click on search button (2). You may search by email and VIN code as well (3) (4).

The screenshot shows the 'Find / Add Customer & Vehicle' interface. At the top, there is a header with a car icon and the title 'Find / Add Customer & Vehicle'. Below the header, there are several input fields and search buttons. A red circle with the number '1' highlights the 'Phone\*' field containing '+1 (408) 000-0000'. A red circle with the number '2' highlights the search button next to the phone field. A red circle with the number '3' highlights the 'Email' field containing 'Email' and its search button. A red circle with the number '4' highlights the 'VIN' field containing 'VIN' and its search button. Other fields include 'First Name' (containing 'First Name'), 'Last Name' (containing 'Last Name'), and 'Address' (containing '# House, Street, Apt'). There are also fields for 'City', 'State', and 'Zip'.

The screenshot shows the bottom navigation bar with four icons: a question mark for 'Help', a house for 'Create', a magnifying glass for 'Search', and a speech bubble for 'Chat'.

If a customer is not found, keep entering customer's data: email, First name, Last Name, Address. Click on Create on the bottom line.

The screenshot shows the 'Find / Add Customer & Vehicle' interface with example data entered. A red circle with the number '1' highlights the 'First Name' field containing 'Example'. The 'Phone\*' field contains '+1 (408) 000-0000', the 'Email' field contains 'example@email.com', and the 'Last Name' field contains 'Owner'. The 'Address' field contains '99 Example'. Below the main form, there is a section titled 'You could find customer / vehicle by VIN' with a 'VIN' field containing 'VIN'. At the bottom, the 'Create' button in the navigation bar is highlighted with a red circle and the number '2'.

Now enter customer's vehicle information: Vehicle's name, Model, Year and select trim from the provided list (1). If the list is not provided enter the Trim yourself. We also recommend that you fill the odometer and average mileage info (2). Add optional information if necessary (VIN, License) (3). Click update to save customer's vehicle information (4).

The screenshot shows a web form titled "Find / Add Customer & Vehicle". At the top, there are search fields for Phone (14080000000), Email (example@email.com), First Name (Example), Last Name (Owner), and Address (99 Example). Below this is a section titled "Add vehicle" containing fields for VIN, License Number, State, Odometer (10 mi), and Approximate mileage per year (10000 mi). The "Vehicle" section includes fields for Make (Ford), Model (F-250), Year (2010), and a dropdown for Trim. The trim dropdown is open, showing options: Cabela, Lariat, XL, and XLT. At the bottom, there are fields for Submodel, # Doors, Transmission, # Speeds, Engine Size, # Cylinders, Power, and Configuration. A navigation bar at the bottom contains "Help", "Search", "Update" (with a red callout 4), "Delete", and "Chat".

Please note that when you create a new customer – customer's account is created by AutoRepair Cloud. Therefore a temporary password will be send to the customer.

When a customer has already been signed up to AutoRepair Cloud a pop up window with confirmation request will appear. Ask customer for a password, enter it and click confirm.

The screenshot shows a web interface for finding or adding a customer and vehicle. A pop-up window titled "The customer is not selected" is displayed in the center. The pop-up contains the following text: "The phone +1 (408) 111-1111 already exists in AutoRepair Cloud but your shop doesn't have permission to work with they customer. Please acquire customer code from the customer." Below this text is a section titled "Enter customer code" with a text input field containing "12345" and a green "Confirm" button. At the bottom of the pop-up, there is a section titled "If the customer doesn't have the customer code then you could initiate the reminder message." with three options: "E-mail" (Send the code reminder to customer's email), "SMS" (Send the code reminder to customer's phone), and "Voice message" (Send the code reminder via voice message). The background interface shows a form with fields for "Phone" (+1 (408)), "First Name" (First Na), "Address" (# Hous), and "Zip".

Now the customer is linked to your shop.