

# Loading New Customer

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off



## Main Menu

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### Imports & Exports

Click Administrative Functions



# Loading New Customer

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## Supplier Administrative Menu

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- Branches By Location
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- Ship To Edit
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Click Customer Settings

# Loading New Customer

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

Edit/Load Customers . . .

[Load New Customer . . .](#)

[Customer Admin. Reports . . .](#)

Customer

Search

Go To:

Main Edit

Application Mgmt.

Locations

Logins

Requestors

Departments

Accounts

Invoicing

Click Load New Customer



# Loading New Customer

Main Menu | Customer Orders | Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Docs | Print | Log Off

## Load New Customer...

<b>*Customer:</b> <input type="text" value="123456"/>	<b>Name:</b> <input type="text" value="ACME"/>
<b>Billing Information</b>	
Address: 1: <input type="text" value="100 ELM ST"/>	City: <input type="text" value="DETROIT"/>
2: <input type="text"/>	State: <input type="text" value="MI Michigan"/>
3: <input type="text"/>	Country: <input type="text" value="US United States"/>
Terms Code: <input type="text"/>	Tax Code: <input type="text"/>
<input type="text"/> %	Tax Rate: <input type="text"/>
ZIP: <input type="text" value="44444"/>	
Salesman: <input type="text"/>	Name: <input type="text"/>
Phone: <input type="text"/>	Notes: <input type="text"/>
Fax: <input type="text"/>	
Email: <input type="text"/>	Ship Via: <input type="text"/>
	FOB: <input type="text"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
	<input type="button" value="Reset"/>

Enter Customer info, Customer ID and Name are mandatory  
Click Save

# Loading New Ship To

## Edit Customer...

<b>Customer:</b> <input type="text" value="123456"/>	<b>Name:</b> <input type="text" value="ACME"/>		
<b>Billing Information</b>			
Address: 1: <input type="text" value="100 ELM"/> <input type="button" value="x"/>	City: <input type="text" value="SAGINAW"/>		
2: <input type="text"/>	State: <input type="text" value="MI"/> <input type="text" value="Michigan"/> <input type="button" value="v"/>		
3: <input type="text"/>	Country: <input type="text" value="US"/> <input type="text" value="United States"/> <input type="button" value="v"/>		
Terms Code: <input type="text"/>	ZIP: <input type="text" value="44444"/>		
Tax Code: <input type="text"/> Rate: <input type="text"/> %			
Salesman: <input type="text"/> Name: <input type="text"/>	Notes: <input type="text"/>		
Phone: <input type="text"/>			
Fax: <input type="text"/>			
Email: <input type="text"/>	Ship Via: <input type="text"/> FOB: <input type="text"/>		
<input type="button" value="SAVE"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>	<input type="button" value="Delete"/>

### Customer Settings...

<input type="button" value="Additional Settings"/>	<input type="button" value="Manage Lists"/>	<input type="button" value="Inventory App Management"/>	<input type="button" value="Order App Management"/>	<input type="button" value="Manage Logins"/>
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Click Manage Lists

# Loading New Ship To

## Edit Customer...

<b>Customer:</b> <input type="text" value="123456"/>	<b>Name:</b> <input type="text" value="ACME"/>
<b>Billing Information</b>	
Address: 1: <input type="text" value="100 ELM"/>	City: <input type="text" value="SAGINAW"/>
2: <input type="text"/>	State: <input type="text" value="MI Michigan"/>
3: <input type="text"/>	Country: <input type="text" value="US United States"/>
Terms Code: <input type="text"/>	ZIP: <input type="text" value="44444"/>
Tax Code: <input type="text"/> Rate: <input type="text"/> %	
Salesman: <input type="text"/> Name: <input type="text"/>	Notes: <input type="text"/>
Phone: <input type="text"/>	
Fax: <input type="text"/>	
Email: <input type="text"/>	Ship Via: <input type="text"/> FOB: <input type="text"/>
<input type="button" value="SAVE"/>	<input type="button" value="Cancel"/>
	<input type="button" value="Reset"/> <input type="button" value="Delete"/>

## Customer Settings...

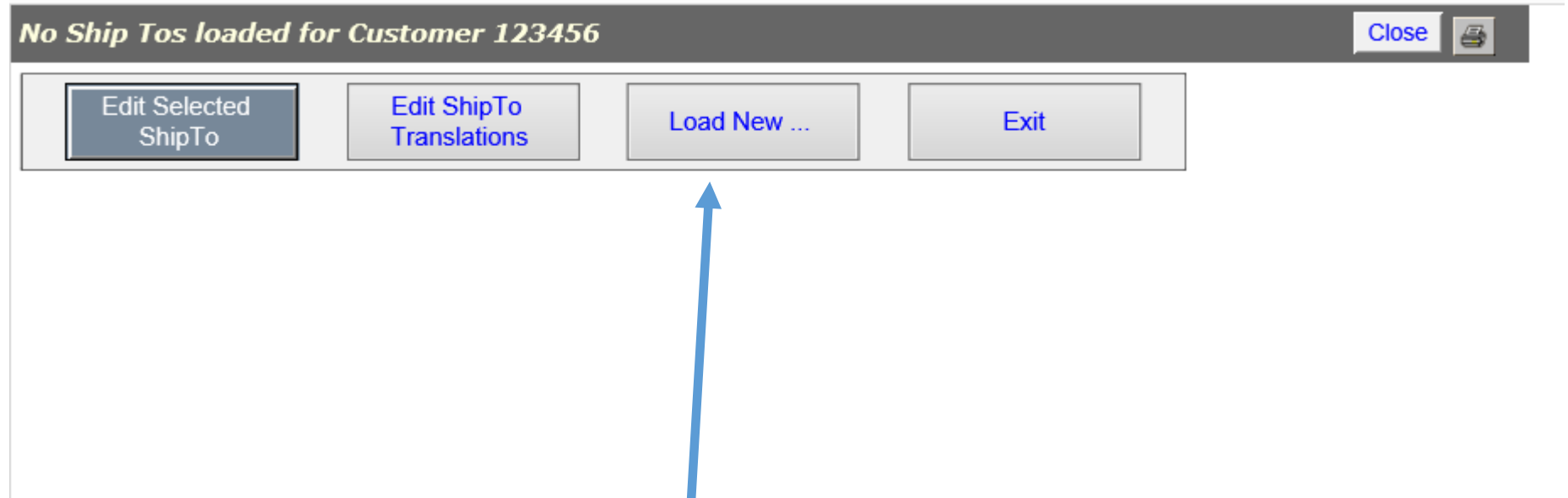
<input type="button" value="Additional Settings"/>	<input type="button" value="Manage Lists"/>	<input type="button" value="Inventory App Management"/>	<input type="button" value="Order App Management"/>	<input type="button" value="Manage Logins"/>
--	---	---	---	--

## Lists...

<input type="button" value="Locations"/>	<input type="button" value="Product Classes"/>	<input type="button" value="Ship Tos"/>	<input type="button" value="Requestors"/>
<input type="button" value="Job Numbers"/>	<input type="button" value="Accounts"/>	<input type="button" value="Departments"/>	<input type="button" value="Requestors By Location"/>
<input type="button" value="Order Request Approvers"/>	<input type="button" value="Order Approvers"/>	<input type="button" value="Usage Approvers"/>	<input type="button" value="Operations"/>
			<input type="button" value="Stations"/>

Click Ship Tos

# Loading New Ship To



Click Load new

# Loading New Ship To

## Load New Customer Ship To...

Ship To ID	1
Name	ACME
Address 1:	100 ELM
2:	
3:	
City	SAGINAW
State	MI MICHIGAN
ZIP	48444
Tax Authority	
Country	
Taxable	<input type="radio"/> Y <input type="radio"/> N <input checked="" type="radio"/> (n/a)
Phone:	
Fax:	
Email:	
Ship Via:	
Notes:	
ShipToDefined: 1:	
2:	
3:	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Enter a ship to code, name and address.



# Loading Locations

**Supplier**

Main Menu | Customer Orders | Branch Orders | Inventory | Branch Inventory | Transactions | Purchasing | Billing | Asset Management | Miscellaneous | Reports | Print | Log Off

**Edit Customer...**

**Customer:**  **Name:**

**Billing Information**

Address: 1:  City:   
2:  State:    
3:  Country:    
Terms Code:  ZIP:   
Tax Code:  Rate:  %

Salesman:  Name:   
Phone:  Notes:   
Fax:   
Email:  Ship Via:  FOB:


**Customer Settings...**

**Lists...**

<input type="button" value="Locations"/>	<input type="button" value="Product Classes"/>	<input type="button" value="Ship Tos"/>	<input type="button" value="Requestors"/>
<input type="button" value="Job Numbers"/>	<input type="button" value="Accounts"/>	<input type="button" value="Departments"/>	<input type="button" value="Requestors By Location"/>
<input type="button" value="Order Request Approvers"/>	<input type="button" value="Order Approvers"/>	<input type="button" value="Usage Approvers"/>	<input type="button" value="Operations"/>
			<input type="button" value="Stations"/>

Click Locations

# Loading Location info

**Edit Facility/Locations for Customer 12345** Close 

Facility	Name/Description	Location	Name/Description	Ship-To	Currency	Pay-On Type	Repairs	
1	PLANT 1	A	CRIB A	1	USD	ON SHIP	NO	Add

Finished

[Generate Point-of-Use Request QR Codes ...](#)

1. Key in Facility Code with a name

2. Key in Location Code with a name

3. Key in Ship To code

4. Set Pay-on Type

5. Click add

# Loading Master Files

<b>Customer:</b> <input type="text" value="123456"/>	<b>Name:</b> <input type="text" value="ACME"/>			
<b>Billing Information</b>				
Address: 1: <input type="text"/>	City: <input type="text"/>			
2: <input type="text"/>	State: <input type="text" value=""/>			
3: <input type="text"/>	Country: <input type="text" value="US United States"/>			
Terms Code: <input type="text"/>	ZIP: <input type="text"/>			
Tax Code: <input type="text"/> Rate: <input type="text"/> %				
Salesman: <input type="text"/> Name: <input type="text"/>	Notes: <input type="text"/>			
Phone: <input type="text"/>	Ship Via: <input type="text"/> FOB: <input type="text"/>			
Fax: <input type="text"/>				
Email: <input type="text"/>				
<input type="button" value="SAVE"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>	<input type="button" value="Delete"/>	
<b>Customer Settings...</b>				
<input type="button" value="Additional Settings"/>	<input type="button" value="Manage Lists"/>	<input type="button" value="Inventory App Management"/>	<input type="button" value="Order App Management"/>	<input type="button" value="Manage Logins"/>
<b>Lists...</b>				
<input type="button" value="Locations"/>	<input type="button" value="Product Classes"/>	<input type="button" value="Ship Tos"/>	<input type="button" value="Requestors"/>	
<input type="button" value="Job Numbers"/>	<input type="button" value="Accounts"/>	<input type="button" value="Departments"/>	<input type="button" value="Requestors By Location"/>	
<input type="button" value="Order Request Approvers"/>	<input type="button" value="Order Approvers"/>	<input type="button" value="Usage Approvers"/>	<input type="button" value="Operations"/>	
<input type="button" value="Event Settings"/>		<input type="button" value="UOMS"/>	<input type="button" value="Stations"/>	

1. Click on the master file box to load, eg. Requestors. Each master file has an Id and description. For instance Requestor 10000 has description of Bob Smith. These master files are used in usage loading and inventory creation.

# Loading Logins

<b>Customer:</b> <input type="text" value="CHY"/>	<b>Name:</b> <input type="text" value="CHYRSLER"/>			
<b>Billing Information</b>				
Address: 1: <input type="text" value="100 UNIVERSITY DRIVE"/>	City: <input type="text" value="AUBURN HILLS"/>			
2: <input type="text"/>	State: <input type="text" value="MI Michigan"/>			
3: <input type="text"/>	Country: <input type="text" value="US United States"/>			
Terms Code: <input type="text" value="NET 30"/>	ZIP: <input type="text" value="48774"/>			
Tax Code: <input type="text"/> Rate: <input type="text"/> %				
Salesman: <input type="text"/> Name: <input type="text"/>	Notes: <input type="text"/>			
Phone: <input type="text"/>				
Fax: <input type="text"/>				
Email: <input type="text"/>	Ship Via: <input type="text" value="UPS1"/> FOB: <input type="text"/>			
<input type="button" value="SAVE"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>	<input type="button" value="Delete"/>	
<b>Customer Settings...</b>				
<input type="button" value="Additional Settings"/>	<input type="button" value="Manage Lists"/>	<input type="button" value="Inventory App Management"/>	<input type="button" value="Order App Management"/>	<input type="button" value="Manage Logins"/>

Click Manage Logins



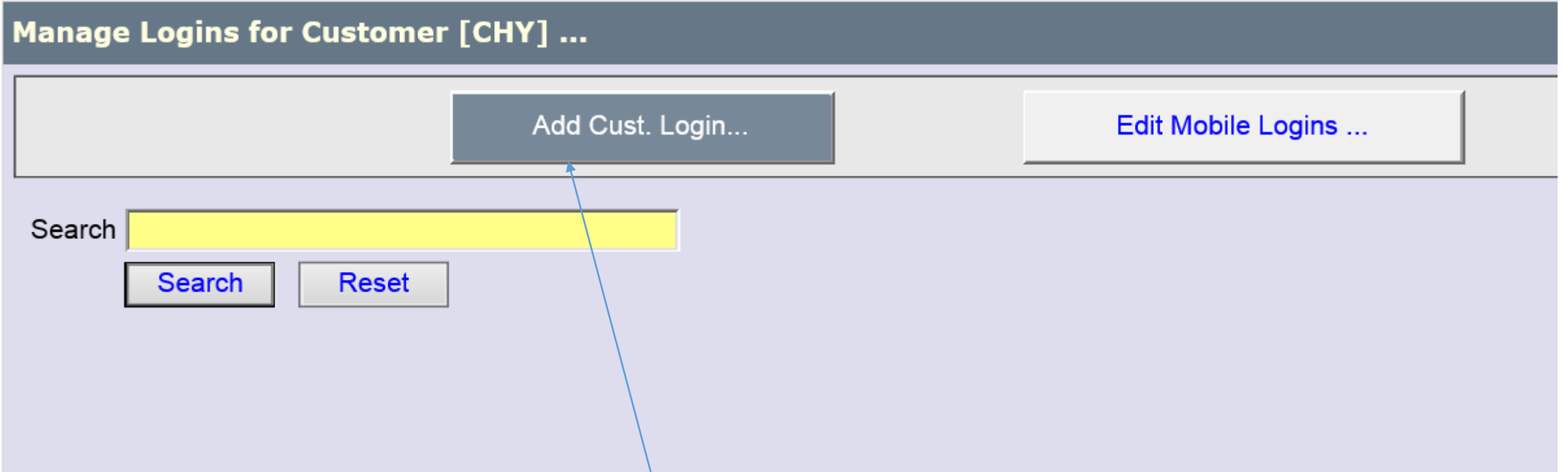
# Loading Logins

**Manage Logins for Customer [CHY] ...**

Add Cust. Login... Edit Mobile Logins ...

Search

Search Reset



Click Add Cust. Login

# Loading Logins

**Add Customer Login for CHY ...**

New Login:   **No Prefix**

Name:

Email:

Check No prefix, enter the login, name and email

# Loading Logins

**Manage Login [abcdef] for Customer [CHY] ...** Close

**Note: password is not set.  
User will not be able to login until password is initialized.**

Login: <input type="text" value="abcdef"/> <input checked="" type="checkbox"/> Active	<b>Multi-App Menu</b>	<b>Touch Menu</b>
Customer: <input type="text" value="CHYRSLER"/>	(None)	Usage
Name: <input type="text" value="Test User"/> <span>×</span>	MAIN APPLICATION	Usage Request Submit
Email: <input type="text"/>	INVENTORY TOUCH	Inquiry
<input type="checkbox"/> Email Events	INVENTORY CART	Order Submit
Default Requestor: <input type="text"/> <input type="checkbox"/> Administrative	ORDER REQUEST	Reports
Default Fac & Loc: <input type="text"/> <input type="text"/>	REQUEST APPROVAL	Browse Inventory
<b>Reporting Permissions:</b>	AUTOMATED IMPORTS	
Additional CustIDs: <input type="text"/> <span>Add/Delete ...</span>		

**Save** **Set Password** **Edit Report List** **Edit Menu** **Edit Events** **Order App** **Inv Cart App** **Cancel** **Delete**

Click set Password and load the password