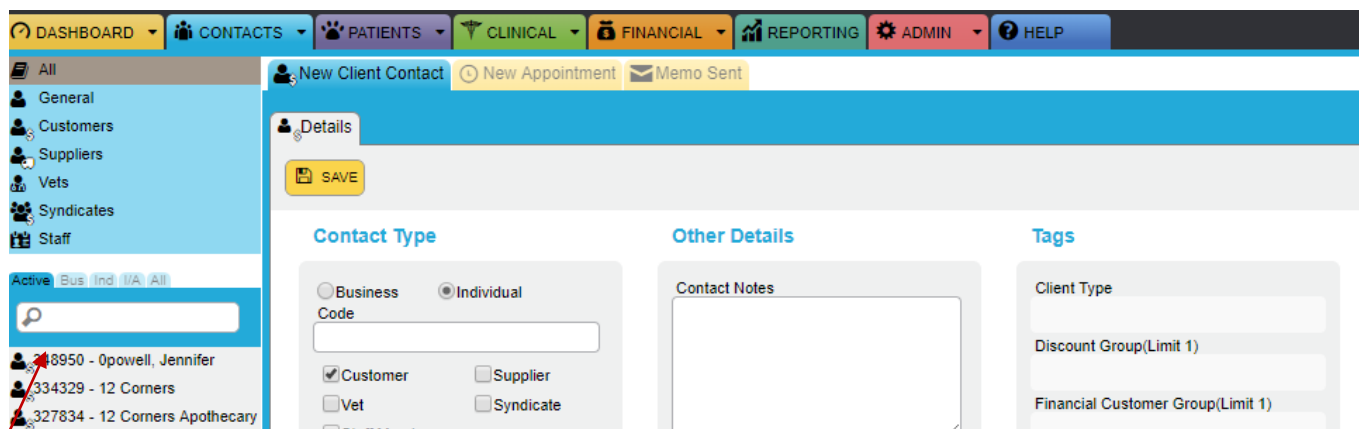# ezyVet – Creating a New Client

Cornell University
College of Veterinary Medicine

1. Select 'Contacts' from the tabs across the top of the screen

2. This will open a New Client Form in the main window

Tip: To search for an existing client use the menu to the left.

3. New Client Fields
   a. Contact Type:
      i. Select Business or Individual
      ii. Leave code field empty
      iii. Check boxes to select Customer (individual or business), Vet (if rDVM), Staff Member (anyone w/ ezyVet account), Supplier (eg. pet insurance company), or Syndicate (related contact, trainer, trailer driver)
   b. Other Details: add any notes here, if select important will highlight notes red
   c. Personal Details: add primary (and secondary) contact here
   d. Contact Methods: add as many as relevant, use name to specify the related contact, use check box to left to indicate preferred method of contact, use check boxes to right to indicate preference for reminders and automated communications, financial records, and general communications
   e. Physical Address: enter address here, will suggest address as you type then autofill
   f. Postal Address: use if mailing address different than physical address
   g. General Information:
   h. Tags: use drop down menus to select relevant options for client type, discount group, financial customer group, general (client type further details), hear about, preferred contact method.
      i. IMPORTANT: zClient Information Reviewed: review information with client and select 'csr reviewed with client'
4. Click 'Save'