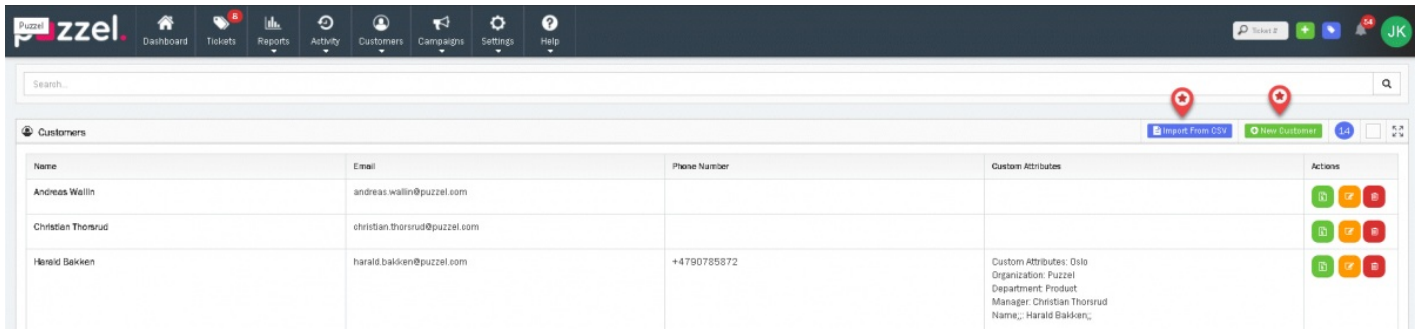



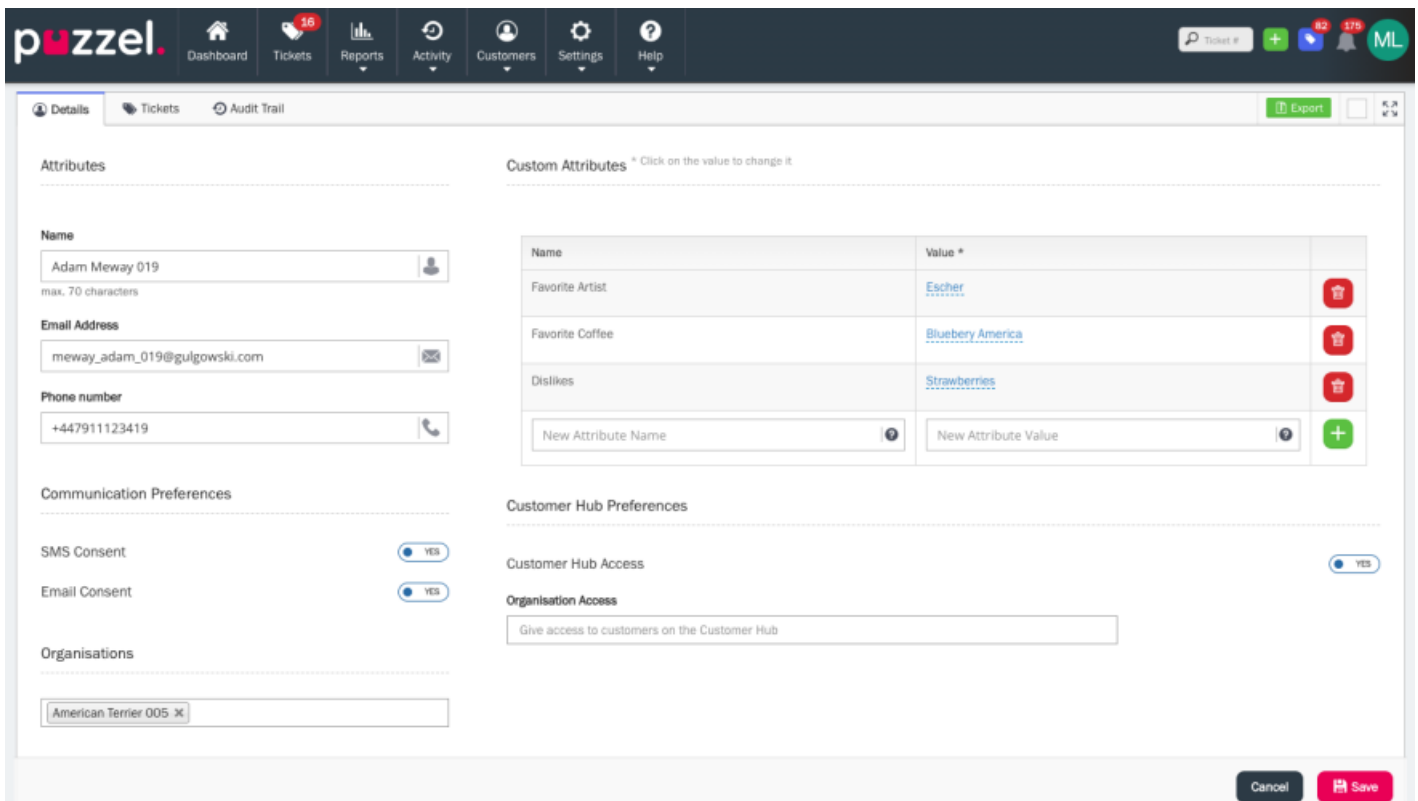
Adding new customers

Customers can be added one at a time, or through bulk import of users, and also when a new customer submit requests for the first time. Select **Customers** in the top menu and choose **Active** and a list of all active customers will be displayed.



Adding customers one at a time

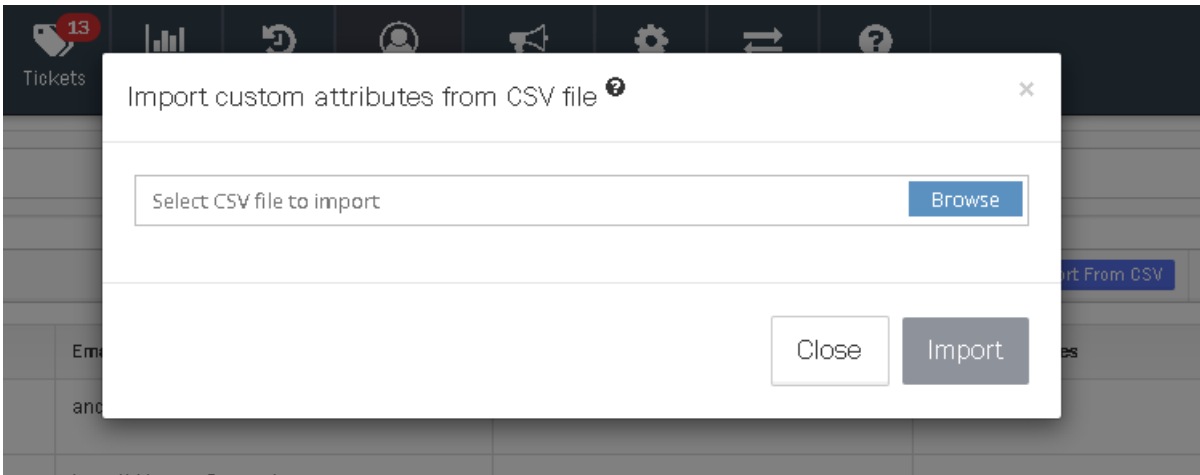
Click on New Customer option as shown in the figure above to open a window for entering customer details and click **Save**. Along with the obvious entries, you can also include custom attributes such as organization, role, department so on and so forth. For adding more attributes, click on the  icon.



Bulk import of customers

To import multiple customer details save these in a CSV format. Then click on the **Import From CSV** button as shown in the picture, Select the CSV file from your stored location and click Import.

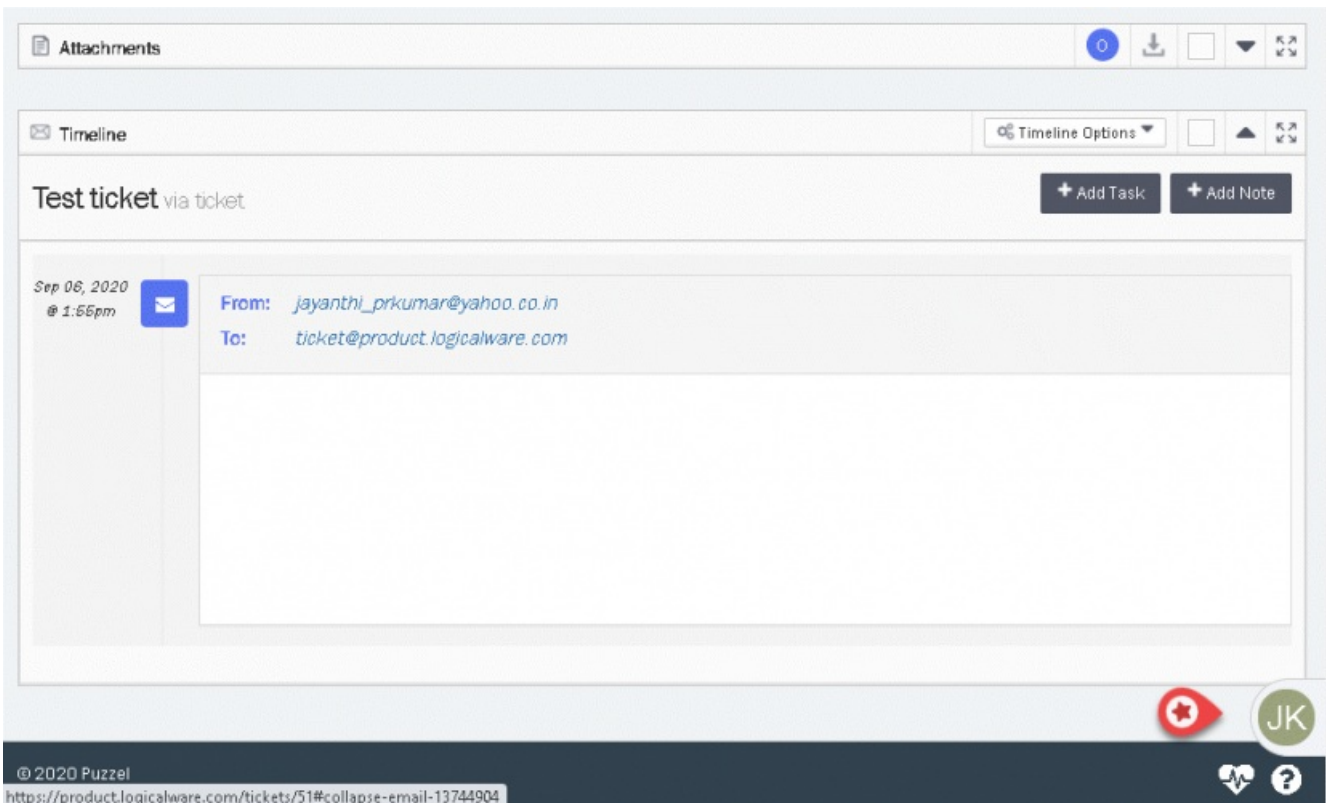
[import_customers_template.csv](#)



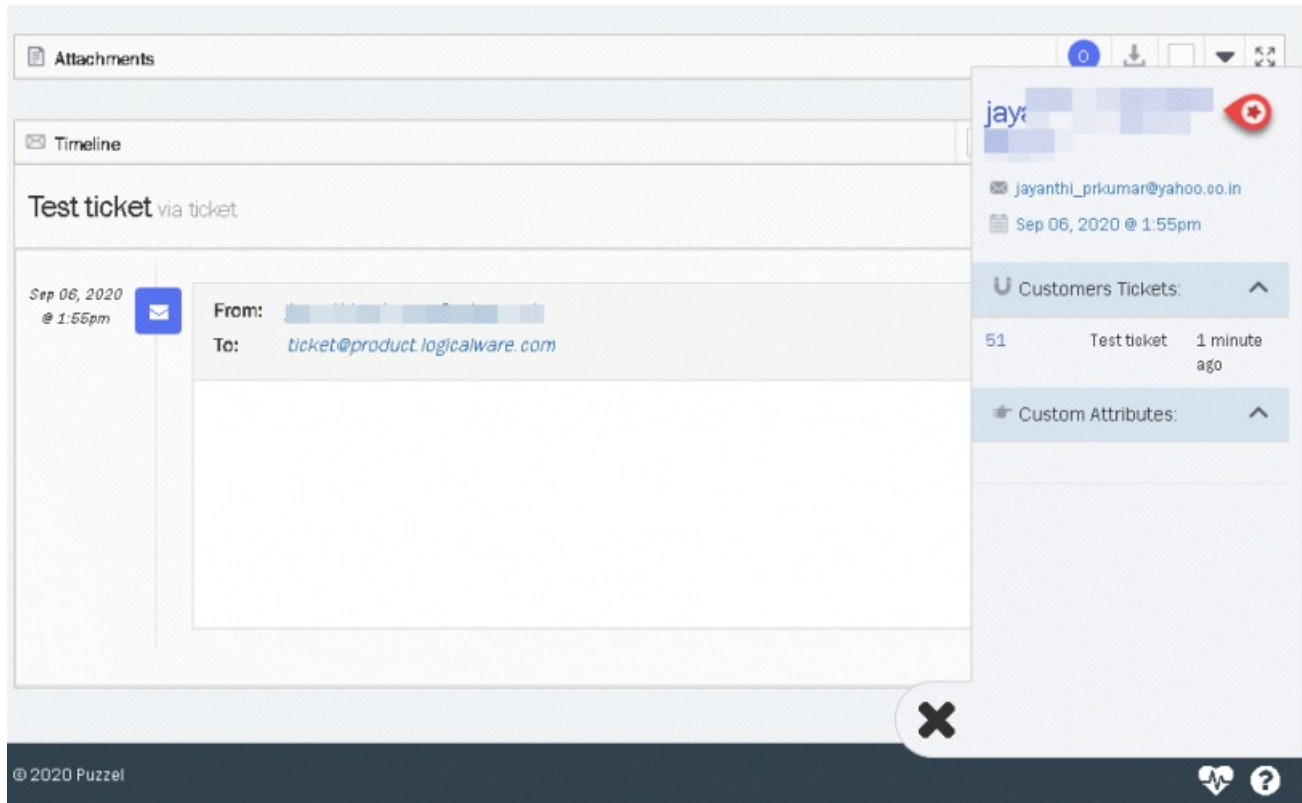
After the customers have been added, you can then update or remove the customer records from **Customers -> Customers -> Active**. (Assuming the user account has sufficient System Permissions to do so).

Automatically adding a customer when they submit a ticket for the first time

As a ticket is created the application checks to see if this belongs to an existing customer - using email address/mobile number as the unique identifier. If no customer exists that uses this identifier then a new customer is automatically created. Open the ticket to see the details and locate for the button with the initials of his/her name at the bottom of the screen as shown below.



The widget opens by clicking on it to show the customer details. By clicking on the name, you will be taken to the customer details page where the basic details from the ticket is already populated. You will be able to add or modify details here as required.



Customer Hub Access

Once the Puzzel Customer Hub application is activated on your account, you'll have the ability to enable or disable a customer's access to the Customer Hub while editing their record. If the customer's access is turned off, they'll encounter a message directing them to reach out to the customer support department upon attempting to log in to the Customer Hub. The contact details for the support department will be configured in your Puzzel Customer Hub application.

Furthermore, you have the option to permit customers to view and interact with tickets associated with 'Organisations' when they're logged into the Puzzel Customer Hub. This feature is especially handy if you wish to assign specific customers with the access rights to view and create tickets on behalf of certain organisations.