Creating a Customer

Contents

1 Creating a Customer

1.1 Customer Creation

For sales orders to be entered on to the system for a specific customer then a customer code and record must exist for that customer.

1. Open the form Customer Wizard -WHSORA035 (It is possible to find the form in the main menu using the standard search facility in the left hand tool bar, click on the magnify glass)
2. The form will open in query mode (turquoise bar top of the screen) the form must be set to entry mode. Use either the 'F4' key on the keyboard or select the cancel query icon.
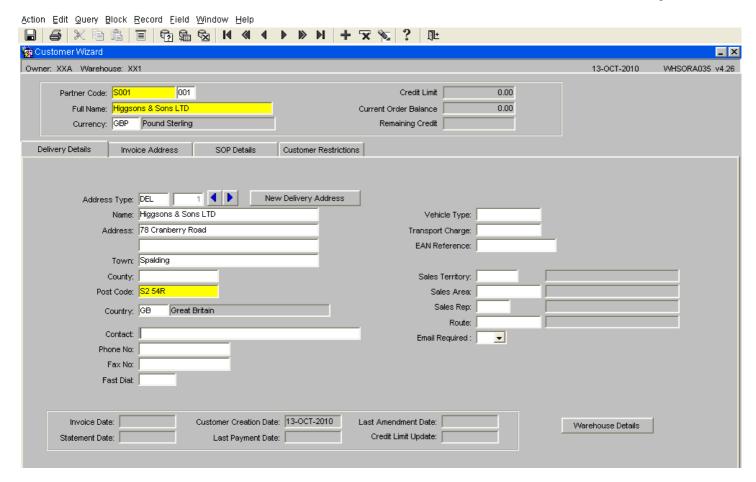

1.2 Delivery Details

Details to enter are the fields marked in yellow which are mandatory for the system.

1. **Partner Code** - a unique 10 alpha/numeric code provided by head office
2. **Full Name** - The Customer name that will be displayed on the documentation

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Action Edit Query Block Record Field Window Help

Customer Wizard

Owner: XXA   Warehouse: XX1   13-OCT-2010   WHSORA035 v4.26

Partner Code: S001   001   Credit Limit   0.00
Full Name: Higgsons & Sons LTD   Current Order Balance   0.00
Currency: GBP   Pound Sterling   Remaining Credit

Delivery Details | Invoice Address | SOP Details | Customer Restrictions

Address Type: DEL   1 ◄ ►   New Delivery Address
Name: Higgsons & Sons LTD   Vehicle Type:
Address: 78 Cranberry Road   Transport Charge:
                                                   EAN Reference:
Town: Spalding
County: Sales Territory:
Post Code: S2 54R   Sales Area:
                                                      Sales Rep:
Country: GB   Great Britain   Route:
Contact: Email Required :   ▼
Phone No:
Fax No:
Fast Dial:

Invoice Date: Customer Creation Date: 13-OCT-2010   Last Amendment Date: Warehouse Details
Statement Date: Last Payment Date: Credit Limit Update:

Though not mandatory (except post code) enter all known address details, as these will be displayed on any despatch documentation such as labels, despatch note or collection note.

Once the above fields have been completed, save the entered record by either using 'CTRL and S' or selecting the 'Save Record' icon.

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2 Document History

Version	Date	Status	Reason	Initials
Version 1	05/11/2010	RELEASED		SPM

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