# Adding a New Customer in Shred-Logix: Step-by-Step Guide

**[Intro]**
*Hi, and welcome back to Shred-Logix University! In this lesson, I'll show you how to enter a new customer into the app.*

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**[Section 1: Getting Started]**
*After logging in, your home page displays a list of customers. To add a new one, look to the top-right corner and click the blue **[New Customer]** button. This opens the New Customer form.*

*The form is made up of several sections. At minimum, you'll need to enter the **main contact information**, plus complete the **Billing Address** and **Service Location** tabs. Those two are required in order to save the customer. Everything else—like payment, billing, and tax information—can be added right away or updated later.*

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**[Section 2: Main Contact Info]**
*Start by filling in your customer's **main contact details**—things like company name, phone, and primary contact person.*

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**[Section 3: Billing Address]**
*Next, go to the **Billing Address** tab. Shred-Logix is integrated with Google Maps, so you can be confident you've got the correct address on file.*

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**[Section 4: Service Location]**
*Now click on the **Service Location** tab. Here you'll see two sections: **Primary Service Location** and **Service Contact**. Sometimes these are the same as the billing address, and sometimes they're different.*

*If they're the same, just check **Same as Billing** and the system will automatically fill in the fields for you. If not, enter the service details manually. Remember—both the Billing and Service tabs must be completed before you can save the customer.*

**[Section 5: Payment & Billing Options]**

*Once the required fields are complete, you'll also have the option to set up **Payment and Billing preferences.***

- *Choose **Payment Terms** such as Due on Receipt, Auto Pay, or your established Net terms.*

- *Select accepted payment methods—Check, Cash, Credit Card, Wire Transfer, or Trade Account.*

- *Set **Invoice Frequency, Attention,** and **Invoice Type**. You can choose Paper, Email, Both, Do Not Send, or Email Attachment. Note: selecting "Email" will send a secure tokenized link, while "Email Attachment" generates a PDF copy of the invoice. Some email servers only accept one method, so both options are available.*

- *Under Invoice Type, you can choose to pass along an **Auto Fuel** charge to the customer. The auto fuel charge is set under your company settings in the routing tab which will be covered in another video.*

- *Next you have billing email, followed by*

- *Credit Card Service Fee- If your customer pays by credit card, you can also enable the **Credit Service Fee**. Simply check the box and enter the fee percentage or amount you want to pass along.*

- *Finally, you can add **Billing Notes**—anything you want to appear directly on the customer's invoice.*

*For more detail on these settings, check out our **Billing and Invoicing** tutorial in the Office lessons of Shred-Logix University.*

**[Section 6: Tax & Profile Info]**

*Moving on, you can add **Tax Information** such as Tax ID or Taxable status. In the **Profile section**, you can enter details like **Lead Source, Industry Type, Assigned Sales Rep, Job Types, Account Number,** and even mark if the account is **C.O.D.** You also have the option to place a customer account **on hold** if they're past due on payments.*

**[Wrap Up]**

*Once everything is filled out, click **Save**—and just like that, you've created a new customer in Shred-Logix. Great job!*