Introduction
This guide explains how to request a new customer and how to amend it in task manager if the request is rejected.

Audience
Staff in Schools and Departments who are responsible for raising sales orders to external customers.

Process

A. Request 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 – select Sundry Debtors (only option).
   c. Country – defaults to United Kingdom but can be changed.
   d. Language – defaults to English UK but can be changed.
   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”

5 Go to the Contact information tab.

6 Click Add to add the address

7 Complete the address:
   a. Address type - you must have at least a General address.
   b. Enter the address details
   c. Phone numbers – enter at least one.
   d. E-mail – the email address to which invoices will be sent.
   e. Contact person – should normally be an accounts payable department (to which invoices will be sent), or the individual to which invoices will be sent.
The e-mail address entered in box ‘d’ is important as it is the mailbox used for sending invoices and for debt chasing.

8. **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.
B. Amend a new customer request in task manager after it has been rejected by the Income Team

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<tr>
<td>1.</td>
<td>Click the Task icon in the toolbar and select the task <strong>Additional information reqd.</strong> The <strong>Master file approval</strong> window opens.</td>
</tr>
<tr>
<td>2.</td>
<td>Review the Income Team’s comment in the Workflow log.</td>
</tr>
<tr>
<td>3.</td>
<td>Click anywhere on the field to be amended. The field is highlighted blue and changes to edit mode.</td>
</tr>
<tr>
<td>4.</td>
<td>Enter a comment.</td>
</tr>
<tr>
<td>5.</td>
<td>Click <strong>Resubmit to Income team.</strong></td>
</tr>
<tr>
<td>6.</td>
<td>Click OK.</td>
</tr>
</tbody>
</table>

**What happens next?**
The request is routed back to the Income Team for approval. Once approved the customer is available for use in the customer lookup.

**Where to go for help**
Contact the Income Team on x6365 or email cashiers@bbk.ac.uk.