

Creating a New Customer

What Is This?

Every loyalty interaction starts with a customer — earning points, redeeming rewards, moving up tiers. The **Create Customer** form lets you add a new customer to your system so you can start tracking their visits, purchases, and rewards.

Real-Life Example

Sarah runs a bubble tea shop in Bangsar. A new regular, Ahmad, has been coming in every week but isn't in the system yet. Sarah opens Pixalink, clicks **Create** on the Customers page, types in Ahmad's name and phone number, and tags him as "Walk-in". Done — Ahmad now earns points on every purchase. Because Sarah set up a welcome reward for new customers, Ahmad automatically gets a free topping on his next visit.

How to Set It Up

1. From the sidebar, go to **CRM → Customers**. You'll see your customer list with names, phone numbers, tags, sources, and statuses.

Customers				
Name	Phone Number	Tags	Source	Status
Ahmad bin Ismail	+60123456789	Walk-in, VIP	Direct	Open
Siti Nurhaliza	+60198765432	Corporate	WhatsApp	Converted
Raj Kumar	+60137891234	Walk-in	Reservation	Lead
Tan Mei Ling	+60145678901	VIP, Regular	Email	Replied
Nurul Aina	+60162345678	—	Direct	Blocked

2. Click the **Create** button at the top-right corner to open the customer creation form.
3. Fill in the customer's details:
 - **Name** (required) — how the customer will appear across the system
 - **Phone Number** (required) — must be unique within your account. The system accepts Malaysian and international numbers.
 - **Email** — useful for receipts or promotions
 - **Gender, Date of Birth** — needed for birthday rewards (customers must be at least 18 years old by default)
 - **Space** — assign the customer to a specific outlet if you have multiple locations

Name

Ahmad bin Ismail

Email

ahmad.ismail@gmail.com

Phone Number

+60123456789

Gender

Male

**Date of Birth**

05/15/1990

**Space**

Bangsar Outlet



4. On the right side panel, set the **Source**, **Status**, **Tags**, and **Tier**:

- **Source** — how this customer found you (defaults to "Direct"; change to WhatsApp, Reservation, etc. if relevant)
- **Status** — where this customer is in your pipeline (defaults to "Open")
- **Tags** — group customers with labels like "VIP", "Corporate", or "Walk-in". Tags can trigger automatic rewards if you've set that up.
- **Tier** — pick a loyalty tier if applicable. Tick **Fixed Tier** to keep them on that tier permanently.

Properties

Source

Direct



Status

Open



Tags

New tag

Tier

Tier

Gold

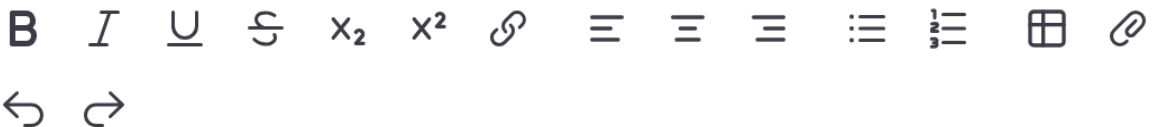


Fixed Tier

If checked, this customer will not be automatically moved to a different tier.

5. (Optional) Add any **Notes** about this customer — internal reminders, preferences, allergies, anything useful for your team.

Notes



Regular customer - prefers less sugar. Visits every Tuesday and Thursday. Allergic to peanuts.

6. Click **Create** to save the customer.

Create Customer



Name

Ahmad bin Ismail

Email

ahmad.ismail@gmail.com

Phone Number

+60123456789

Gender

Male



Date of Birth

05/15/1990



Space

Bangsar Outlet



Create

Cancel

What Your Customers Will See

Once added, the customer won't receive any notification by default — they're simply in your system. If you've set up a welcome reward or any tag-based rewards, those will be assigned to the customer automatically behind the scenes.

When the customer visits your loyalty portal or scans a QR code, they'll see their points balance, available rewards, and tier status.

Good to Know

- **Phone numbers must be unique.** If you get an error, search your customer list first — that person might already exist.
- **Source helps you track what's working.** Set it correctly so you can see which channels bring in the most customers (Direct, WhatsApp, Reservation, etc.).
- **Tags can trigger rewards.** If you've set up tag-based rewards, adding a tag to a new customer will automatically give them the matching reward.
- **The status field is flexible.** Use it to track your customer pipeline — from "Lead" all the way to "Converted". Mark difficult contacts as "Do Not Contact" or "Blocked" to keep things clean.
- **Custom fields show up automatically.** If your account has custom fields configured, they'll appear in the form without any extra setup.
- **Avatar uploads** only appear if your account has the loyalty portal avatar feature turned on.

What's Next?

- [What Are Rewards and How to Create Them](#) — set up rewards your new customers can earn
- [Customer Reward Lifecycle Explained](#) — understand what happens after a reward is assigned