

# Setting Up New Accounts

Company

Company Name: <input type="text"/>	Type: <input type="text"/>	Website: <input type="text"/>	ID Status: <input type="text"/>	Account Manager: <input type="text"/>
Status: <input type="text"/>	Segment: <input type="text"/>	Source: <input type="text"/>	Territory: <input type="text"/>	
Opt out of E-marketing communications: <input type="checkbox"/>				
Sub Type: <input type="text"/>	Sample Sent Date: <input type="text"/>	Comments: <input type="text"/>	Customer Alerts: <input type="text"/>	
Notes: <input type="text"/>				

## 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

Address 1: <input type="text"/>	Address 2: <input type="text"/>	Type Business <input type="checkbox"/> Billing <input type="checkbox"/> Shipping <input type="checkbox"/>
Address 3: <input type="text"/>	Address 4: <input type="text"/>	
City: <input type="text"/>	State: <input type="text"/>	
Zip Code: <input type="text"/>	Country: <input type="text"/>	

## Address:

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

#### Phone

	Country:	Area:	Number:
Business:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fax:	<input type="text"/>	<input type="text"/>	<input type="text"/>
ISDN:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Modem:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Toll Free:	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### E-mail

	E-mail Address:
Business:	<input type="text"/>
Sales:	<input type="text"/>
Support:	<input type="text"/>

## Phone:

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

#### Person

Last Name: <input type="text"/>	First Name: <input type="text"/>	Salutation: <input type="text"/>	Type Admin <input type="checkbox"/>
Title: <input type="text"/>	Department: <input type="text"/>		Finance <input type="checkbox"/>
Territory: Default ▾	Website: <input type="text"/>	Account Manager: <input type="text"/>  Julia Smith ▾	Operations <input type="checkbox"/>
Opt out of E-marketing communications: <input type="checkbox"/>			Sales <input type="checkbox"/>
			Support <input type="checkbox"/>

## Person:

1. Last Name
2. First Name
3. Title

Sage CRM My CRM Team CRM Reports Marketing

Now: New Company

Company

Company Name:

Status: --None--

Opt out of E-marketing communications: ☐

Sub Type:

Type: --None--

Segment: --None--

Sample Sent Date:

Website:

Source: Phone

Comments:

ID Status:

Territory: Default

Customer Alerts:

Account Manager:  Julia Smith

Save Cancel Maintain Relationship Help

S Maintain Relationship (TOP) 9/2/2016

Record Type  Customer

Relate: ☒

Sage 100 Company Code  TOP  Tobacco Outlet Products






Customer No.  ALIBABA SMOKE SHOP

Accept Cancel ?

## 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.


**S** \* Customer Maintenance (PET) 9/1/2016

Customer No. BRAWLEY AH NC     

Name Brawley Animal Hospital


Copy From... Renumber... More...

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os


Address 111 Raceway Dr 

ZIP Code 28117

City Mooresville State NC


Country USA  United States


Residential ☐


Salesperson 1004  Bates


Telephone (704) 663-5122 Ext


Fax


Terms Code 99  Prepaid


Primary Contact DR. ANGIE  Dr. Angie Finkes


Ship Code UPS GROUND 


Primary Ship To 0001  Brawley Animal Hospital

Tax Schedule NONTAX  Nontaxable Tax Sch Exemptions...

Credit Hold ☐ 




Credit Limit 500.00 

E-mail Address info@brawleyanimal.com 

URL Address 120.21 

Paperless...

Sage 50 ID Brawley AH NC

 Accept Cancel Delete  

## 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