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)

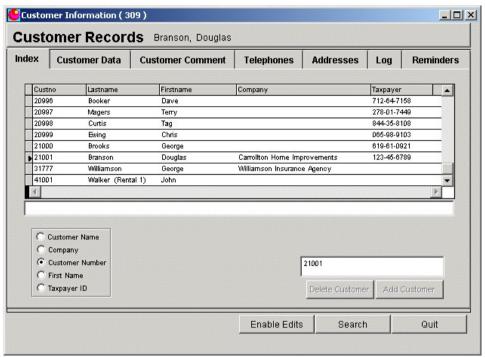This is a very simple Windows dialog - (screen).

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.
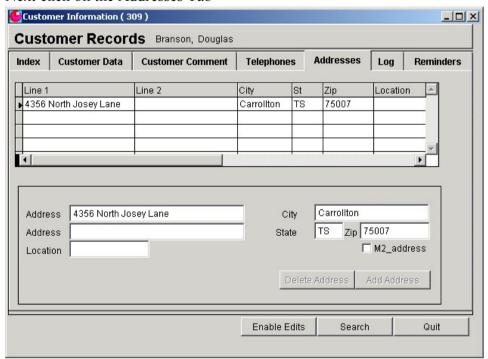

Create_21001_2.png

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.

Create_21001_3.png

Next click on the Addresses Tab

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"