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Workforce Dashboard

Employee Management

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Add new customer

Manage customers

Components

Settings

Add New Customer

Create a new customer record

Basic Information

Enter the basic details of the customer

Type of Customer *

Select customer type

Category of Customer *

Select customer category

Segment of Customer *

Select customer segment

Name of Customer *

Enter customer name

CIN

Enter CIN

GSTIN

Enter GSTIN

PAN

Enter PAN

TAN

Enter TAN

Email Address *

Enter email address

Office Contact *

Enter office contact number

Contact Information

Enter the contact person details

Contact Person *

Enter contact person name

Designation *

Enter designation

Contact Email *

Enter contact email

Contact Number *

Enter contact number

☐ On WhatsApp

Preferred Communication *

Select preferred communication

Office Address

Enter the office address details

Address Line 1 *

Enter address line 1

Address Line 2

Enter address line 2

Village/Town *

Enter village/town

District *

Select district

Taluka *

Select taluka

State *

Maharashtra

Pincode *

Enter pincode

Billing Address

Enter the billing address details

☐ Same as Office Address

Address Line 1 *

Enter address line 1

Address Line 2

Enter address line 2

Village/Town *

Enter village/town

District *

Select district

Taluka *

Select taluka

State *

Maharashtra

Pincode *

Enter pincode

+ Save and Add New Customer

Save Customer