## How to Add a Customer Group

1. On Sales folder, click the Customer Groups menu. This will open a new Customer Group screen if there is no existing record yet. If not, it will show the integrated search grid.



- 3. Enter a Group Name and its Description. Note that Group Name is required. Refer to Customer Group for the fields description.
- 4. On the grid area, select the customers that will be part of this group.
- 5. Tick the subgroup where the customer belongs to.

roup Name:   Con						
	tracts De	scription: Con	tracts			
× Remove 🔡 La	yout 🔍 Filter R	ecords (F3)				
Customer No.	Name		Special Pricing	Contracts	Buyback	Quote
0001005006	Brown Brother F	arms		$\checkmark$		
0001005069	ABC Reseller			~		

6. Click Save button.

1. On Sales folder, click the Customer Groups menu. If there is no existing record yet, it will open a new Customer Group screen. The Customer Group search grid will be docked at the center panel.

2. On Customer Group search grid, click the New toolbar button.



- 3. Enter a Group Name and its Description. Note that Group Name is required. Refer to Customer Group for the fields description.
- 4. On the grid area, select the customers that will be part of this group.
- 5. Tick the subgroup where the customer belongs to

Customer Group - Contr	acts		0		۲	
		Ħ				
New Save Search I	Refresh Delete Undo Clo	se				
Group Name: Contracts Description: Sales Contracts						
😂 Remove 📑 Layout •	Filter Records (F3)					
Customer No.	Name	Special Pricing	Contracts	Buyback	Quote	
0001005006	Brown Brother Farms		V			
0001005066	ABC Reseller					
👔 🖉 🕡 Edited			14 4 P	age	1 of 1 🕨	

- 6. Click Save button.
- 1. On Sales folder, click the Customer Groups menu. If there is no existing record yet, it will open a new Customer Group screen. The Customer Group search grid will be docked at the center panel.
- 2. On Customer Group search grid, click the New toolbar button.



- 3. Enter a Group Name and its Description. Note that Group Name is required. Refer to Customer Group for the fields description.
- 4. On the grid area, select the customers that will be part of this group.

5. Tick the subgroup where the customer belongs to.

Customer Group - Coo.	3				~
New Save Search	Refresh Delete Undo Cl	<mark>گ</mark> اose			
Group Name: CG03	Description:	Board Members			
😑 Remove 🛛 🖶 Layout	<ul> <li>Filter Records (F3)</li> </ul>				
Customer No.	Name	Special Pricing	Contracts	Buyback	Quote
0001005007	ABC Reseller		<b>V</b>	<b>V</b>	
0001005010	H&D Fashion	<b>V</b>	<b>V</b>	<b>V</b>	
😧 👰 Edited				age	1 of 1 🕨

- 6. Click Save button.
- 1. On Menu, double click the **Customer Group menu**. If there is no existing record, it will open a new Customer Group screen. If there is an existing record, it will open the Search Customer Group screen.
- If the search screen is displayed, proceed to step 2. Otherwise, proceed to step 3. 2. On **Search Customer Group screen**, click the **New** toolbar button.



- 3. Enter a Group Name and its Description. Note that Group Name is required. Refer to Customer Group for the fields description.
- 4. On the grid area, select the customers that will be part of this group.
- 5. Tick the subgroup where the customer belongs to.

🔄 Customer Group - CG0001					××
New Save Search Delete Un	do Close				
Group Name: CG0001	Description:	Board Members			
🕞 Remove 🦞 Filter Records (F	3)				
Customer No. Name		Special Pricing	Contracts	Buyback	Quote
🔲 000000001 JT Tynan			<b>V</b>	1	<b>V</b>
☑ 100000001 Home Deale	ers		<b>V</b>		
😮 😒 🏆 Edited			🛯 🗐 Page	1 0	f 1 🕨 🕅

6. Click Save button.