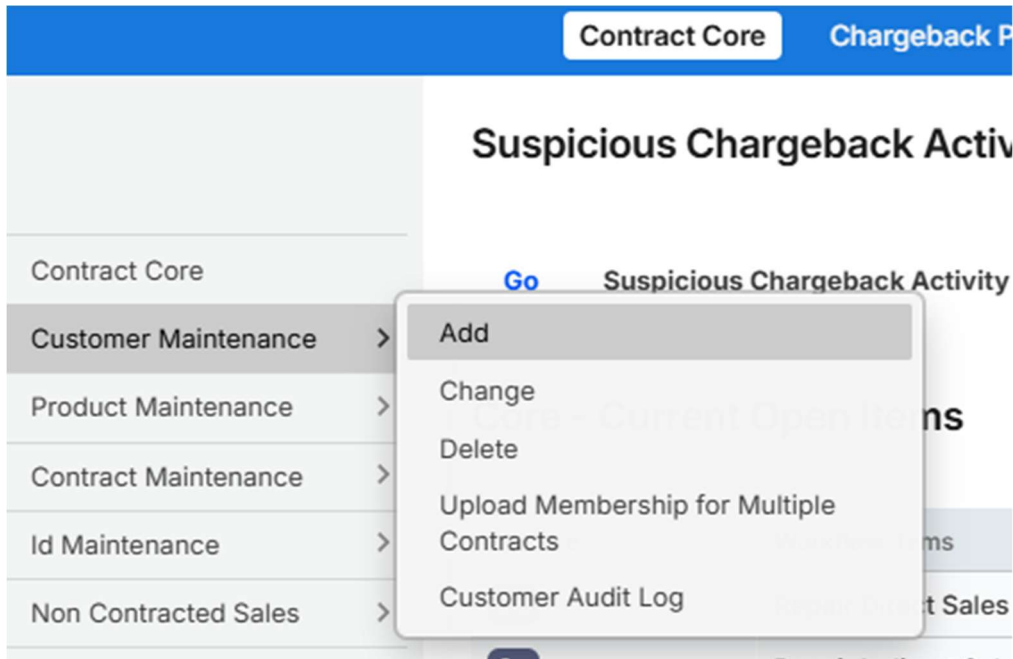


Adding a New Customer

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.

Customer Header -



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

Customer Header -

1. Header 2. Alias 3. Relationship

Customer Type: * BUYING GROUP

COT: *

340B Entity:

Territory: * UNKNOWN

Reference ID: *

Name: *

Address 1:

Address 2:

Address 3:

City: * State:

Zip Code: * Country: United States

Contact:

Email:

Phone:

Fax:

Dispensing Status Utilization Duplicate Submission Validation:

Level: * Parent Child

Fill in the required customer details, then hit SAVE to add a new customer.

A Level will need to be selected for Vendor Type customers.

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.