## Training Document How to Set up a New Customer in AR



In this lesson you will learn about using the Accredo system.

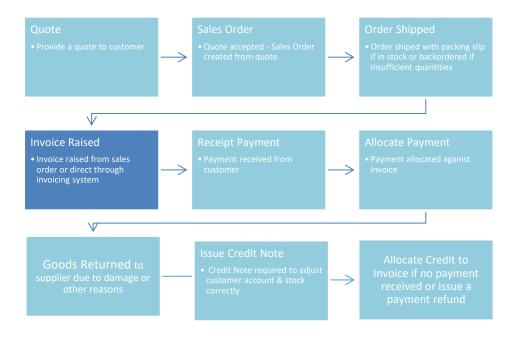
After completing this lesson you will be able to:

• Set up a new customer

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## **Process flow**



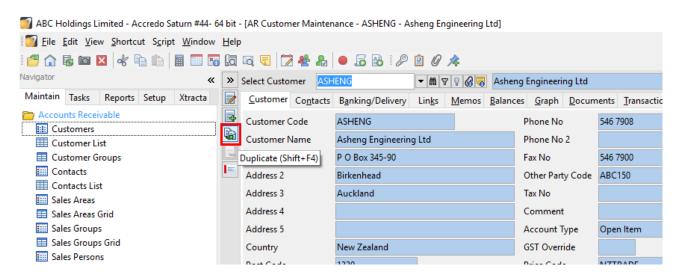
### How to Set up a new Customer

- Maintain / Accounts Receivable / Customers
- Click on the Insert Button 🖳 (F4) to create a New Customer from Scratch

🇊 ABC Holdings Limited - Accredo Saturn #44- 64 bit - [AR Customer Maintenance - ASHENG - Asheng Engineering Ltd]

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Navigator «	<b>»</b>	Select Customer ASH	ENG	▼ 聞 🛛	' 🛛 🚱 😽	Ashen	g Engineering Ltd			
Maintain Tasks Reports Setup Xtracta		Customer Contacts	Banking/Delivery	Lin <u>k</u> s	<u>M</u> emos	Balance	es <u>G</u> raph <u>D</u> ocun	nents <u>T</u> ra	nsactions	
Accounts Receivable  Customers  Customer List  Customer Groups		nsert (F4) <sup>er</sup> Name	ASHENG Asheng Engineering P O Box 345-90	ı Ltd			Phone No Phone No 2 Fax No	546 7908 546 7900		
🛗 Contacts		Address 2	Birkenhead				Other Party Code	ABC150		
E Contacts List E Sales Areas		Address 3	Auckland				Tax No			
Sales Areas Grid		Address 4					Comment			
📰 Sales Groups		Address 5					Account Type	Open Ite	m	
Sales Groups Grid		Country	New Zealand				GST Override			
Sales Persons Sales Persons Grid		Post Code	1330				Price Code	NZTRAD	E	
Buying Group (Categories 1)		Web Address	www.asheng.co.nz	_		<b>G</b>	Discount Code	2		
Categories 2		Email Address	info@asheng.co.nz				Buying Group	SILVER		
Memo List		Currency	NZD				Category 2			
Link List		Customer Group	0000				Credit Limit			
Inventory Control		Branch					Bill To Customer			
C Invoicing System		Location					Stop Credit			
Invoice List		Sales Area	AUCK				Order No Req'd			
Shippers Promotion (Categories 1)		Sales Person	NT				Back Order			
Categories 2		Inactive								
Memo List			_							
🛄 Link List										

• Or you can click on the Duplicate Button (Shift+F4) which will copy some of the data in set up fields from the existing one.



You will need to change the Customer Code for the new customer and the customer name along with any other data in all the fields and other tabs as required e.g. Contacts and Banking/Delivery Tabs

# Contact

For further information or for assistance with Accredo please do get in touch with us.

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