

SOP4: New Customers

The purpose of this section is to introduce the user how to add a new Customer onto the Agresso system.

New Customers

Adding the new Customer can then be used for generating Sales Orders.

Please ensure you have the relevant details when adding a new Customer - VAT Registration Number – Contact Details including Address, Phone, Fax, Email, Post code.

Once a New Customer is added onto the system the Data Control Section within the Finance office will receive an email informing them of the New Customer added and will complete the necessary checks regarding New Customers (e.g. Not already on the system, Credit Control Checks, etc...)

Existing Customers – Any changes to customers should be sent to:

finance-salesled@glasgow.ac.uk

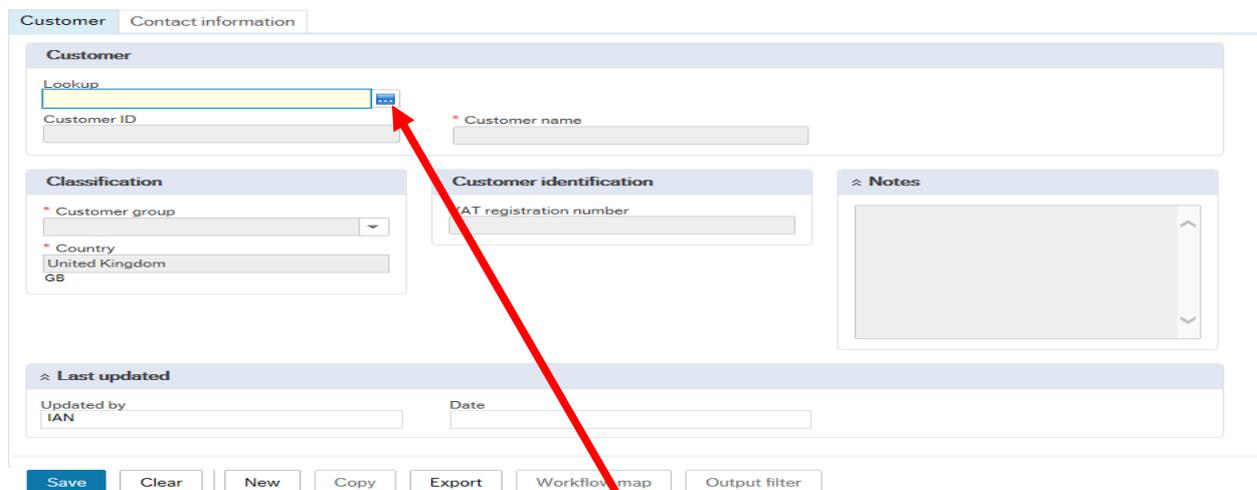
SOP4.1: Check to confirm Customer is not on Agresso

Before adding a new customer a search must be done to ensure Customer is not already on the Agresso system.

1. To access the Customer information screen:



The following screen will appear:



The screenshot shows the 'Customer' information screen in Agresso. The 'Lookup' field is highlighted in yellow. A red arrow points from the 'Lookup' field to the 'Customer' link in the previous screenshot. The screen includes fields for 'Customer ID', 'Customer name', 'Customer group', 'Country' (set to 'United Kingdom'), and 'VAT registration number'. There is also a 'Notes' section and a 'Last updated' section showing 'Updated by IAN' and a 'Date' field. At the bottom, there are buttons for 'Save', 'Clear', 'New', 'Copy', 'Export', 'Workflow map', and 'Output filter'.

2. To Search for Customers Click on the Lookup  search screen:

3. In the Search Criteria enter the name of required Customer Then click on

Search

The results will appear below. A more advanced search can be done using the advanced option

Advanced or the filter option Filter

Value lookup

Search criteria

Clydebank high

Advanced

Search

Customer ID	Name	Address	Post Code	Place
628360	Clydebank High School	Janetta Street	G81 3EB	Clydebank

Close

4. If the Customer required cannot be found a new Customer will need to be set up. If the Customer is found there is no need to set up a new Customer and the CustID should be noted to be used for raising Sales Orders.

SOP4.2: Adding a New Customer

1. To access the Customer information screen:

Select Menu Option
Select Customer and sales
Select Customer

Menu

Your employment

Procurement

Customers and sales

Customer information

Customer

The following screen will appear:

1. To create a New Customer Click on the New button at the bottom of the screen

New

Save Clear New Copy Export Workflow map Output filter

The red star * indicates required fields that must be used when adding a Customer

SOP4.3: Customer Details Tab

Customer Contact information

Customer

Lookup

Customer ID [NEW]

* Customer name Agresso Training Company

Classification

* Customer group All UK Customers GBP Currency CA

* Country United Kingdom GB

Customer identification

VAT registration number GB123456789

2. **Customer ID** Ignore this field – Once saved a Customer ID will be assigned.

3. **Customer Name** Enter the Name of the Customer

4. **Customer Group** Please select the appropriate Customer Group that should be associated to the customer using the drop down button.

* Customer group

All UK Customers GBP Currency

Accommodation Customers Only

All UK Customers GBP Currency

All UK customers EUR currency

A listing of customer groups and when to use these is noted below:

CA	All UK Customers GBP Currency - Used for customers with a UK billing address and GBP Currency	No Vat Registration Number Required
CAE	All UK Customers EUR currency - Used for customers with a UK billing address and EUR Currency	No Vat Registration Number Required
EU	EU Businesses GBP Currency - Used for customers with a EU billing address and GBP Currency	VAT REGISTRATION NUMBER REQUIRED

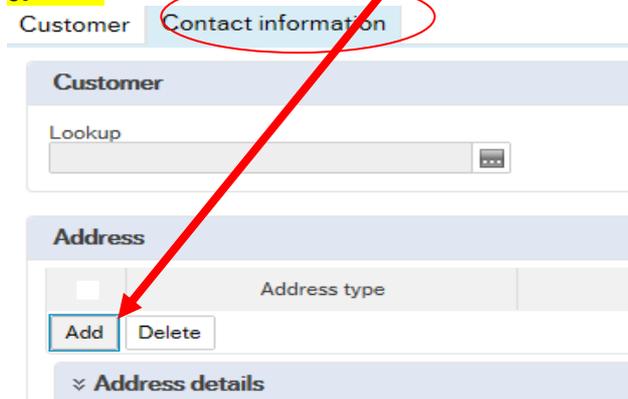
EUE	EU businesses EUR currency - Used for customers with a EU billing address and EUR Currency	VAT REGISTRATION NUMBER REQUIRED
EU1	EU Consumers GBP currency - Used for consumers with a EU billing address and GBP Currency	No Vat Registration Number Required
EU2	EU Consumers EUR Currency - Used for consumers with a EU billing address and EUR Currency	No Vat Registration Number Required
EUR	EU Ross Section - EU Ross Section ONLY	No Vat Registration Number Required
RE1	Rest of the world GBP currency - Used for customers with a Non UK or Non EU billing address and GBP Currency	No Vat Registration Number Required
REE	Rest of the world EUR currency - Used for customers with a Non UK or Non EU billing address and EUR Currency	No Vat Registration Number Required
REU	Rest of the world USD currency - Used for customers with a Non UK or Non EU billing address and USD Currency	No Vat Registration Number Required

N.B. If you are unsure which customer group to use please contact the sales ledger section who will be able to advise (finance-salesled@glasgow.ac.uk)

- Country** Please select the country of the Supplier. This is a standard two letter code for the company. See webpage for country codes:
http://en.wikipedia.org/wiki/ISO_3166-1
- VAT RegNo** In order to zero rate the supply of goods within the EU a VAT registration number must be added to all customers accounts assigned to groups EU and EUE and shown on the sales invoice. E.g. An example of a VAT registration number is BE0425260668
- Text Optional field, which can be used to hold any free text information required. E.g. Supplier used for Training sessions

SOP4.4: Contact Information Tab

- Click on the button **Add** This will open the fields relating to customer contact details.
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Customer **Contact information**

Customer

Lookup

Address

Address type

Add **Delete**

≡ **Address details**

This will open the fields relating to customer contact details.

Address

<input type="checkbox"/>	Address type	Street address	Place	County	Post Code
<input type="checkbox"/>	General	University Avenue			G12 8QQ

Add Delete

⌵ **Address details**

<p>Address</p> <p>* Address type General</p> <p>* Street address University Avenue</p> <p>* Country United Kingdom</p> <p>* Post Code G12 8QQ</p> <p>* Place Glasgow</p> <p>County</p>	<p>Phone numbers</p> <p>* Telephone 0662</p> <p>Telefax</p> <p>Telephone 2</p>	<p>E-mail and website</p> <p>E-mail finsup@glasgow.ac.uk</p> <p>E-mail cc</p> <p>URL</p>	<p>Contact person</p> <p>Name Ian Brown</p>
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10. Street Address Enter the Address of the Customer

11. Country This will default to United Kingdom. This can be changed if required using the drop down option.

12. Post Code Enter the Post Code of the Customer

13. Place Enter the Town/City of the Customer

14. Telephone Enter the Telephone number of the Customer contact. All other numbers are optional.

15. Email Enter the Email address of the Customer contact. E-mail cc is optional.

16. Name Enter a name of the Customer staff member who should be contacted regarding any queries.

SOP4.5: Saving the New Customer

1. 1. To create a New Customer Click on the New button at the bottom of the screen

Save



2. Once saved the user will get a Customer ID. This Customer can now be used for processing sales order.

✓ Successfully saved. Customer ID 631194 is now created.

Once saved Details of any new customers created will be passed to data control for data validation. They will assign a Credit Controller, and will mark the customer as being data checked.