Company Logo Here	WORK INSTRUCTION			
	DOC NUMBER:	D0053764	**REVISION:**	A
	OWNER:	Customer Service	**REV. DATE:**	04/27/2017
	NEW CUSTOMER ACCOUNT SETUP			

TRIGGER EVENT:

A prospect account places a purchase order.

PURPOSE:

The purpose of this document is to record the SyteLine steps required to setup a new customer account.

PROCESS:

Quote to Cash

PROCESS STEP(s):

Quote, Order

REFERENCE:

- ISO 9001 Quality Management Systems - Requirements
- D0059944 Quote
- D0030848 Customer Orders
- D0053870 Customer Service Training Reference Manual

APPLICABILITY:

Sales and Customer Service

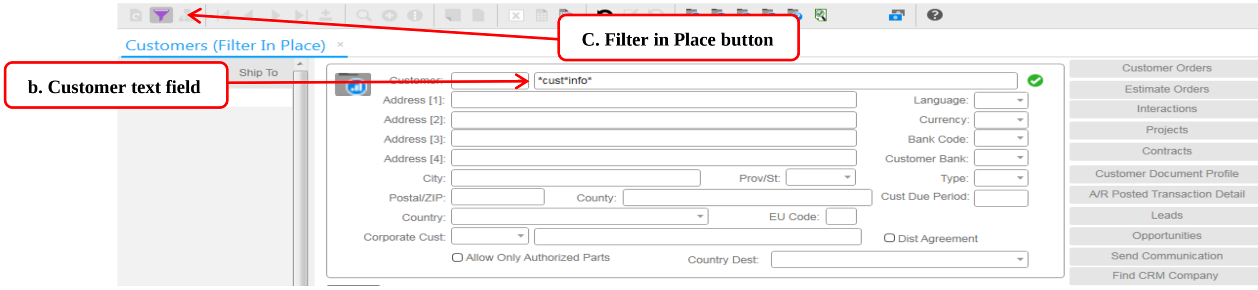
RESPONSIBILITY and ACCOUNTABILITY:

Customer Service Staff is responsible for entering all new Customer Accounts.

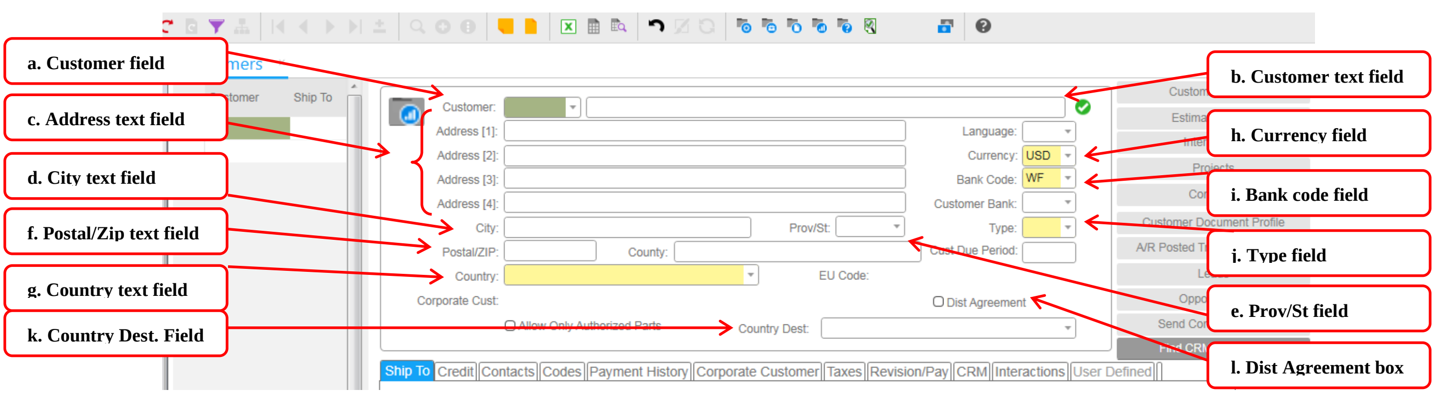
DEFINITIONS:

PROCEDURE:

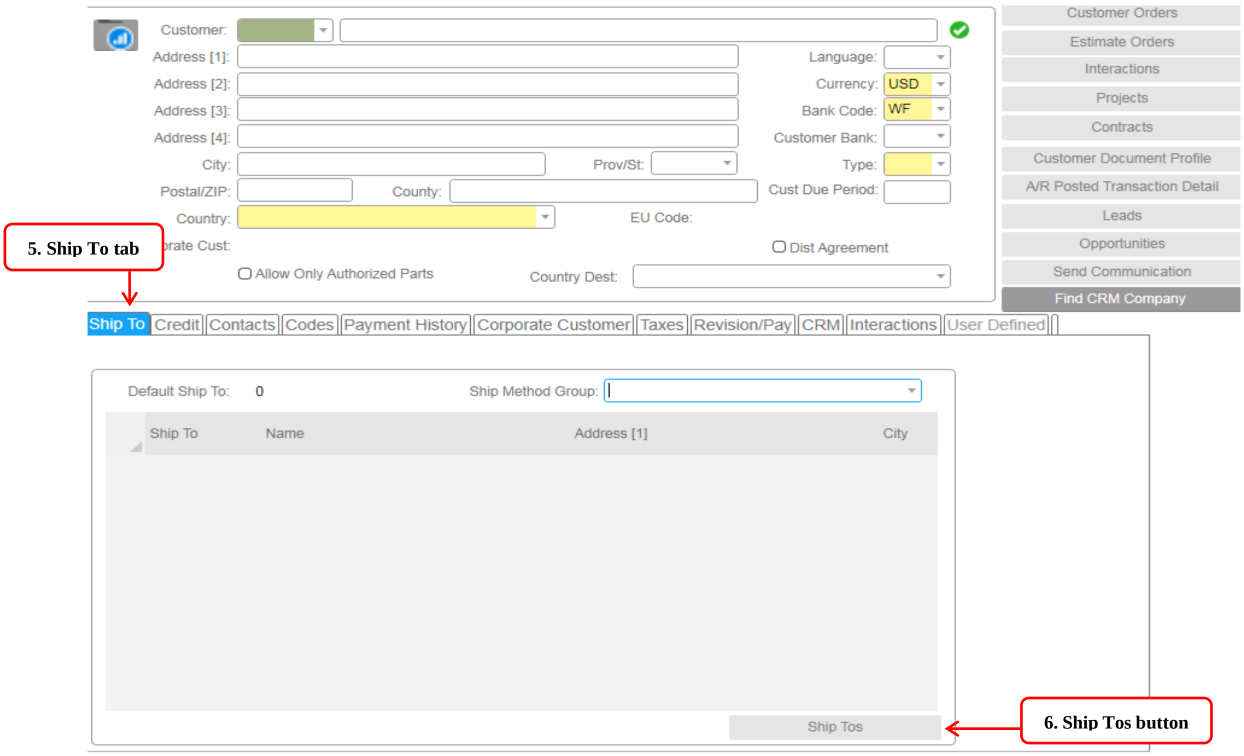
1. Log into SyteLine
2. Open **Customers** form
    a. International customer only, you must run a Denied Parties Checklist to ensure the account passes.
    b. To ensure the account is not already set up in SyteLine, in the customer text field and/or city/state/country fields enter partial company information (followed by *).
    c. Click the Filter in Place  button to see if customer account pulls up. If not begin a new customer account set up.



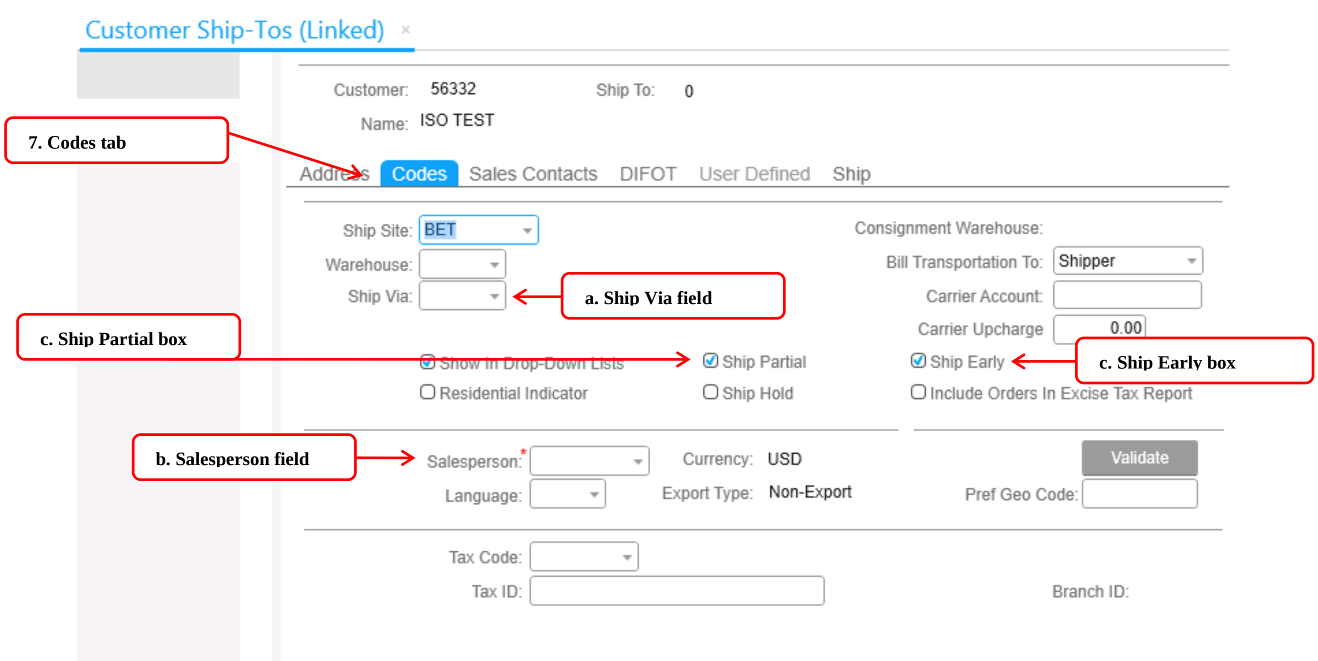
3. To create new account enter, (CTRL + N). All fields must be typed in capital letters.
    a. Customer field: tab through (Customer number will be system generated once saved)
    b. Customer text field: Enter customer's name, and the store name or ship to's city
    c. Address field(s) : Enter billing street address
    d. City text field: Enter the city for the billing address
    e. Prov/St field: Enter Province or State location
    f. Postal/Zip field: Postal or Zip Code
    g. Country field: From the dropdown menu select country where product will bill to (United States must be typed in, not in the dropdown menu.)
    h. Currency field: Defaults to USD
    i. Bank code field: Defaults to current Company bank
    j. Type field: Dropdown menu click either: 1 = Domestic / 2 = Foreign / 3 = InterCo
    k. Country Dest. Field: For International accounts only, select final destination country when ship to address is within the United States
    l. Dist Agreement box: For active International distributors accounts, box must be checked



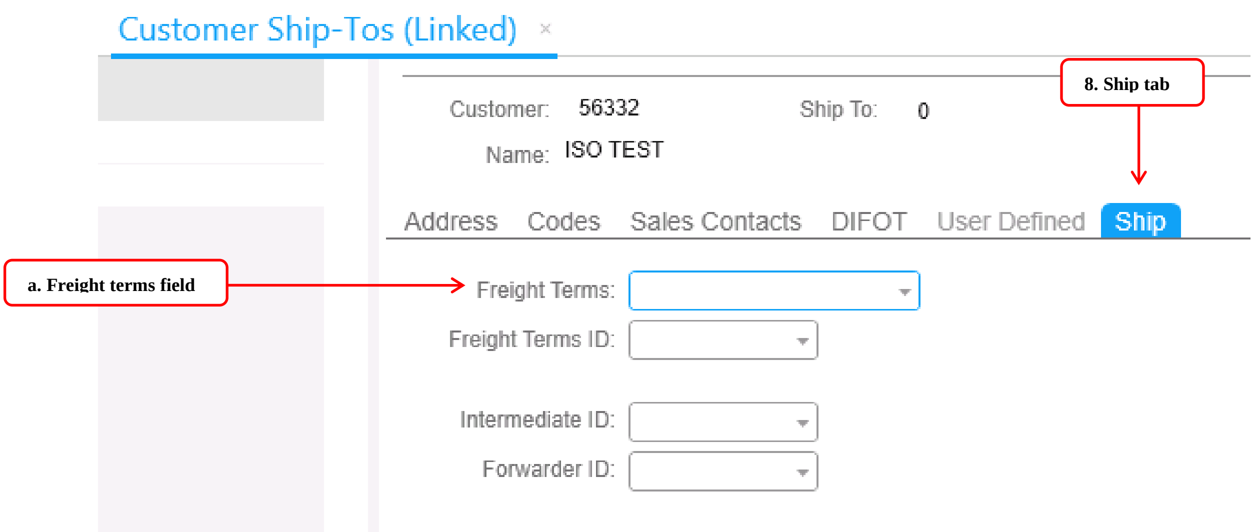
4. Save form (CTRL + S)
5. Click on the **Ship To** tab
6. Click on Ship Tos button at the bottom of the tab



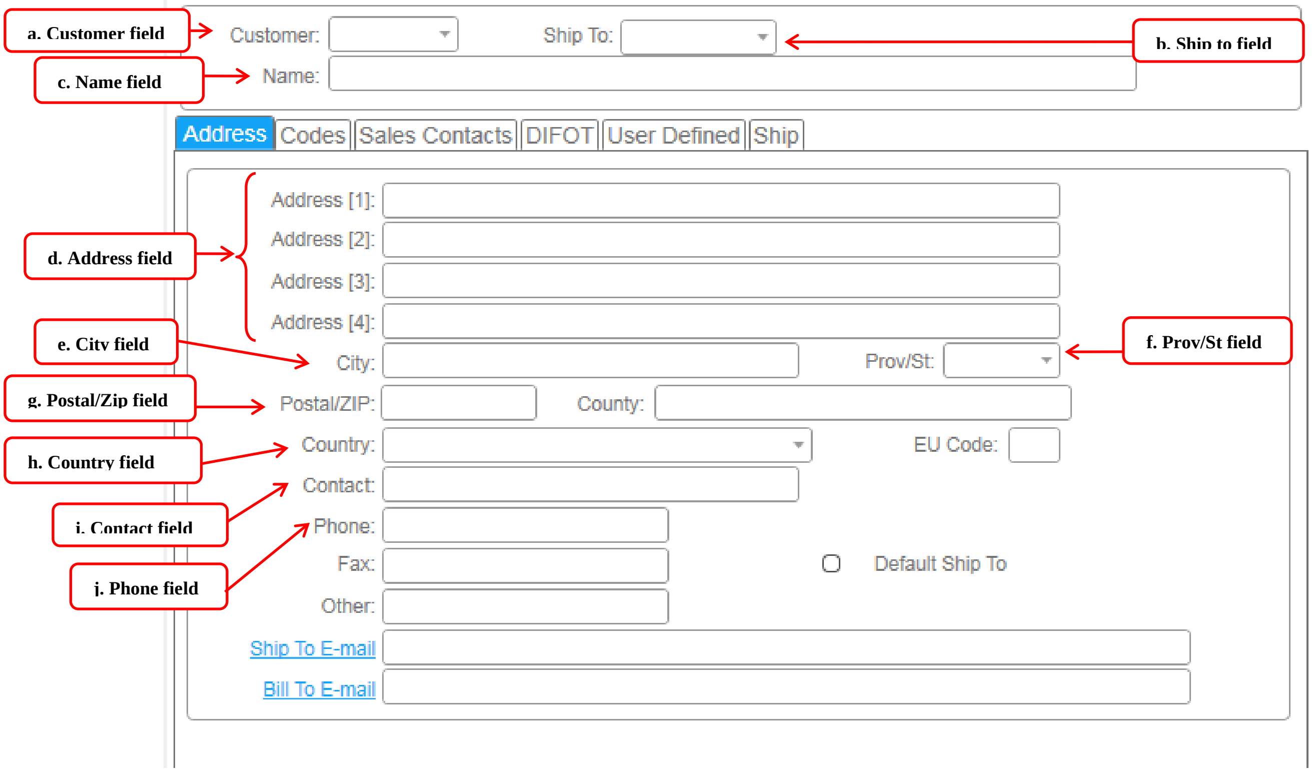
7. Click on the **Codes** tab
   a. Ship via field: Enter preferred carrier
   b. Salesperson field: From the dropdown menu select the appropriate regional manager
   c. Verify or adjust the Ship Partial and Ship Early check boxes



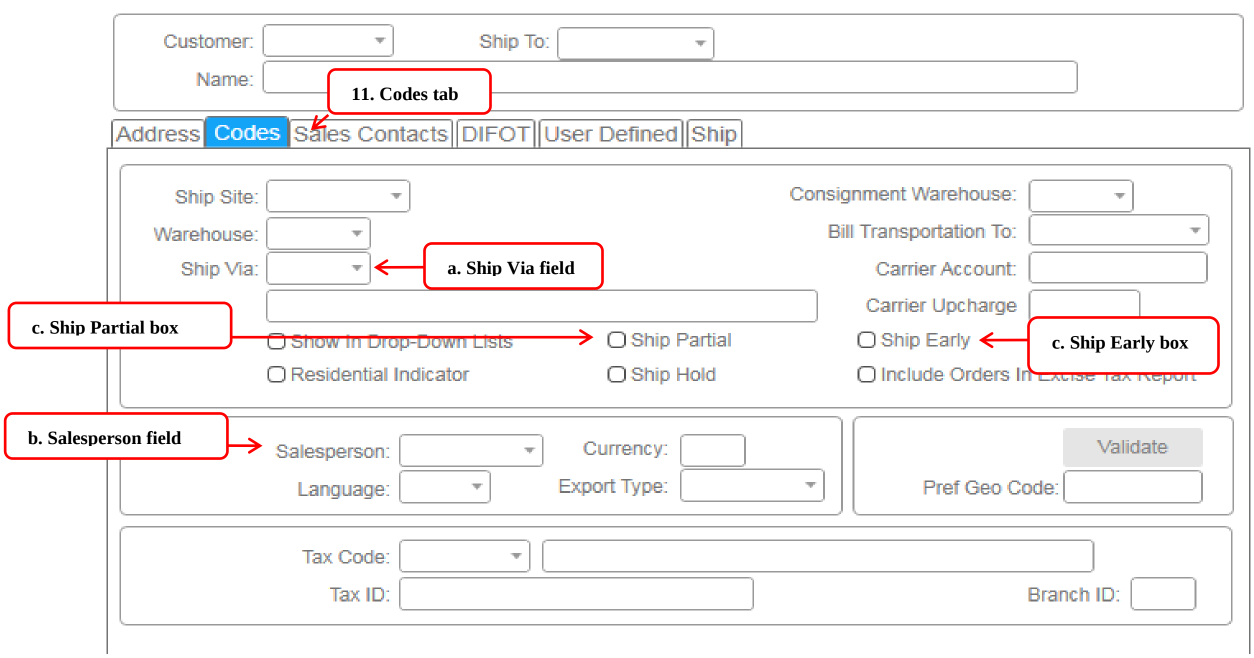
8. Click on the **Ship** tab
    a. Freight terms field: Freight terms field: From the dropdown menu select the appropriate freight terms for the account



9. Save form (CTRL + S)
10. Begin a new record (CTRL + N)
    a. Customer field: System will default this field to the system generated customer number
    b. Ship to field: System will default this field to ship to number 1
    c. Name field: Enter ship to’s company name
    d. Address tab/field(s): Enter the ship to company’s street address
    e. City field: Enter the city for the ship to location
    f. Prov/St field: Enter province or state for the ship to location
    g. Postal/Zip field: Enter postal or zip code for the ship to location
    h. Country field: Enter country for the ship to location
    i. Contact field: Enter name of contact at ship to location
    j. Phone field: Enter phone number of contact at ship to location

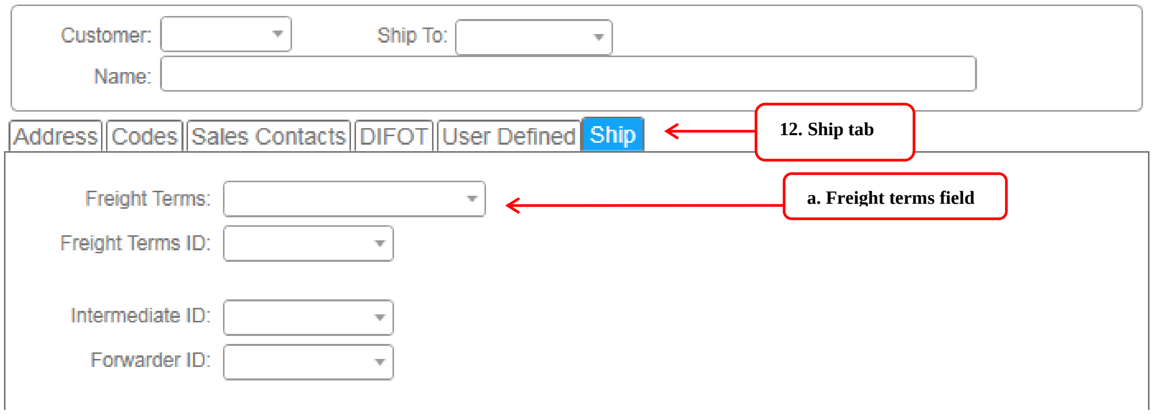


11. Click on the **Codes** tab
   a. Ship Via field: Enter preferred carrier
   b. Salesperson field: From the dropdown menu select the appropriate regional manager
   c. Verify or adjust the Ship Partial and Ship Early check boxes



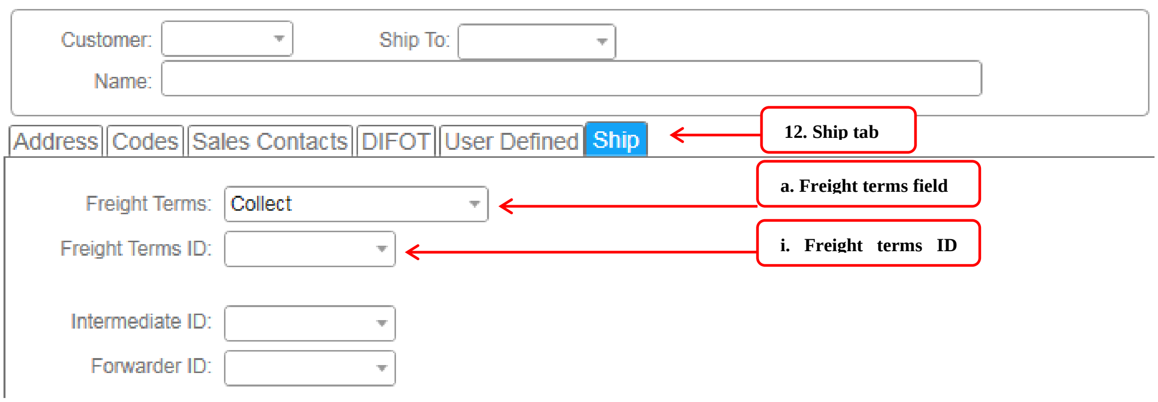
12. Click on **Ship** tab

   a. Freight terms field: From the dropdown menu select the appropriate freight terms for the account.



Note: For freight terms of collect, or bill recipient, follow these instructions:

i. Freight Terms ID field: Right click, select Add option



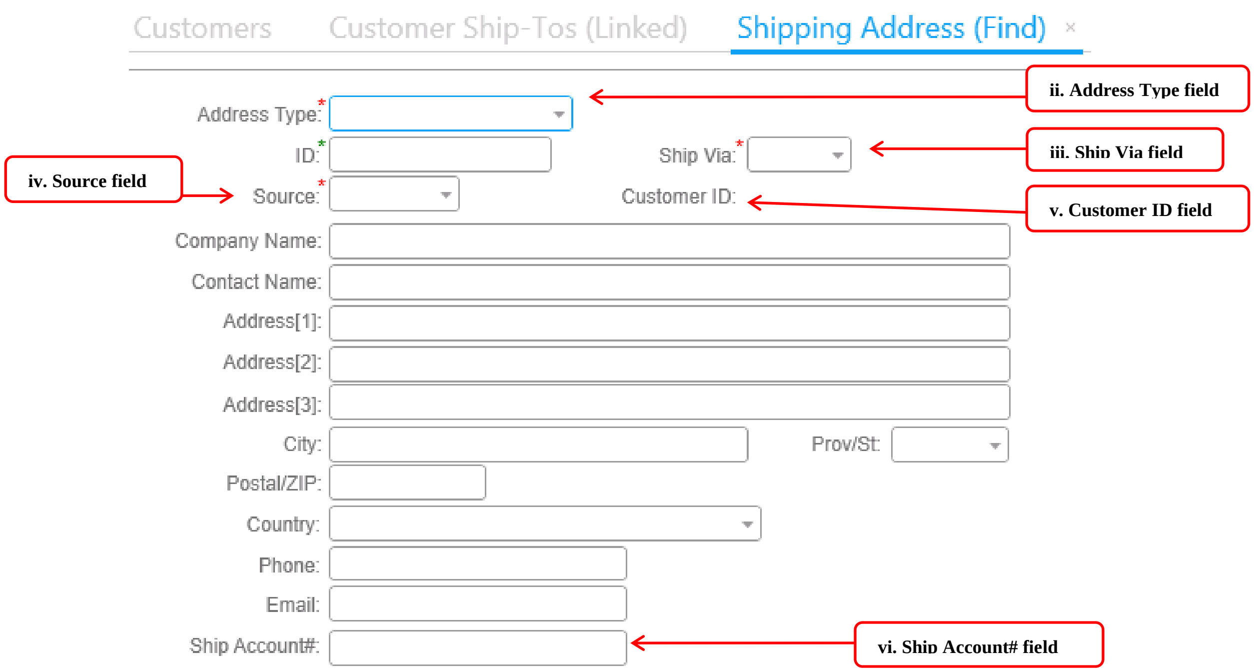
ii. Address Type field: From the dropdown menu select collect or bill recipient

iii. Ship Via field: From the dropdown select preferred carrier

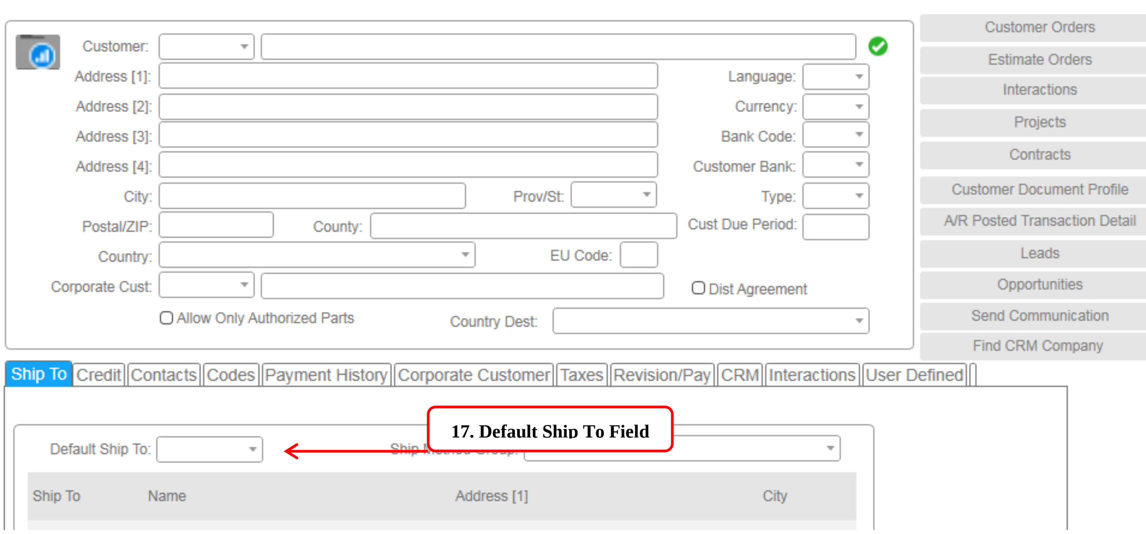
iv. Source field: Dropdown menu select customer option.

v. Customer ID field: Enter the customer account number followed by an * and hit the dropdown to select customer Ship to 1

vi. Ship Account # field: Enter the customer's freight carrier account number



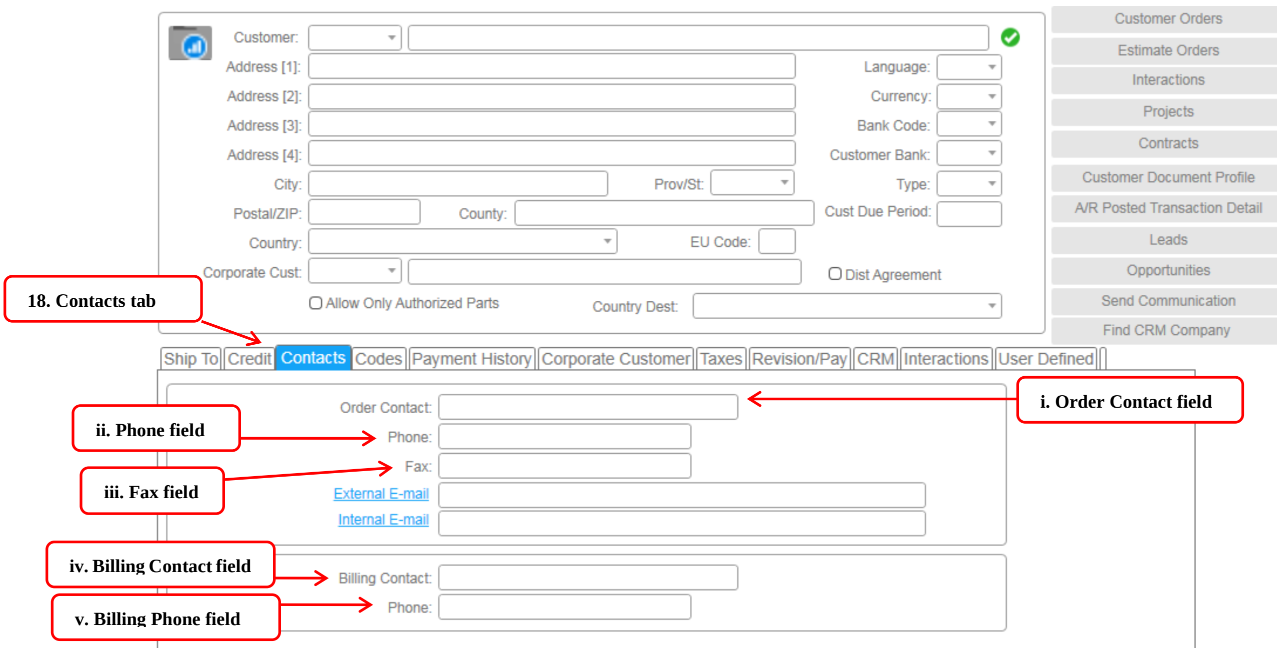
13. Save form (CTRL + S)
14. Close the **Shipping Address** form
15. Save form (CTRL + S)
16. Close the Ship To form. This will take you back to the **Customers** form.
17. Default Ship to field: Select 1 from the dropdown menu



18. Click on **Contacts** tab
    a. Enter any applicable, billing and purchasing contact information
        i. Order Contact field: Enter the name of the order contact
        ii. Phone field: Enter phone number of the order contact
        iii. Fax field: Enter fax number of the order contact

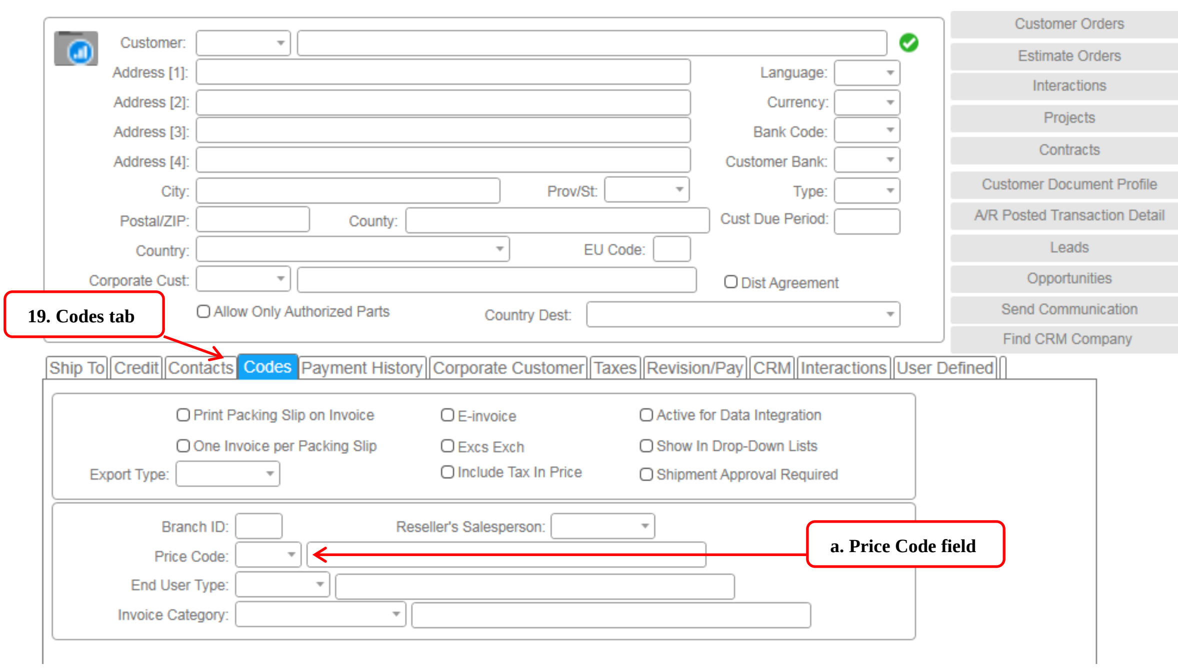
iv. Billing Contact field: Enter the name of the billing contact

v. Billing Phone field: Enter the phone number of the billing contact

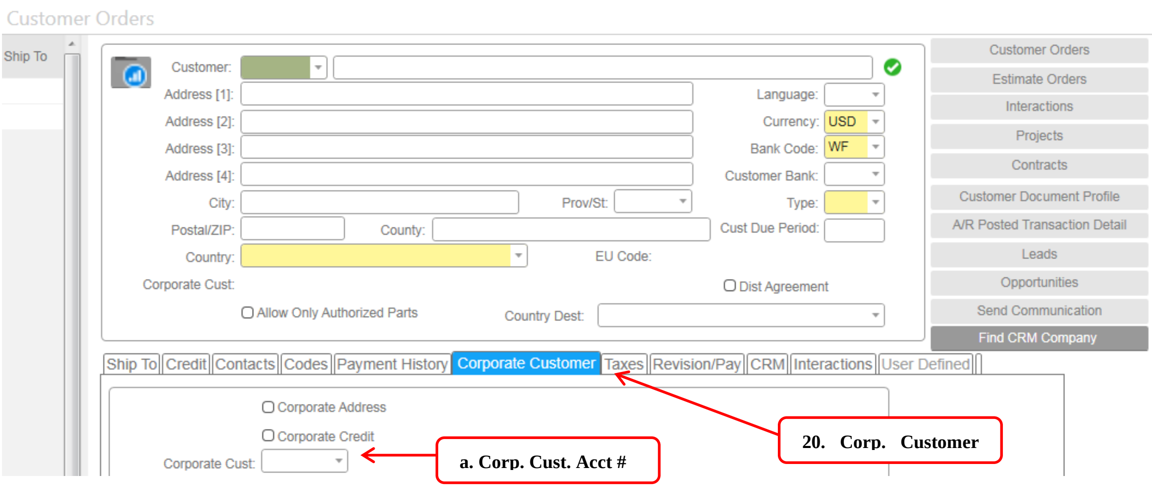


19. Click on **Codes** tab

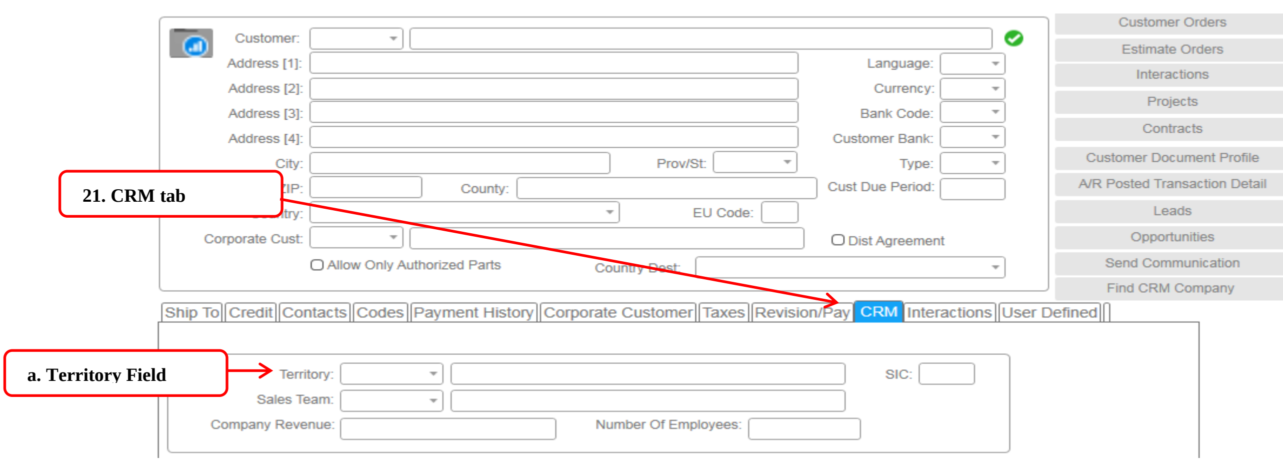
a. Price Code field: From the dropdown menu select the appropriate price code



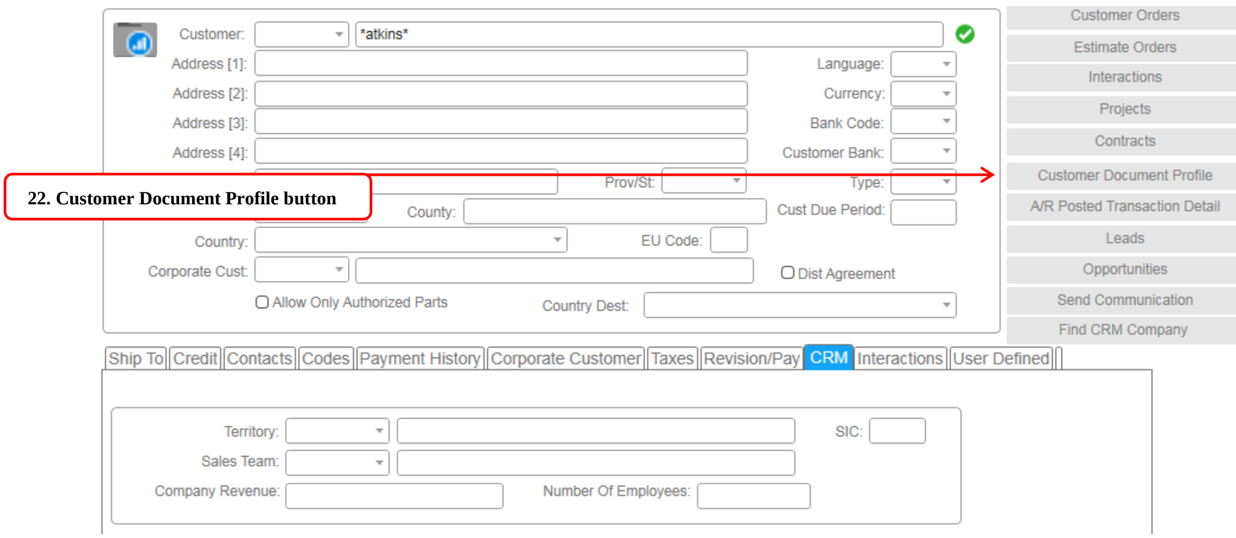
20. Click on Corporate Customer tab, if applicable
    a. If applicable, type in the Corporate Customer Account Number or select the Corporate Customer Account Number for the dropdown menu
    b. Save (CTRL + S)



21. Click on **CRM** tab
    a. Territory field: Dropdown menu select appropriate territory code
    b. Save form (CTRL + S)



22. If applicable, click on **Customer Document Profile** button to set up task such as: Order Verification, Order Invoicing/Credit Memo, etc. (Button is located in right hand corner within the various menu option choices) All items highlighted in yellow need to be filled in. (Process will need to be replicated for each task required)



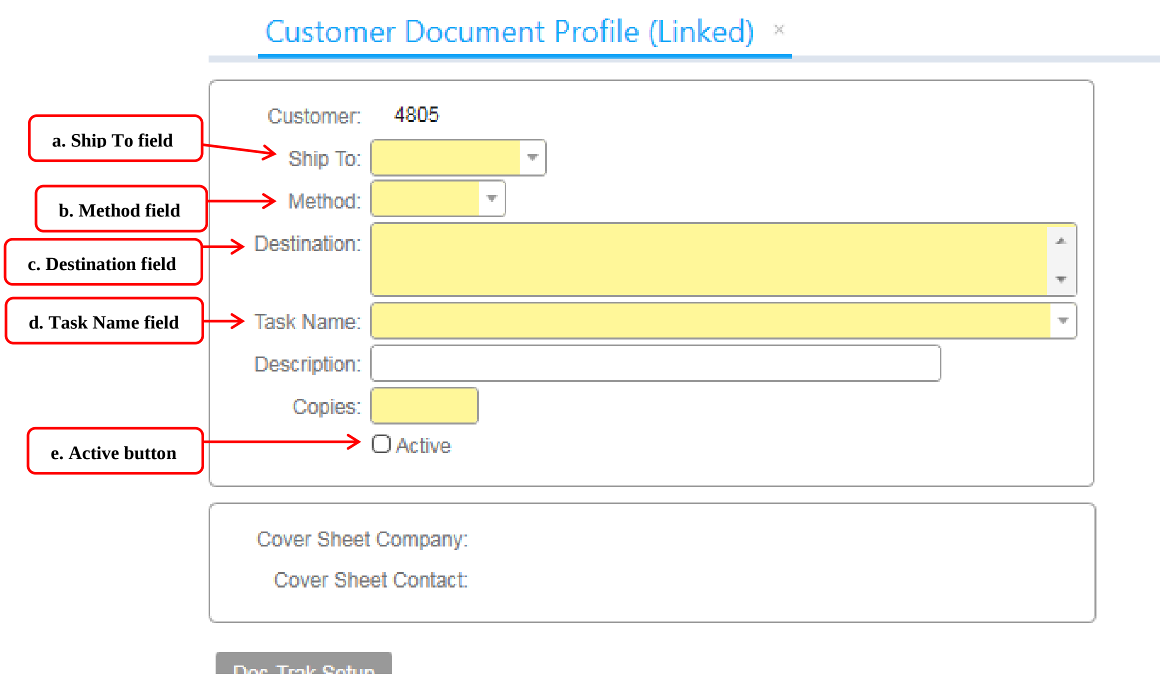
a. Ship To field: Select ship to 1 from the drop down menu

b. Method field: Select appropriate method to be used: Printer, Fax, or E-mail

c. Destination field: Insert the recipient's printer address, fax number, or e-mail address

d. Task Name field: Select the appropriate task needed from the dropdown list

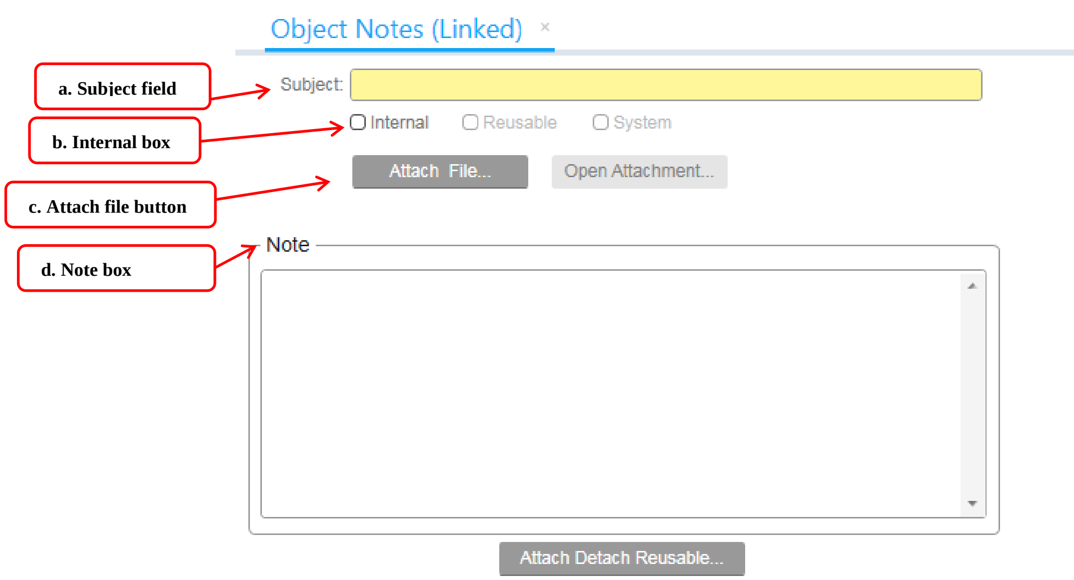
e. Click on the active button (Failure to click on the active button will not allow the task to run in the system)



23. Save form (CTRL + S)

24. Close out of **Customer Document Profile** form (This will take you back to the **Customers** form)

25. If special instructions are applicable, click on the **Note** icon on the SyteLine toolbar to set up instructions such as: specific delivery instructions, purchase order requirements, etc.
    a. Subject field: Type the brief description of the subject that the note is for (i.e.: Customer Note, Change of Billing Address, Shipping Note, etc.).
    b. Click on Internal box
    c. If applicable, click on attach file button, and attach specific file
    d. Note box: Type special instruction(s)



26. Save form (CTRL + S)
27. Close **Object Notes** form
28. Notify A/R that a New Account has been set up.
    a. International customers only: Put NT in the tax code
    b. A/R will determine tax code for all other accounts.
29. Manually scan, browse, or upload any corresponding documentation to the customer service documentation storage (See D0054080 Customer Service Documentation Storage)

REVISION	DATE	DESCRIPTION OF CHANGE
-	04/14/2015	Initial release
A	04/27/2017	Cosmetic / Formatting / General Editing Changes, Also, changed title of the document, along with adding screen shots to follow in the procedure for StyeLine.