

How to Add a Customer and Company to Selling Lane CRM

written by Jude Campbell | October 13, 2023



- First step is always to search for the customer first to make sure that you already haven't added him or her into the CRM.
- After you've searched and found the customer, the software will automatically allow you to add first name last name, etc.
- Once the basic details are in, go back in and tweak the customer, adding details like cell phones, additional email, addresses, physical addresses company, names, and titles at the company.
- Once you've added the company, you can edit that information and add more details such as business address, business URL, etc.

below is a brief video explaining the process mentioned above.

Short explanation video, on how to add a company and customer