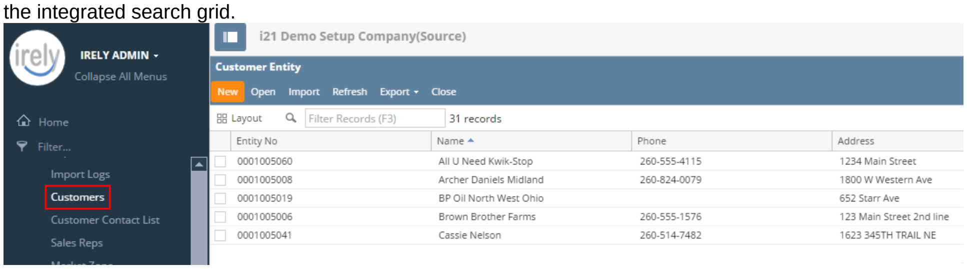
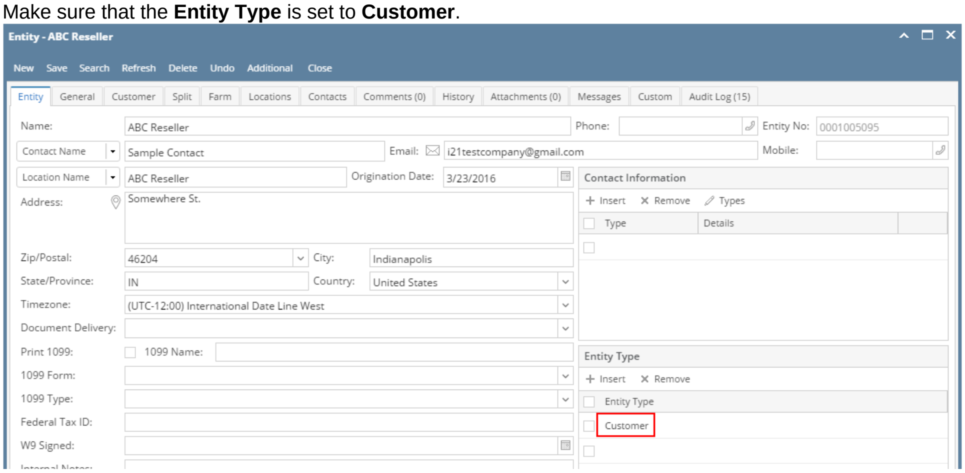
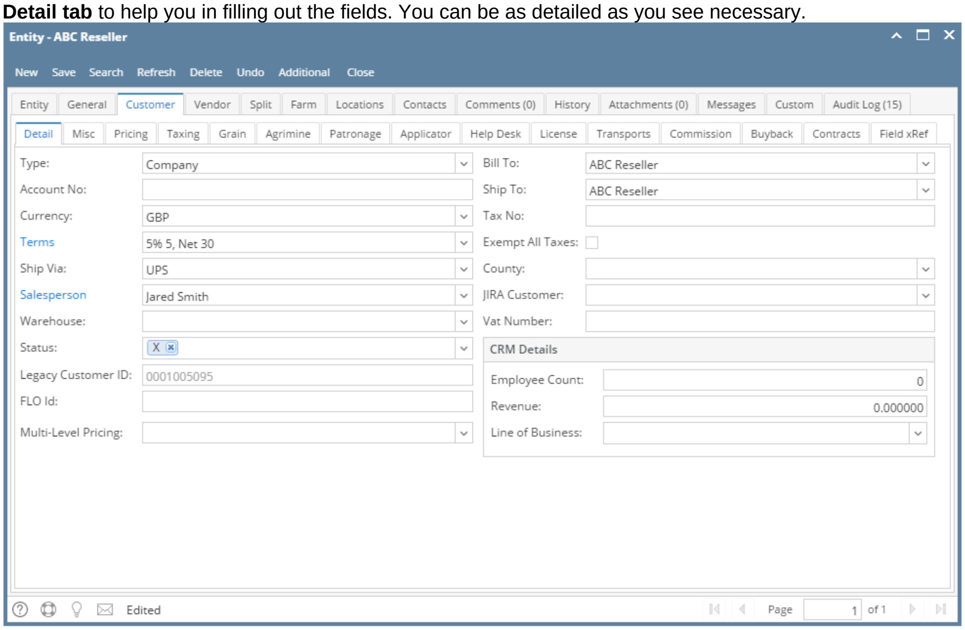
# How to Add a Customer

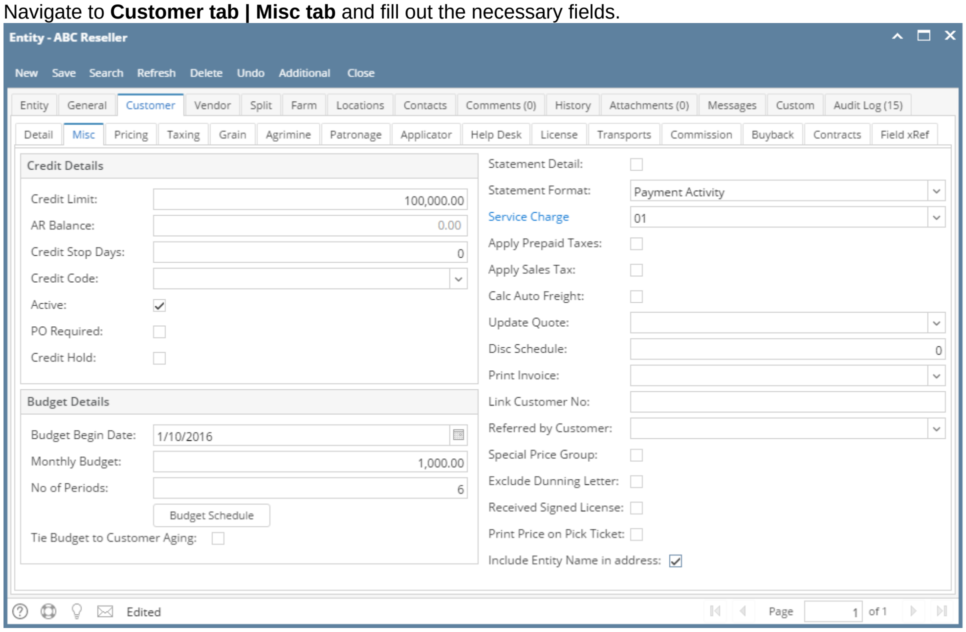
Here are the steps on how to add a new customer:

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**.


   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.


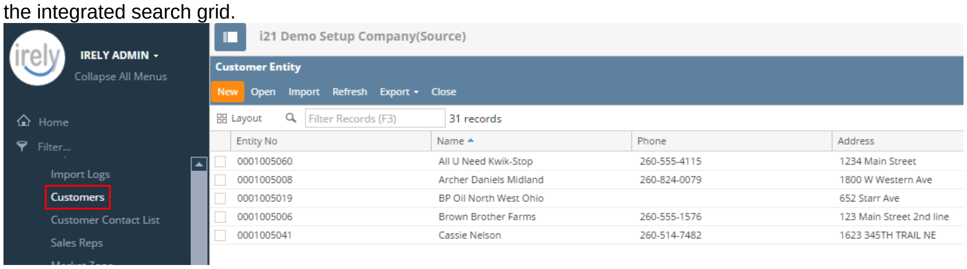
4. Navigate to **Customer tab | Misc tab** and fill out the necessary fields.




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

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

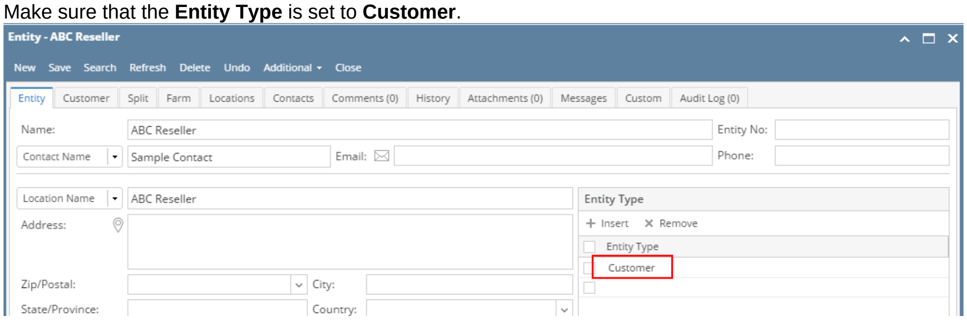
1. Click the **Sales | Customers menu**. This will open the Create New Entity screen if there is no existing record yet. If not, click the **New button** on the integrated search grid.



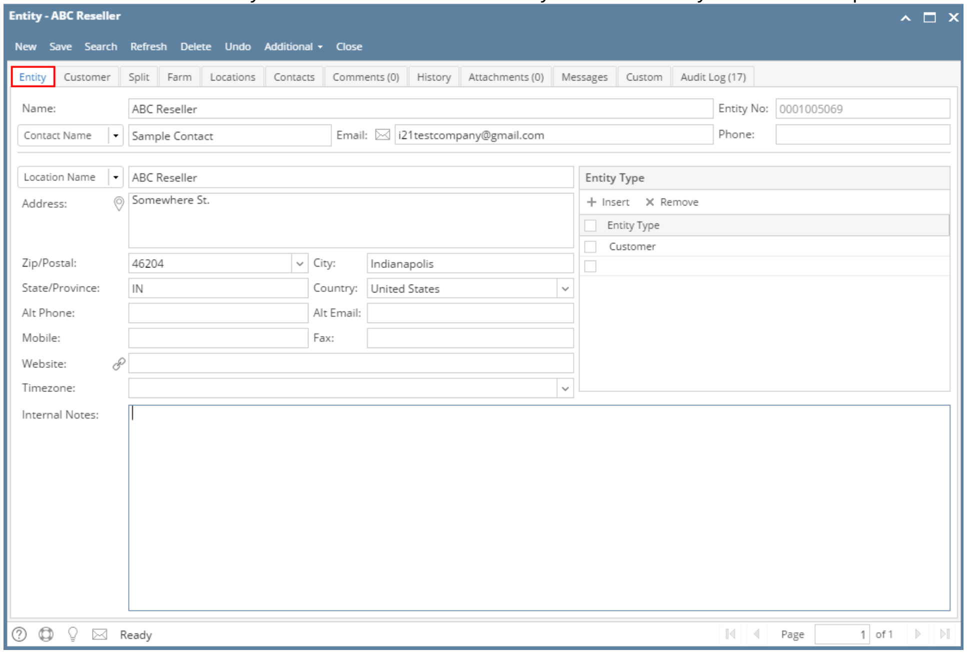

Note that the New button will open the Create New Entity screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.

2. Fill out the **Entity tab** fields.

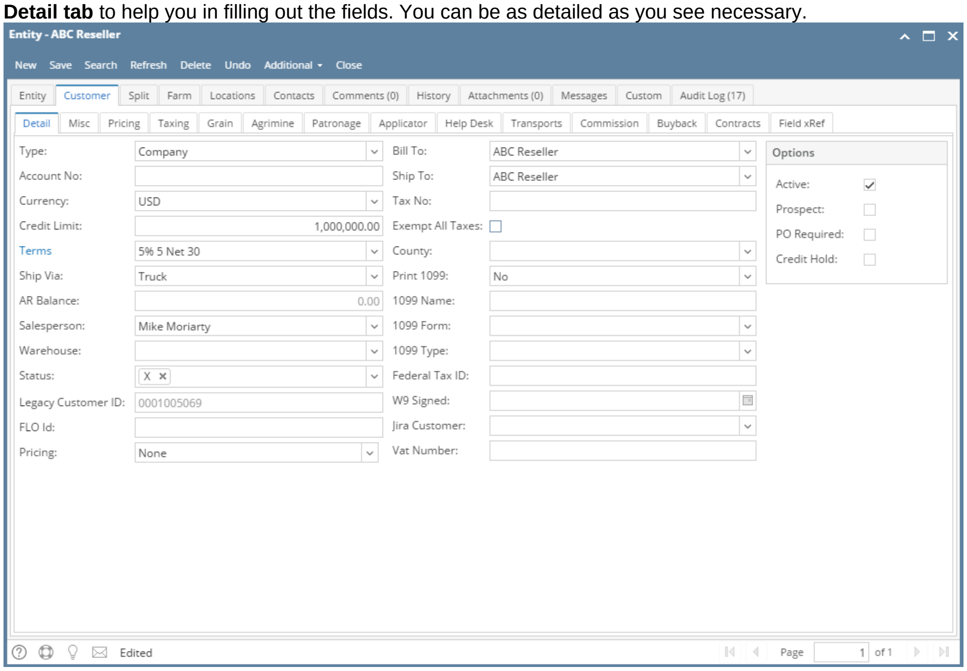
   a. Enter the **Name**, **Contact Name**, and **Location Name**. These are the required details on this tab.
   b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
   c. Make sure that the **Entity Type** is set to **Customer**.



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

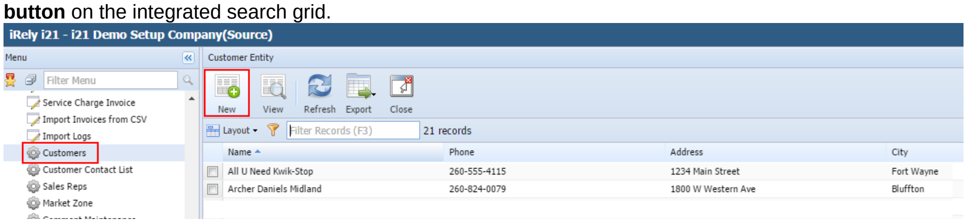



3. Navigate to **Customer tab | Detail tab** and fill out the fields. Required detail on this tab is **Terms**. Refer to Customer Entity **| Field Description | Detail tab** to help you in filling out the fields. You can be as detailed as you see necessary.




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.

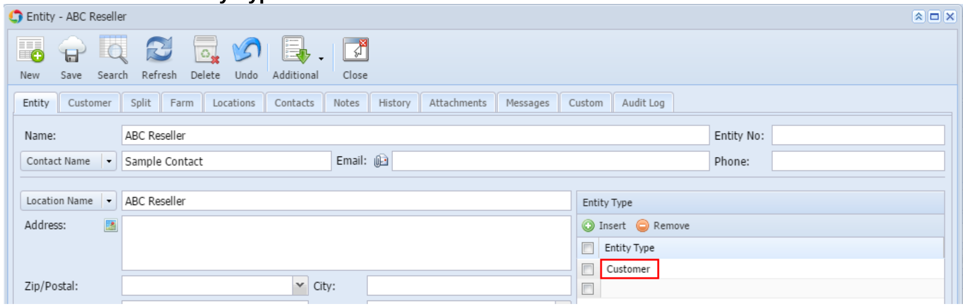



Note that the New button will open the Create New Entity screen. You can either fill out this screen, or simply close it and proceed with the succeeding steps.

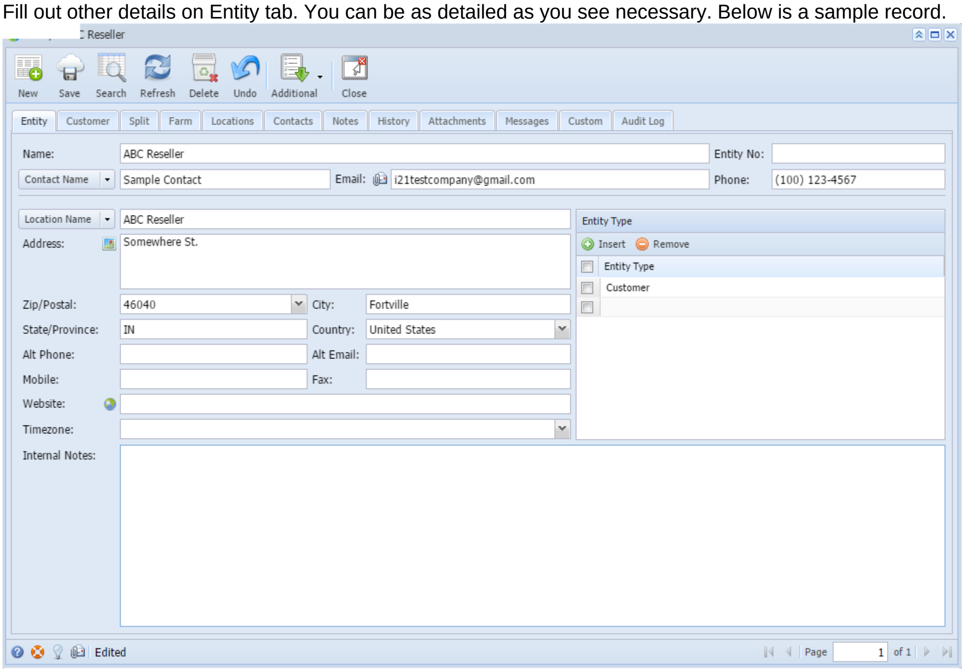
2. Fill out the **Entity tab** fields.

   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.

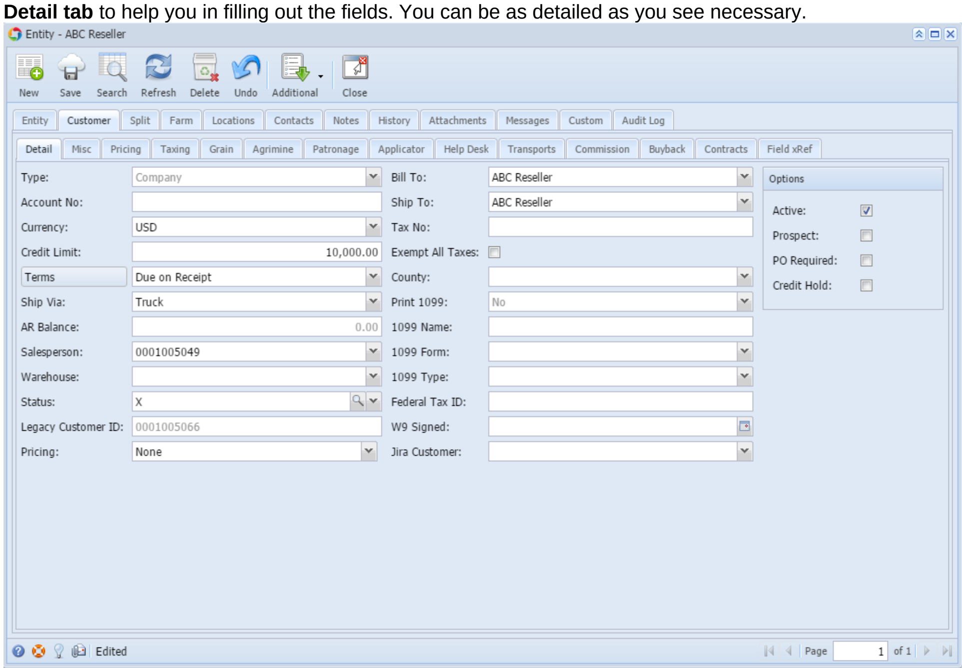
c. Make sure that the **Entity Type** is set to **Customer**.




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




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.

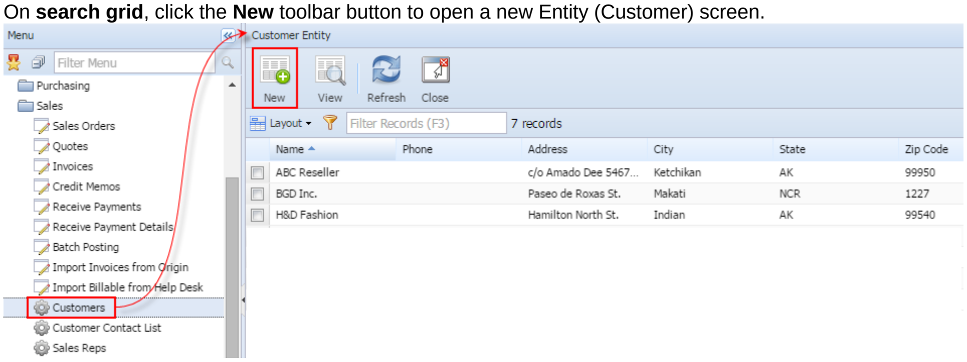



4. Click the **Save** button. The **Entity No field** will get disabled**.**

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

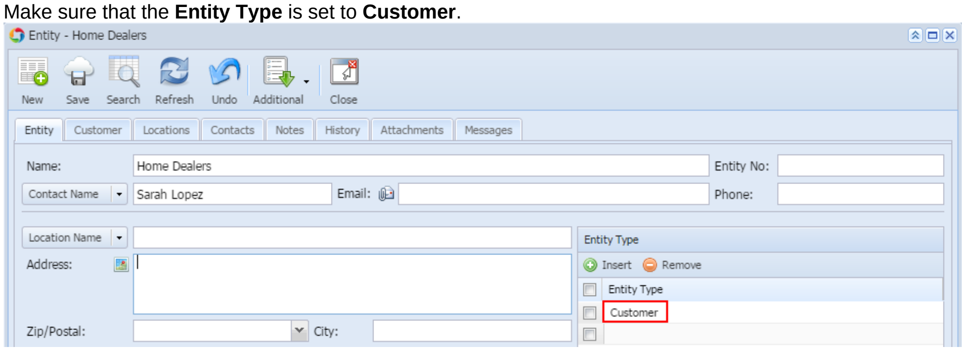
1. From the **Sales folder**, click the **Customers** menu. If there is no existing record yet, it will open a new Entity (Customer) screen. The **Customer Entity search grid** will be docked at the center panel.

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

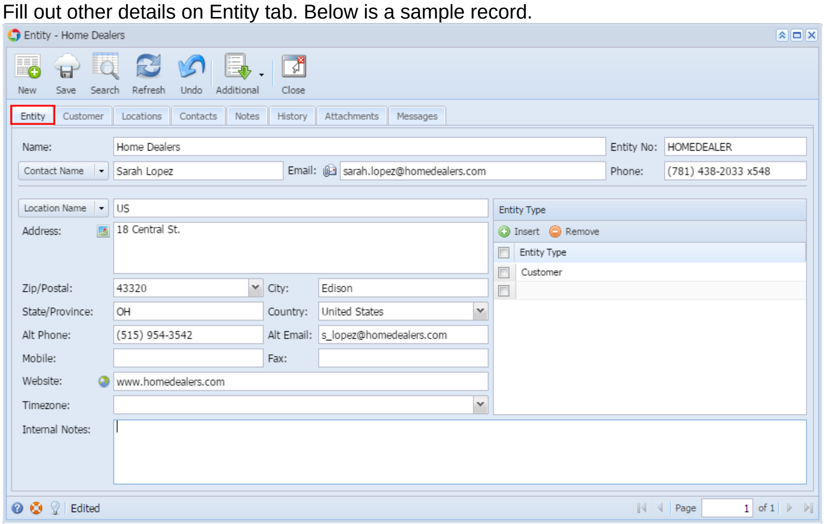



3. Fill out the **Entity tab** fields.

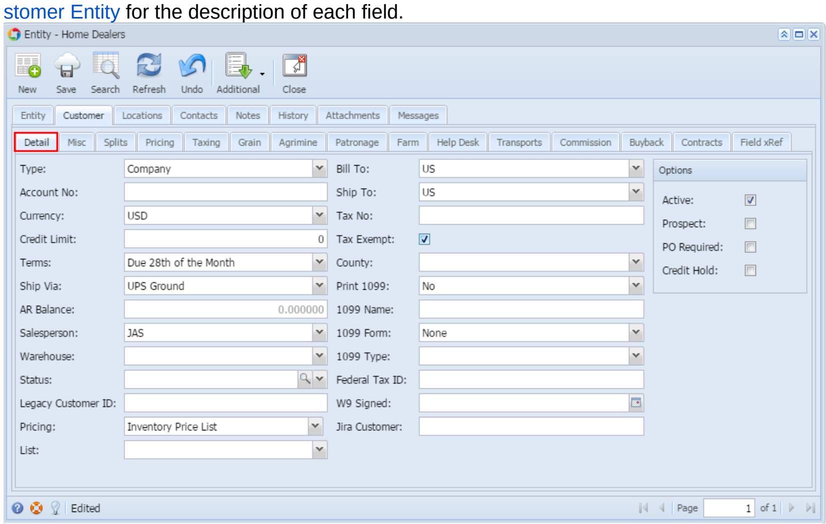
   a. Enter the **Name**, **Contact Name**, and **Location Name**. These are the required fields on this tab.
   b. You can either enter the **Entity No** or let the system generate it for you upon saving the record.
   c. Make sure that the **Entity Type** is set to **Customer**.



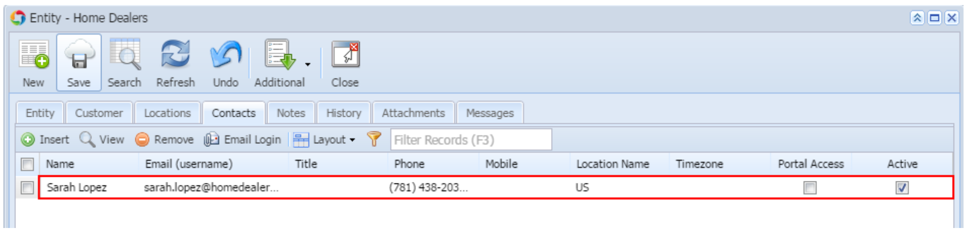

   d. Fill out other details on Entity tab. Below is a sample record.



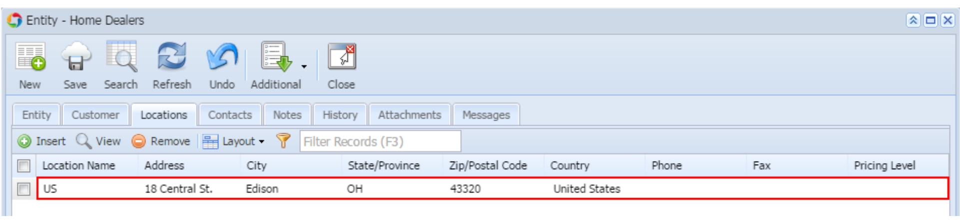
4. Navigate to **Customer tab** and fill out the necessary fields. You can be as detailed as you like. The required field on this tab is **Terms**. Refer to Cu stomer Entity for the description of each field.




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**.



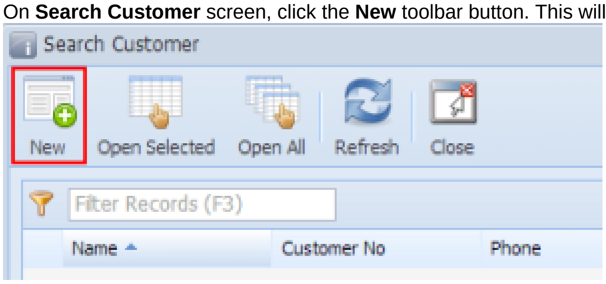

While the **Locations Name, Address**, **Zip/Postal**, **City**, **State/Province**, **Country**, **Ship Via**, **Terms**, and **Warehouse** fields will be considered as **Entity Locations details**.



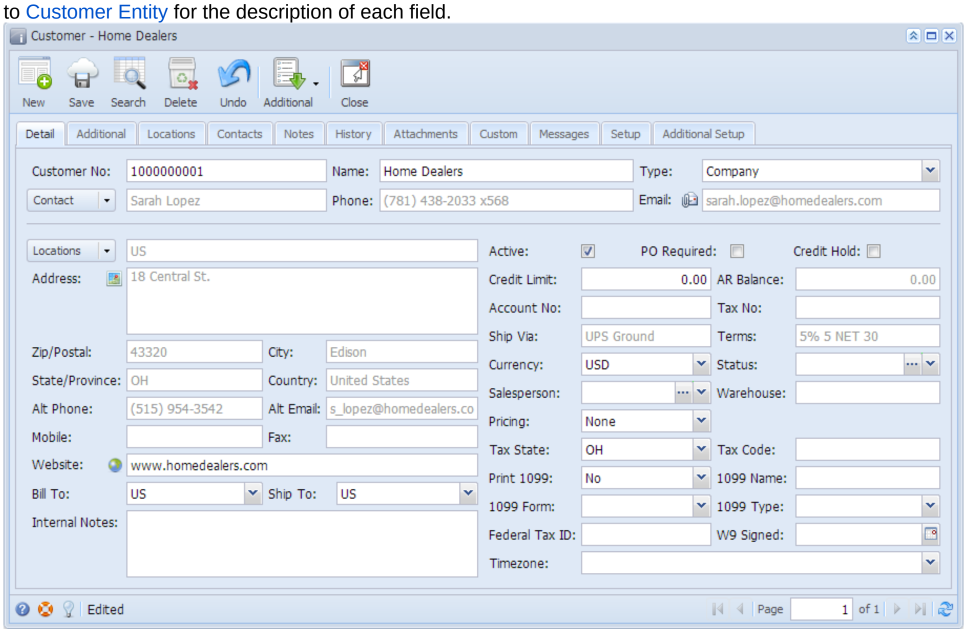

5. Click the **Save** toolbar button. The **Entity No field** will get disabled**.**

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

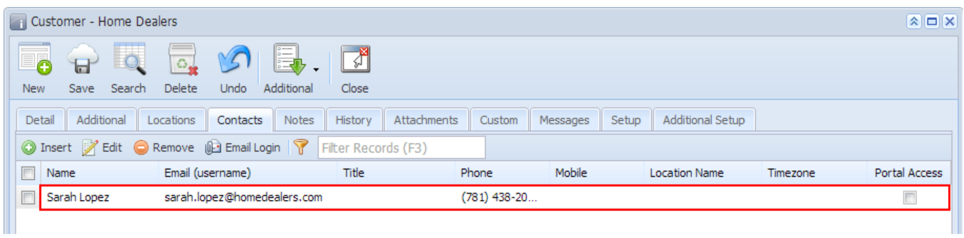
1. From the **Accounts Receivable > Maintenance**, double click the **Customers** menu. If there is an existing record, it will open the Search Customer screen. Otherwise, it will open a new Customer screen.
   If the search screen opens, proceed to step 2. Else, proceed to step 3
2. On **Search Customer**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



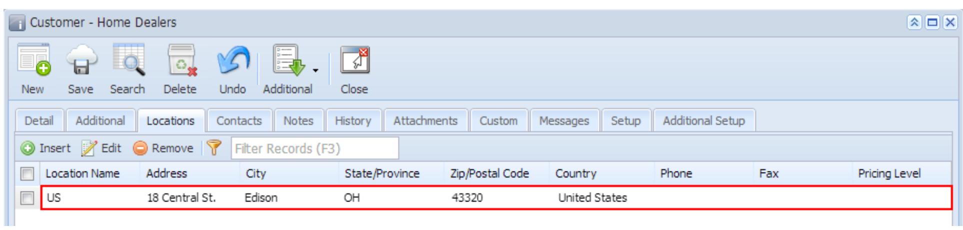
3. Enter the necessary details. You can be as detailed as you like. The required fields are **Customer No**, **Name**, **Contact**, **Locations**, **Terms**. Refer to Customer Entity for the description of each field.




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




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.




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.