

Entering a new customer

Note: There are many features on the 'Customer Details' screen that are not required unless they suit your particular needs. You can safely ignore those features, the software will notify you if you missed a required field.

Note: These instructions are designed for the 'Full' menu of TBS CleverPLUS.

Step 1: Click button 20 (Sales+Customers) in the 'SELLING' column.

Step 2: Click button A (Record Entry Menu) on screen 20 (Sales+Customers).

Step 3: Click button A (Customer Details Entry) on screen 20a (Customer Record Entry).

Step 4: Click the 'New' button on the top right hand corner of the screen.

Step 5: Your cursor will now be in the 'Code' (light blue) box near the top left hand side of the screen. Enter a new customer code. This can be up to 6 characters long with letters and numbers. We recommend starting with letters indicating the person's name or the business name and then a number. For example a customer called 'TBS Software' could be 'TBS001'.

Step 6: Enter the: Title / First Name / Surname / Business name. Remember you can press enter after each one and the software will automatically take you to the next step.

Step 7: Click into the 'Statement / Mail' box. Here you can select if this customer likes to receive correspondence from you by email or mail or fax. If you set this to email and enter an email address you can automatically email the customer a statement later (e.g. at the end of the month).

Step 8: Click into the 'Address' box (light blue) on the 'Contact Details' TAB. In the bottom half of the screen. Fill in the address, press enter and fill in the suburb then press enter again. You will notice the state and postcode are completed automatically.

Step 9: You can fill in the appropriate contact information such as: Telephone / Fax / Mobile / Email. Also nominate how many days you give this client to pay their invoices (the default is 45, maybe you don't allow accounts - set it to zero if you like).

Step 10: Click the 'Save' button at the top of the screen.

You can now enter more customers by clicking 'New' at the top of the screen and following the same procedure or click 'Exit' to leave the 'Customer Details' screen.