

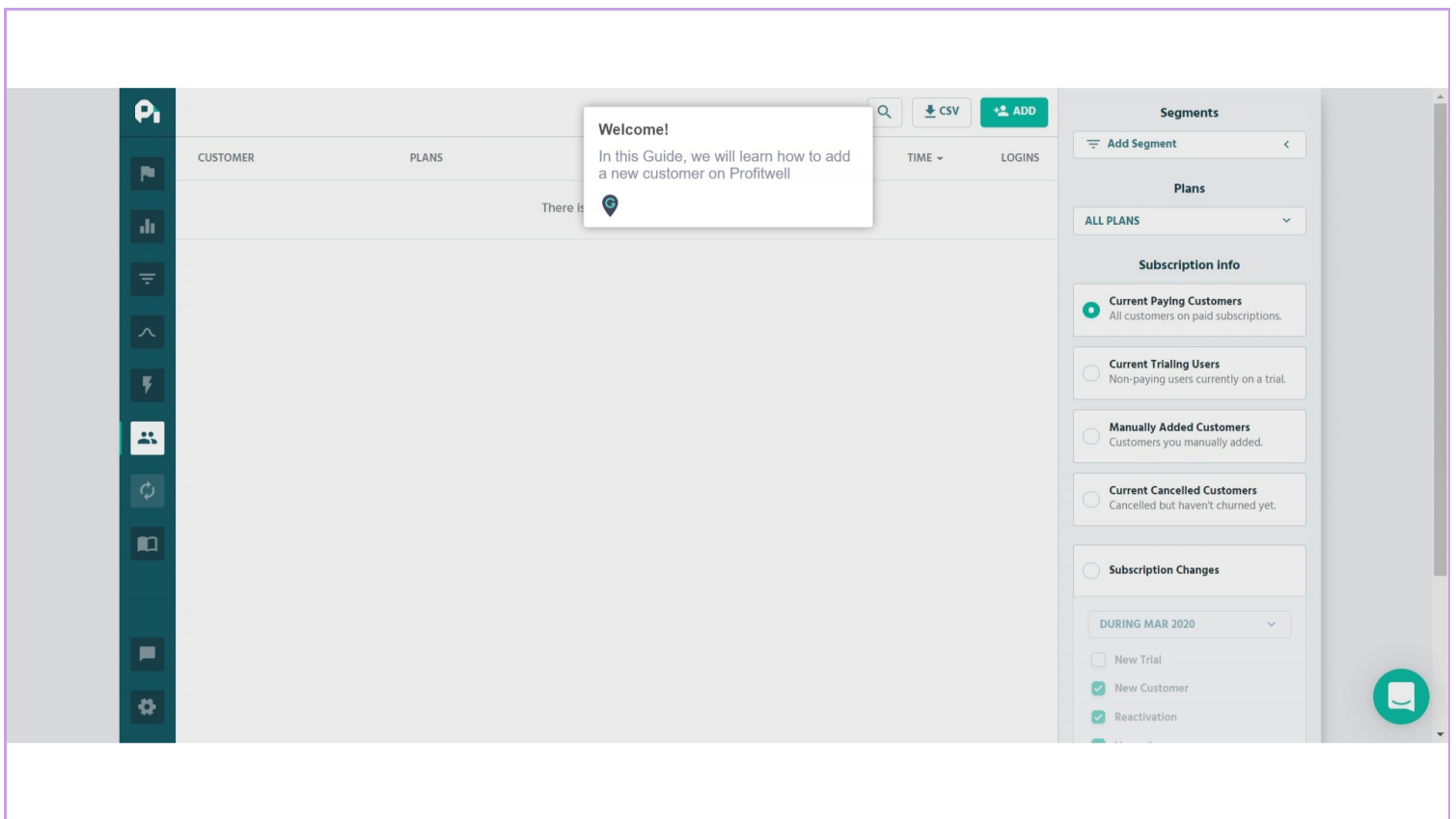


How to add a new customer on Profitwell

Step: 01

Welcome!

In this Guide, we will learn how to add a new customer on Profitwell



Step: 02

Click on "Add"

The screenshot displays the myGuide dashboard. At the top right, there is a search icon, a 'CSV' download button, and a green '+ ADD' button. A tooltip with the text 'Click on "Add"' is positioned over the '+ ADD' button. Below the navigation bar, the main content area shows a table with the following headers: CUSTOMER, PLANS, MAR MRR, ACTIVITY, TIME, and LOGINS. The table is currently empty, displaying the message 'There is no data to display'. On the right side, there is a sidebar with a 'Plans' section containing a dropdown menu set to 'ALL PLANS'. Below this is a 'Subscription info' section with several radio button options: 'Current Paying Customers' (selected), 'Current Trialing Users', 'Manually Added Customers', 'Current Cancelled Customers', and 'Subscription Changes'. Under 'Subscription Changes', there is a dropdown menu set to 'DURING MAR 2020' and a list of checkboxes: 'New Trial', 'New Customer' (checked), 'Reactivation' (checked), 'Upgrade' (checked), and 'Downgrade' (checked). A vertical sidebar on the left contains various navigation icons, including a home icon, a list icon, a settings icon, and a chat icon.

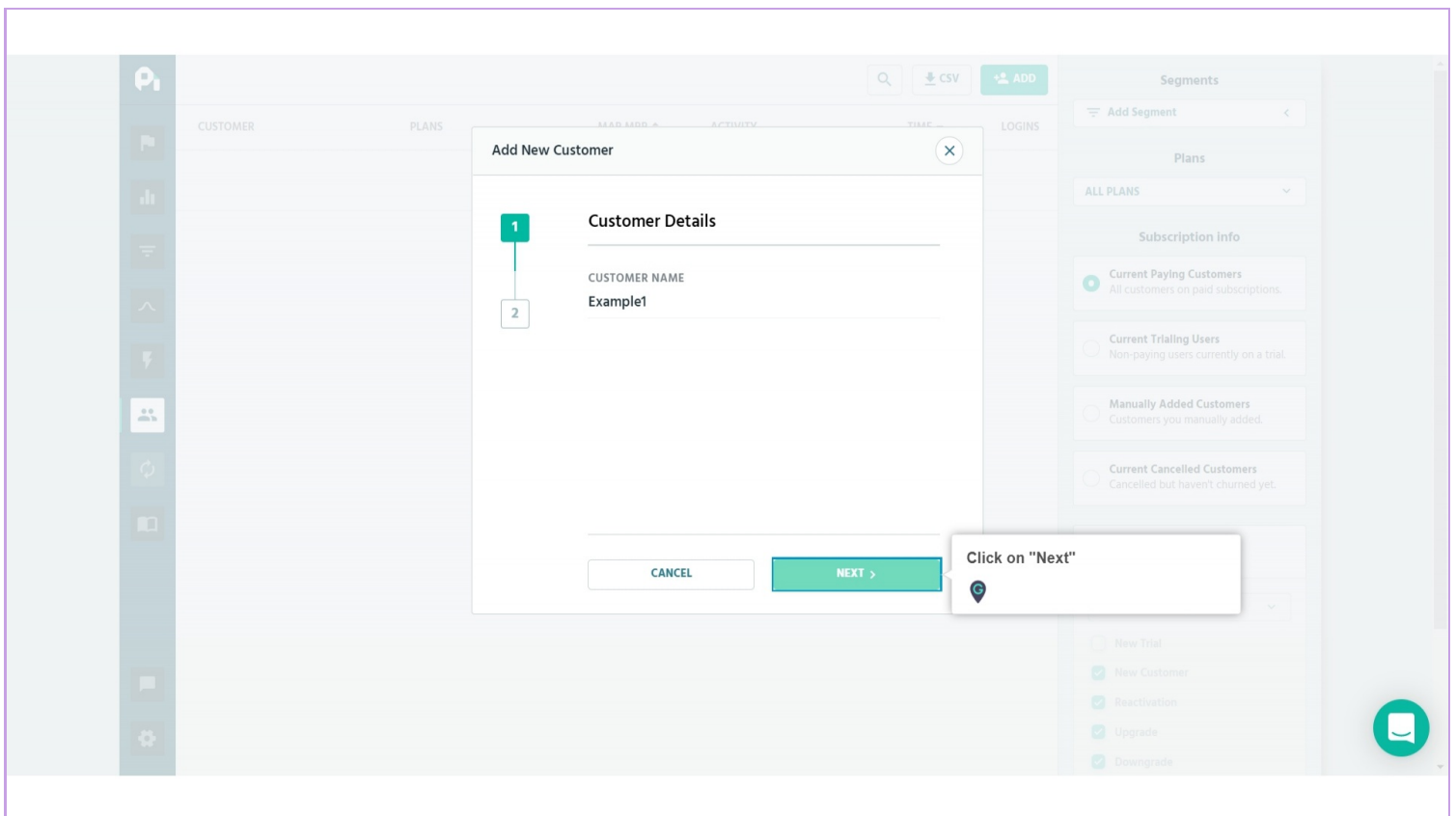
Step: 03

Enter Customer's name or email

The screenshot displays the 'Add New Customer' form within a software interface. The form is titled 'Add New Customer' and features a 'Customer Details' section. A text input field labeled 'CUSTOMER NAME' contains the placeholder text 'Enter a name or email'. A callout box points to this field with the text 'Enter Customer's name or email'. The form also includes 'CANCEL' and 'NEXT >' buttons. The background shows a dashboard with various filters and options.

Step: 04

Click on "Next"



Step: 05

Add "Subscription Details"

The screenshot shows a web application interface for adding a new customer. The main form is titled "Add New Customer" and is divided into several sections:

- Subscription Details:** A text input field containing "Subscription Details". A callout box with a location pin icon points to this field, containing the text "Add 'Subscription Details'".
- PLAN NAME:** A text input field containing "Starter Plan".
- SUBSCRIPTION TYPE:** A dropdown menu with "PAID SUBSCRIPTION" selected.
- PLAN VALUE:** A text input field containing "50.00".
- PLAN CURRENCY:** A dropdown menu with "USD" selected.
- EFFECTIVE DATE:** A date picker showing "03/02/2020".
- CHURN DATE (OPTIONAL):** A dropdown menu with "SELECT A DATE" selected.
- BILLING FREQUENCY:** A dropdown menu with "MONTHLY" selected.

At the bottom of the form, there are two buttons: "X CLEAR FORM" and "+ ADD ANOTHER SUBSCRIPTION".

On the right side of the interface, there is a "Segments" section with a search bar and a list of segments:

- Current Paying Customers
All customers on paid subscriptions.
- Current Trialing Users
Non-paying users currently on a trial.
- Manually Added Customers
Customers you manually added.
- Current Cancelled Customers
Cancelled but haven't churned yet.
- Subscription Changes

Below the segments, there is a "DURING MAR 2020" section with a dropdown menu and a list of actions:

- New Trial
- New Customer
- Reactivation
- Upgrade
- Downgrade

Step: 06

Click on "Submit"

The screenshot shows a web application interface for adding a new customer. The main form is titled "Add New Customer" and is divided into several sections:

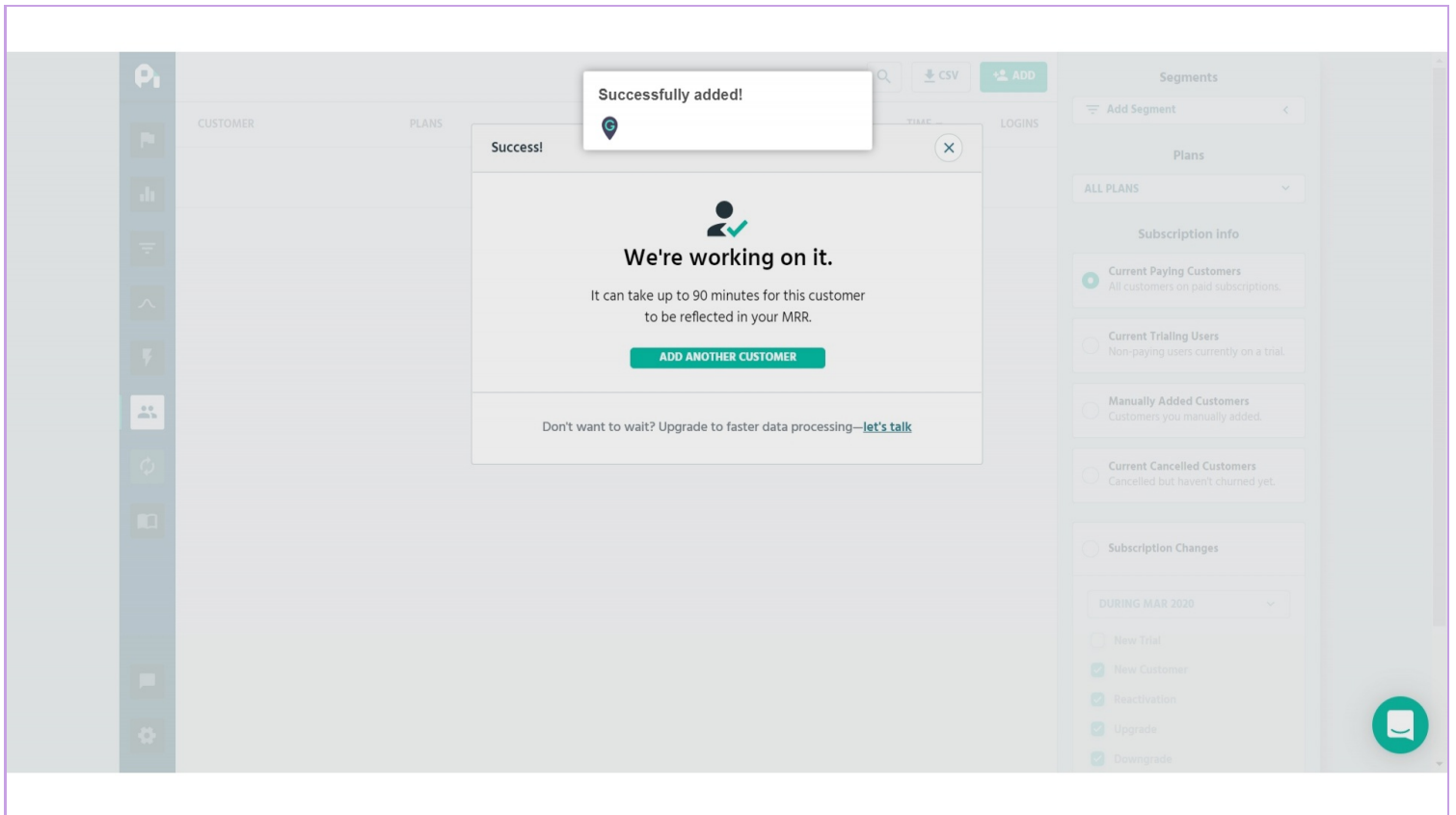
- Subscription Details:** This section contains the following fields:
 - PLAN NAME:** Example11
 - SUBSCRIPTION TYPE:** TRIAL SUBSCRIPTION (NON-PAID)
 - PLAN VALUE:** 0.00
 - PLAN CURRENCY:** USD
 - EFFECTIVE DATE:** 03/02/2020
 - CHURN DATE (OPTIONAL):** 04/02/2020
 - BILLING FREQUENCY:** MONTHLY
- Buttons:** At the bottom of the form, there are two buttons: "< BACK" and "SUBMIT".

A callout box with a location pin icon points to the "SUBMIT" button, containing the text "Click on 'Submit'".

The background shows a sidebar with navigation icons and a main content area with tabs for "CUSTOMER" and "PLANS". On the right, there are sections for "Segments" and "Plans".

Step: 07

Successfully added!



Thank You!

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