

# Add or edit a Customer

Add aCustomer :

1. Home > Sales (A/R) > Customer (under Maintenance) - Can also click on New User (Create)
2. Click New, enter details on Create New Entity screen - If a user name already exists in the system, it will find the duplicate and prompt to merge or create a new one
3. Duplicate Entities found: Add or Merge - Select the entity to merge or click add to enter
4. Click Customer tab > enter Details > Misc tab - click Active, click PO required (if customer is PO required customer) and fill out other required details

## **Edit an existing Customer :**

1. Home > Sales (A/R) > Customer (under Maintenance)
2. In search bar, filter search by Name and select & open the customer
3. Edit the customer, click Save (wait for system to save, once it is saved it will show on the bottom in red as **Saved**)