

### **Preparation for using the ADD CUSTOMER mode.**

Discussion: This will allow you to set-up a customer on-the-fly. This is very useful when you have a customer that wants to purchase something that you have to special order. You can also help a customer establish credit by using this feature. Depending on how you set up this file will depend on what the counter personnel will have the authority to do. This will be explained in detail during the set-up instructions.

1. Go into Customer maintenance (CUSMNT) and set up a customer for each location that you want to have customer set-up function.

You may give the customer name as NEW CUSTOMER. I recommend that you complete the tax information as if the new customer will be fully taxed with your jurisdiction number. I also recommend that you set-up this new customer number as a COD customer only. This will prevent the counter from opening up a charge account for Jane Doe.

2. After you have set up the customer you need to put that customer number in the "Customer number for "helium customer" template:" on the Location Master File for that location. (Master Menu, File Maintenance Menu, Location Master file).

3. Now when you go into order entry, on the screen that you normally put the customer number to search for, you will have the option to (F6) Add a Customer.