

Lesson 10 Creating Customer Records 101

Prerequisite
lesson 1

There are two ways to create customers. This lesson will cover only the quick customer setup. It does not allow you to do everything that is possible but it will give you everything you need 99% of the time with one fourth the work.

The quick customer setup dialog can be accessed two ways.

- 1 - From the Main Menu Bar - Customers / Customer Quick Setup.
- 1 - From the View edit post screen click on the New customer button.

Individual Customer (Borrower)

This is a very simple Windows dialog - (screen).

The screenshot shows a Windows-style dialog box titled "Add New Customer (NC-101)". It features two tabs: "Customer ID" and "Memo". The "Customer ID" tab is selected. The form contains the following fields and values:

Customer No	21001	Taxpayer ID	123-45-6789
Title			
First Name	Douglas	Initial	
Last Name	Branson		
Company Name	Carrollton Home Improvements		
Address	4356 North Josey Lane	Cust Type	IND
Address			
City	Carrollton	State	TS
		Zip	75007
Comment			
Work Phone	972-123-4567	FAX Phone	
Home Phone	214-444-0999	Cell Phone	

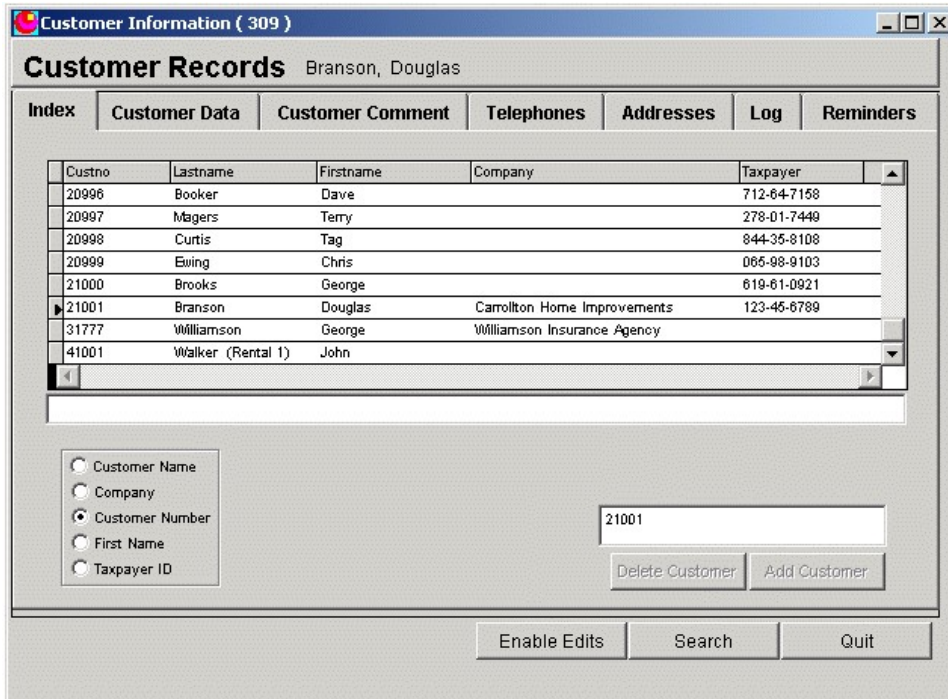
At the bottom right of the dialog are "Save" and "Cancel" buttons.

Create_21001_1.png

Fill in the customer data for your customer. Duplicate the example customer above. Be sure to set the customer type in the Cust Type combo box to IND for individual customer.

Click on Save.

Next pull up the view customer screen. This screen will not really be covered in this lesson but you will get a glimpse of part of it.



Create_21001_2.png

Select the Customer Number option in the Windows option box. Type the customer number into the filter text box and notice the small ► on the left side of the grid. It is pointing to your new customer.

Click on the Customer Data tab.

Customer Information (309)

Customer Records

 Branson, Douglas

Index Customer Data Customer Comment Telephones Addresses Log Reminders

Customer No: 21001
Last Name: Branson
First Name: Douglas
Initial(s):
Title:
Company: Carrollton Home Improvements

Customer Type:
Work Phone: 972-123-4567
Home Phone: 214-444-0999
Fax Phone:
Cell Phone:
Credit Rating:
Secured Limit:
Unsecured Limit:
Tax ID: 123-45-6789

Enable Edits Search Quit

Create_21001_3.png

Next click on the Addresses Tab

Customer Information (309)

Customer Records

 Branson, Douglas

Index Customer Data Customer Comment Telephones Addresses Log Reminders

Line 1	Line 2	City	St	Zip	Location
4356 North Josey Lane		Carrollton	TS	75007	

Address: 4356 North Josey Lane
City: Carrollton
State: TS Zip: 75007
Location:
 M2_address

Delete Address Add Address

Enable Edits Search Quit

Create_21001_4.png

You will notice there is considerably more information here than appears on the Customer Quick Setup dialog.

Set up Insurance Agency Record

The setup is exactly like the example for customer 21001 above with one exception. Set the customer type to “IA”

Set up Investor Record

The setup is exactly like the example for customer 21001 above with one exception. Set the customer type to “IV”