

Lesson 7: Managing Customers

In this lesson the user will learn how to define and create an **NWCG** customer and an **OTHER** customer.

1. Sign in using your assigned User Name and Password
2. **Customer>Create Customer**
3. Select **NWCG** from the customer type drop down
4. Create a NWCG customer using your state and three letter initials the unit ID format = XX (state) YYY (three letter ID. i.e. WV-JDR
5. Fill in the required fields marked with an asterisk and fill in the customer address information
6. Click on **Create Customer**
7. Repeat the process this time select **Other** from the customer type dropdown
8. With **Other** customer the user needs to select the State or Country ID prefix from the dropdown.
9. Fill in the required fields marked with an asterisk and fill in the customer address information
10. Click on **Create Customer**. Record the system generated customer ID
_____.

11. Next step is to select **Customer > Customer Console**.
12. Use the search criteria and search for the customers you have created.
13. Use the search criteria to search customers other than those you created.