How to Add a Customer

Here are the steps on how to add a new customer:

1. Click the Sales | Customers menu. This will open the Create New Entity screen if there is no existing record yet. If not, click the New button on the integrated search grid.

inclu	i21 Demo Setup Company	(Source)		
Collapse All Menus	Customer Entity			
	New Open Import Refresh Export	✓ Close		
	용 Layout Q Filter Records (F3)	31 records		
♥ Filter	Entity No	Name 🔺	Phone	Address
· · ·	0001005060	All U Need Kwik-Stop	260-555-4115	1234 Main Street
Import Logs	0001005008	Archer Daniels Midland	260-824-0079	1800 W Western Ave
Customers	0001005019	BP Oil North West Ohio		652 Starr Ave
Customer Contact List	0001005006	Brown Brother Farms	260-555-1576	123 Main Street 2nd line
Sales Reps	0001005041	Cassie Nelson	260-514-7482	1623 345TH TRAIL NE

Note that the New button will open the Create New Entity screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.

- 2. Fill out the Entity tab fields.
 - a. Enter the Name, Contact Name, and Location Name. These are the required details on this tab.
 - b. You can either enter the Entity No or let the system generate it for you upon saving the record.
 - c. Make sure that the Entity Type is set to Customer.

New Seve Search Refresh Delete Undo Additional Cooe Entity General Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (15) Name: ABC Reseller Phone: Image: Phone: Entity No: 0001005095 Contact Name Sample Contact Email: [2] trestcompany@gmail.com Mobile: Location Name ABC Reseller Origination Date: 3/23/2016 Contact Information Address: [9] Somewhere St. Type Decails Zip/Postal: 46204 City: Indianapolis Type State/Province: IN Country: United States V Print 1099: 1099 Name: V Entity Type Entity Type 1099 Form: V Finity Type Finity Type Finity Type 1099 Form: V Entity Type Finity Type Finity Type 1099 Form: V Entity Type Finity Type Finity Type 1099 Form: V Entity Type Finity Type Finity Type 1099 Form: V Entity Type Entity Type Finity Type Federal Tax ID: V<	ntity - ABC Reselle	er														~ ⊔
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Address:	Location Name	- ABC	Reseller				Origination Date:	3/23/2	016		Contact l	nformatio	n			
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- d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.
- 3. Navigate to Customer tab | Detail tab and fill out the fields. Required detail on this tab is Terms. Refer to Customer Entity | Field Description | Detail tab to help you in filling out the fields. You can be as detailed as you see necessary.

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count No:								Ship Io:		ABC Reseller				
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hip Via: UPS County:														
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ulti-Level Pricing:							~	Line of	Business:					

4. Navigate to Customer tab | Misc tab and fill out the necessary fields.

Entity - ABC	Reseller														□ ×
New Save	Search	Refr	esh De	lete Ur	ndo Addition	nal Close									
Entity G	eneral	Custor	ner Ve	endor	Split Farm	Locations	Contacts	Comments (0) History	Attachme	nts (0) Messa	iges Custo	om Audit L	.og (15)	
Detail N	Misc Pri	icing	Taxing	Grain	Agrimine	Patronage	Applicator	Help Desk	License	Transports	Commission	Buyback	Contracts	Field x	Ref
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								Include	Entity Nam	e in address	: 🖌				
	_														
00	2 🖂	Edited	ł									Page	1	of 1	

5. Click the Save button. The Entity No field will get disabled.

Here are the steps on how to add a new customer:

1. Click the Sales | Customers menu. This will open the Create New Entity screen if there is no existing record yet. If not, click the New button on the integrated search grid.

	i21 Demo Setup Company(So	ource)		
Collapse All Menus	Customer Entity New Open Import Refresh Export -	Close		
	田 Layout Q Filter Records (F3)	31 records		
♥ Filter	Entity No	Name 🔺	Phone	Address
	0001005060	All U Need Kwik-Stop	260-555-4115	1234 Main Street
Import Logs	0001005008	Archer Daniels Midland	260-824-0079	1800 W Western Ave
Customers	0001005019	BP Oil North West Ohio		652 Starr Ave
Customer Contact List	0001005006	Brown Brother Farms	260-555-1576	123 Main Street 2nd line
Sales Reps	0001005041	Cassie Nelson	260-514-7482	1623 345TH TRAIL NE
Market Zana				

Note that the New button will open the Create New Entity screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.

- 2. Fill out the Entity tab fields.
 - a. Enter the Name, Contact Name, and Location Name. These are the required details on this tab.
 - b. You can either enter the Entity No or let the system generate it for you upon saving the record.
 c. Make sure that the Entity Type is set to Customer.

Entity - ABC Reseller	$\Box \times$
New Save Search Refresh Delete Undo Additional - Close	
Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (0)	
Name: ABC Reseller Entity No:	
Contact Name 🔹 Sample Contact Email: 🖂 Phone:	
Institut Name V ABC Recaller	
Address: © + insert X Remove	
Entity Type	
Zin/Postal:	
State/Province: Country: V	

d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

Split	Farm	Locations	Con	tacts C	comments (0)	History	Attachments (0)	Mes	ssages	Custom	Audit	Log (17)			
ABC	Reseller											Entity No:	000100506	9	
Samp	ole Cont	act			Email: 🖂 i2	1testcomp	oany@gmail.com					Phone:			
ABC	Reseller								Entity	Туре					
Some	where !	St.							+ Ins	ert × Re	move				
									En	ntity Type					
									Ci	ustomer					
4620	4			 City: 	Indiana	apolis									
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3. Navigate to Customer tab | Detail tab and fill out the fields. Required detail on this tab is Terms. Refer to Customer Entity | Field Description | Detail tab to help you in filling out the fields. You can be as detailed as you see necessary.

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- 4. Click the Save button. The Entity No field will get disabled.
- 1. Click the Sales | Customers menu. This will open the Create New Entity screen if there is no existing record yet. If not, click the New toolbar button on the integrated search grid.

iRely i21 - i21 Demo Setup C	comp	any(Source)			
Menu	«	Customer Entity			
Filter Menu	٩	Image: New Image:	ecords		
Customers		Name A	Phone	Address	City
Customer Contact List		All U Need Kwik-Stop	260-555-4115	1234 Main Street	Fort Wayne
Sales Reps		C Archer Daniels Midland	260-824-0079	1800 W Western Ave	Bluffton
💮 Market Zone					

Note that the New button will open the Create New Entity screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.

2. Fill out the Entity tab fields.

- a. Enter the Name, Contact Name, and Location Name. These are the required details on this tab.
- b. You can either enter the Entity No or let the system generate it for you upon saving the record.

c. Make sure that the Entity Type is set to Customer.

🕽 Entity - ABC Reseller	
Image: Search Refresh Delete Undo Additional Close	
Entity Customer Split Farm Locations Contacts Notes History Attachments Messages Custom Audit Log	
Name: ABC Reseller Entity No:	
Contact Name 🔹 Sample Contact Email: 🚱 Phone:	
Location Name ABC Reseller Entity Type	
Address: 📓 🚱 Insert 🤤 Remove	
Entity Type	
Customer Customer	
Zip/Postal: City:	

d. Fill out other details on Entity tab. You can be as detailed as you see necessary. Below is a sample record.

, Linesen	lei								
New Save Sear	rch Refresh Delete Undo Additio	nal Close							
Entity Customer	Split Farm Locations Contac	ts Notes	History Attachments Mes	ssages Ci	uston	Audit Log			
Name:	ABC Reseller						Entity No:		
Contact Name 💌	Sample Contact	Email	i21testcompany@gmail.co	om			Phone:	(100) 123-4567	
Location Name -	ABC Reseller				Enti	ty Type			
Address:	Somewhere St.				0	Insert 🤤 Remove			
						Entity Type			
Zip/Postal:	46040 ~	City:	Fortville			Customer			
State/Province:	IN	Country:	United States	*					
Alt Phone:		Alt Email:							
Mobile:		Fax:							
Website: 🥥									
Timezone:				*					
Internal Notes:									
🕜 😒 🏆 🔃 Edit	ted						ŀ	🗐 Page	1 of 1 🕨 🕅

3. Navigate to Customer tab | Detail tab and fill out the fields. Required detail on this tab is Terms. Refer to Customer Entity | Field Description | Detail tab to help you in filling out the fields. You can be as detailed as you see necessary.

New Save Search	Refresh Delete Undo Additional Close plit Farm Locations Contacts Notes History Attachments Messages Custom Audit Log	
Detail Misc Prici	g Taxing Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts	Field xRef
Type:	Company Bill To: ABC Reseller	Options
Account No:	Ship To: ADL Reseiter	Active:
Currency:		Prospect:
Credit Limit:	10,000.00 Exempt All Taxes:	PO Required:
Terms	Due on Receipt Y County:	Credit Hold:
Ship Via:	Truck Y Print 1099: No	
AR Balance:	0.00 1099 Name:	
Salesperson:	0001005049 Y 1099 Form:	
Warehouse:	▼ 1099 Type:	
Status:	X Federal Tax ID:	
Legacy Customer ID:	0001005066 W9 Signed:	
Pricing:	None 💙 Jira Customer:	
) 😧 💡 🕼 Edited		[4 4 Page 1 of 1 ▶

4. Click the Save button. The Entity No field will get disabled.

Here are the steps on how to add a new customer:

1. From the Sales folder, click the Customers menu. If there is no existing record yet, it will open a new Entity (Customer) screen. The Customer Entity search grid will be docked at the center panel.

2. On search grid, click the New toolbar button to open a new Entity (Customer) screen.

Menu		Customer Entity					
🚆 🗇 🛛 Filter Menu	9		2				
Purchasing	-		Defeeth Class				
🚞 Sales		New View	Kerresh Close				
Alles Orders		🖶 Layout 🔹 💡 🛛 Filt	er Records (F3)	7 records			
📝 Quotes		Name 🔺	Phone	Address	City	State	Zip Code
A Invoices	_	ABC Reseller		c/o Amado Dee 5467	Ketchikan	AK	99950
Credit Memos		BGD Inc.		Paseo de Roxas St.	Makati	NCR	1227
Receive Payments		H&D Fashion		Hamilton North St.	Indian	AK	99540
Receive Payment Details							
Batch Posting							
🏹 Import Invoices from 🖓 rigin							
🦙 Import Billable from Help Desk	-						
Customers	1						
🕼 Customer Contact List							
🎡 Sales Reps							

- 3. Fill out the Entity tab fields.
 - a. Enter the Name, Contact Name, and Location Name. These are the required fields on this tab.
 b. You can either enter the Entity No or let the system generate it for you upon saving the record.
 c. Make sure that the Entity Type is set to Customer.

🗊 Entity - Home Deale	🗘 Entity - Home Dealers 🔹 🖻 🔀									
New Save Search	th Refresh Undo Additional Close									
Entity Customer	Locations Contacts Notes History Attachments Messages									
Name:	Home Dealers	Entity No:								
Contact Name 💌	Sarah Lopez Email: 📦	Phone:								
Location Name 👻		Entity Type								
Address:	1	🔾 Insert 🤤 Remove								
		Entity Type								
		Customer								
Zip/Postal:	City:									

d. Fill out other details on Entity tab. Below is a sample record.

Entity - Home Deal	ers							× 🗆	
New Save Search	ch Refresh Undo Addition	- Close							
Entity Customer	Locations Contacts Note	s History	Attachments Messages						
Name:	Home Dealers						Entity No:	HOMEDEALER	
Contact Name	Sarah Lopez	Email	arah.lopez@homedealers	.com			Phone:	(781) 438-2033 x548	
Location Name	LIC.				-				
Address W	18 Control St				Ent	tity Type			
Address:	16 Celitial St.				2	🔘 Insert 🤤 Remove			
						Entity Type			
Zip/Postal:	43320	City:	Edison			Customer			
State/Province:	ОН	Country:	United States	~					
Alt Phone:	(515) 954-3542	Alt Email:	s_lopez@homedealers.com						
Mobile:		Fax:							
Website: 🥥	www.homedealers.com								
Timezone:				~					
Internal Notes:	1								
🛛 🙆 🔗 🛛 Edited							14 4	Page 1 of 1 > 0	

4. Navigate to **Customer tab** and fill out the necessary fields. You can be as detailed as you like. The required field on this tab is **Terms**. Refer to Cu stomer Entity for the description of each field.

🗘 Entity - Home Dealers 🔹 🗆 🗙										
Image: Search Refresh Undo Additional Close										
Entity Customer Locations Contacts Notes History Attachments Messages										
Detail Misc	Splits Pricing Taxing Grain Agrimine	Patronage Farm	Help Desk Transports	Commission Buy	back Contracts	Field xRef				
Type:	Company	Bill To:	US	¥	Options					
Account No:		Ship To:	US	*	Active:	V				
Currency:	USD	Tax No:			Prospect:					
Credit Limit:	0	Tax Exempt:	V		PO Required:					
Terms:	Due 28th of the Month	County:			Credit Hold:					
Ship Via:	UPS Ground	Print 1099:	No	*						
AR Balance:	0.000000	1099 Name:								
Salesperson:	JAS	1099 Form:	None	*						
Warehouse:	¥	1099 Type:	1099 Type:							
Status:	Q. ¥	Federal Tax ID:								
Legacy Customer	ID:	W9 Signed:								
Pricing:	Inventory Price List 👻	Jira Customer:								
List:	¥									
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The Contact Name, Email, Phone, Alt Phone, Alt Email, Mobile, Fax, and Timezone fields will be treated and saved as part of the Entity Contact details.

🗊 En	Entity - Home Dealers										
New	Save Sea	rch Refresh Undo	Additional Close								
Enti	Entity Customer Locations Contacts Notes History Attachments Messages										
🖸 I	nsert 🔍 View	😑 Remove 🕕 Email I	Login 🏪 Layout 👻 🔇	Filter Recon	ds (F3)						
	Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active		
	Sarah Lopez sarah.lopez@homedealer		(781) 438-203 US		US						

While the Locations Name, Address, Zip/Postal, City, State/Province, Country, Ship Via, Terms, and Warehouse fields will be considered as Entity Locations details.

Entity - Home Dealers									
New Save Search Refresh Undo Additional Close									
Entity Customer Locations Contacts Notes History Att	Entity Customer Locations Contacts Notes History Attachments Messages								
📀 Insert 🔍 View 🤤 Remove 🔚 Layout 🔻 🍸 Filter Records (F	3)								
Location Name Address City State/Pro	ovince Zip/Postal Code	Country	Phone	Fax	Pricing Level				
US 18 Central St. Edison OH	43320	United States							

5. Click the Save toolbar button. The Entity No field will get disabled.

Here are the steps on how to add a new customer:

- 1. From the Accounts Receivable > Maintenance, double click the Customers menu. If there is an existing record, it will open the Search Customer screen. Otherwise, it will open a new Customer screen.
- If the search screen opens, proceed to step 2. Else, proceed to step 3 2. On **Search Customer** screen, click the **New** toolbar button. This will open a new Customer screen.



3. Enter the necessary details. You can be as detailed as you like. The required fields are Customer No, Name, Contact, Locations, Terms. Refer to Customer Entity for the description of each field.

Customer - Home Dealers										
New Save Se	arch Delete Undo	Additional	Close							
Detail Additional Locations Contacts Notes History Attachments Custom Messages Setup Additional Setup										
Customer No:	100000001		Name:	Home Dealers			Type:	Company		~
Contact -	Sarah Lopez		Phone:	(781) 438-2033	x568		Email: 🕡	sarah.lopez@ho	omedealers.com	
Locations -	US				Active:	V	PO Require	d: 🔳	Credit Hold: 📃	
Address: 🔝	18 Central St.				Credit Limit:		0.00	AR Balance:		0.00
					Account No:			Tax No:		
Zin/Postal·	43320	City:	Edison		Ship Via:	UPS Grou	und	Terms:	5% 5 NET 30	
State/Province:	OH	Country:	United S	tates	Currency:	USD	~	Status:		··· ¥
Alt Phone:	(515) 954-3542	Alt Email:	s lopez@	whomedealers.co	Salesperson:		•	Warehouse:		
Mobile:		Fax:			Pricing:	None	~			
Website: 🥥	www.homedealers.co	 m			Tax State:	ОН	~	Tax Code:		
Bill To:	US 🗸	Ship To:	US	v	Print 1099:	No	~	1099 Name:		
Internal Notes:					1099 Form:		~	1099 Type:		×
					Federal Tax ID:			W9 Signed:		
					Timezone:					~
🕝 😟 🏆 Edited	Ø Ø Image Image									

The Contact, Phone, Email, Mobile, Fax, Alt Phone, and Alt Email fields will be treated and saved as part of the Customer Contact details.

Customer - Home Dealers						
New Save Search Delete Undo Additional	Close					
Detail Additional Locations Contacts Notes	History Attac	hments Custom	Messages S	etup Additional Setup		
💿 Insert 📝 Edit 🤤 Remove 🕼 Email Login 🏼 💡	Filter Records (F3)				
Name Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access
Sarah Lopez sarah.lopez@homedealers.com	(781) 438-20	D				

While the Locations, Address, Zip/Postal, City, State/Province, Country, Ship Via, Terms, Warehouse, and Tax Code fields will be considered as Customer Locations details.

Cu:	stomer - Home D	ealers								
New	Save Search	Delete U	Additional	Close						
Deta	Detail Additional Locations Contacts Notes History Attachments Custom Messages Setup Additional Setup									
😳 I	nsert 📝 Edit 🧲	Remove 💡	Filter Records (F3))						
	Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level	
	US	18 Central St.	Edison	ОН	43320	United States				

4. Click the Save toolbar button. The Customer No, and other fields related to Customer Location and Customer Contacts will be disabled after saving the new Customer record.