

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.



- 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**.

The screenshot shows the 'Entity - ABC Reseller' form, Entity tab. The form contains various fields for customer information. The 'Entity Type' field is set to 'Customer'.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (15)

Name: ABC Reseller Phone: Entity No: 0001005095

Contact Name: Sample Contact Email: i21testcompany@gmail.com Mobile:

Location Name: ABC Reseller Origination Date: 3/23/2016

Address: Somewhere St.

Zip/Postal: 46204 City: Indianapolis

State/Province: IN Country: United States

Timezone: (UTC-12:00) International Date Line West

Document Delivery:

Print 1099: 1099 Name: 1099 Form: 1099 Type: Federal Tax ID: W9 Signed:

Contact Information

+ Insert X Remove Types

Type Details

Entity Type

+ Insert X Remove

Entity Type

Customer

- 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.

The screenshot shows the 'Entity - ABC Reseller' form, Customer tab, Detail sub-tab. The form contains various fields for customer details. The 'Status' field is set to 'X'.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (15)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk License Transports Commission Buyback Contracts Field xRef

Type: Company Bill To: ABC Reseller

Account No: Ship To: ABC Reseller

Currency: GBP Tax No:

Terms: 5% 5, Net 30 Exempt All Taxes:

Ship Via: UPS County:

Salesperson: Jared Smith JIRA Customer:

Warehouse: Vat Number:

Status: X CRM Details

Legacy Customer ID: 0001005095 Employee Count: 0

FLO Id: Revenue: 0.000000

Multi-Level Pricing: Line of Business:

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

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.

Entity No	Name	Phone	Address
0001005060	All U Need Kwik-Stop	260-555-4115	1234 Main Street
0001005008	Archer Daniels Midland	260-824-0079	1800 W Western Ave
0001005019	BP Oil North West Ohio		652 Starr Ave
0001005006	Brown Brother Farms	260-555-1576	123 Main Street 2nd line
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**.

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

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (17)

Name: ABC Reseller Entity No: 0001005069

Contact Name: Sample Contact Email: i21testcompany@gmail.com Phone:

Location Name: ABC Reseller

Address: Somewhere St.

Zip/Postal: 46204 City: Indianapolis

State/Province: IN Country: United States

Alt Phone: Alt Email: Mobile: Fax: Website: Timezone: Internal Notes:

Entity Type: + Insert X Remove Entity Type Customer

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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.

Entity - ABC Reseller

New Save Search Refresh Delete Undo Additional Close

Entity Customer Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (17)

Detail Misc Pricing Taxing Grain Agrimine Patronage Applicator Help Desk Transports Commission Buyback Contracts Field xRef

Type: Company Bill To: ABC Reseller Ship To: ABC Reseller

Account No: Ship To: ABC Reseller

Currency: USD Tax No: Exempt All Taxes: County: Print 1099: No

Credit Limit: 1,000,000.00 AR Balance: 0.00

Terms: 5% 5 Net 30 Salesperson: Mike Moriarty Warehouse: Status: X X

Legacy Customer ID: 0001005069 FLO Id: Pricing: None

Options: Active: [X] Prospect: [] PO Required: [] Credit Hold: []

W9 Signed: Jira Customer: Vat Number:

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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 Company(Source)

Menu Filter Menu

Service Charge Invoice Import Invoices from CSV Import Logs Customers Customer Contact List Sales Reps Market Zone

Customer Entity

New View Refresh Export Close

Layout Filter Records (F3) 21 records

Name	Phone	Address	City
All U Need Kwik-Stop	260-555-4115	1234 Main Street	Fort Wayne
Archer Daniels Midland	260-824-0079	1800 W Western Ave	Bluffton

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.

- Enter the **Name**, **Contact Name**, and **Location Name**. These are the required details on this tab.
- 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**.

The screenshot shows the 'Entity - ABC Reseller' form. The 'Entity Type' dropdown is set to 'Customer', which is highlighted with a red box. Other fields include Name: ABC Reseller, Contact Name: Sample Contact, Email: [empty], Phone: [empty], Location Name: ABC Reseller, Address: [empty], Zip/Postal: [empty], and City: [empty].

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

The screenshot shows the 'Entity - ABC Reseller' form with detailed information filled out. Fields include Name: ABC Reseller, Contact Name: Sample Contact, Email: i21testcompany@gmail.com, Phone: (100) 123-4567, Location Name: ABC Reseller, Address: Somewhere St., Zip/Postal: 46040, City: Fortville, State/Province: IN, Country: United States, Alt Phone: [empty], Alt Email: [empty], Mobile: [empty], Fax: [empty], Website: [empty], Timezone: [empty], and Internal Notes: [empty]. The 'Entity Type' dropdown is set to 'Customer'.

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.

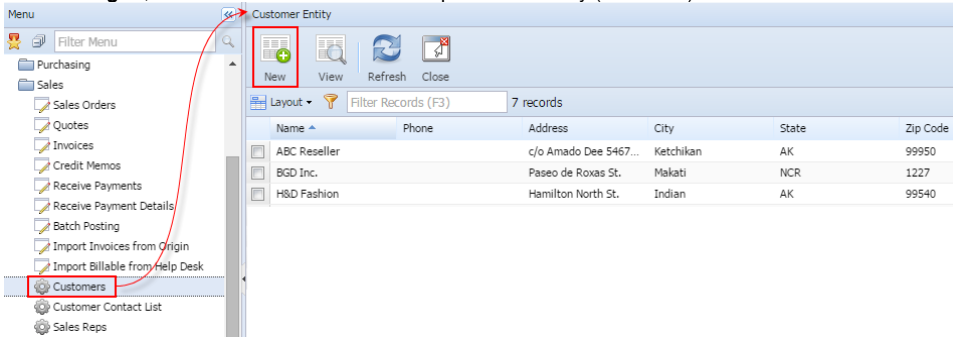
The screenshot shows the 'Entity - ABC Reseller' form, Customer tab, Detail sub-tab. Fields include Type: Company, Bill To: ABC Reseller, Ship To: ABC Reseller, Account No: [empty], Currency: USD, Tax No: [empty], Credit Limit: 10,000.00, Exempt All Taxes: [empty], Terms: Due on Receipt, County: [empty], Ship Via: Truck, Print 1099: No, AR Balance: 0.00, 1099 Name: [empty], Salesperson: 0001005049, 1099 Form: [empty], Warehouse: [empty], 1099 Type: [empty], Status: X, Federal Tax ID: [empty], Legacy Customer ID: 0001005066, W9 Signed: [empty], Pricing: None, Jira Customer: [empty]. The 'Options' section includes Active: [checked], Prospect: [empty], PO Required: [empty], and Credit Hold: [empty].

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.



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**.

The screenshot shows the 'Entity - Home Dealers' form with the 'Entity' tab selected. The 'Name' field is filled with 'Home Dealers'. The 'Contact Name' field is filled with 'Sarah Lopez'. The 'Location Name' field is empty. The 'Entity Type' dropdown is set to 'Customer', which is highlighted with a red box. The 'Entity No' field is empty.

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

The screenshot shows the 'Entity - Home Dealers' form with the 'Entity' tab selected. The 'Name' field is filled with 'Home Dealers'. The 'Contact Name' field is filled with 'Sarah Lopez'. The 'Location Name' field is filled with 'US'. The 'Entity Type' dropdown is set to 'Customer'. The 'Entity No' field is filled with 'HOMEDeALER'. The 'Address' field is filled with '18 Central St.'. The 'Zip/Postal' field is filled with '43320'. The 'City' field is filled with 'Edison'. The 'State/Province' field is filled with 'OH'. The 'Country' field is filled with 'United States'. The 'Alt Phone' field is filled with '(515) 954-3542'. The 'Alt Email' field is filled with 's_lopez@homedealers.com'. The 'Website' field is filled with 'www.homedealers.com'. The 'Timezone' field is empty. The 'Internal Notes' field is empty.

- 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 [Customer Entity](#) for the description of each field.

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**.

Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
Sarah Lopez	sarah.lopez@homeddealer...		(781) 438-203...		US			<input checked="" type="checkbox"/>

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

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
US	18 Central St.	Edison	OH	43320	United States			

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

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

- 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
- 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

Detail Additional Locations Contacts Notes History Attachments Custom Messages Setup Additional Setup

Customer No: 1000000001 Name: Home Dealers Type: Company

Contact: Sarah Lopez Phone: (781) 438-2033 x568 Email: sarah.lopez@homedealers.com

Locations: US Active: ☒ PO Required: ☐ Credit Hold: ☐

Address: 18 Central St.

Zip/Postal: 43320 City: Edison

State/Province: OH Country: United States

Alt Phone: (515) 954-3542 Alt Email: s_lopez@homedealers.co

Mobile: Fax:

Website: www.homedealers.com

Bill To: US Ship To: US

Internal Notes:

Credit Limit: 0.00 AR Balance: 0.00

Account No: Tax No:

Ship Via: UPS Ground Terms: 5% 5 NET 30

Currency: USD Status: ...

Salesperson: Warehouse:

Pricing: None

Tax State: OH Tax Code:

Print 1099: No 1099 Name:

1099 Form: 1099 Type:

Federal Tax ID: W9 Signed: 3

Timezone:

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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

Detail Additional Locations **Contacts** Notes History Attachments Custom Messages Setup 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...				

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.

Customer - Home Dealers

Detail Additional **Locations** Contacts Notes History Attachments Custom Messages Setup Additional Setup

Insert Edit Remove Filter Records (F3)

Location Name	Address	City	State/Province	Zip/Postal Code	Country	Phone	Fax	Pricing Level
US	18 Central St.	Edison	OH	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.