Introduction
This guide explains how to create a new customer.

Audience
All staff who raise sales invoices.

Process

Initiator
- Checks if customer already exists

Initiator
- Creates new customer (if customer does not already exist)

Income Team
- Approves new customer

Create a new customer

To create a new customer:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the main menu select Customer and Sales, then Customer Information &gt; Customer. The Customer window opens.</td>
</tr>
<tr>
<td>2</td>
<td>On the Customer tab, enter the customer name in the Customer Lookup. If no matching values are found then the customer does not exist. Note: if you don’t find your customer try searching alternative names e.g. UAL or University of the Arts</td>
</tr>
<tr>
<td>3</td>
<td>If the customer does not exist you can proceed with creating a new record. Click New at the bottom of the screen.</td>
</tr>
</tbody>
</table>
| 4    | Complete the Customer tab: 
  a. Enter the customer name.  
  b. Customer group – defaults to Sundry Debtors.  
  c. Country – defaults to United Kingdom.  
  d. Language – defaults to English UK.  
  e. Head office – defaults to customer name entered at step a.  
  f. Short name - enter an abbreviation for the customer name.  
  g. External ref: not used by end users. Enter “X” or “N/A” |
Go to the **Contact information** tab.

Click Add to add the address.

Complete the address:

a. Select the address type. Note, you must have at least a **General** address.

b. Enter the address details

c. You must provide at least one telephone number.

d. You must provide an email address for invoices to be sent out. Can be for a personal or group mailbox.

e. Contact can be an individual name or accounts payable department – wherever the invoice needs to be sent.

Click **Save**. The **Update relations** pop up window appears.
9 Click OK.

10 A confirmation message is displayed and the customer is assigned a customer ID.

11 Click OK.

What happens next?
The request is routed to the Income Team for verification and approval.

View a request in workflow
To check where your request is in workflow:

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<td>From the main menu select <strong>Customer information</strong> then <strong>Workflow enquiry – Customer</strong>.</td>
</tr>
</tbody>
</table>

Locate your request (check Customer ID column) then click the workflow icon on the left.

The workflow map displays. Click **Close** to close window and return to the **Workflow enquiry** window.

Where to go for help
Contact the Income Team on 020 3907 0700 (option 3), or email cashiers@bbk.ac.uk.