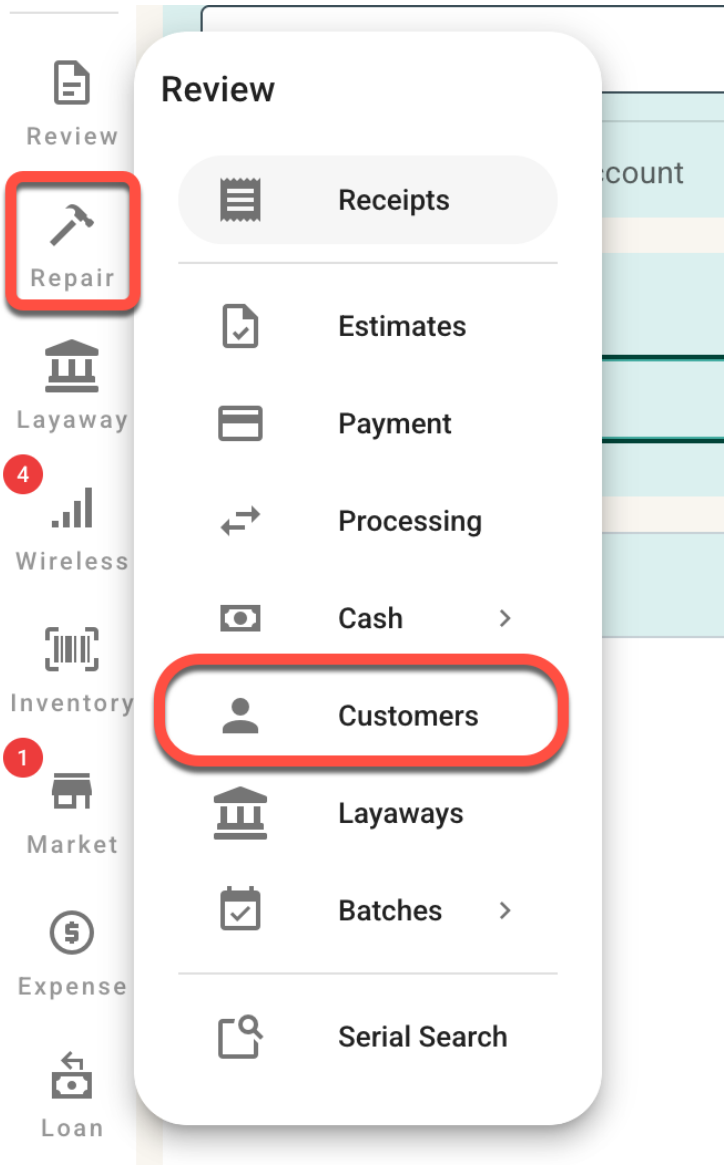
Create a Customer

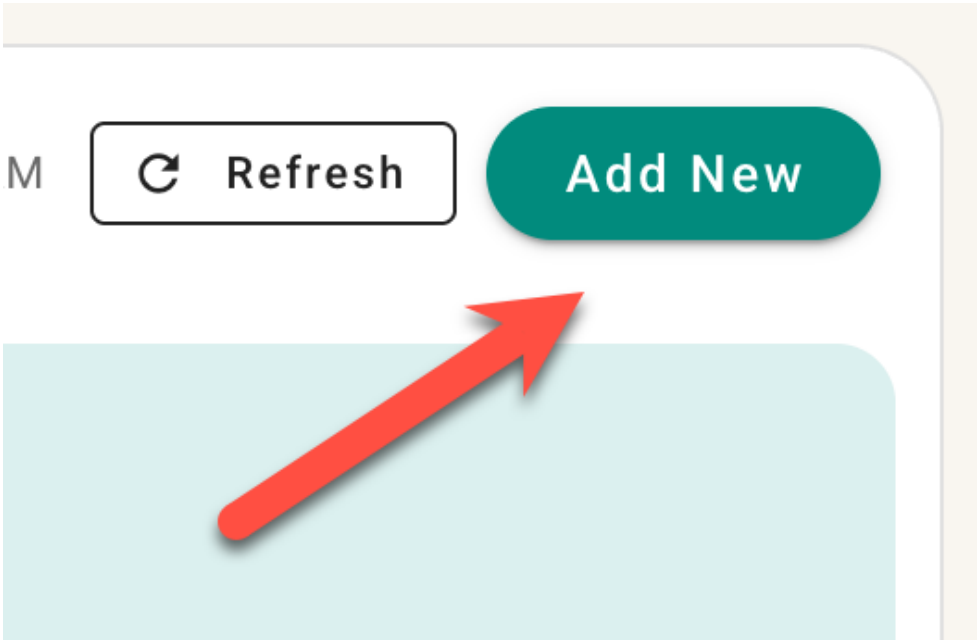
Create a customer record to keep contact details, addresses, loyalty activity, and purchase history together.

Open the customer list

1. From the main menu, select **Review**.
2. Select **Customers**.
3. On the customer list, select **Add New**.



Open Review and select Customers.



Select Add New from the customer list.

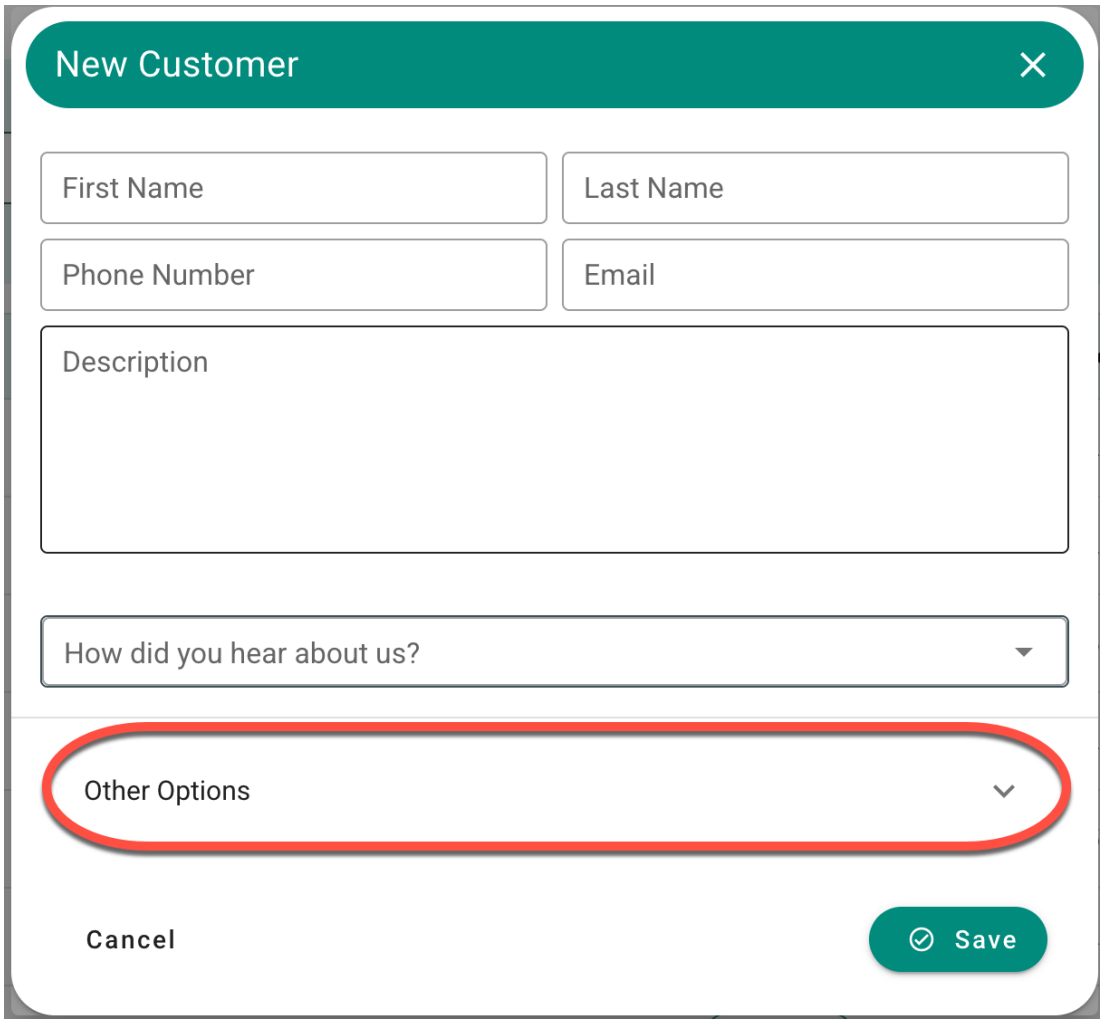
Enter the required information

- **First name** is always required.
- **Phone number** is always required.
- **Last name** is optional unless your organization has enabled the setting that makes it required.
- **Email** is optional.

You may also add an internal description and record how the customer heard about your business. Depending on your settings, the referral-source field may be required.

Add more details

Select **More Options** to enter an address, preferred language, additional contact information, and customer tags.



If you do not need the optional details, leave More Options closed and continue.

Save the customer

1. Review the information.
2. Select **Save**.

The customer will be added to the customer list and can be selected in supported sales and service workflows.

> **Tip:** A separate settings article will explain how to require customer last names and referral sources. Link that article here once it is available.

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