Opening a new account – Nav

An account can be created either on CRM or NAV. When we raise a lead on CRM this can be qualified to an

From Customers shortcut: -

New

Enter – generates a new customer number

Populate the following fields;

General Tab

Name (Company Name or Individual's Name if not a business)

Salesperson Code (see salesperson matrix)

Credit Limit *

Company Reg No (if provided)

Instruction Text - any specific instruction that you want to flag up when an order is being processed. e.g. "off

Address & Contact Tab

All relevant address fields

TL&PT or FL required?

Phone no.

Contact Name if available

E-mail/Confirmation e-mail/statement e-mail

Web login e-mail (if to be set up for online ordering)

Invoicing Tab

Vat Registration no. (if provided)

JCP Type of Supply Code – based on what product is being ordered/used for.

General Bus Posting Group (defaults to UK, change if applicable)

Vat Bus. Posting Group (defaults to UK, change if applicable)

Customer Posting Group (defaults to UK, change if applicable)

Customer Price Group (if applicable)

Currency Code (if not GBP)

Payments Tab

Payment Terms Code**

Make sure the 'Print Order Conf' box is ticked unless customer has asked us NOT to send an order confirma

Additional Notes

*Standard credit allowance is £6,000 For Peacock Salt, anything more than this must be agreed by Garry.

**Standard Payment terms is M20 for Peacock Salt, anything more than this must be agreed by Garry.

If thecustomer wants to pay each time they order, use option for Paid by Credit/Debit Card (VSA).

For payment prior to delivery use the option for Prepayment Required (PP).

Any other notes relevant to the account can be added to the ‘Comments’ on the top ribbon in the Home scre

L Brierley 23/04/23