Setting Up New Accounts



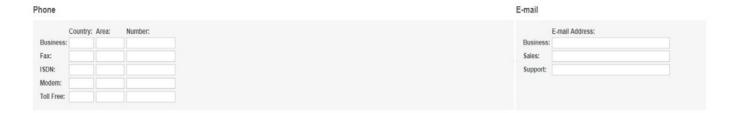
Company:

- 1. Company Name
- 2. Type: Always choose Customer
- 3. ID/Status: Customer
- 4. Status: Active
- 5. Source: Where it came from
- 6. Territory: PET
- 7. Account Manager: The Sales Rep that will handle the account
- 8. Sub-Type: Veterinarian, Boarder, Groomer, etc.
- 9. Sample Sent Date: Date Sample was Originally Sent if sample was sent, otherwise leave blank
- 10. Comments/Customer Alerts: Any important information you want someone to see. Hours of operation, contact names, cell phone numbers, etc.
- 11. Notes: Delivery hours, Special shipping instructions, etc.



Address:

- 1. Address 1: Street Address
- 2. City
- 3. State
- 4. Zip Code
- 5. Country



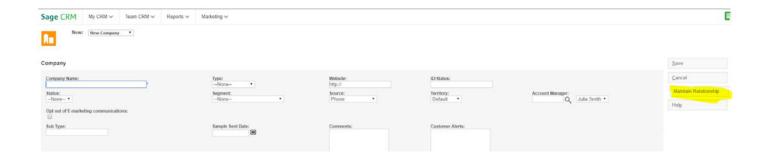
Phone:

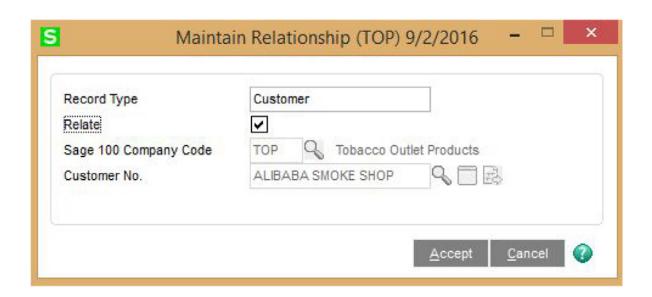
- 1. Business Phone
- 2. Fax Number
- 3. Email:
 - Put all emails in all 3 fields



Person:

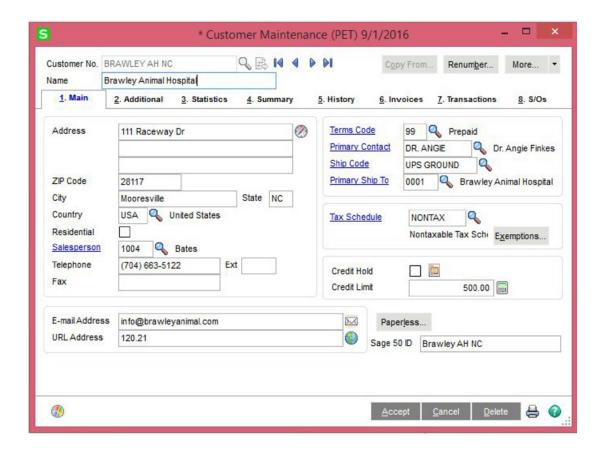
- 1. Last Name
- 2. First Name
- 3. Title





Maintain Relationship:

- 1. When the screen comes up choose PET
- 2. Create a Customer Number Example Julia's Pets in Georgia you could do JULIASPETS_GA
- 3. Click Accept
- 4. Wait a minute or so and reload the home page so the customer will link to the system.



Customer Maintenance: Screen 1:

- 1. When the screen comes up change Term Code from N10 to Prepaid
- 2. Assign UPS Ground as the Ship Code
- 3. Click on Primary Ship To Wording: Enter location code 0002 and then hit tab