

Creating Profiles

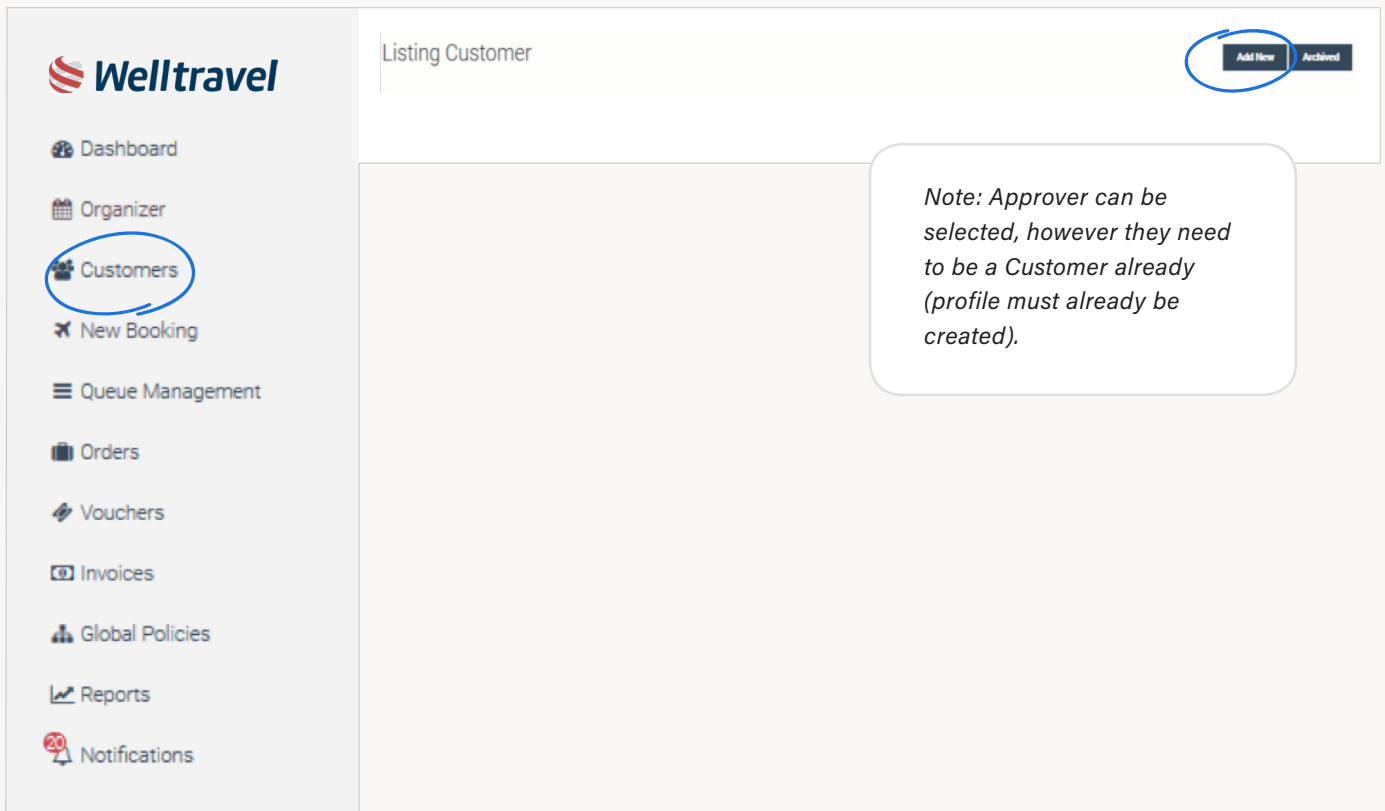
Profiles for Customers & Organizations

Step-by-step guidelines with easy-to-follow diagrams

1.0 Customer Profiles

1. Click on Customers and click on Add New on the top right hand side of the page.
2. Complete all necessary details and save

Figure 1



1.0 Customer Profiles Continued...

Figure 2

90: Nikki Marchant *Welltravel.Accounts: 124, Credit: CHF 0.00, Organization: da Travels* [Edit](#) [Contacts](#) [Archive customer](#) [Back](#)

Person has been updated successfully

Address
Nikki Marchant
10 test drive
gold coast
8000 cape town
South Africa

General
Correspondence Language
French

Links
nikkitest@testing.com
+27217779999

Tags

Offers | Approval Requests | Orders | Invoices | Policy Levels | Comments | SMS | Messages | History

Offers

Name
Teaser

[Add New](#)



Note: at anytime the agent can edit the customer profile or the customer can update his or her profile on the TravelApp which will automatically update on the Agent Platform.

2.0 Organization Profile

1. Follow same process as above by clicking on Customer—Add New and then select Organization.
2. Complete information and save.