RSA e-Business: Navigation

How to create a new customer

1. Select the tab **Invoices** from the main menu.

2. Under **Maintenance** group, click on the link **<u>Customer - New</u>.** This will open a new window.

3. Enter a **customer number,** which is required. The value should not exist previously in the database.

4. Optionally change the default values for the other filed is necessary. It is recommended to give a value to the following fields: Name, address, city, country, telephone, and fax.

5. Optionally on the bottom side of the screen, click on each Tab menu and change the default values.

6. Click on the **Save** button for creating and saving the customer information.

The window below shows the interface for creating a new customer.

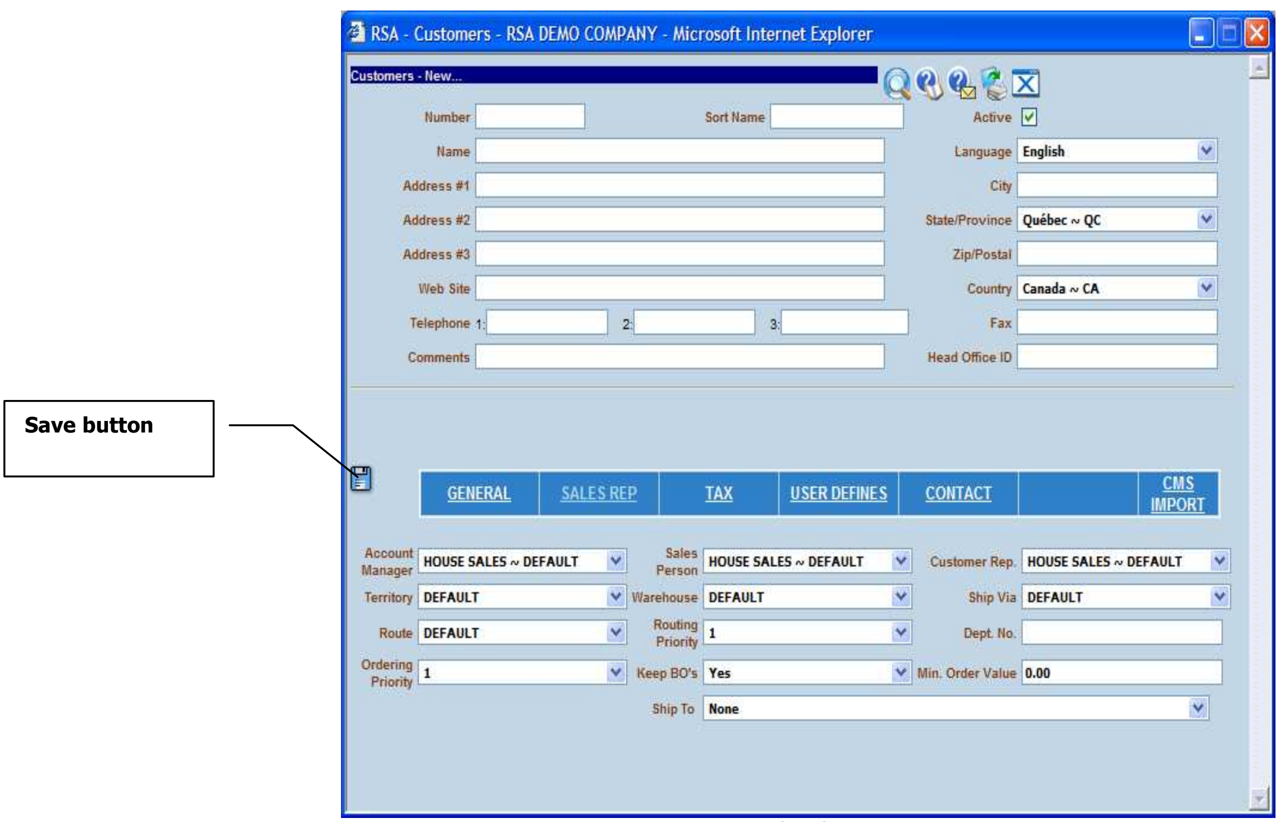

Fig 1: window for creating a customer

How to modify customer information: Summary

1. Select the tab **Invoices** from the main menu.

2. Under **Maintenance** group, click on the link **<u>Customers - Search</u>.** This will open a new window.
3. In the new window click on the **Search** button . Optionally you can enter some search criteria before clicking on the search button.
4. In the displayed list, choose a customer by clicking on the **Select** button . The Modify button will appear.

5. Click on the **Modify** button on the top right side of the window.

6. Change the value of the fields you want.

7. When you are done click on the **Save** button .

How to modify customer information: details

1. Select the tab **Invoices** from the main menu.

2. Under **Maintenance** group, click on the link **<u>Customers - Search</u>.** This will open a new window (see fig 1 below)

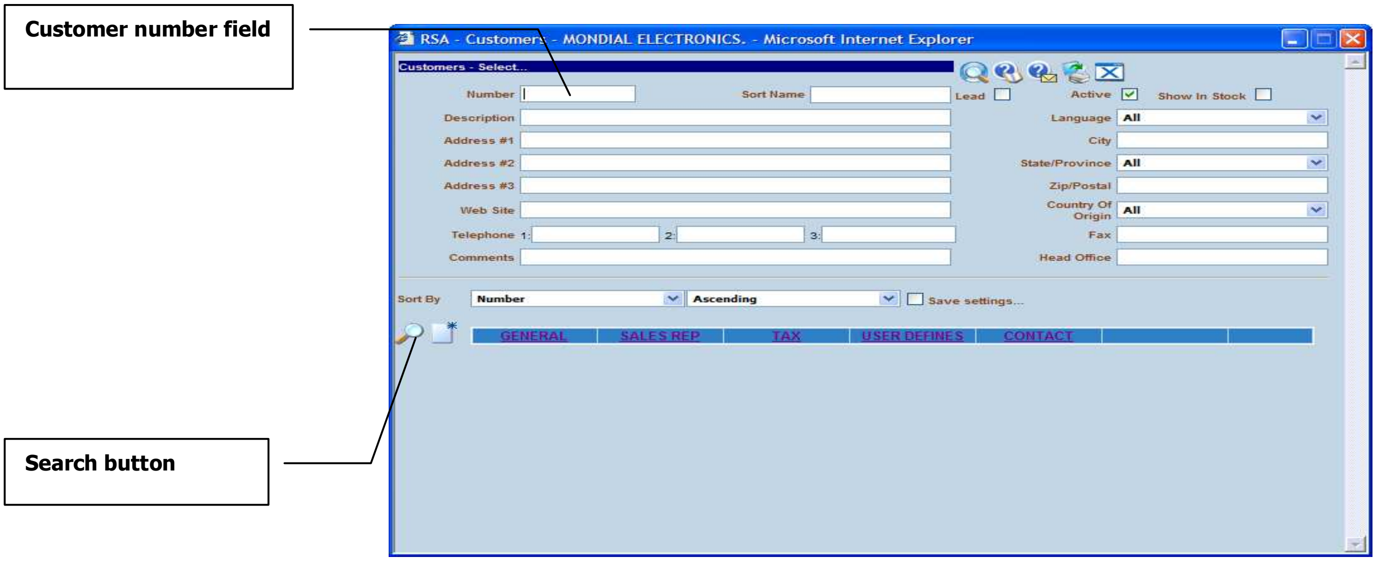

Fig 2: window for searching a customer by criteria

3. In the new window, use on the following methods for searching for a customer:

   1. **Searching a customer number by criteria**:
      a. Enter the keywords in one or any fields you want. The keywords can be either one or any combination of either a word, a character, a wildcard like % character.

      b. Optionally use the sorting options for the result display

      c. Once the criteria are defined, click on the tab key or the Search button . This will bring a list of customers meeting the search criteria (See fig 3 below).

   2. **Searching a customer number without any criteria:**
      a. Click directly on the search button without entering any criteria. This will bring a list of customers meeting the search criteria (See fig 3below).

A list of customers that meet the search criteria is displayed if any is found.

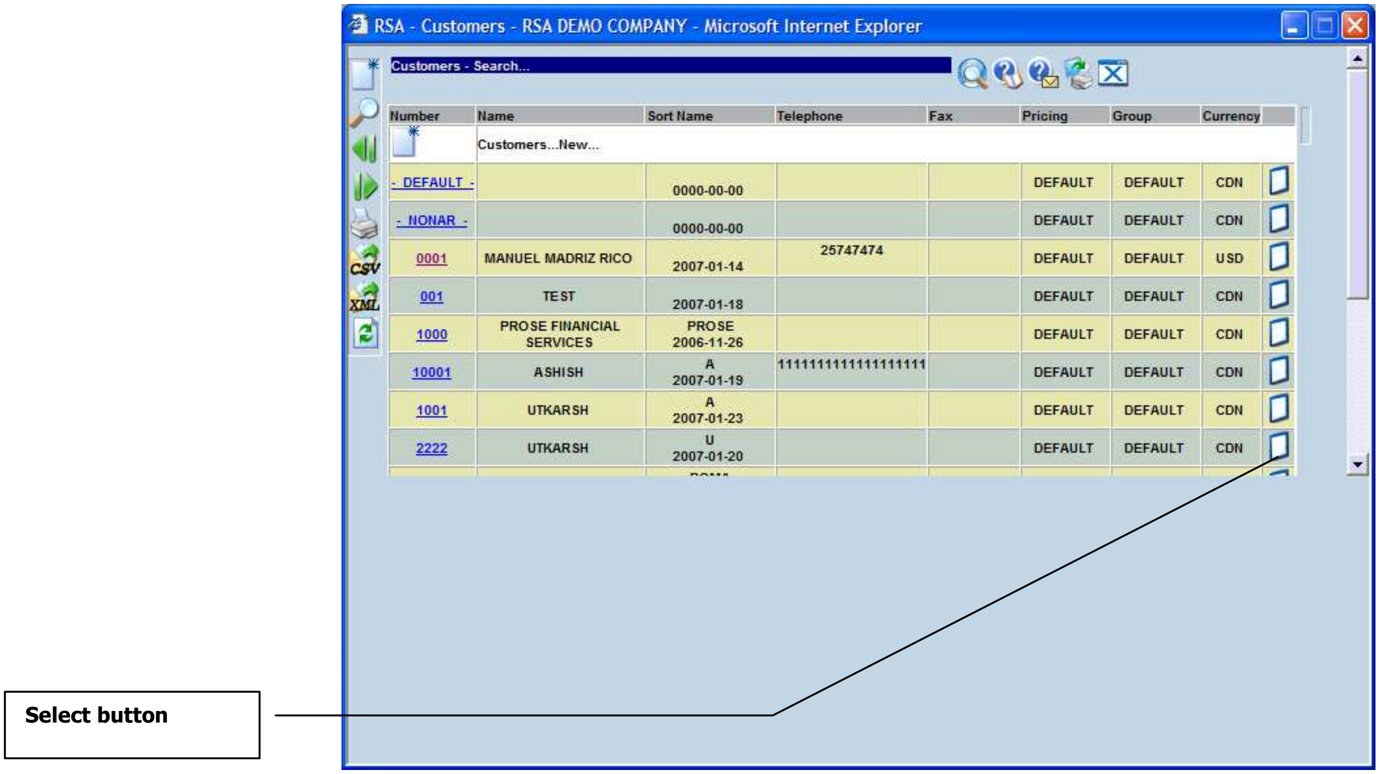

Fig 3: List of customers

4. Navigate through the list of customers and select the desired customer using the select button . This will shows a **Modify** button on the top right side of the window (see fig 4 below).

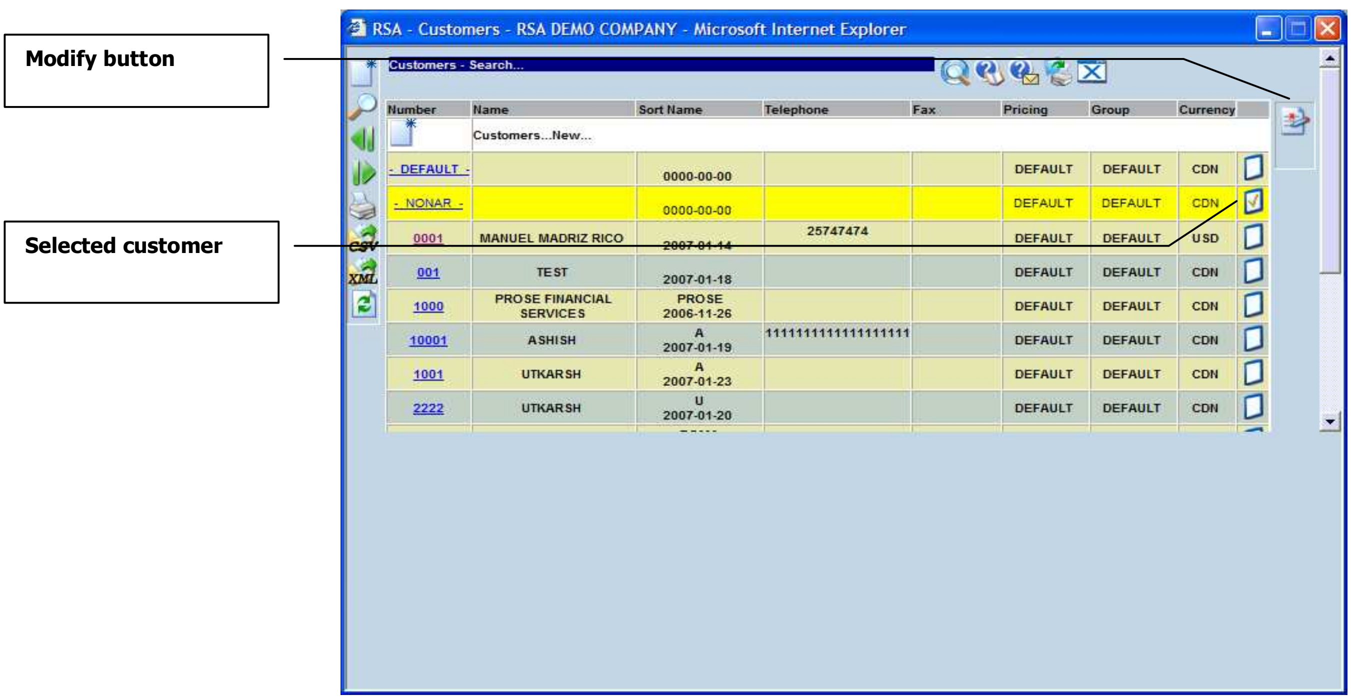

Fig 4: Selecting a customer

5. Click on the Modify button . This will open a window with the default values of the selected customer (see fig 5 below).

Save button

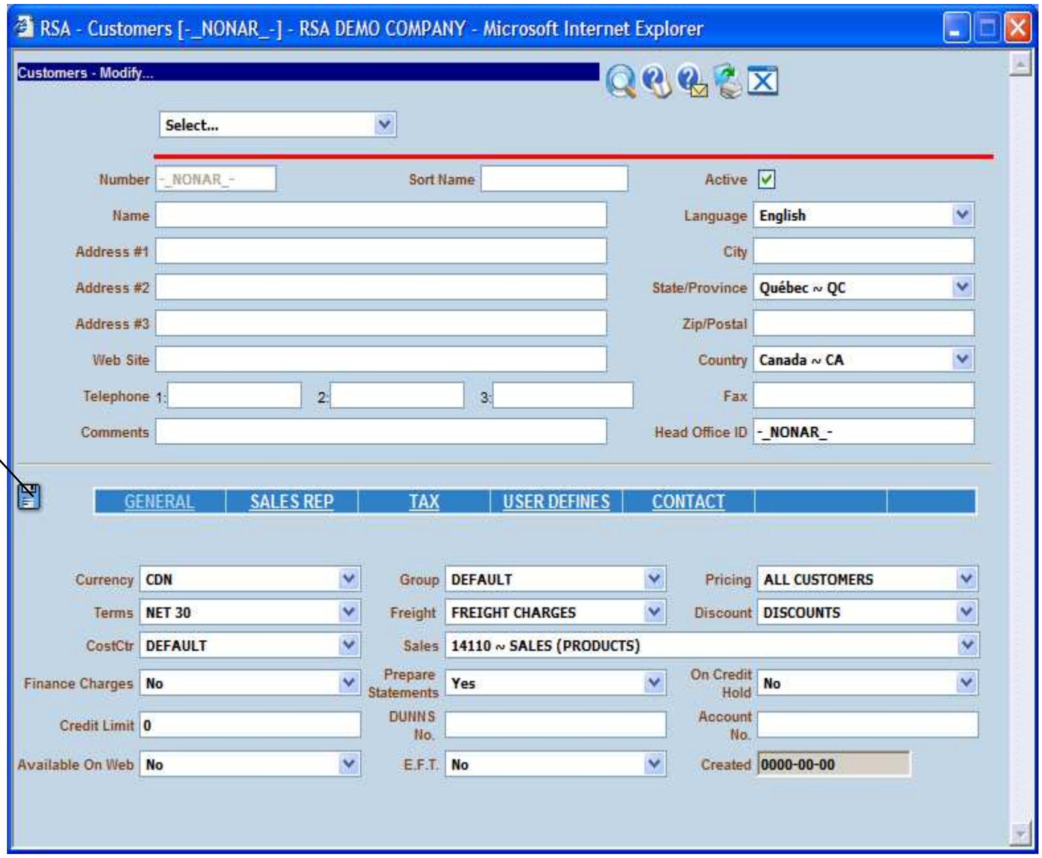

Fig 5: window for modifying the customer information

6. Use the tab key for navigation through the fields and change their values if necessary.

7. Click on the **Save** button  when you are done.

How to delete a customer:

Notes: in the following it is suppose that you have the privileges for deleting a customer

1. Select the tab **Invoices** from the main menu

2. Under **Maintenance** group, click on the link **<u>Customers - Search</u>.** This will open a new window.
3. In the new window click on the **Search** button . Optionally you can enter some search criteria before clicking on the search button.
4. In the displayed list, choose a customer and click on the **Select** button .
   A delete button will appear on the top right side of the window if you have a delete privilege
5. Click on the **Delete** button .

6. On the confirmation window, read the information of customer.

7. Click inside the checkbox for confirming your action
8. Click on the Delete button for deleting the customer