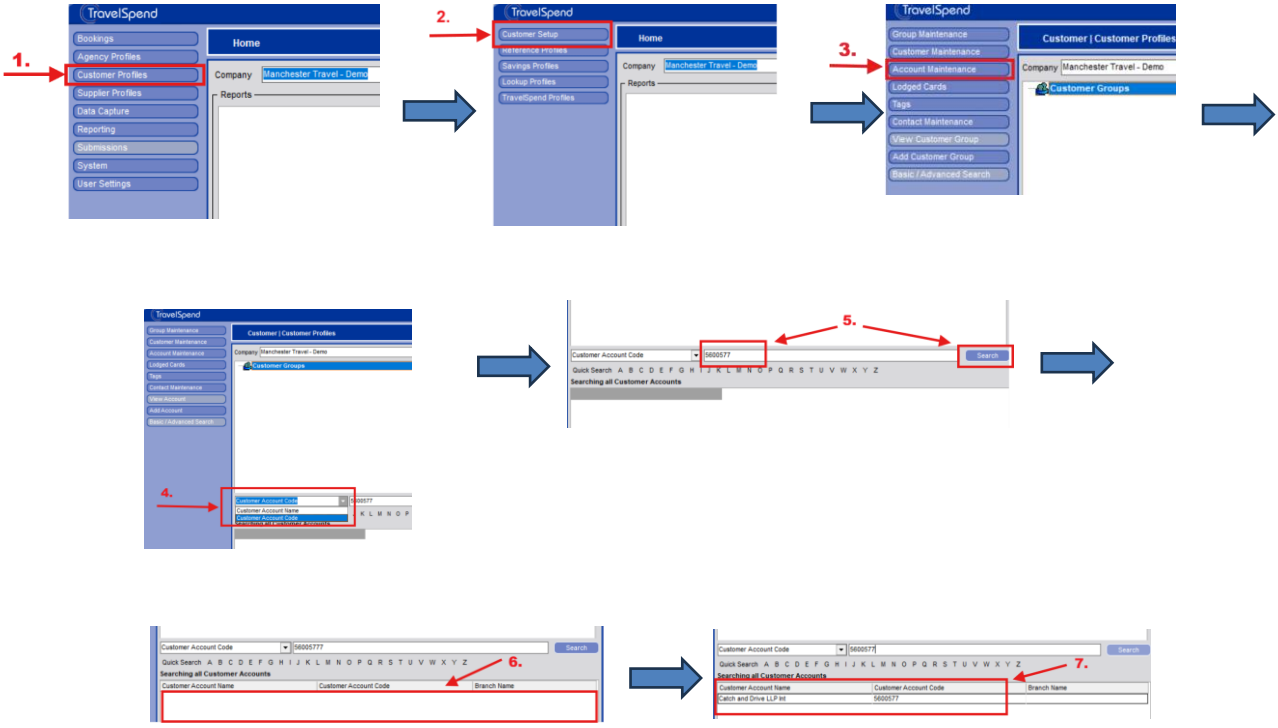
Customer Set up

This document will lead you step by step through setting up a new Customer in the TravelSpend Database. The document will cover setting up customers that have already had booking data imported into TravelSpend as well as those that have not yet been seen by the database.

From the TravelSpend Client Home page navigate to the Account Maintenance page following the instruction below:

1. Click on ***Customer Profiles***
2. Click on ***Customer Setup***
3. Click on ***Account Maintenance***
4. Change the search criteria to 'Customer Account Code'
5. Enter the account code to be created on the database into the Search function box and click on ***Search***
6. If no data is returned, follow the steps in Section A
7. If data is returned, follow the steps in Section B



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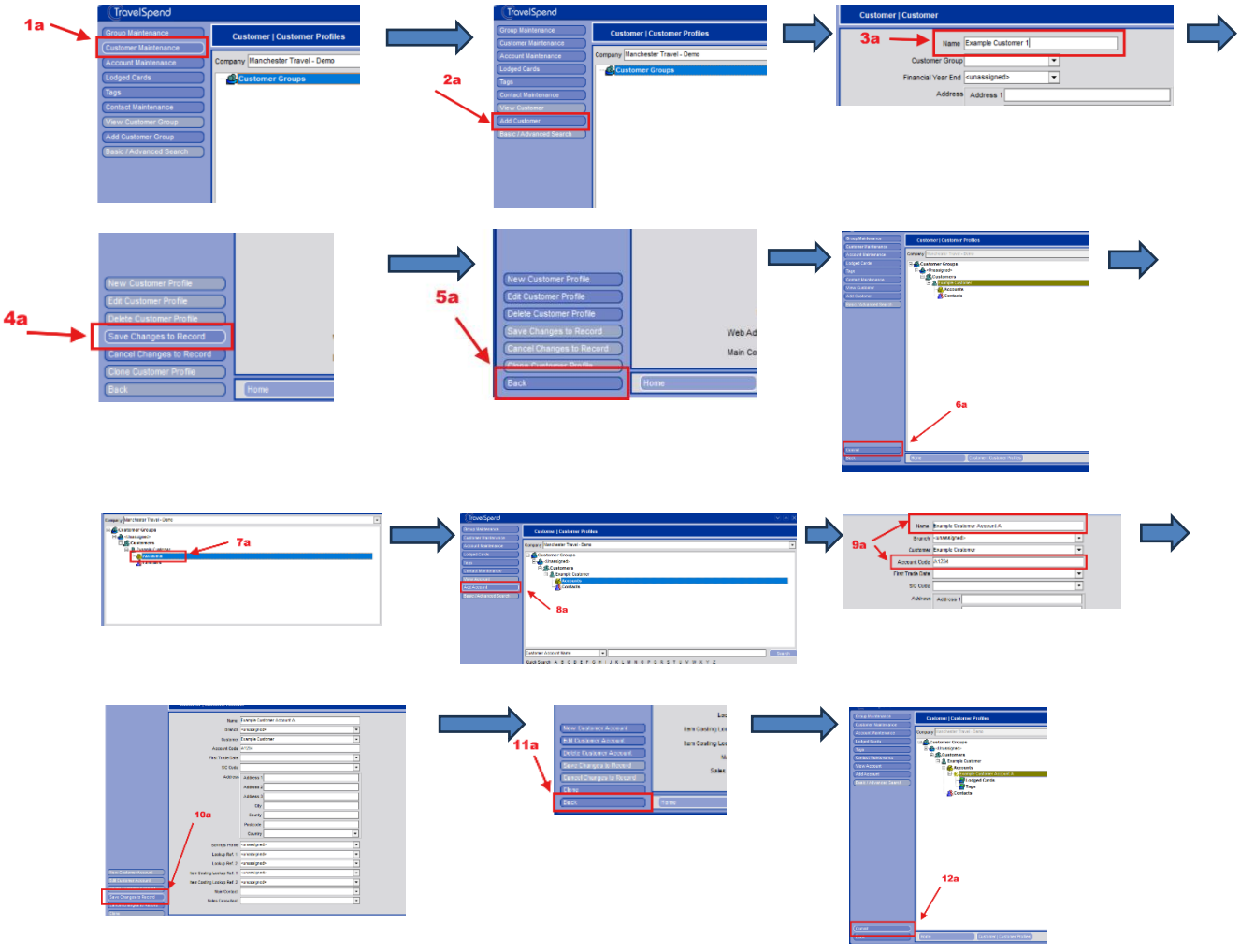
Section A – No Data returned on the initial search

1. Click on ***Customer Maintenance***
2. Click on ***Add Customer***
3. Enter Customer Name in the 'Name' Field
4. Click on ***Save Changes to Record***
5. Click on ***Back***
6. Click on ***Commit***
7. Click on the ***Accounts*** line under the newly created Customer
8. Click on ***Add Accounts***
9. Enter the Customer Account Name and Account Code
10. Click on ***Save Changes to Record***
11. Click on ***Back***
12. Click on ***Commit***

If you need to add more than one Account to a Customer, for Reporting, repeat steps 7 -12



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Section B - Data returned on the initial search

1. Double click data returned in the search area so that it 'moves' to the active section (top window)
2. Click on the Account that needs renaming, so that the Search Area disappears
3. Click on ***View Account***
4. Click on ***Edit Customer Account***
5. Change the name of the Customer Account to be the required Name
6. Click on ***Save***
7. Click on ***Back***
8. Click on ***Commit***
9. Click on the Customer Name that needs amending
10. Click on ***View Customer***
11. Click on ***Edit Customer***
12. Change the name of the Customer to the required name
13. Click on ***Save***
14. Click on ***Back***
15. Click on ***Commit***

