

## Creating Customer Groups

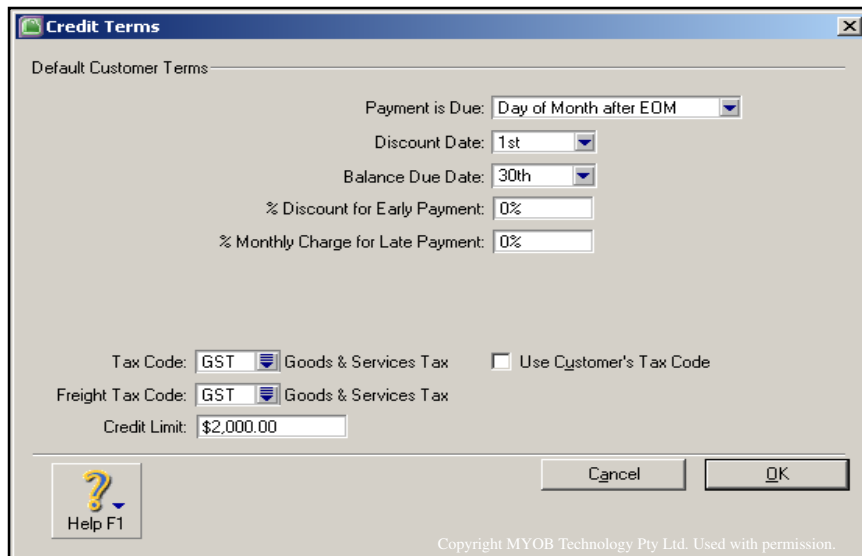
Have a look at the customer list below before creating it in the computer.

Name of the Customer	Terms	Credit Limit
Mary Smith	30 days after EOM	\$2,000
John Jones	30 days after EOM	\$1,000
Ted Hall	30 days after EOM	\$2,000

End of Month

Firstly the credit terms will need to be set for customers.

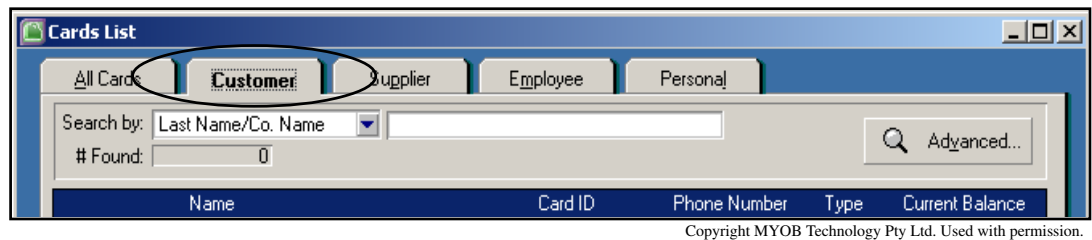
From the menu at the top of the window select [ **Setup** ], [ **Preferences** ] and then [ **Sales** ]. Select the [ **Terms** ] button at the bottom of the window and complete as shown below.



Click [ **OK** ] and then [ **OK** ] once more once completed.

From the **Command Centre** select the icon [ **Card File** ] located at the right hand side of your window.

Click [ **Cards List** ] and then press the [ **Customer** ] tab. Have a look at the window carefully. It should be the same as the one below.



Locate the icon [ **New** ] from the bottom of the window and click it. This will reveal another window.



Complete the first window of the **Card File** as shown below. To move between the cells press **Tab**.

**Note:** Not all boxes below need to be filled in. Only enter information into the computer if you are going to use it at some future date.

**Card Information**

Profile | Card Details | Selling Details | Payment Details | Contact Log | Jobs | History

Smith, Mary      1234      A/R Balance ⇄: \$0.00

Card Type: Customer      Designation: Individual       Inactive Card

Last Name: Smith      First Name: Mary

Card ID: 1234

Location: Address 1: Bill To

Address: 24 Buxton Street

City: Adelaide

State: SA      Postcode: 5000

Country:

Phone#1: 08 8236 3698

Phone#2:

Phone#3:

Fax:

Email:

Website:

Salutation: Ms

Contact:

Note that cards can be made inactive when no longer needed.

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The next task is to set up Mary's card details. Click the **tab** called [ **Card Details** ] and complete the information as shown in the window below. Note that a number of the cells do not have information entered into them. If you do not need to use them why use them? Albert wishes to run his business as simply as possible. An explanation will be given later as to how to use some of these other cells.

**Card Information**

Profile | **Card Details** | Selling Details | Payment Details | Contact Log | Jobs | History

Smith, Mary      1234      A/R Balance ⇄: \$0.00

Notes: Mary has extra wide feet

Double click in this area to link to picture file.

Identifiers...      [ ]

Custom List #1: [ ]      Custom Field #1: [ ]

Custom List #2: [ ]      Custom Field #2: [ ]

Custom List #3: [ ]      Custom Field #3: [ ]

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