Contents

Purpose

Use this procedure to establish Credit information for a new or existing customer.

Use the **Billing > Credit > Credit Detail** sheet to enter and update credit information (such as defining credit limits) for the current customer. You can also define other credit options such as whether you receive non-traditional payment instruments from them.
This procedure will outline the create process, since both create and the change process use the same menu paths and procedures.
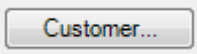
Trigger(s)

A company has called you to have you work up a quote or buy a product that you sell that you have not had any dealings with in the past.

Prerequisites

Setup Customer

Proper menu security (usually someone in Accounting)

Helpful Hints

- Remember that you can right click on a field to drill into more details.

- Buttons like are used to perform a search for a valid value.

- Fields that have a pull down beside them indicate that there is a valid list of values that you can select from. You can enter the value by typing if you already know the value.

- Clicking on the small upside down triangle on the New Icon will provide a pull down menu for creating new portions of the part, such as adding a plant, warehouse or location.

- Remember to use field help to find out more detail about a field that is not defined in this manual. Help ⇨ **Field Help**

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Industry Class General Data

Definition

Industry class types are sets of industry class codes. The industry class codes can be grouped by the industrial classifications settled by the national or international standards that best fit the needs of your company. The list of standards include the Standard Industrial Classification (SIC) system, North American Industry Classification System (NAICS), National Association of Colleges and Employers (NACE), and International Standard Industrial Classification (ISIC) among others.

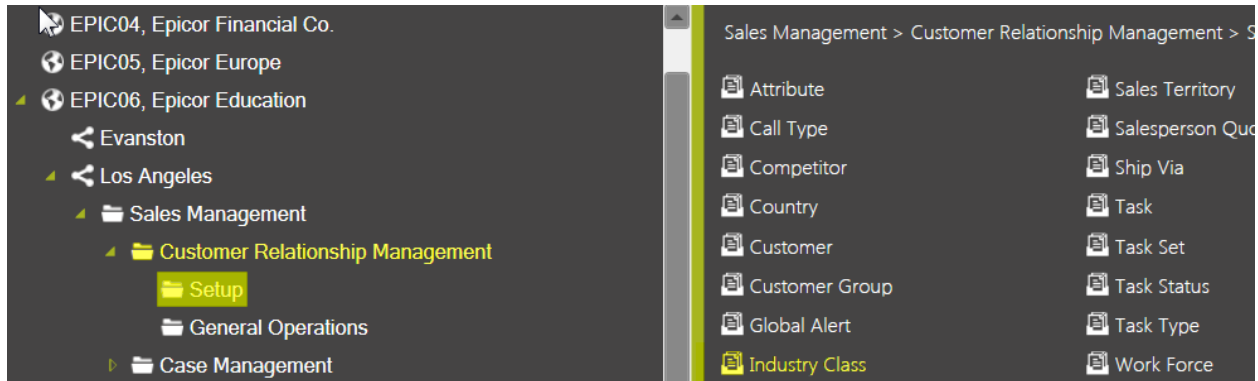You can then classify customers and ship to locations with these codes.

Procedure

1. Setup the Industry Class types and codes

2. Set up the Industry Class on a customer
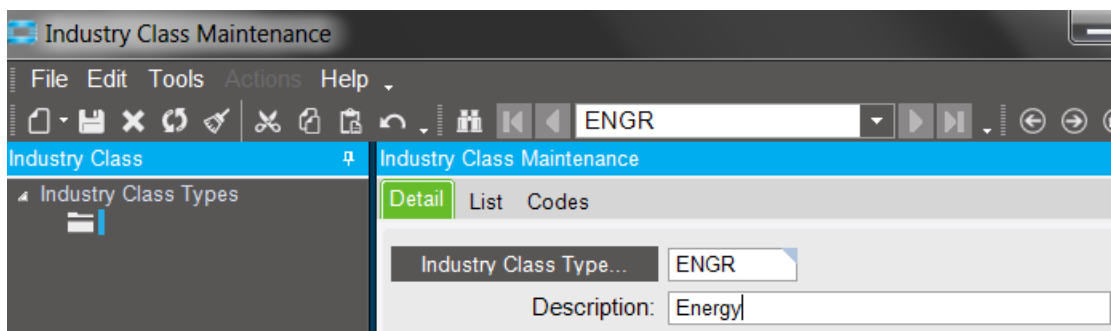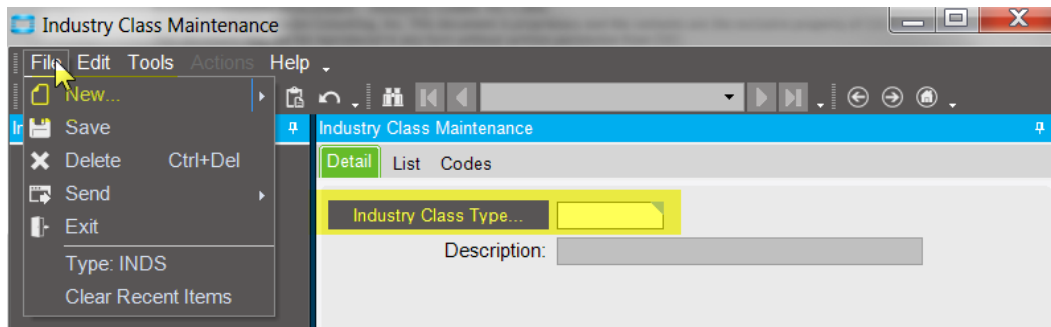
Industry Class
Menu Path

Sales Management ⇨ Customer Relationship Management ⇨ Setup ⇨ Industry Class

To manually enter an Industry Class Type you can enter on the Detail Screen, or you may copy and paste to the list view using an excel spreadsheet.

The following shows how to add one at a time.
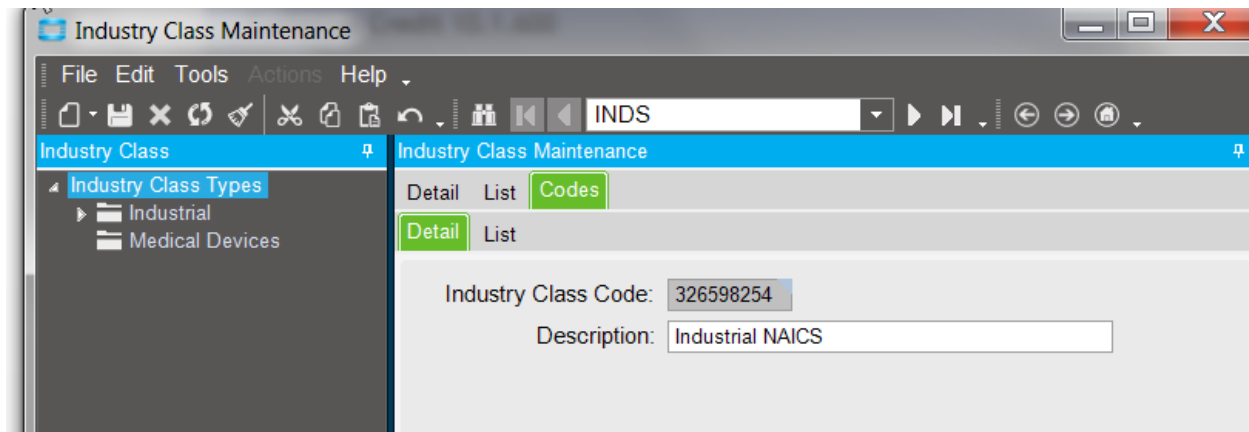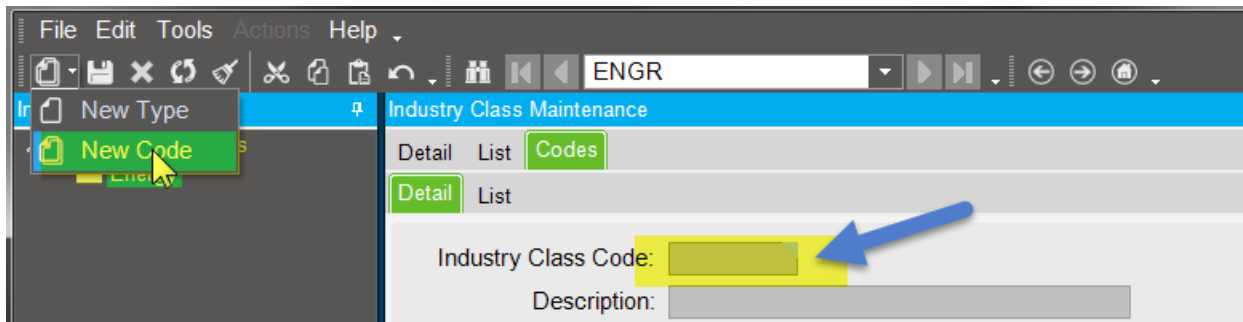
Select > File > New

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Field Name	R/O/D	Description
Industry Class Type	R	Examples; ENGR, Aero, Med, SERV, Manf, Cons, etc.
Description	R	Type the description (this Industry Class is determined by you and your type of business

After entering the Industry Class Type move to the Codes Tab

File > New > Industry Class Code:

Field Name	R/O/D	Description
Industry class	R	The list of standards include the Standard Industrial Classification (SIC) system, North American Industry Classification System (NAICS), National Association of Colleges and Employers (NACE), and International Standard Industrial Classification (ISIC) among others. These can be found in SIC Codes
Description	R	Enter a description

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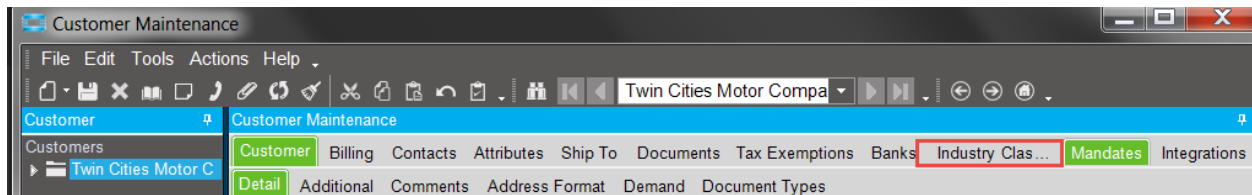
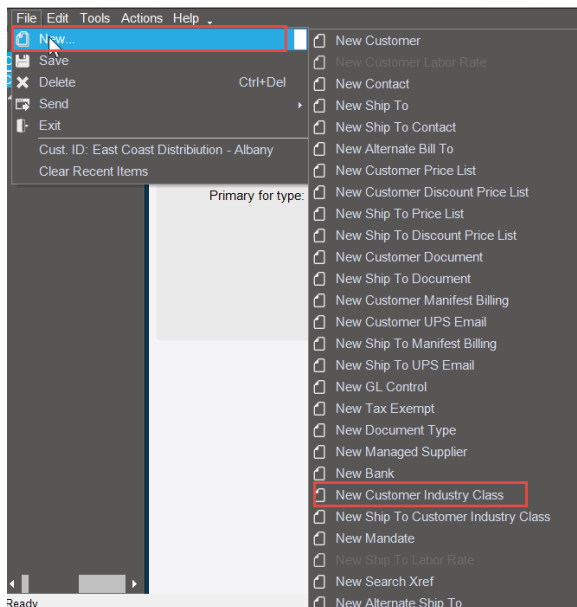# Customer Maintenance

Industry Class

Menu Path

Financial Management ⇨ Accounts Receivable ⇨ Setup ⇨ Customer ⇨ Industry Class

Select the Industry Class Tab in Customer Maintenance

In the Tree view, Select New> New Customer Industry Class

Select the Detail Sheet and click on the Down Arrow to see list of the Industry type Classes and select for this customer

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Customer Industry Class 10.1.600

Once you have slected the Industry Class Type tab or Save and enter the Industry Class code that goes with the Class Type

Select the Button Industry Class code

Search for the correct Code

Save

Note: you can follow the same steps to apply Industry codes to the Ship to address