Creating a New Customer

1. Go to Setup and then Click Customer icon

II •	Orders	Production	RMA	Purchasing	Invento	ny Repo	rts Accou	nting Projects	CRM	Setup			
Custome	rs Ship	ping Pricing	Product	s Designers	Vendors	Inventory	Interfaces	Reports Import/Export Employees	Ø Rejects	Capacity Planning •	Containers	System	
🕥 Bu	siness Intel	ligence 🥥	CRM 🤞	iDashboard	is 🔱	Support	FeneVis	ion University					

2. Click +, Enter Customer Name, Add a Site Name if customer has multiple locations. Or to edit an existing customer double-click the customer name.

tive Customers 💌 Type: {All} 💌 Gr	roups: {All}	▼ Filter:		•	Column: {All}	•
Customer	Customer ID	Address	City	State	Company Phone	Company Email Ad
Assura Windows and Doors	18	1543 N. Powerline Road	Pompano B	Be FL	(954) 781-4430	gdacal@assurawin
Customer Default[Customer Default MAIN]	DEFAULT					
Elegant Shower	20	4805 SW 75th Avenue	Miami	FL	(305) 424-9254	frank0172@hotma
Magic Mirror	17	600 Roseland Dr.	West Palm	E Fl	(561) 296-2209	alex@magicmirrora
Quality Glazing Contractors	19	Calle Concepcion	San Juan	PR	(787) 764-9404	rosemary.rivera@
TEST CUSTOMER	14	12345 Street	Miami	FL		
	Add	Customer				×
	Add	Customer :: Custom	ier			×
	Add Type Cust	Customer :: Custom omer ID: 23	er			×
	Add Type Cust Cust	Customer :: Custom omer ID: 23 omer Name:	ier			×
	Add Type Cust Cust	Customer :: Custom omer ID: 23 omer Name: 1 ID: 23	ier	2		×
	Add Type Cust Site 1 Site 1	Customer :: Custom omer ID: 23 omer Name: 1 ID: 23 Name:	ier	5		×
	Add Type Cust Site I Site I Site I	Customer :: Custom omer ID: 23 omer Name: 1 ID: 23 Name: 1	ier	2		×

3. In the general tab, add all the contact information and then copy to Financial and Shipping

Edit Cus	tomer - 23 -	LA Tempering

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Customer			Status
23 - LA Tempering 划		Active 👻	
General Financial Shipping Documents	User Defined		
Address	Phone Number	Copy To	
6550 NW 82 ave		Financial Shipping	
Address 2	Fax Number		
Miami FL 33166	Email Address		
USA			
Order Cutoff Day	Uplo	ad Action	
{None}	▼ {No	one}	*
tool The			

 4. In the financial Tab, fill: sales person, internal person, terms, credit limit, and taxor exemption Edit Customer - 23 - LA Tempering

Edit Customer - 25 - LA Tempering				
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Customer 23 - LA Tempering				Status Active
General Financial Shipping Documents	User Defined			-
Address	Phone Number	Copy	/ То	
6550 NW 82 ave		Ger	neral Shipping	
Address 2	Fax Number			
Miami FL 33166	Email Address			
USA				
Salesperson	[Tax Exempt	Tax Schedule	
Juliao, Humberto E 🧹	•	No 🝷	Miami-Dade	
Internal Salesperson		Tax		
Arteaga, Javier 🗸	•	6.00%	FL-Sales Tax	
Order Currency		Tax 1		
US Dollar	•	1.00%	Miami-Dade Surtax	
Pricing		Tax 2		
•••		0.00%		
Surcharge		Tax 3		
		0.00%		
Terms		Tax 4		
NET 30 V	 Exception Dates 	0.00%		
Invoice Group				
{None}	•			
Invoice Minimum Invoice Surcharge Delivery Mi	inimum Delivery Surcharge			
\$0.00 \$0.00 \$0.00	\$0.00			
Credit Limit		Open AR		
\$30,000.00 V		\$0.00		

5. To add the Surcharge click on the Surchage button, on the new window, check the override checkbox and also input the corresponding % on the percentage field

Customer 23 - LA Tempering 📎			Status Active
General Financial Shipping Documents	User Defined		
Address	Phone Number	Сору То	
6550 NW 82 ave		General Shipping	
Address 2	Fax Number	Surcharges: LA Tempering	
Miami FL 33166	Email Address	Currency: US Dollar	
USA		Override Part Description Type	e Percentage
Salesperson		FL-WEST-COAST-SURCH FL WEST COAS %	10.00%
Juliao, Humberto E	•	\bigcirc	
Internal Salesperson			
Arteaga, Javier	-		
Order Currency			
US Dollar	•		
Pricing			
Surcharge			
Terms			
	- Exception Dates		
{None}	•		
Invoice Minimum Invoice Surcharge Delivery	Minimum Delivery Surcharge		
\$0.00 \$0.00 \$0.00	\$0.00		
Credit Limit			
\$30,000.00			

6. In the shipping Tab select Vortex Truck from The Ship Via

23 - LA Tempering 🛐 General Financial Shipping	Documents User Defined	
Ship To		
{Default}		
Address	Phone Number	Сору То
6550 NW 82 ave		General Fin
Address 2	Fax Number	
Miami FL 33	166 Email Address	
USA	The root co	
Ship Via	Racking Note	
Vortex Truck	-	

7. Add Contacts Names with additional emails and phones by clicking the Contacts Book icon and then add

Edit Customer - 23 - LA Te	mpering				– 🗆 🗙	t -			
19 - 19 - 12 (🚺 🌵 🖏 🖞 🕨 🖳 🗐	0				Phone	Contact Email	Addr Salespe	
Customer	Contacts	Contacts			-		<	Junao, 11	
General Financial Si	Contacts	Contact Info User Define	ed						
	Customers F	t Customer:	LA Tempering			-			
{Default}	Customer	First Name:	Ī				Addres	s Add	Iress 2
Address		Last Name:							
6550 NW 82 ave		Name:]			
Address 2		Site:	LA Tempering			•			
Miami		Type							
USA	-	Job Titler	<u></u>						
Ship Via	-	Address:	Address 1						
Packing Type		Hud Cas.	Address 2						
	-		City	State	Zip Code				
No Routes Assigned						-			
		Phone Number:							
		Mobile Number:							
		Fax Number:							
		Email Address:							
		Notes:							
	C		OK	Cancel					>
		Print Preview	Fax	Email	Add	Delet	e		
								Location: MAIN	•

8. Assign the customer to a group by clicking the icon and then checking the group box

Edit Customer - 23 - LA Tem	npering					— D
1- 1 - 1			1 - 📖 - 🚺	0 🔒		
Customer 23 - LA Tempering Signature General Financial Shir	nning Doc	uments	Liser Defined			Status Active
Address		Gro	up Assignments			
6550 NW 82 ave		-	Group	Select	Primary	
Address 2			Broward			
Miami FL	33166		Central FL			
USA			International			
			Miami-Dade			
Order Cutoff Day			Out-of-State			
{None}			Palm Beach			
Lead Time			West Coast			
0						
Measurement Type						
Imperial						
Language						
English (United States)						
URL						
Notes						

9. If the customer is Tax Exempted, add the certificate number in the User Defined field Tax Exempt No. Edit Customer - 23 - LA Tempering

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Customer 23 - LA Tempering S General Financial Shipping Documents User Defined
Name Value
Tax Exempt No.