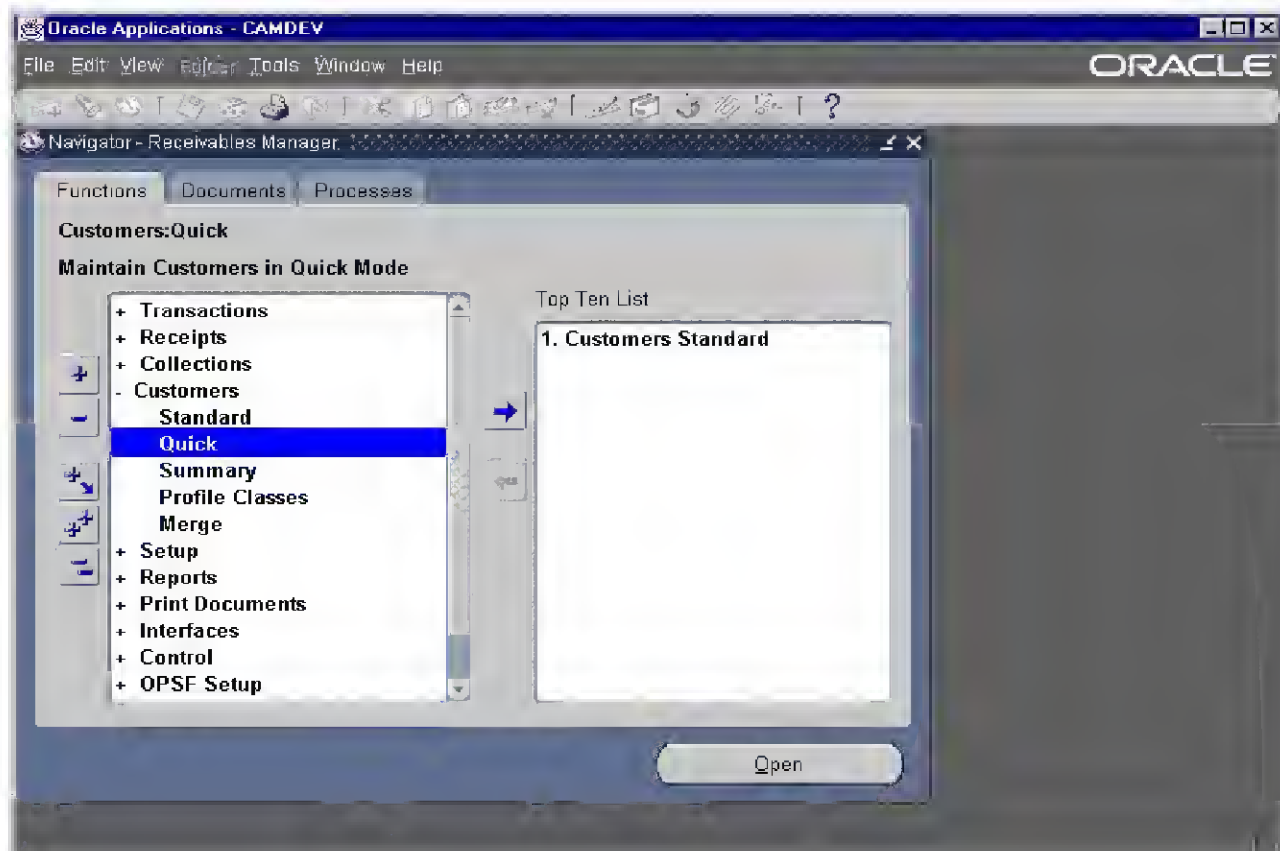


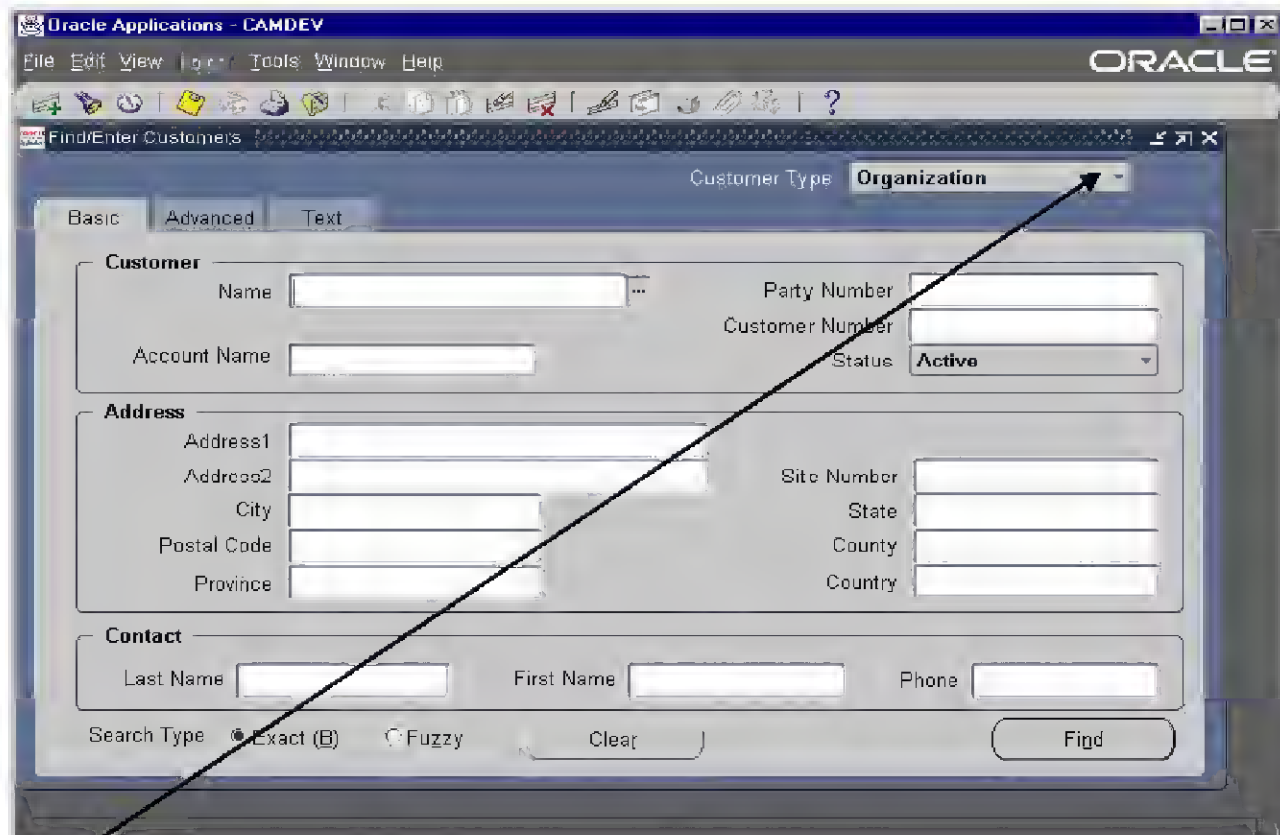


## **CREATE A CUSTOMER**

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



The following form appears on the screen in the basic tab

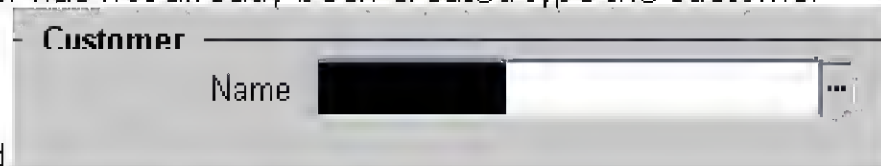


Select the option of **All** in the Customer Type field.

### Avoid duplication

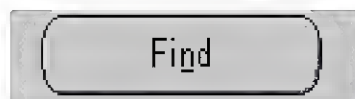
Select the Tick box "Fuzzy", at the bottom left hand side.

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



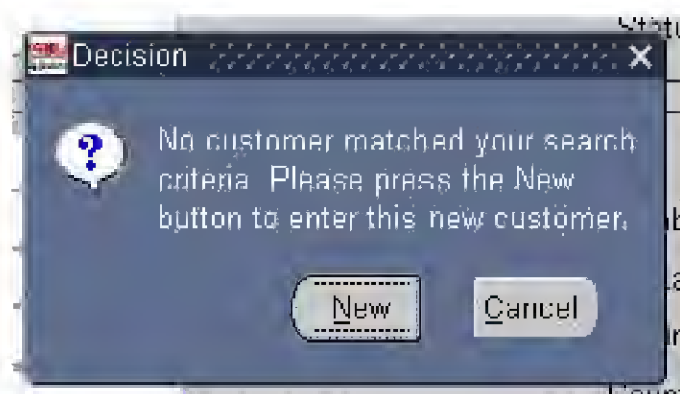
A screenshot of a software window titled "Customer". It contains a single text input field labeled "Name". The field is currently empty, and a black rectangular redaction box is placed over the text area. To the right of the input field, there are three small dots indicating a dropdown menu.

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



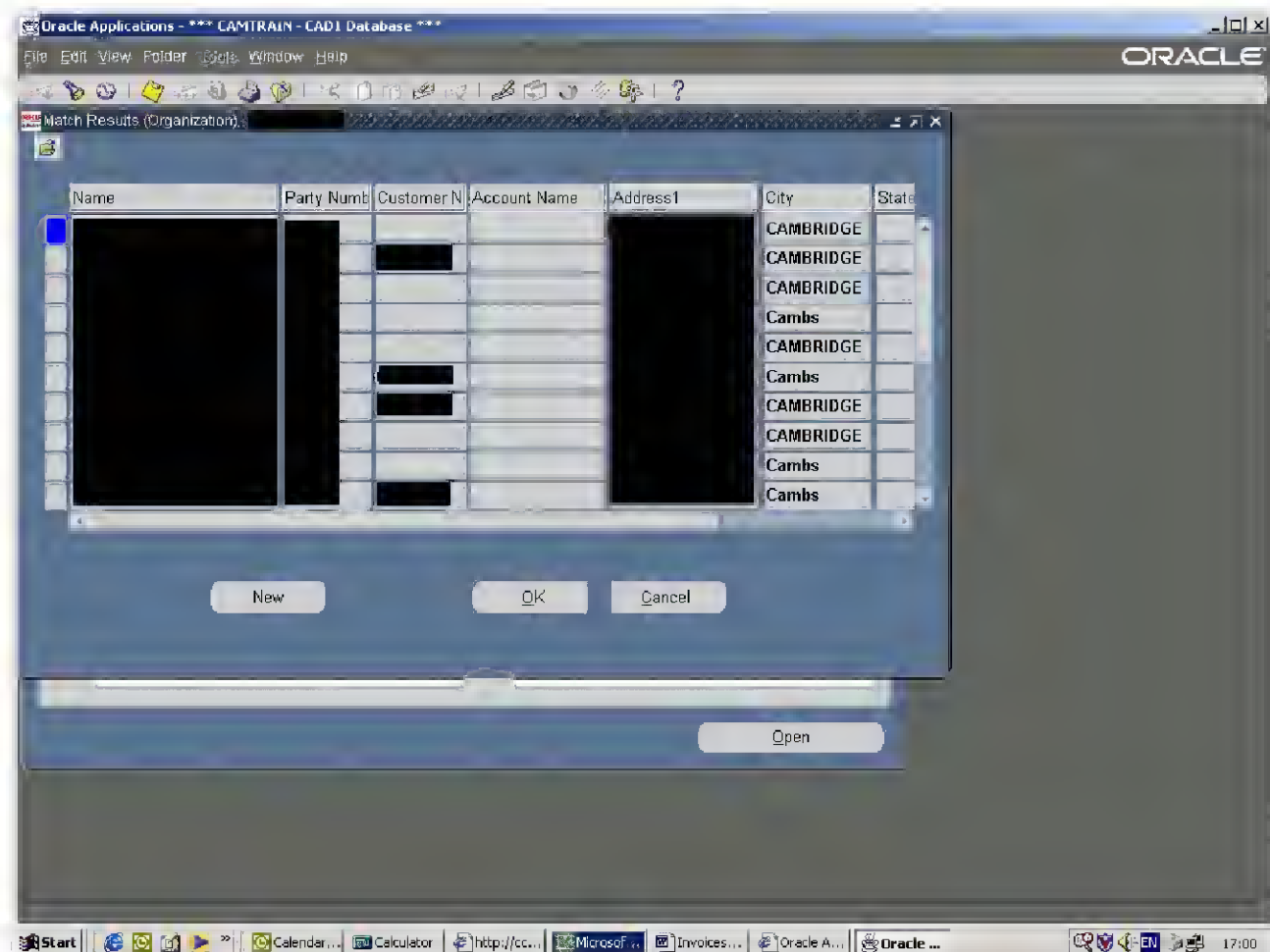
And click on

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

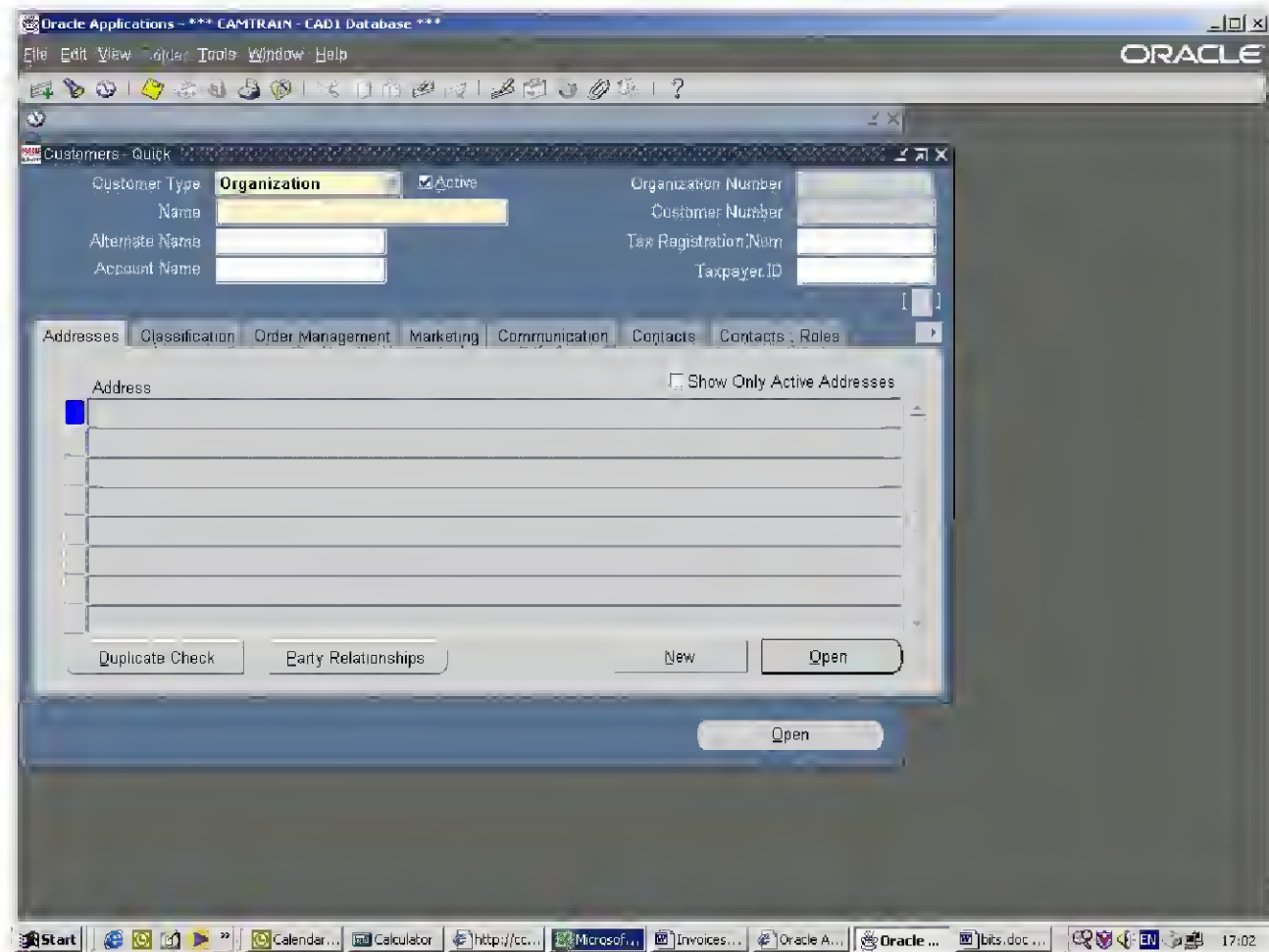


However if the screen below appears, then some matches have been found. In this case, scroll down the list, and if the Customer you wish to invoice is there, then write down the Customer Number”.

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

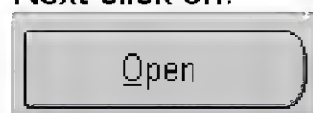


The following screen will now appear:



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.

Click in the white address field and the customer address screen appears, see below: -

Country **United Kingdom** Site Number

Context Value **UAA** UK/Africa/Australasia Address Style

Address Line1

Address Line2

Address Line3

Address Line4

Town/City **Ely**

County **Cambs**

Postal Code

The yellow fields are mandatory, enter data and click OK  
The address field is now populated.

Next, tick the boxes of "Bill To" and "Ship To" – per below:

Country **United Kingdom** Site Number

Address

EDI Location  Joint Billing Address  Active

Addressée

Business Purpose Characteristica Communication Contacts Contacts Roles Bank Accounts

Bill To  Ship To  Market

Statements  Billing  Legs

Select the save icon

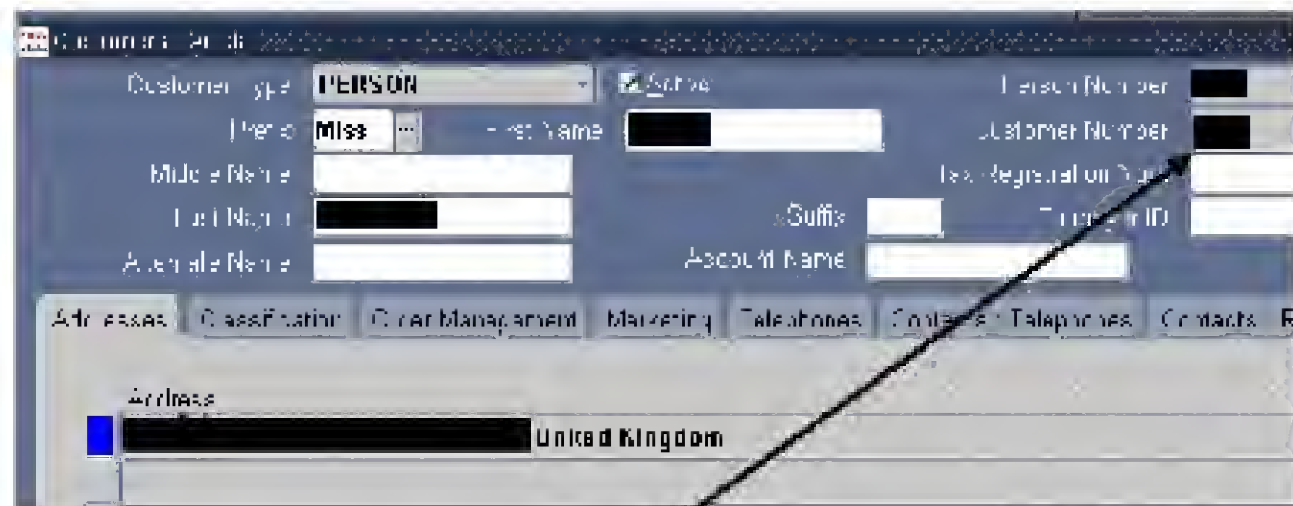


The status bar at the bottom of the screen informs you  
**' Transaction complete: 3 records applied and saved'**

A screenshot of a software interface showing a text field labeled 'Site Number' with the value '1476' entered.

The site number is now generated.

Click on the

A screenshot of a software interface showing a customer record form. The form includes fields for Customer type (PERSON), Gender (Miss), First Name, Last Name, Middle Name, Surname, Account Name, Person Number, Customer Number, Tax Registration Date, and TIN/ID. Below the form are tabs for Addresses, Classification, Order Management, Marketing, Telephones, Contacts, and Telephones. An arrow points from the text below to the Customer Number field.

The customer number is now populated

Click  on this screen above.

The system returns to the main menu screen/Navigator.