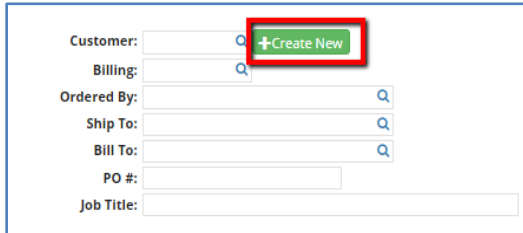


## CREATING A NEW CUSTOMER CODE

Before an order can be entered for a customer, the customer record must be created. Because XOMS will allow multiple contacts to be associated with a shipping or a billing customer code, give careful consideration to how you set your customers up in the system.

### CUSTOMER SHIPPING:

You can either create a new record when starting an order or from Customers/Customer Shipping and clicking Create New.



Customer:

Billing:

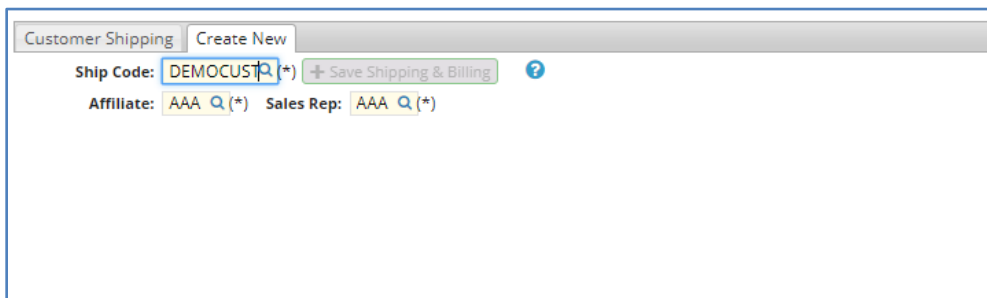
Ordered By:

Ship To:

Bill To:

PO #:

Job Title:



Customer Shipping Create New

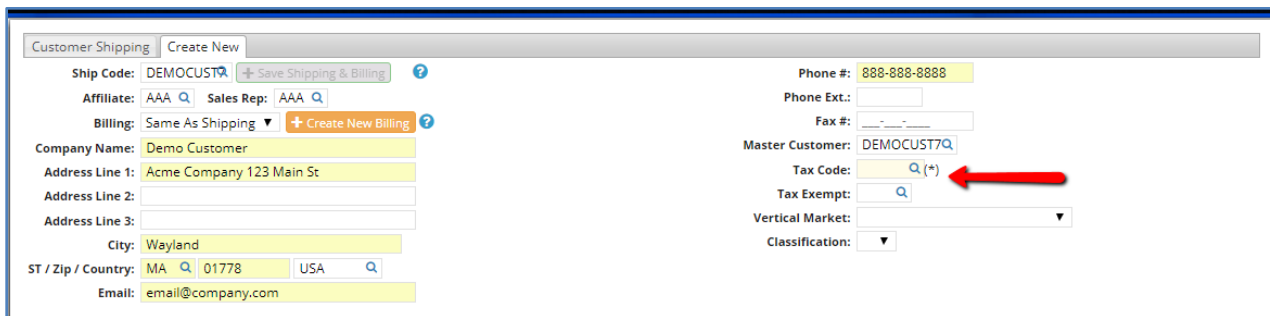
Ship Code: DEMOCUST7Q (\*)

Affiliate: AAA (\*) Sales Rep: AAA (\*)

Type a customer code between 4 and 10 characters long in the Search field. As you type, the system will search to see if the code is available to use. If results are returned, you will be informed by a message "Code already exists" and you must choose a different code. If no results are returned, you are free to use that code and can proceed.

Start in the Company Name field, and you can press the Tab button on your keyboard, or click through the fields to enter your customer's shipping information. Once you have entered the required information, you can create your customer contacts.

**PLEASE NOTE: TAX CODE IS A REQUIRED FIELD, YOU MUST SELECT A TAX CODE, CLICK THE MAGNIFYING GLASS AND SEARCH BY THE TWO LETTER STATE CODE FOR APPLICABLE RATES**



Customer Shipping Create New

Ship Code: DEMOCUST7Q

Affiliate: AAA (\*) Sales Rep: AAA (\*)

Billing: Same As Shipping

Company Name: Demo Customer

Address Line 1: Acme Company 123 Main St

Address Line 2:

Address Line 3:

City: Wayland

ST / Zip / Country: MA 01778 USA


Email: email@company.com

Phone #: 888-888-8888

Phone Ext.:

Fax #:

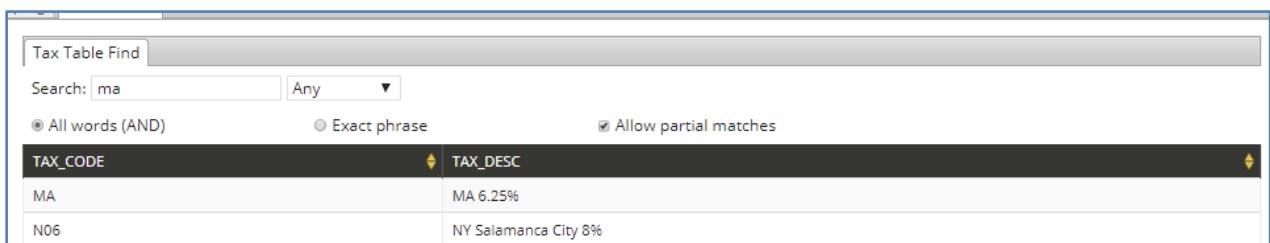
Master Customer: DEMOCUST7Q

Tax Code:   

Tax Exempt:

Vertical Market:

Classification:



Tax Table Find

Search: ma Any

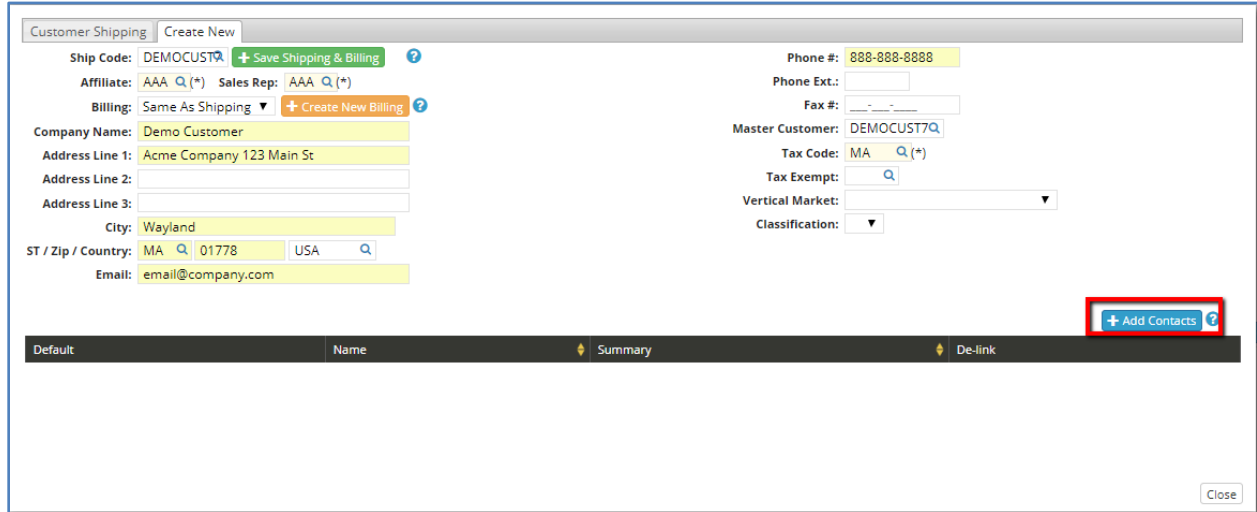
All words (AND)  Exact phrase  Allow partial matches

TAX_CODE	TAX_DESC
MA	MA 6.25%
N06	NY Salamanca City 8%

## CREATING CONTACTS:

From the "Customer Shipping" screen, click the "Add Contacts" button:

NOTE: You can add as many contacts to a Customer Shipping Record or Customer Billing Record as needed. Customer Contacts can be created for the first time from either the customer shipping screen, or the customer billing screen. Once a contact has been created in the system from the shipping screen you should be able to find them and add them to the billing screen (and vice versa):



The screenshot shows the 'Customer Shipping' screen with the following details:

- Ship Code: DEMOCUST7
- Affiliate: AAA Q (\*)
- Billing: Same As Shipping
- Company Name: Demo Customer
- Address Line 1: Acme Company 123 Main St
- City: Wayland
- ST / Zip / Country: MA 01778 USA
- Email: email@company.com
- Phone #: 888-888-8888
- Master Customer: DEMOCUST7Q
- Tax Code: MA Q (\*)

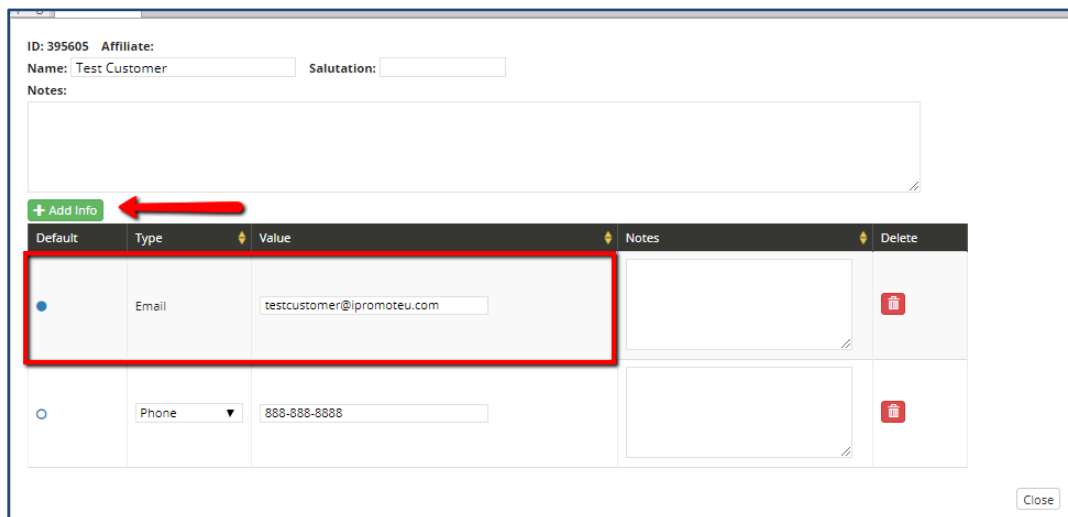
A red box highlights the '+ Add Contacts' button in the bottom right corner.

Enter the full name of the contact person in the search field. If there is another contact with that name, you will be able to see them in the search results and you can select or edit their information. If you need to create a new contact, click the "Create New" button.

You will then want to add contact info by clicking "+ Add info"

To enter the contact information, select the type of contact details from the drop down list under the column "Type". Then type the actual details (email address, phone number etc.) in the column titled "Value". If you need to add any additional information about the contact information, you can add it in the notes section under the column "Notes". In order to designate default contact information, click the corresponding radio button under the column "Default".

**\*NOTE: This is recommended for email address info, as it ensures customer facing documentation will go to the correct email address when this contact is listed on an order\***



The screenshot shows the 'Add Info' table for a contact. A red arrow points to the '+ Add Info' button. The table has the following structure:

Default	Type	Value	Notes	Delete
<input checked="" type="radio"/>	Email	testcustomer@ipromoteu.com		
<input type="radio"/>	Phone	888-888-8888		

Once you have completed entering your contact information, click the "Close" button in the bottom right-hand corner.

You will come back to the Customer Shipping Screen. Here, you can also mark your contact as a default. This will make the contact populate automatically on an order when you use this shipping and/or billing code.

Default	Name	Summary	De-link
<input checked="" type="radio"/>	Test Customer	Phone (1) Email: testcustomer@ipromoteu.com Links: TEST VADM	

**\*NOTE: If you have more than one contact listed, you can leave this default button unselected and you can select which contact you are working with from a dropdown in the Ship To, Ordered By, And Bill To contact fields on the Create New Order Screen.\***

### CUSTOMER BILLING:

A new customer billing address cannot be created without a customer shipping to be associated with it; it will cause an error. If you haven't first created a customer shipping address, always start with that first.

There are three common ways to create a billing profile

#### SHIPPING AND BILLING IS THE SAME

Once you have entered in all the required info, you will notice a button labeled "+ Save Shipping & Billing" has now become active next to the ship code. If your billing information is the same as the shipping information, including contacts, press this button. It will copy over all of this information to the Customer Billing profile.

Customer Shipping | Create New

Ship Code: DEMOCUST7 **+ Save Shipping & Billing** ?

Affiliate: AAA Q (\*) Sales Rep: AAA Q (\*)

Billing: Same As Shipping **+ Create New Billing** ?

Company Name: Demo Customer

Address Line 1: Acme Company 123 Main St

Address Line 2:

Address Line 3:

City: Wayland

ST / Zip / Country: MA Q 01778 USA Q

Email: email@company.com

Phone #: 888-888-8888

Phone Ext.:

Fax #:

Master Customer: DEMOCUST7Q

Tax Code: MA Q (\*)

Tax Exempt: Q

Vertical Market:

Classification:

Default	Name	Summary	De-link
<input checked="" type="radio"/>	Test Customer	Phone (1) Email: testcustomer@ipromoteu.com Links: TEST VADM	

**+ Add Contacts** ?

Close

## BILLING IS DIFFERENT THAN SHIPPING

If you need to add information that is different than the shipping profile, press the "+ Create New Billing" button. The information from the Shipping Customer will copy over, but you can make any necessary changes to the Billing Customer's information like Terms, Lockbox etc., or additions like a CC email or an additional contact etc....

Once done press "+ Save Billing" to save and exit this screen.

Default	Name	Summary	De-link
<input checked="" type="radio"/>	Test Customer	Phone (1) Email: testcustomer@ipromoteu.com Links: TEST VADM	

## BILLING IS AN EXISTING PROFILE

If you want your new shipping profile to be attached to an existing billing profile, you can change the drop down option from "Same as Shipping" to "Already Exists" and select the billing profile you would like to attach your shipping profile too.

Billing: Same As Shipping + Create New Billing ?

Company Name: Same As Shipping

Address Line 1:

Address Line 2: Already Exists

Address Line 3:

From this screen you can type the existing Bill Code you would like to use. As you type, any possible matches will appear in a list for you to select from.

Customer Shipping Create New

Ship Code: DEMOCUSTOMER + Save Shipping ?

Affiliate: AAA  Sales Rep: AAA

Billing: Already Exists ?

Bill Code:  (\*)

Default	Summary	De-link
<input checked="" type="checkbox"/>	TEST01	
	TEST011 - TEST011 Company	

Once you locate and select the appropriate bill code, press Tab and the Bill code will be attached to your Shipping profile.