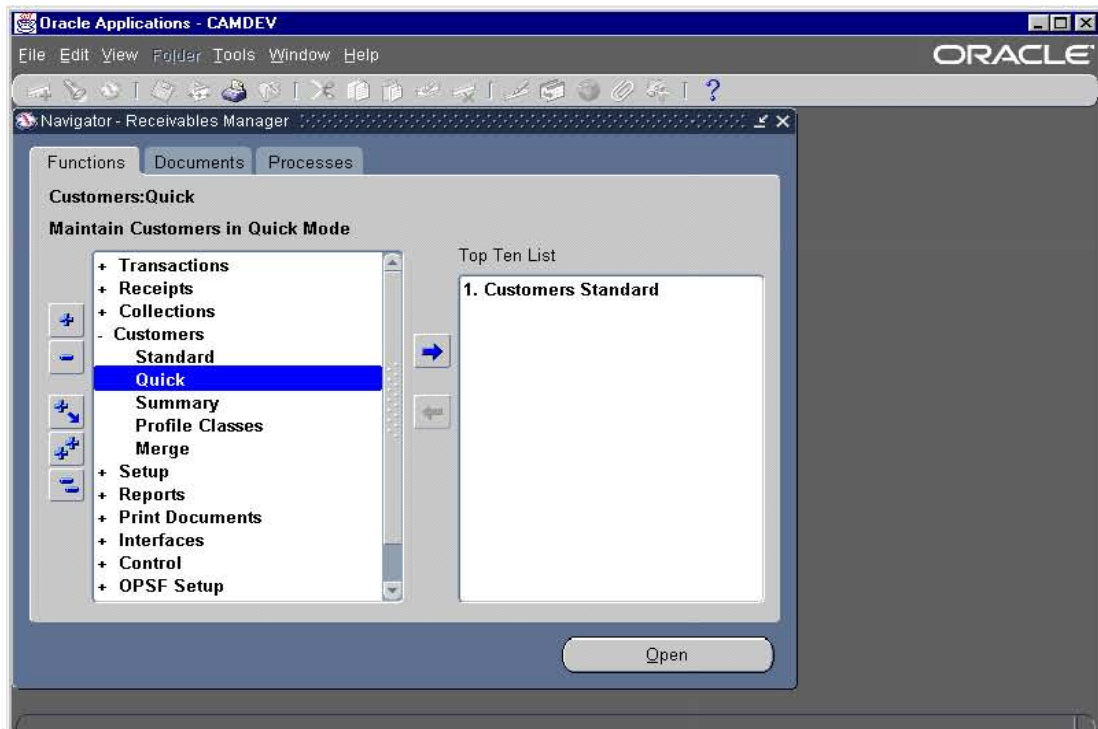


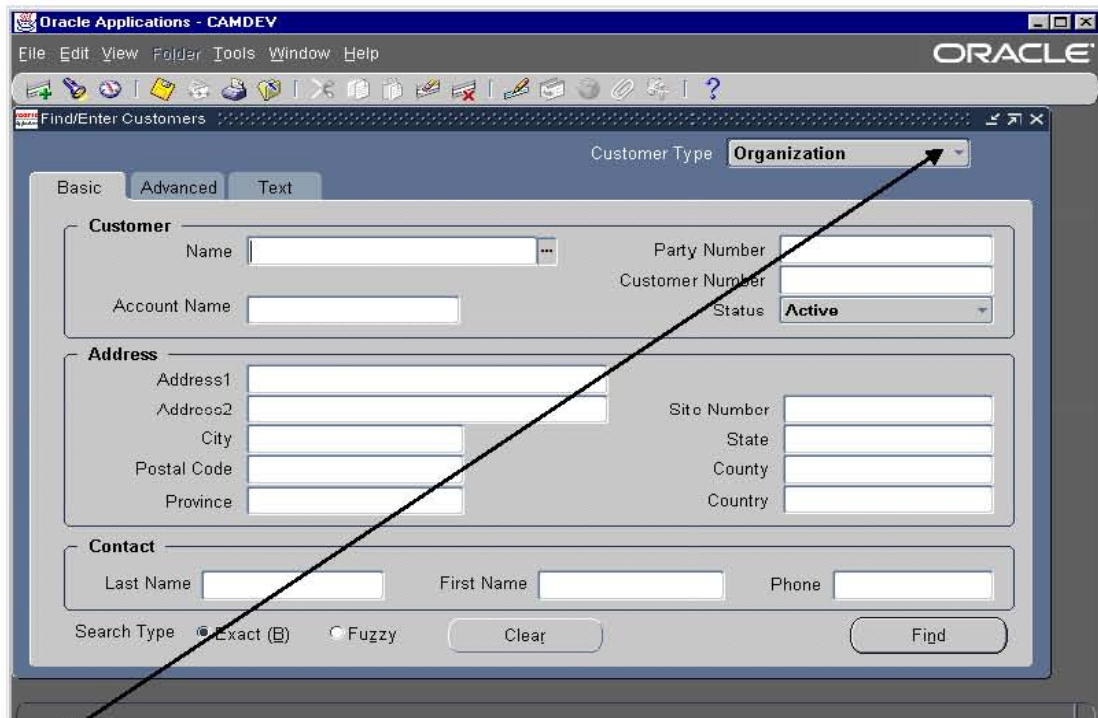


CREATE A CUSTOMER

Within the Receivables Business User menu select **Customer > Quick**



The following form appears on the screen in the basic tab



Select the option of **All** in the Customer Type field.

Avoid duplication

Select the Tick box "Fuzzy", at the bottom left hand side.

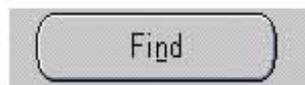
To ensure the customer has not already been created type the customer



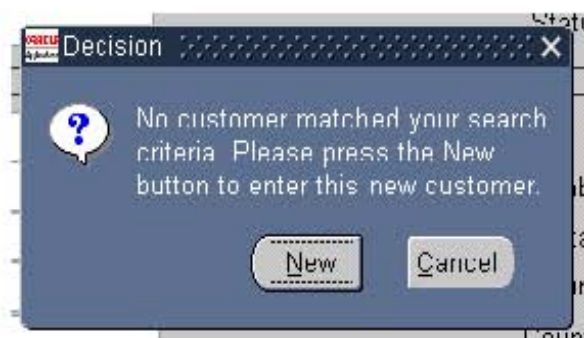
A screenshot of a software window titled "Customer". It features a "Name" label followed by a text input field. The input field contains a blacked-out name and a small "..." button to its right.

name in the name field
and use the Postal Code field where possible.

And click on

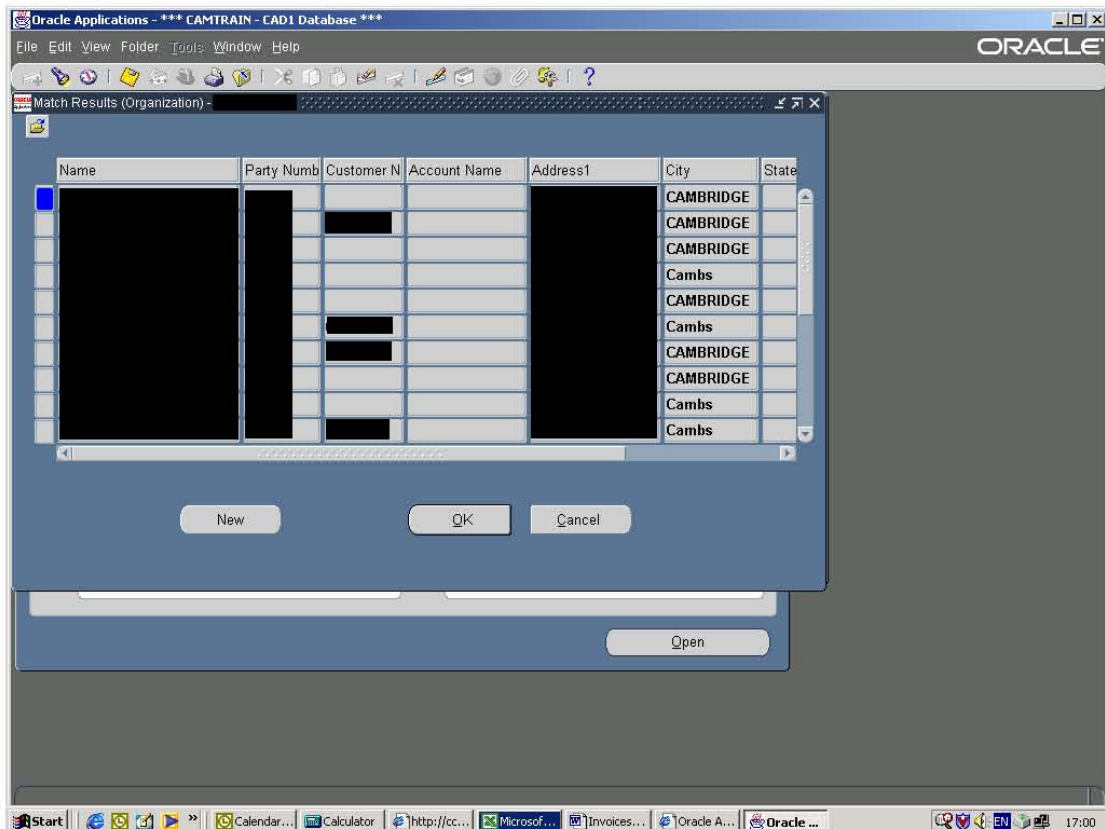


If this information window appears it clearly states the customer does not exist in the format it has been typed in the field.

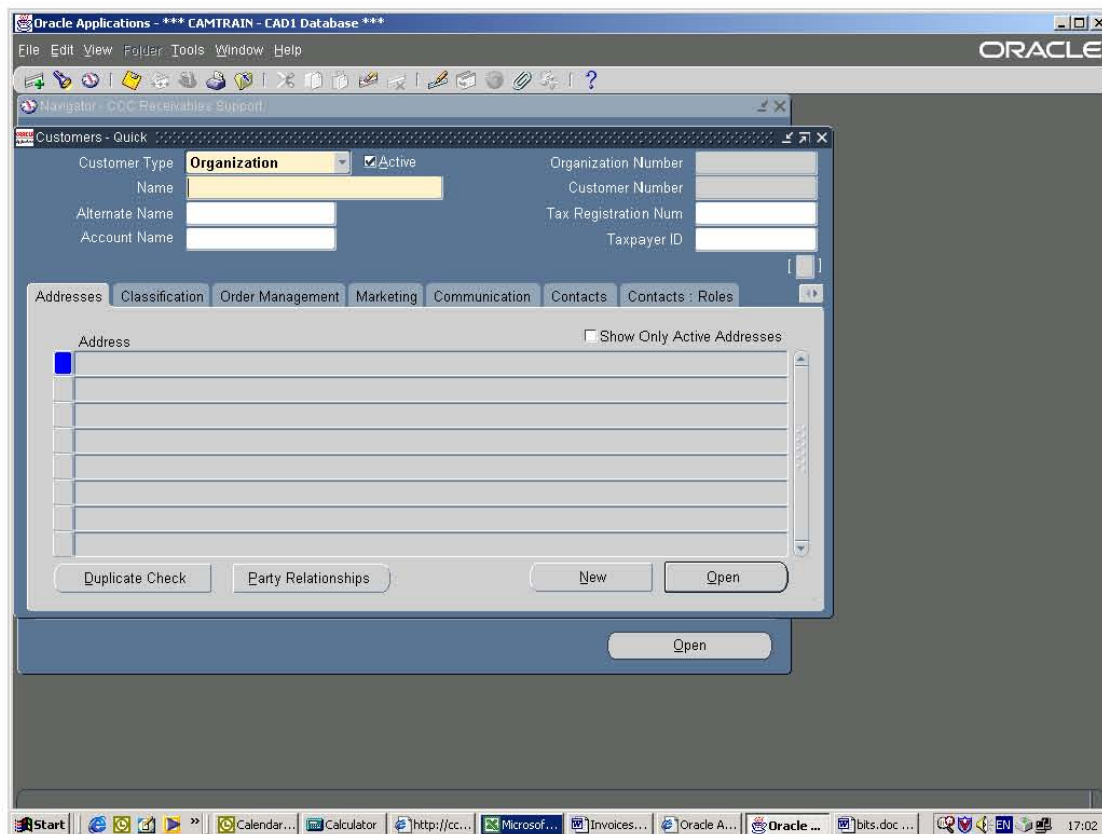


However if the screen below appears, then some matches have been found. In this case, scroll down the list, and if the Customer you wish to invoice is there, then write down the Customer Number”.

If the Customer you wish to create is not there, then click **New**.

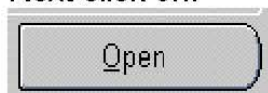


The following screen will now appear:



Make sure you change the “Customer Type” to either Organization or Person (depending on what type of Customer). Then type in the Customers name.

Next click on:



The Customers addresses (NEW) screen appears.

Select the save icon



The status bar at the bottom of the screen informs you
' Transaction complete: 3 records applied and saved'


Site Number 1476

The site number is now generated.

Click on the

A screenshot of a software interface for managing customer records. The form is titled 'Customer' and includes fields for 'Customer type' (PERSON), 'Title' (Miss), 'First Name', 'Last Name', 'Address Name', 'Suffix', 'Account Name', 'Phone Number', 'Customer Number', 'Tax Registration No.', and 'Manager ID'. A 'Save' button is visible. Below the form is a navigation bar with tabs for 'Addresses', 'Classification', 'Order Management', 'Marketing', 'Telephones', 'Contacts', 'Telephones', and 'Contacts'. The 'Addresses' tab is active, showing a list of addresses with one entry for 'United Kingdom'. An arrow points from the 'Customer Number' field to the 'United Kingdom' address entry.

The customer number is now populated

Click  on this screen above.

The system returns to the main menu screen/Navigator.