Create new customer

General

Kebab menu (⋮)

Type	Menu item	Right
	Create new customers	<Role> / BASIS / Create new customers

Grid

Click	Swipe	Views
	1. Accounts (if it is a Key account)	1. Table 2. Map

Column definition

Name	Additional information
Client	
Name 1	
Name 2	From version 18
Name 3	From version 18
Street	
Postal code	
Location	

Name	Additional information
Telephone	
Mobile Phone	From version 18
Fax	
E-mail	
E-mail for shipping notification	<Role> / BASIS / customer master data "E-mail for shipping notification"
Homepage	
Country	Editable only during creation
Language	Editable only during creation
Prospect attribute 1 - 6	If translated in the backend, the respective attributes are extended here. The selectable entries are defined in the Code tables in the backend. Code list: Prospect attribute 1-6 If a Code table entry is defined, the field is mandatory. If no Code table entry is defined, a text field is provided for input, which does not require mandatory entry.
Price list	Defined per client in the Code tables in the backend. Code list: Price lists prospects

Differences online / offline entry

Field / Function	Online	Offline (not when using a connector)
Country	Editable only during creation	Editable only during creation
Language	Editable only during creation	Editable only during creation
Prospect attribute 1-6	Editable only during creation	Until the next Data import + Data Transfer

Field / Function	Online	Offline (not when using a connector)
Price list	Editable only during creation	Until the next Data import + Data Transfer
CRM Widget (from version 19)	Editable only during creation	Until the next Data import + Data Transfer
Request customer master data sheet	Yes	Only at the next Data import + Data Transfer
Transfer orders	Yes	Only at the next Data import + Data Transfer
Fields of customer processing (e.g. Customer's attribute, Visiting frequency, etc.)	After creation	After creation

FAQ

Release

Revision #9
Created 2026-08-31 10:32:49 UTC by n8n
Updated 2026-09-02 14:56:38 UTC by n8n