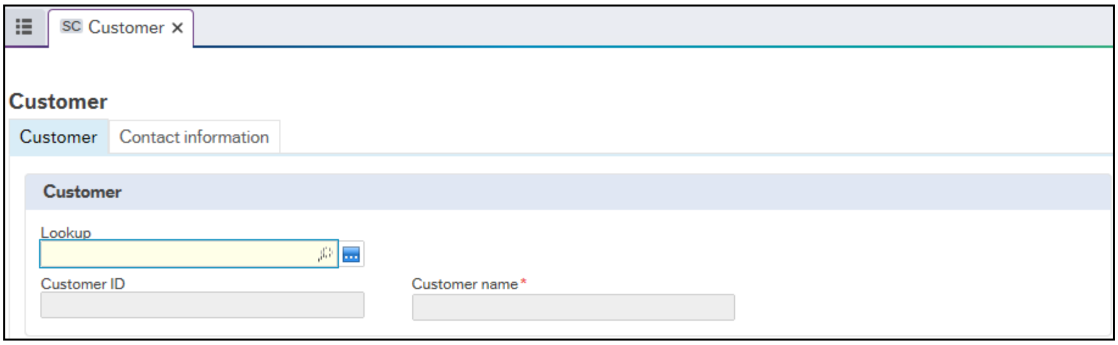
Business World User Guide

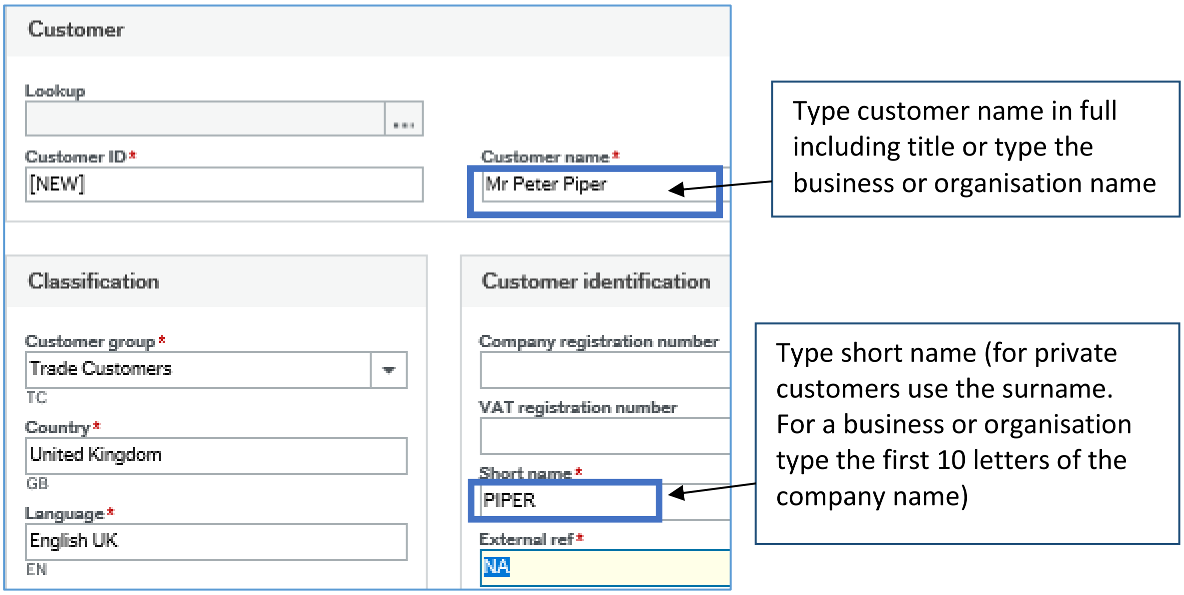
Title	New Customer Creation
Summary	New customer creation is used when you need to raise a sales order (debtors invoice) for goods or services that have been supplied but the customer does not already exist on the system for you to select. Before setting up a new record you will need to complete a search for the customer to ensure it is not already set up in the system, details of how to use the search facility can be found in the **Business World: Getting Started** guide. Once you have established that the customer record does not exist then you can set up a new one. Once the record is created it will be forwarded in workflow to the Customer Payment and Debt (CP&D) team for approval. You will need to wait for the record to be approved before creating a sales order (debtors Invoice). This guide will show you how to set up a new customer.
Audience	Sales to cash users.
Content	1. Creating the Customer 2. Checking the Customer in Workflow 3. Dealing With A Rejected Customer 4. Further information

CREATING THE CUSTOMER

From the Business World menu select **Customers and sales→Customer Information→ Customer.** The following window will be displayed where you should search for the customer. See **Business World Getting Started** guide for details on how to search. From this window you can set up the new customer record.



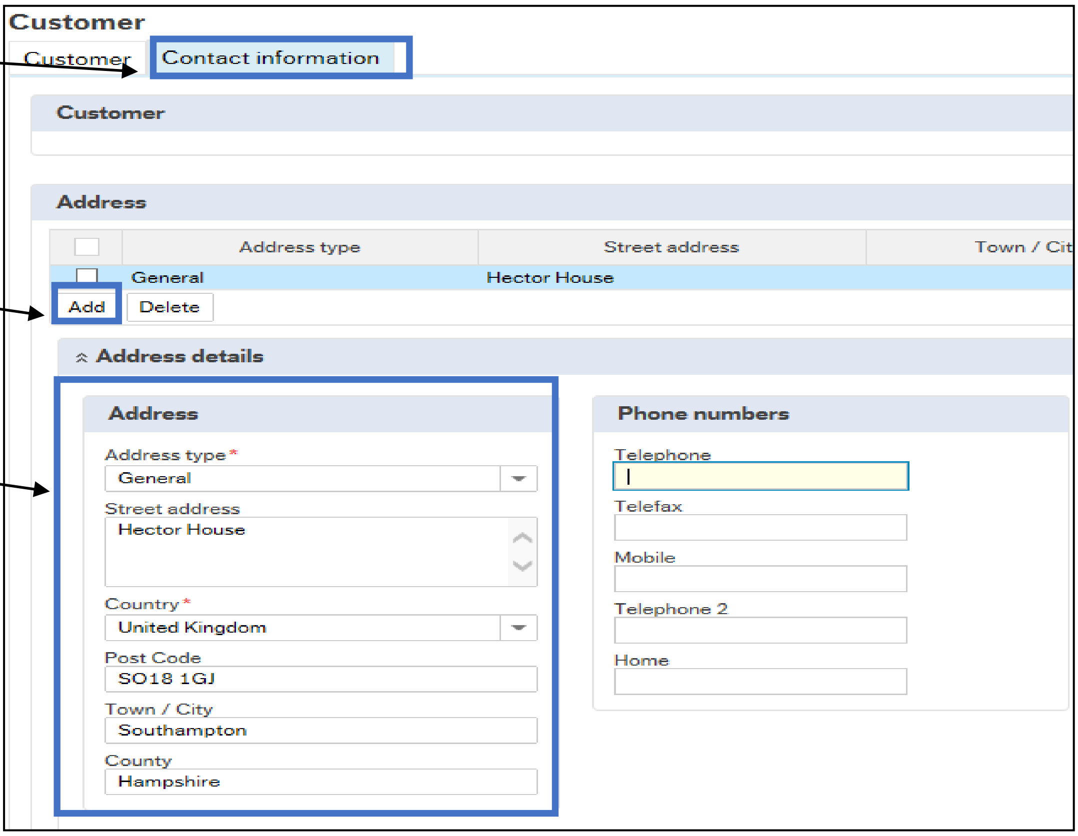
Select the **New** button at the bottom of the window. The following screen will be displayed



Note: Failure to type the customer name in full including the customer's title will result in the customer record being rejected and a delay in raising the invoice.

Select this tab

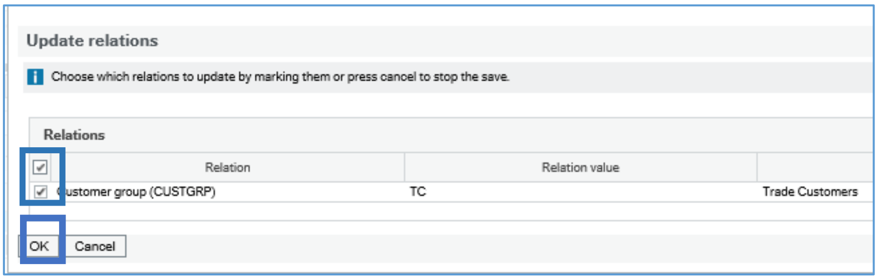
Click here and add the address details in the section below



Click on the **Save** button.

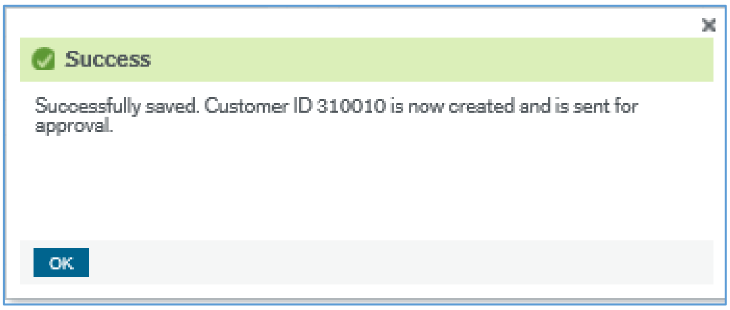
Tick here

Click OK



Click on the **Save** button a second time.

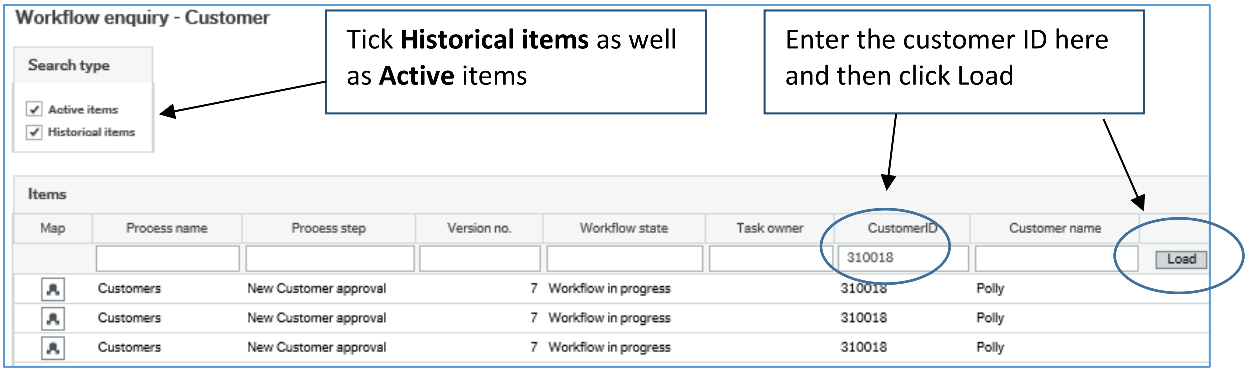
Click OK



Once the record is created it will be forwarded in workflow to the Customer Payment and Debt (CP&D) team for approval (there is a 5 day turnaround time for this). Once approved you can use the new record to raise your sales order.

CHECKING THE CUSTOMER IN WORKFLOW

Select **Customers and sales→Workflow enquiry - Customer.** The following window will be displayed where you should search for the task to see the workflow status



Check the **Workflow state** field to see the current position.

Workflow in progress	Still in workflow and you cannot use the customer yet
Finished	The customer record has been approved and can be used
Rejected	You will need to take some action – see next section

DEALING WITH A REJECTED CUSTOMER

As mentioned in the previous section your customer may be rejected to you and you will need to take some action if that is the case: The following shows some examples of the reasons and the actions required:

Duplicate record	You will need to close the record
More information required	The task has been returned to you to provid more information
Rejected amendments	You may have made amendments to a record that are not approved

As with all other authorisations you are required to do, the **Tasks** button in the top right of your screen will show you if there is something to do.

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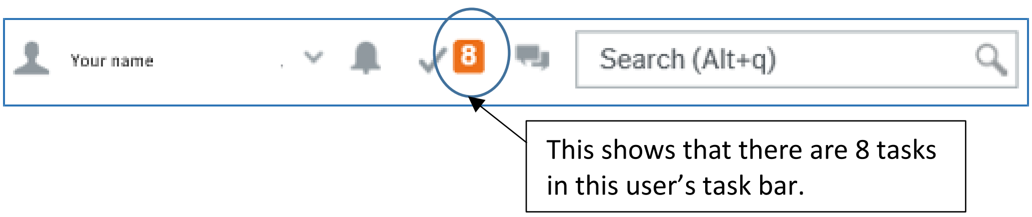
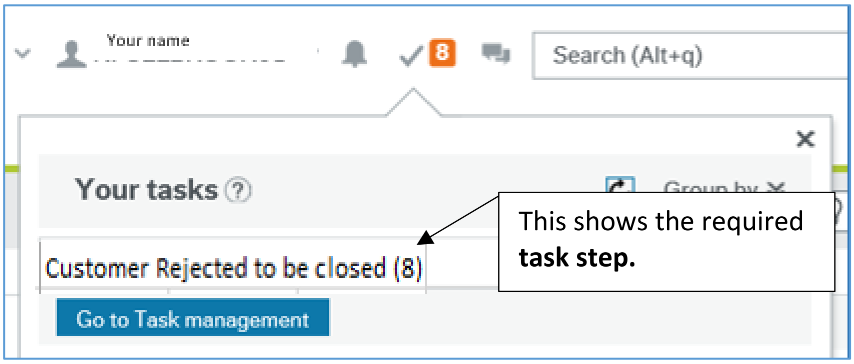
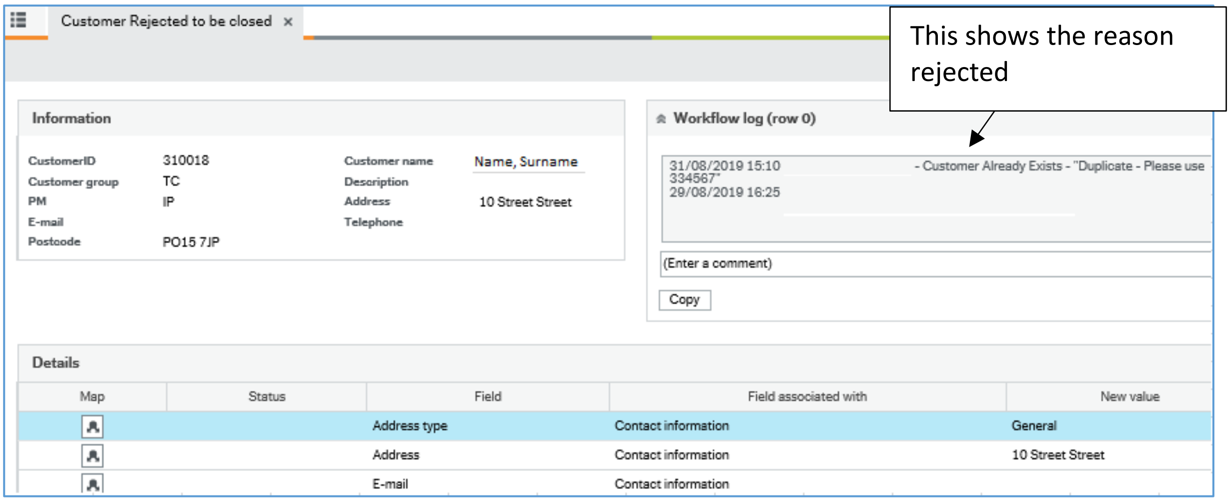


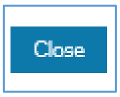
To look at your tasks, click on the orange box – a **Your tasks** pop-up will appear.



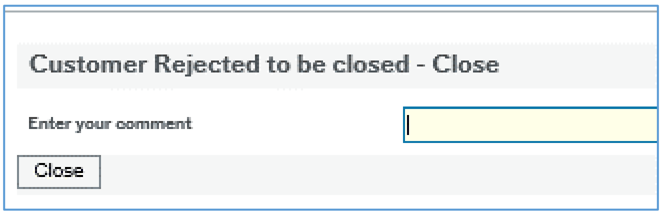
There are other steps you might see here, depending on why the customer has been rejected, the others are *New Customer Query, Customer amendments rejected*

You can now either click on **Go to Task management** or **Customer Rejected to be closed** in the **Your tasks** pop-up.

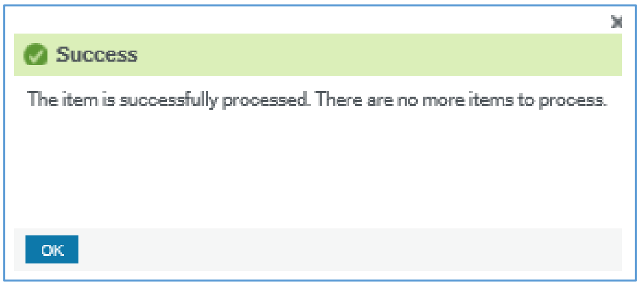


At the bottom of this window is the 

button, click on it and then enter the reason for closure and click **Close** again.



You will get the following message and your customer record will no longer exist.



If your customer has been rejected for more information you can access the tasks in the same way, make the relevant changes according to the rejection reason and then click the **Save** button at the bottom of the window to return the customer task for approval.

FURTHER INFORMATION

If you have any further questions, please do not hesitate to contact the Business World inbox at Business.World@southampton.gov.uk.

Please also find a link to the Business World FAQs on Staff Stuff here.