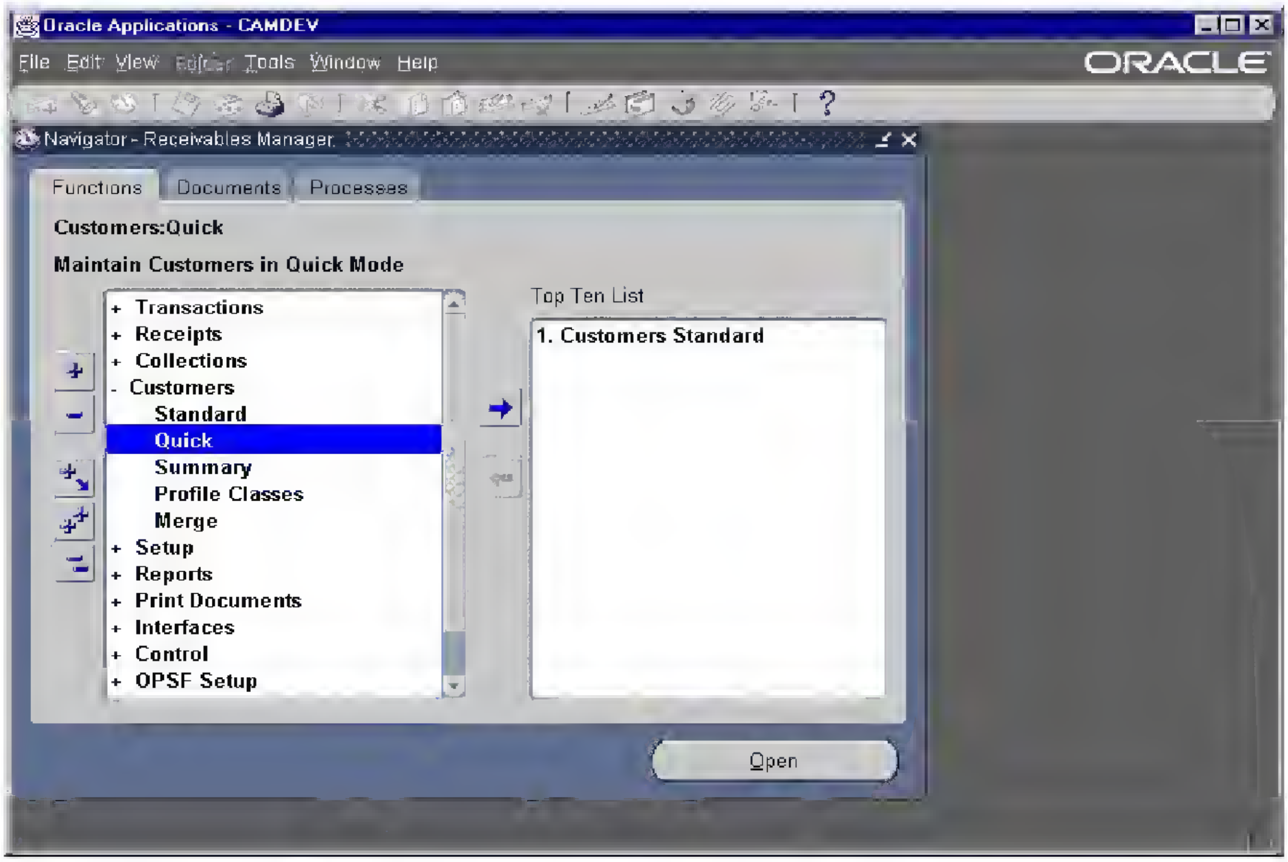
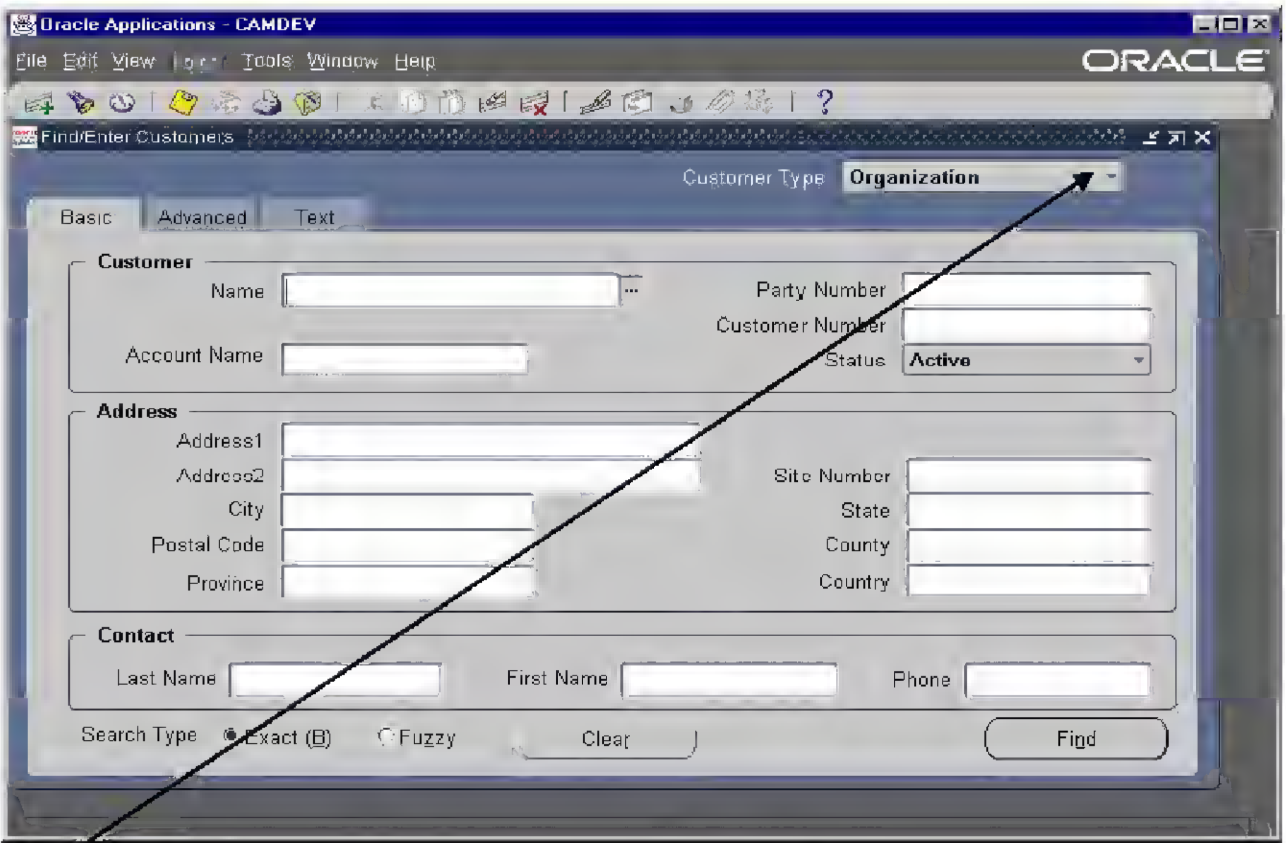
CREATE A CUSTOMER

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



The following form appears on the screen in the basic tab

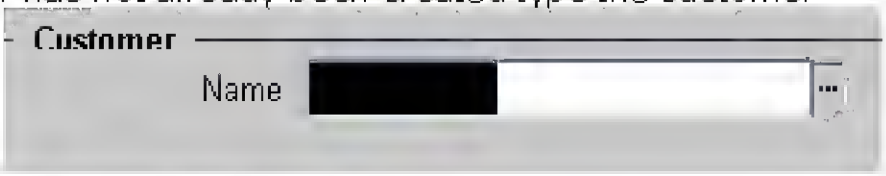


Select the option of **All** in the Customer Type field.

Avoid duplication

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

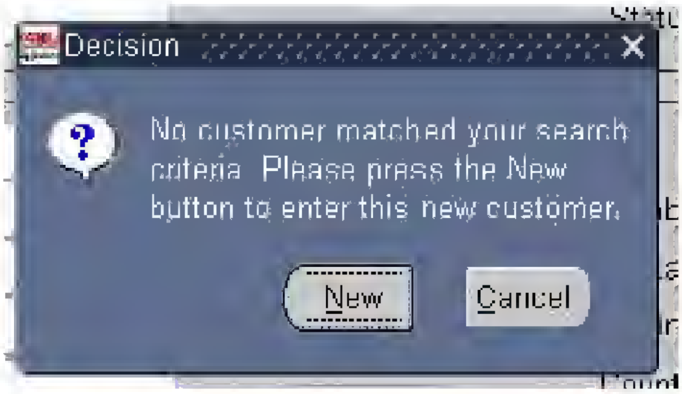
To ensure the customer has not already been created type the customer name in the name field



and use the Postal Code field where possible.

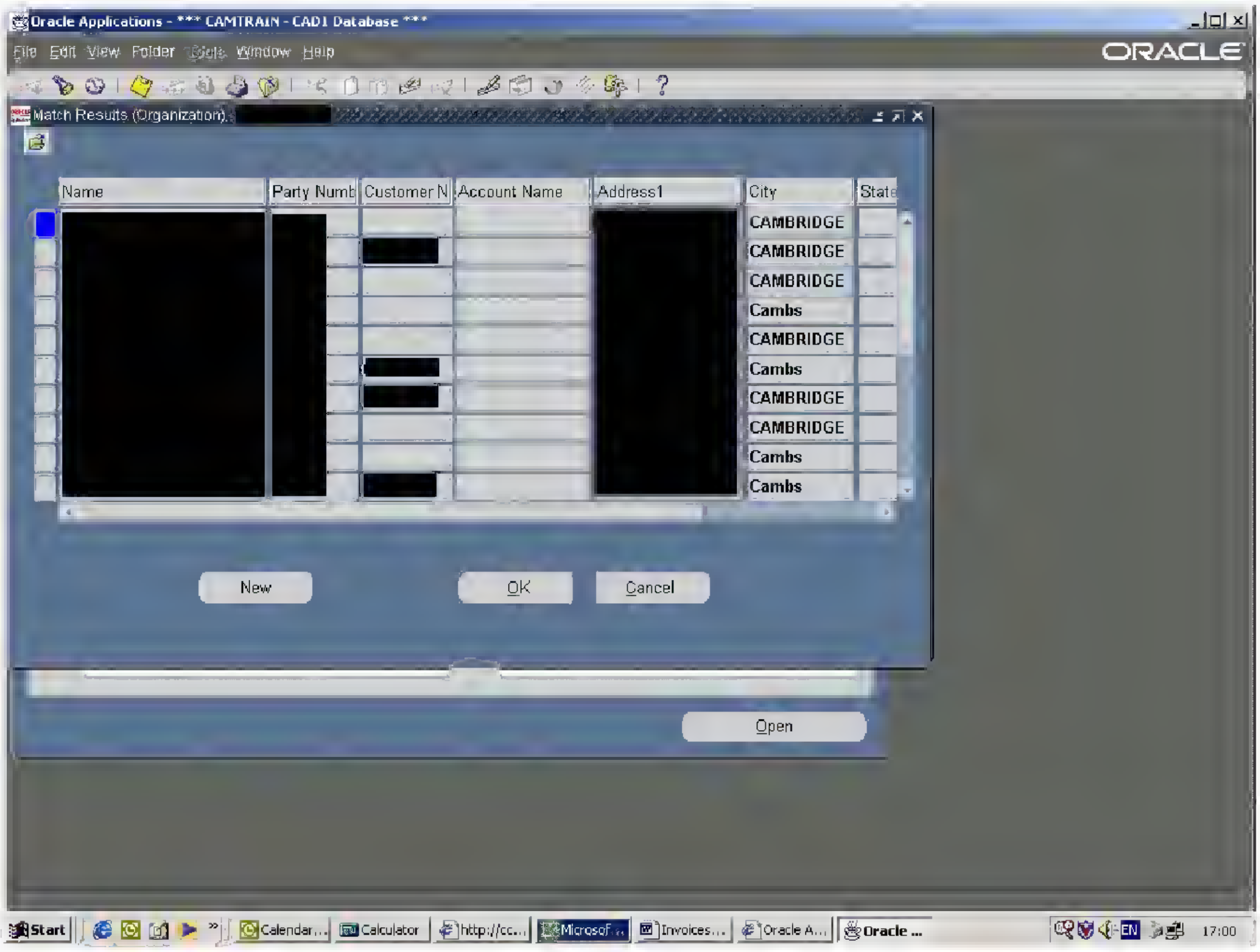
And click on

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

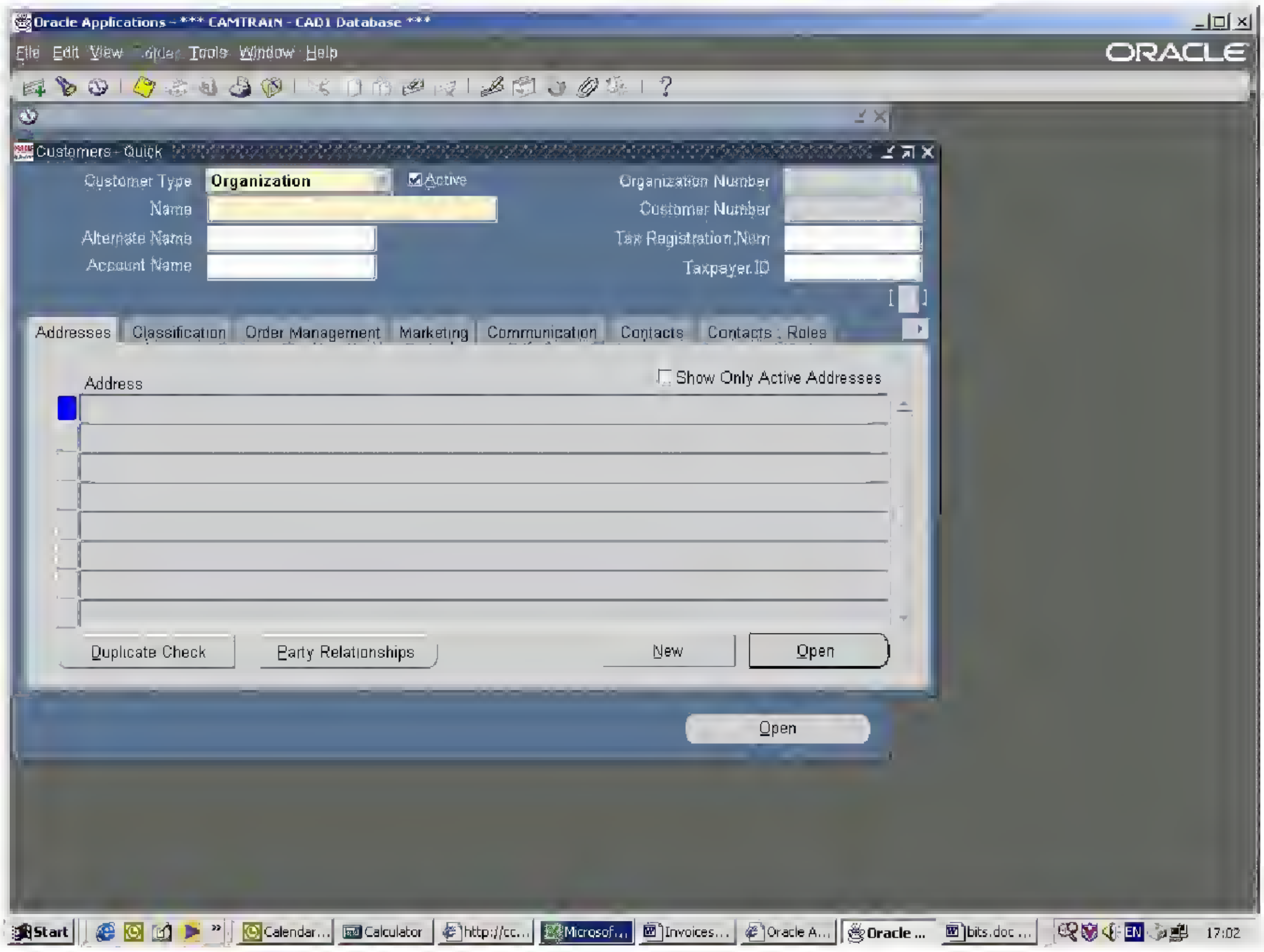


However if the screen below appears, then some matches have been found. In this case, scroll down the list, and if the Customer you wish to invoice is there, then write down the Customer Number".

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

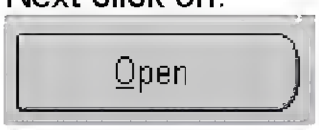


The following screen will now appear:



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:

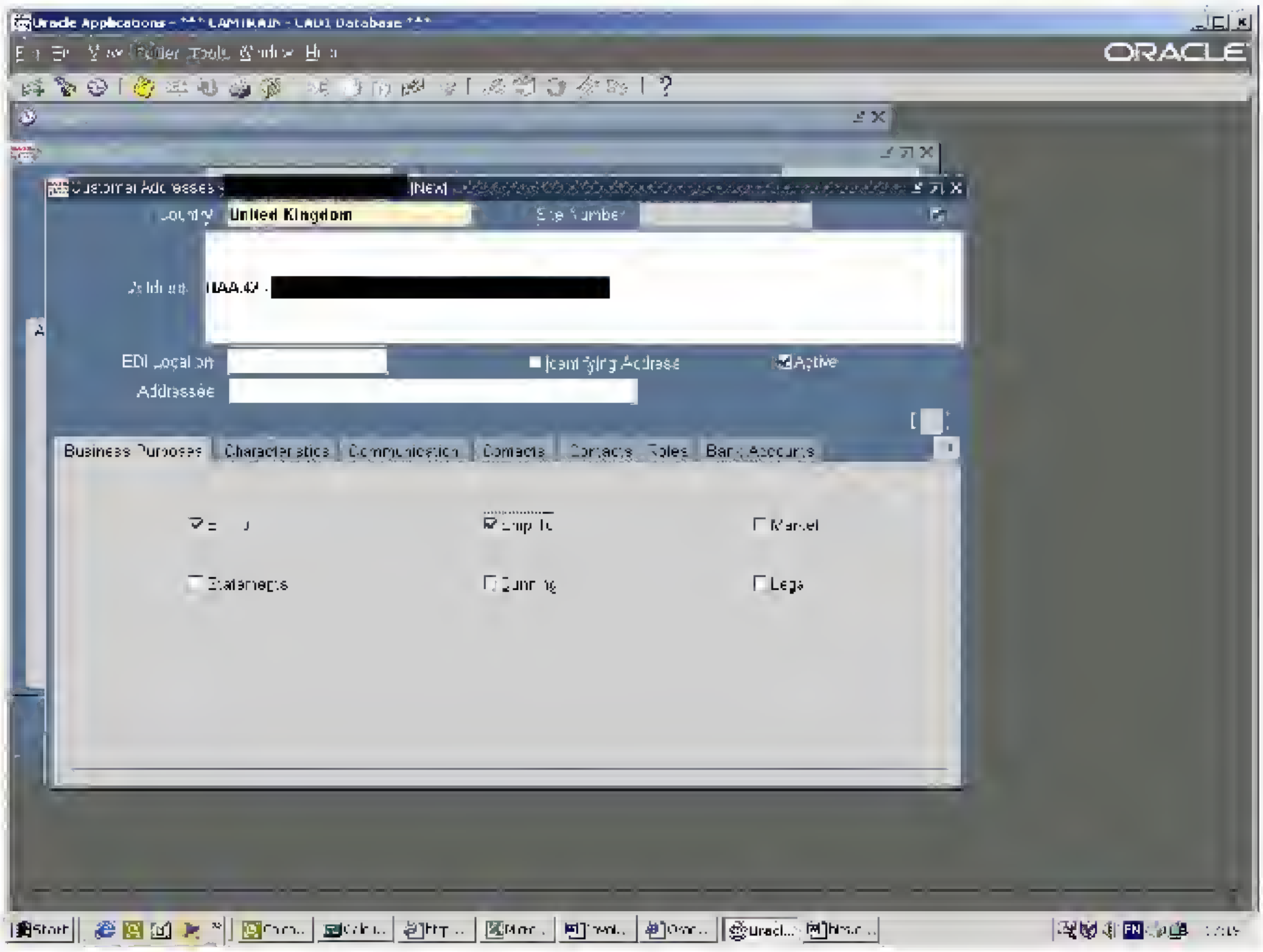


The Customers addresses (NEW) screen appears.

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

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:

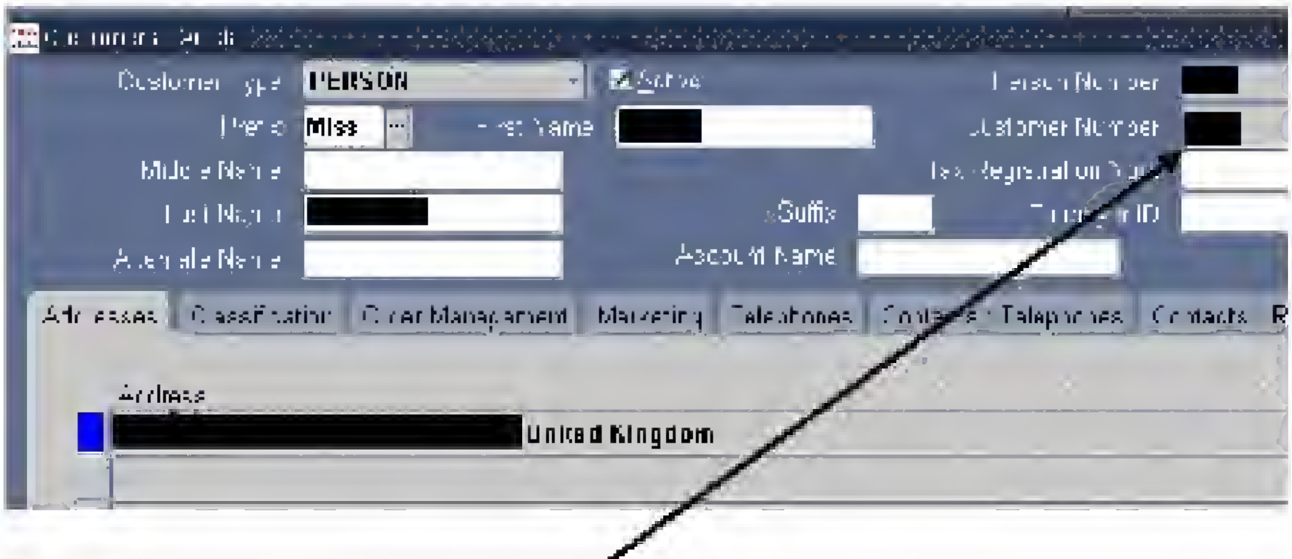


Select the save icon 

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

The site number is now generated.

Click on the 



The customer number is now populated

Click  on this screen above.

The system returns to the main menu screen/Navigator.