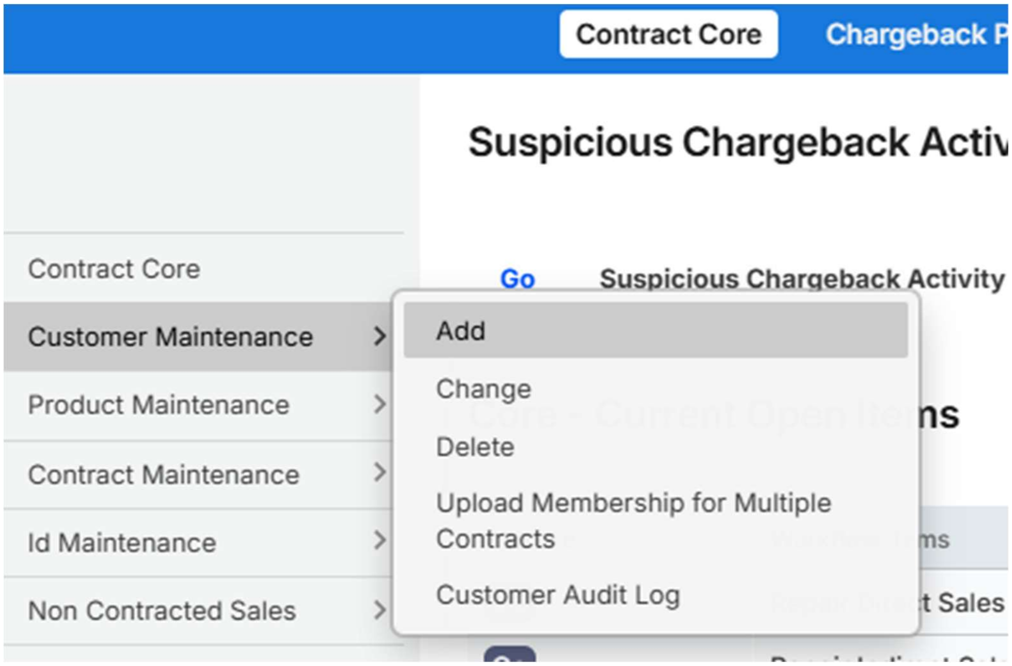
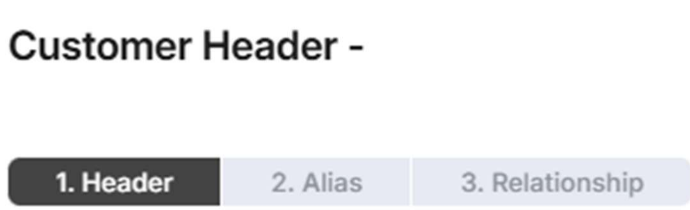
Adding a New Customer

To add a new customer, navigate to Contract Core -> Customer Maintenance -> Add.

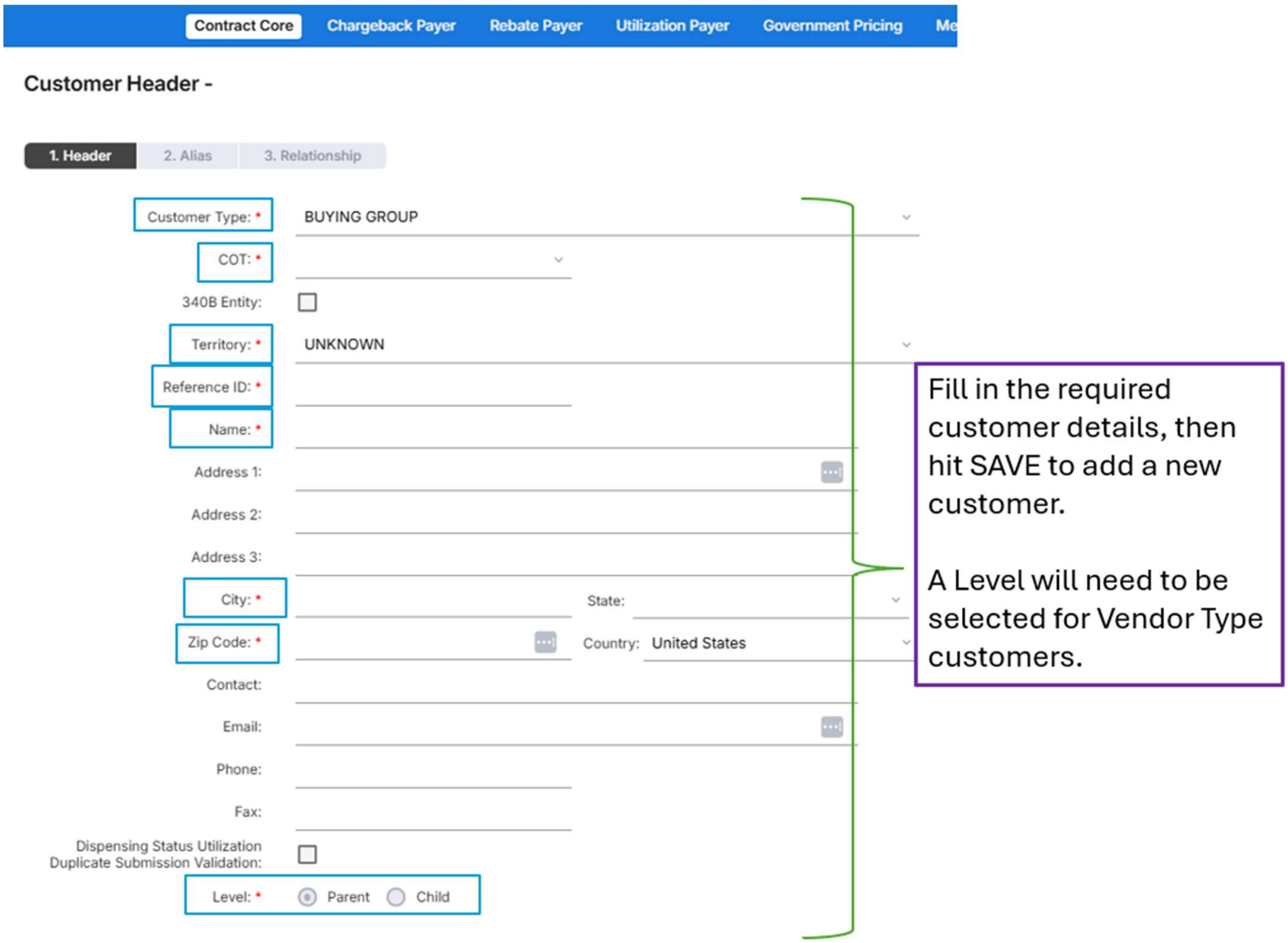


The customer header will open.

Customer details are split across three different tabs:
1. Header – Customer Details, including customer type, class of trade, reference ID, name, and address details must be submitted.
2. Alias – Customer aliases and IDs are assigned here. The Reference ID listed on the Customer Header will be the default alias for the customer unless changed.
3. Relationships – Establish customer relationships for vendors, purchasers, and buying groups. Correct customer relationships are required for chargeback and rebate operations in the iContracts application.



The following fields need to be completed on Tab 1. Header, indicated by an asterisk*:



Alternatively, a user can load customer data by using the Customer Interface by creating a data file and loading the file via Contract Core -> Interfaces -> Uploads -> Upload Customer.

This interface can be used to add new customers and update existing customer data.
- Loading data via the Customer Interface does not support adding or changing customer aliases.
- Loading data via the Customer Interface does not manage or change customer relationships.

Typically, the customer interface is only used during implementation to load customer master data into the application.