



Adding a Customer

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to add a new customer in IWDS 2.0. **The customer information section of the customer profile should be maintained with current and up to date information for the customer.**



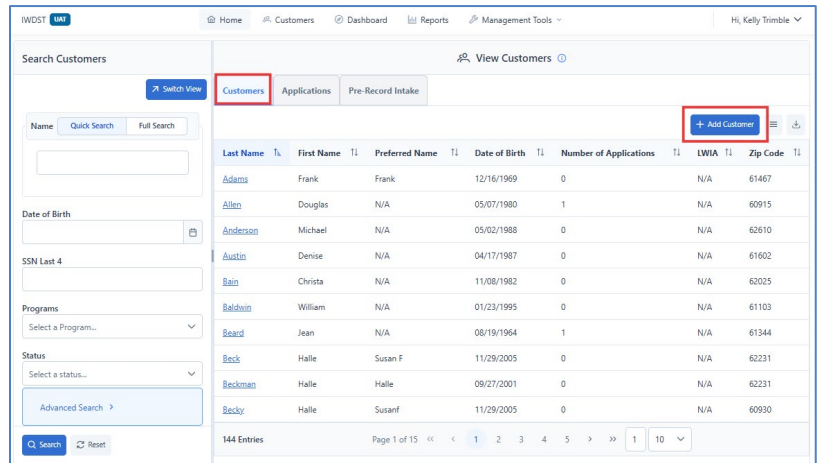
Audience

This document is designed to guide both trainers and end users through the process of adding a new customer in the IWDS 2.0 system.



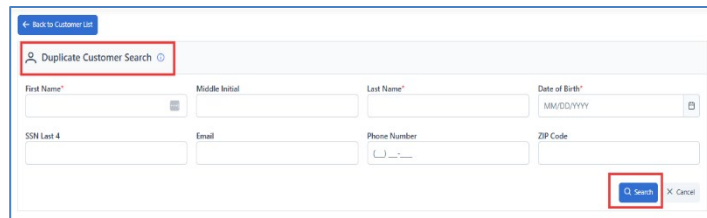
Navigate to Customers

- Log into IWDS 2.0. ([Link](#))
- Select **Customers**.
- The View Customers Page is displayed.
- The View Customers page is a two-panel page with the **Search Filter** on the left and the **List View** on the right.
- Select **Add Customer**



Duplicate Customer Search

- After clicking Add Customer, the user will perform a Duplicate search.
- Enter the required First Name, Last Name and Date of Birth. Additional fields available.



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Add Customer

- After searching a customer, possible matches will display. Preview those matches by selecting the eye icon under **Preview**.
- If the search does not return the customer with a duplicate, select **Add Customer**.
- Create Customer Profile page will Display.
- Provide the Basic required Customer information to create the Customer record.
- Click **Add Customer** to create the Customer Profile.



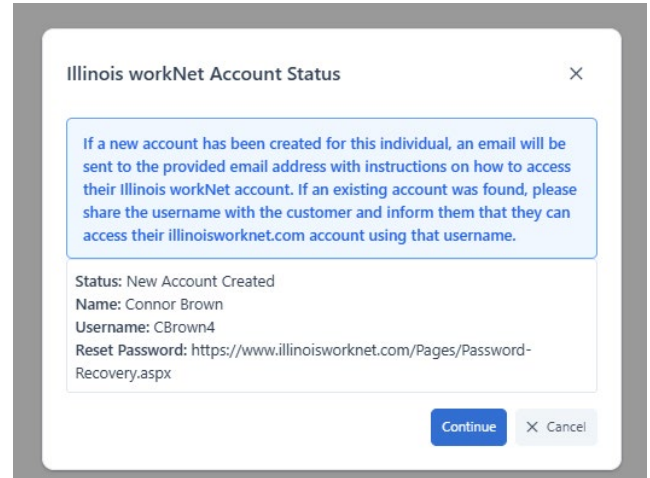
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Adding a Customer - Account Created

- After adding a customer, a Illinois workNet account will be created.
- A pop-up modal will display the Illinois workNet Account Status.
- New accounts will send an email to the new customer on accessing their Illinois workNet account.
- If an existing account was found, the user can share the username with and the reset password link.
- Click **Continue**



The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration.

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