**Create a Customer – USMF**

This is a set of instructions on how to create a customer on legal entity USMF in Dynamics 365 for Finance and Operations. These are generated from a task recording of a person performing the process of creating a customer. The specific values used are not specifically important, but the steps taken are.

1. Go to Accounts receivable > Customers > All customers.
2. Click New.
3. In the Name field, type a value.
4. In the Customer group field, enter or select a value.
5. In the list, click the link in the selected row.
6. In the Delivery terms field, enter or select a value.
7. In the list, select row 7.
8. In the list, click the link in the selected row.
9. In the Mode of delivery field, enter or select a value.
10. In the list, select row 5.
11. In the list, click the link in the selected row.
12. In the Phone field, type a value.
13. In the Street field, type a value.
14. In the City field, type a value.
15. In the State field, type a value.
16. In the ZIP/postal code field, enter or select a value.
17. In the list, click the link in the selected row.
18. In the Street field, type a value.
19. Click Save and open.
20. Click Save.
21. In the Customer account field, enter or select a value.
22. Close the page.
23. In the Customer account field, type a value.
24. Click Save.
25. Expand the Sales order defaults section.
26. In the Site field, enter or select a value.
27. In the list, select row 2.
28. In the list, click the link in the selected row.
29. In the Sales group field, enter or select a value.
30. In the list, click the link in the selected row.
31. In the Sales order pool field, enter or select a value.
32. In the list, select row 2.
33. In the list, click the link in the selected row.
34. Click Save.

A new customer must have the following fields filled out: Customer Group, Language, Line of business, segment, subsegment, sales district, sales group, sales order pool, total discount, price, and line discount plus mode of delivery.