



Global 3000 Service Pack Note

Debtors Ledger - Quick Account Creation

Author	DCP	
Project	ZD60_00423.docx	
Version	1.0	1 of 3

INTRODUCTION

This service pack provides the ability to create customer accounts quickly using an existing account as a template.

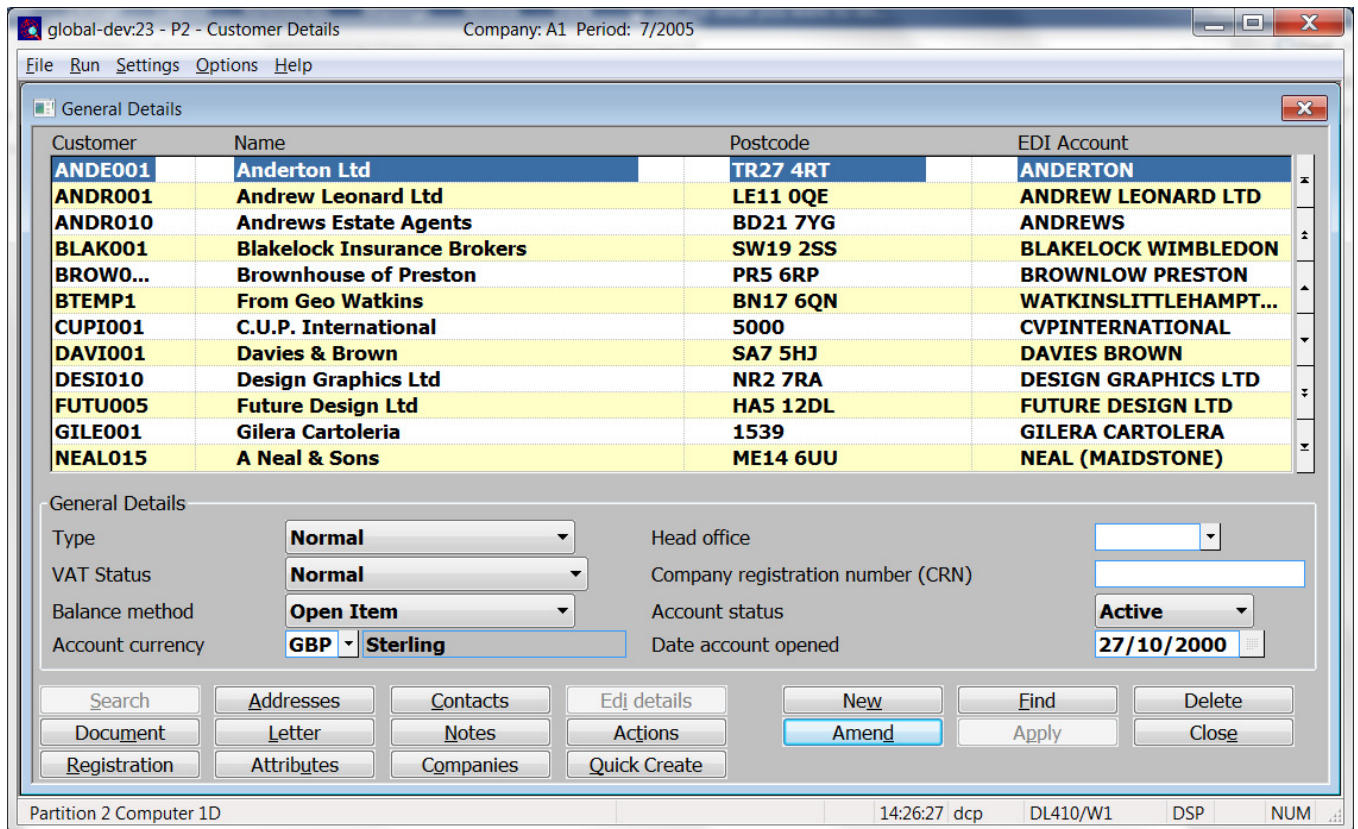
The changes introduce a new button in customer maintenance. The new button (labelled 'Quick Create') allows new accounts to be created quickly using an existing customer as a template.

It should be noted that the new account is created with exactly the same settings (credit limit, trading terms etc) as the template account, however bank details, email addresses, SOP discounts and attribute settings are not copied to the new account. A single address and contact can be specified for the new account (defaulted from the invoice address at the template account).

Warning, once a new account is created using the new option you must thoroughly check that the settings for the new account are correct.

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Customer Maintenance



Quick Create Press this to quickly create a new account using an existing customer account as a template. The new account is created with exactly the same settings (credit limit, trading terms etc) as the template account, however bank details, email addresses, SOP discounts and attribute settings are not copied to the new account. A single address and contact can be specified for the new account (defaulted from the invoice address at the template account).

Warning Once a new account is created using the new option you must thoroughly check that the settings for the new account are correct. It should be noted that any documents that were configured for delivery via email for the template account will be configured as 'printed' for the new account.

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