

# **Creating a Customer**

Aptean Ltd  
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# 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.

The screenshot shows the 'Customer Wizard' application window. At the top, there is a menu bar with 'Action', 'Edit', 'Query', 'Block', 'Record', 'Field', 'Window', and 'Help'. Below the menu is a toolbar with various icons. The main window title is 'Customer Wizard' and it shows 'Owner: XXA Warehouse: XX1' and the date '13-OCT-2010' along with the version 'WHSORA035 v4.26'. The form is divided into several sections:

- Partner Information:** Partner Code: S001 001 (highlighted in yellow), Full Name: Higgsons & Sons LTD (highlighted in yellow), Currency: GBP Pound Sterling. Financial fields include Credit Limit (0.00), Current Order Balance (0.00), and Remaining Credit.
- Delivery Details:** Address Type: DEL 1 (highlighted in yellow), Name: Higgsons & Sons LTD, Address: 78 Cranberry Road, Town: Spalding, Post Code: S2 54R (highlighted in yellow), Country: GB Great Britain. Other fields include Vehicle Type, Transport Charge, EAN Reference, Sales Territory, Sales Area, Sales Rep, Route, and Email Required.
- Invoice and Statement Dates:** Invoice Date, Statement Date, Customer Creation Date: 13-OCT-2010, Last Payment Date, Last Amendment Date, and Credit Limit Update.
- Warehouse Details:** A button labeled 'Warehouse Details' is located at the bottom right.

## 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



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:  
 Town: Spalding EAN Reference:  
 County: Sales Territory:  
 Post Code: S2 54R Sales Area:  
 Country: GB Great Britain Sales Rep:  
 Contact: Route:  
 Phone No: Email Required:  
 Fax No:  
 Fast Dial:

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

Warehouse Details

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.



## 2 Document History

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

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