

D 1 How to Create a New Customer

Access level: All employees, except external users

Learn: How to create customers, suppliers and other partners in TimeLog Project.

In order to create a new project it is mandatory to have a customer associated. The customer's information is used to fill in necessary information on an invoice.

When You Want to Create a New Customer:

Figure 1: Main Menu -> Customers & Contacts-> New Customer

- Enter the *Company Name*: of the new customer ①.
- Enter *Customer No.*: ②. If automatic numeration is selected in the System Administration (F10), this will automatically be filled in for you.
- Enter *Contact Details*: from *Phone*: to *Country*: ③ with the needed information.
- Select a *Customer Status*: ④. With the customer status it is possible to indicate which relation the customer has to the company e.g. a supplier, partner or a customer.
- Select an *Owner*: ⑤. The owner can be the employee with closest contact to the customer. The list of possible owners can be edited by creating or deleting new employees.
- Select an *Industry Code*: ⑥. Industry Codes makes it possible to classify customers by industry. Industry codes can be created, edited and deleted in the *System Administration*.
- Information about the customer's economy can be filled in below *Finance* ⑦.
- Click on *Save* in order to store the entered information. Click on *Save and New* ⑧ in order to save the information and continue with a new customer.
- How to create a contact on the customer see ⇨ [D2](#).

Figure 1: Main Menu -> Customers & Contacts -> [new customer]

The screenshot shows the 'New Customer' form in the TimeLog system. The form is titled 'CUSTOMERS & CONTACTS' and has tabs for 'START', 'CUSTOMERS', and 'CONTACTS'. The 'New Customer' section includes fields for 'Company Name' (Anrond IT), 'Customer no.:' (AIT), 'Customer Status' (Customer), 'Owner' (ASC (Ashlee Samson)), and 'Industry Code' (IT). The 'Contact Details' section includes fields for 'Phone', 'Fax', 'E-mail', 'Website', 'Address', 'Address2', 'Address3', 'Postal Code', 'City', 'State', and 'Country'. The 'Finance' section includes a 'Comment' field. At the bottom, there are 'Save' and 'Save and New' buttons. Eight numbered callouts (1-8) point to specific fields and buttons as described in the text.