

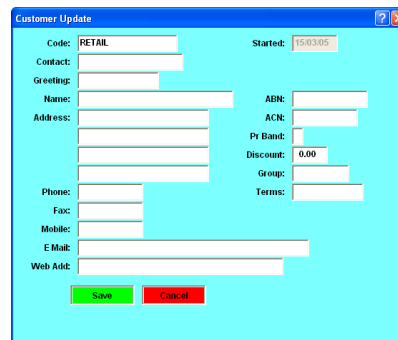
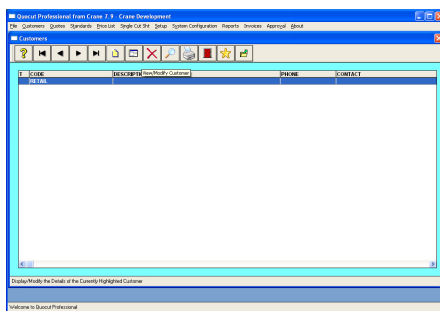
SETTING UP A CUSTOMER

Each quote has an option to be assigned to a customer for reference purposes. If multiple quotations are prepared on a regular basis for the same customer, their details can be entered into the customer database. For non-repeat work, a generic code can be used, which will allow the user to complete the customer's name and details for the quotation. An example of a generic code could be RETAIL, COD or GENERAL etc. Any number of generic codes can be created.

1. Setting up a customer

To set up a customer select the **Customer** menu option:

- Select **Add** to create a new customer or **View/Modify** to edit details.
- A dialogue box will appear to allow customer's details to be recorded into the database – choose which fields you wish to complete.
- **SAVE.**



FIELDS AVAILABLE FOR CUSTOMER DETAILS:

Code: Codes must never have spaces and can either be part of a company name or something that is meaningful to the user and should be unique to each customer entry.

Note: *The field takes a code of up to eight letters/numbers.*

Contact: The contact person normally dealt with.

Greeting: (Optional) How correspondence is to be addressed.

Name: The trading name of an entity for the full name of an individual (given name first).

Address: Record address details. **Note the site address is usually recorded at the time of raising the quotation.**

Phone, Fax, Mobile, Email, Web Address, ABN/ACN: As appropriate.

Price Band: This option allows a default price band to be assigned to a client's account, which will be used when the quotation is raised. It is recommended that price band 1 be used for RETAIL.

Discount: Complete this field if customer normally receives a discount. This will be automatically added to the quotation when raised, but can be modified by the quote or item/s.

Group (Optional): This field is optional and can only be used if a database has been established in menu option Setup | Customer Groups.

Terms (Optional): This field is used to record terms for payment if invoicing functionality is used.

For further assistance contact the support line on 1800 227 335