Creating A New Customer In Finex

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This tutorial guides you through creating a new Customer in Finex.

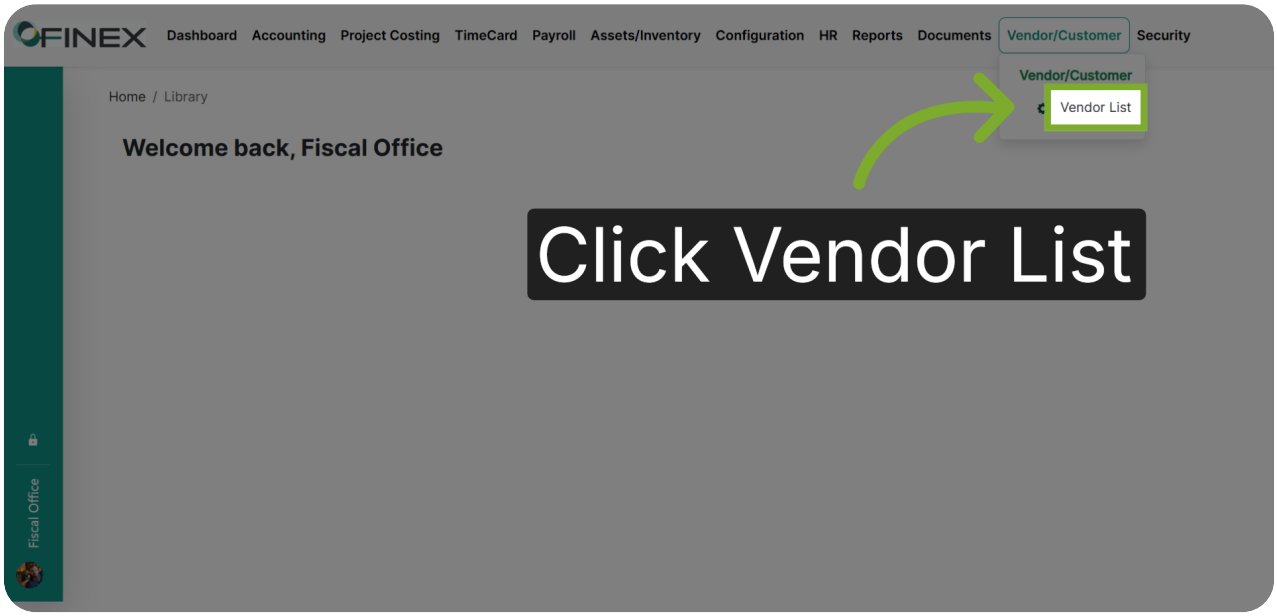
Go to www.finexweb.com

01 Access Vendor/Customer Section

Click Vendor/Customer to access the Vendor and Customer section of Finex.

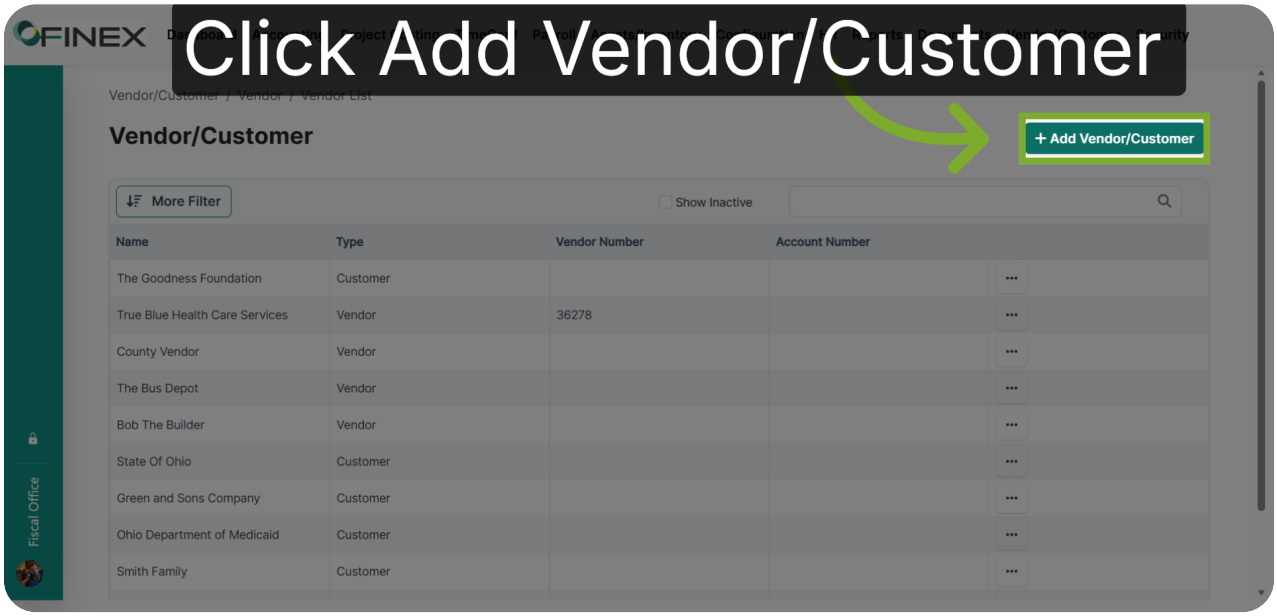
02 Open Vendor List

Click Vendor List to access the list of Vendors and Customers in Finex.



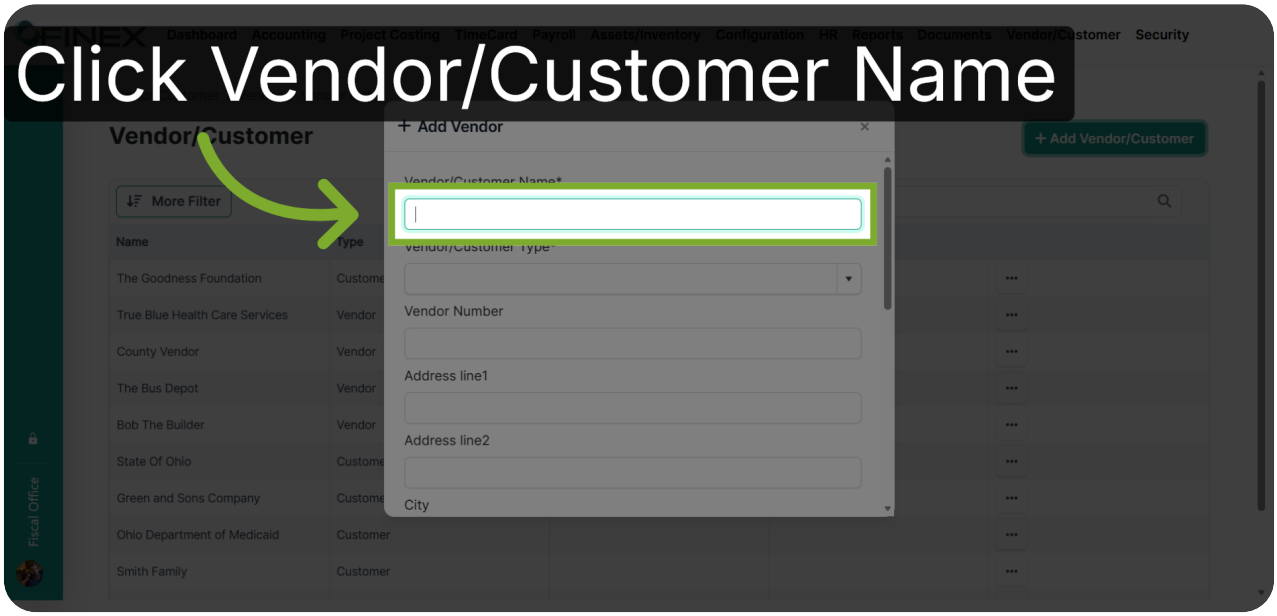
03 Select Add Vendor/Customer

Click Add Vendor/Customer to start the process of making a new Customer.



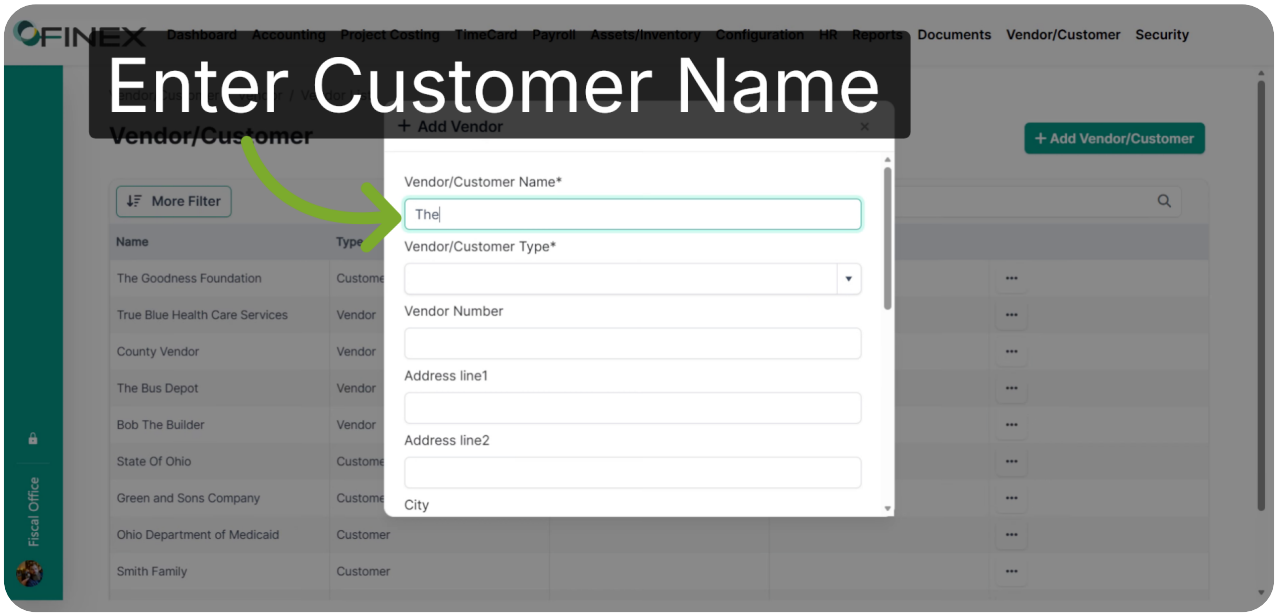
04 Select Vendor/Customer Name Field

Click the Vendor/Customer Name field.



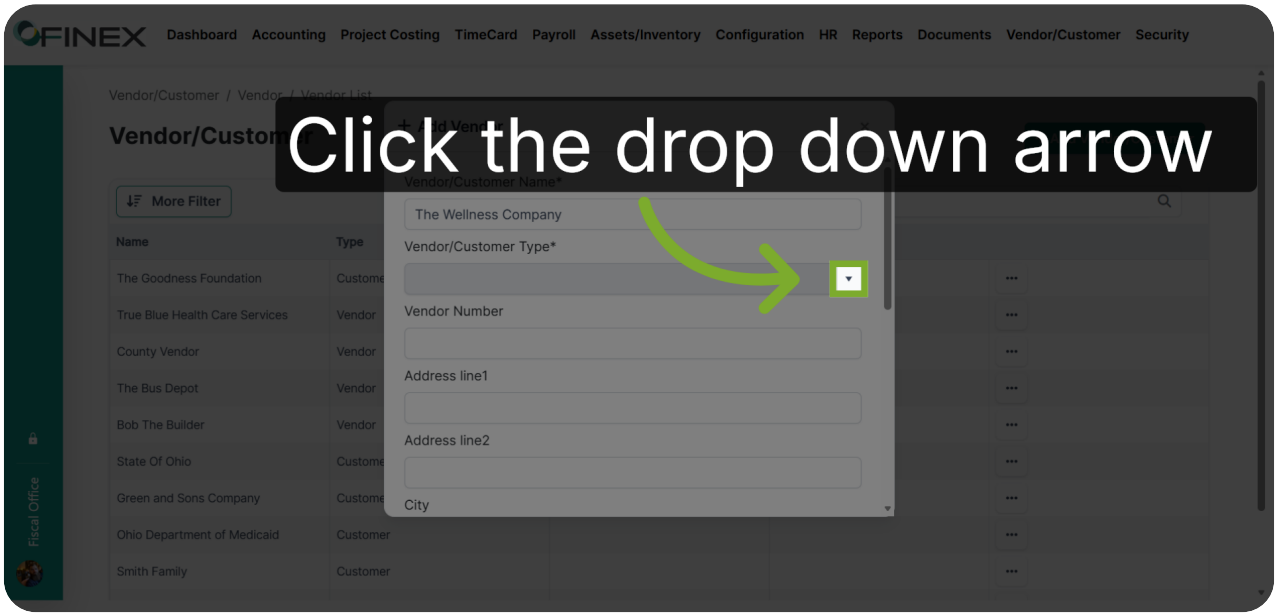
05 Enter Customer Name

Enter the name of your Customer.



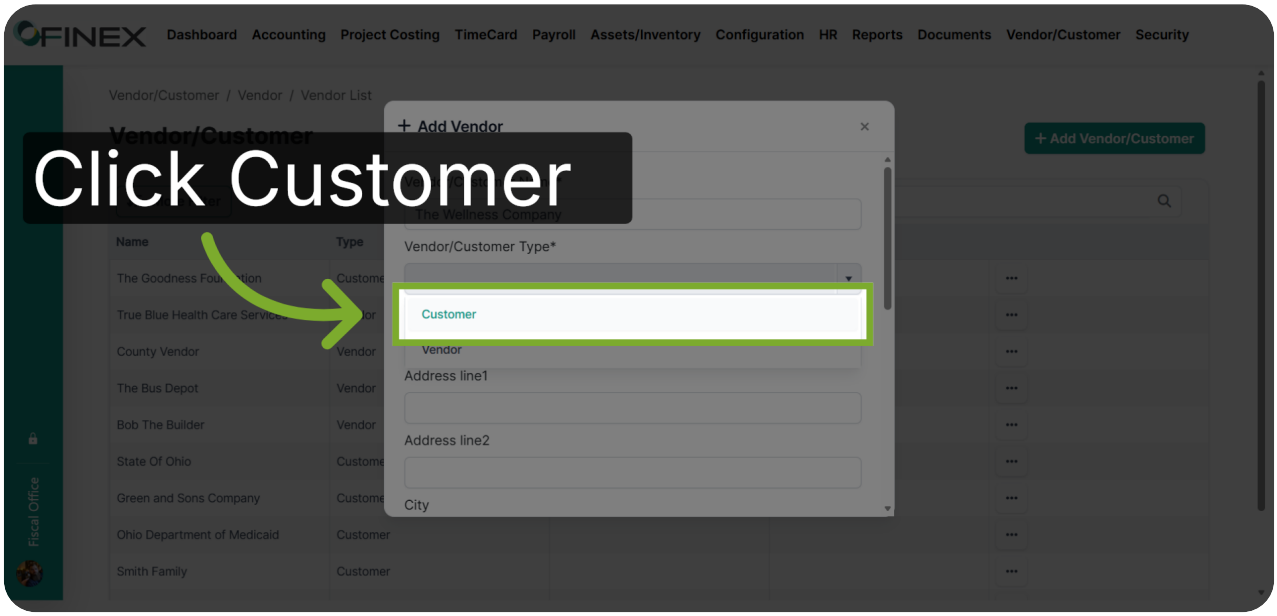
06 Access Customer Type Options

Click the drop-down arow to view the Vendor/Customer Type list.



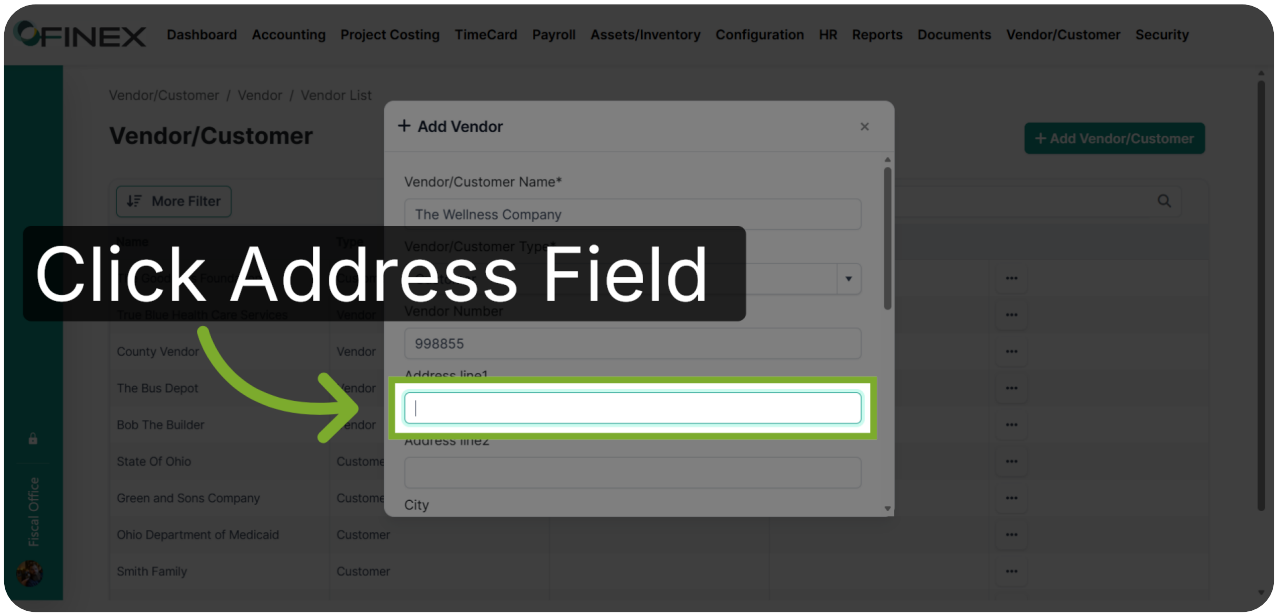
07 Choose Customer Type

Select Customer from the drop-down list.



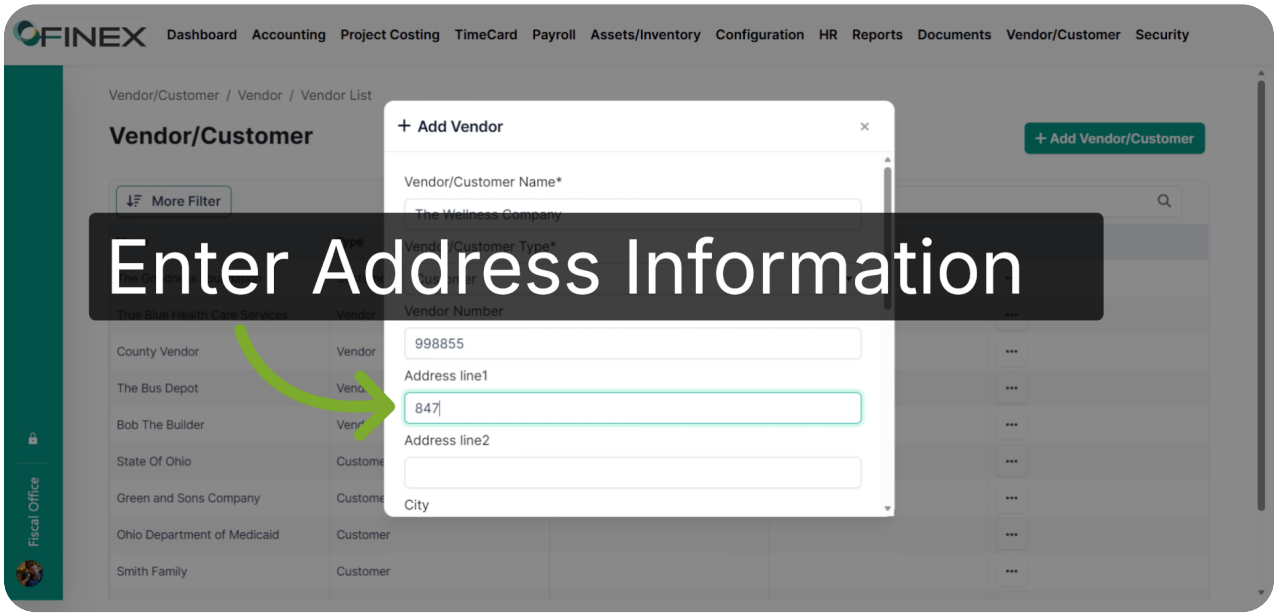
08 Select Address Field

Click the Address field.



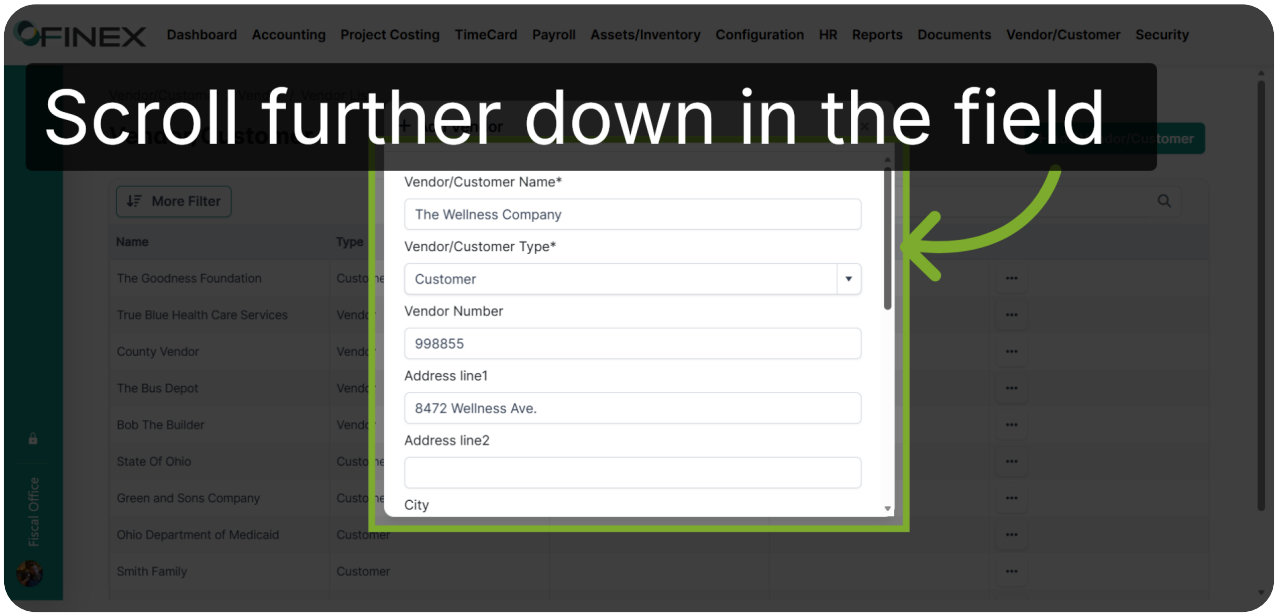
09 Enter Address Information

Enter the customer's address.



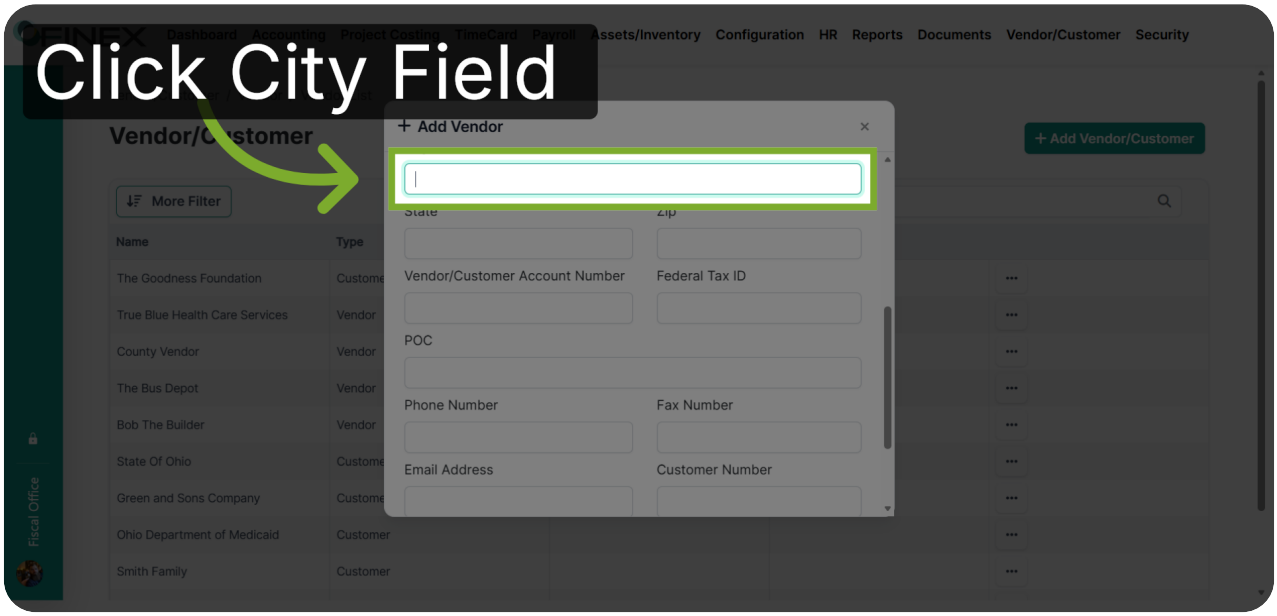
10 Scroll Down On the Enter Customer Window

Scroll down to add more information to the customer you are creating.



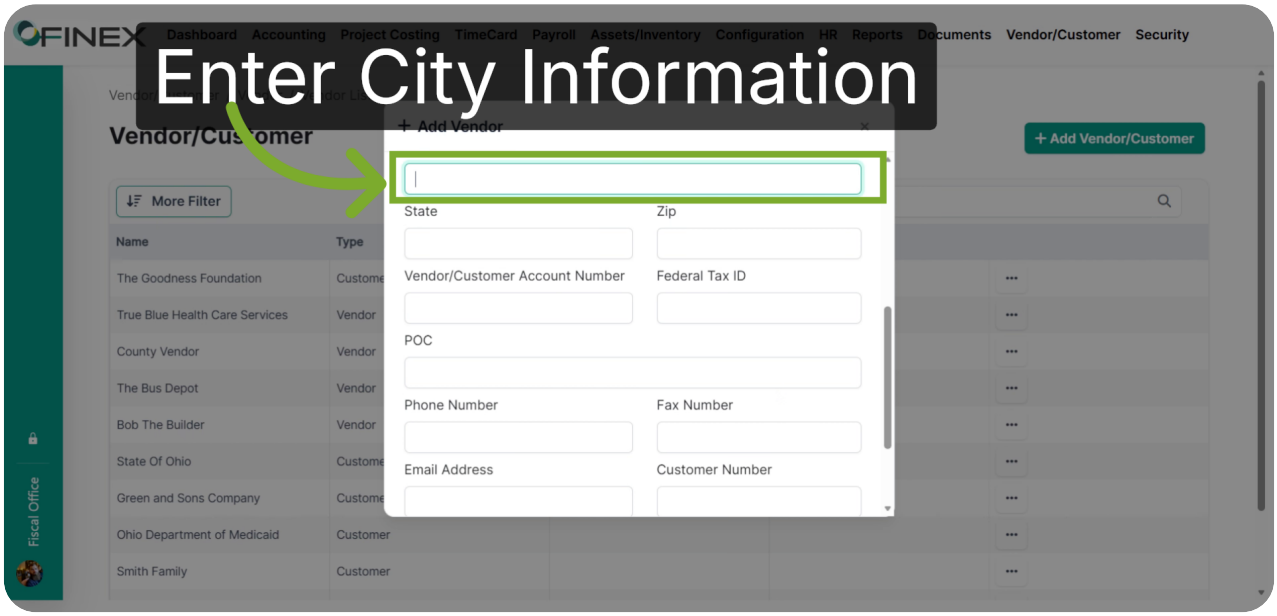
11 Select City Field

Click the City field.



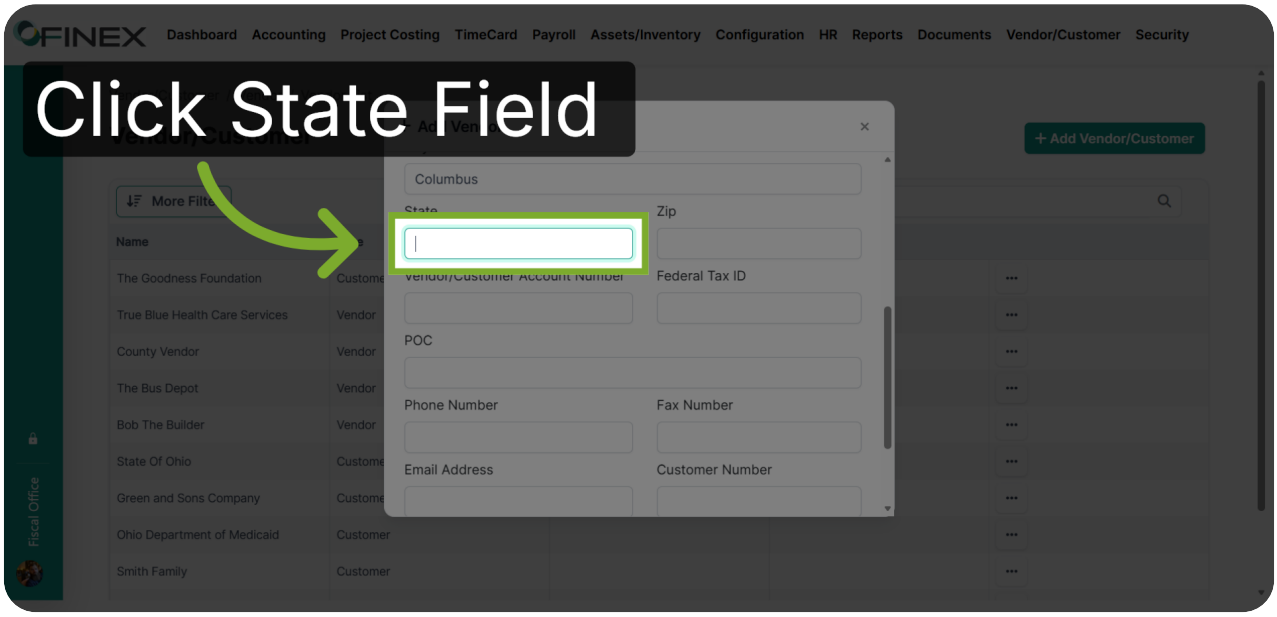
12 Enter City Information

Enter the city where the Customer is located.



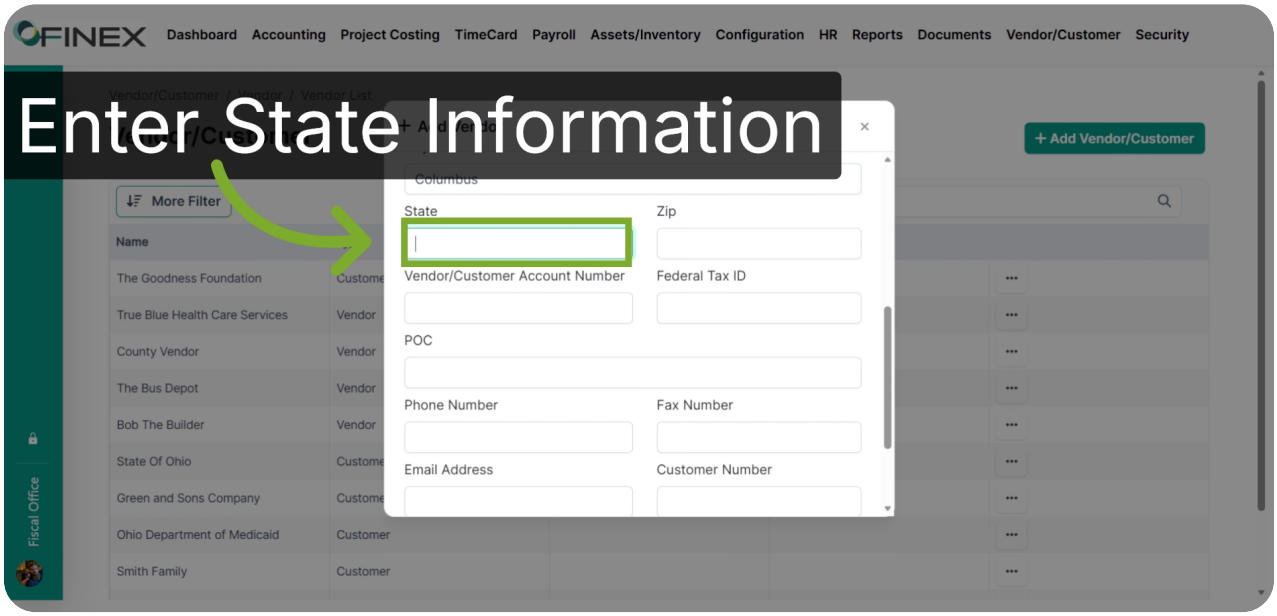
13 Select State Field

Click the State field.



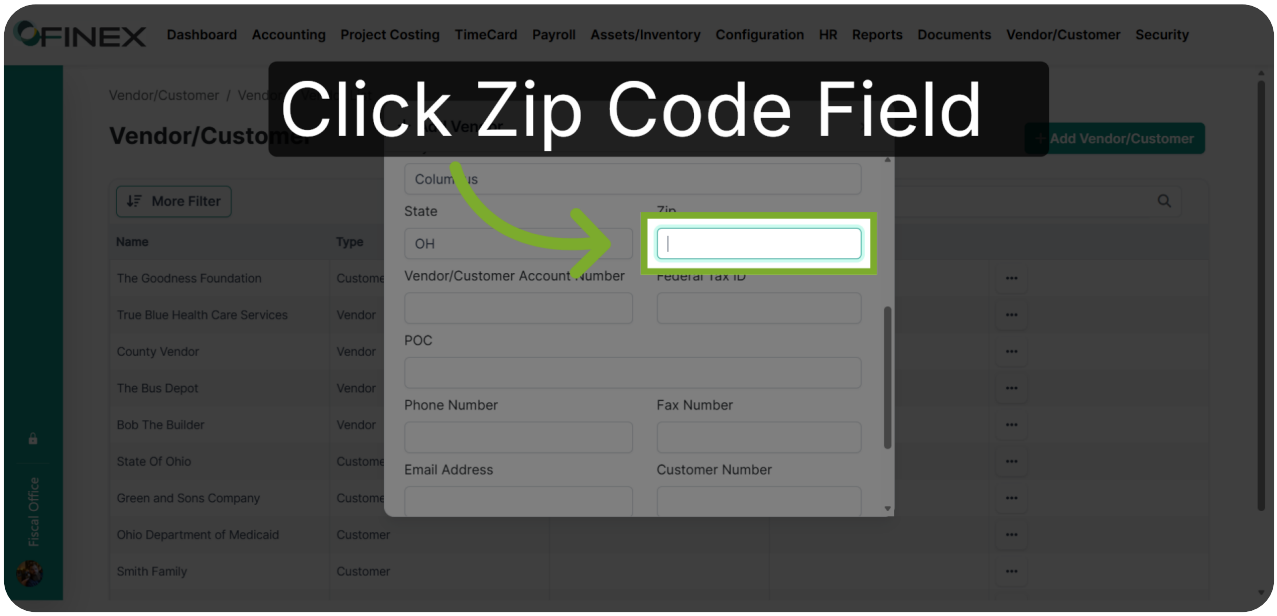
14 Enter State Information

Enter the State where your customer is located.



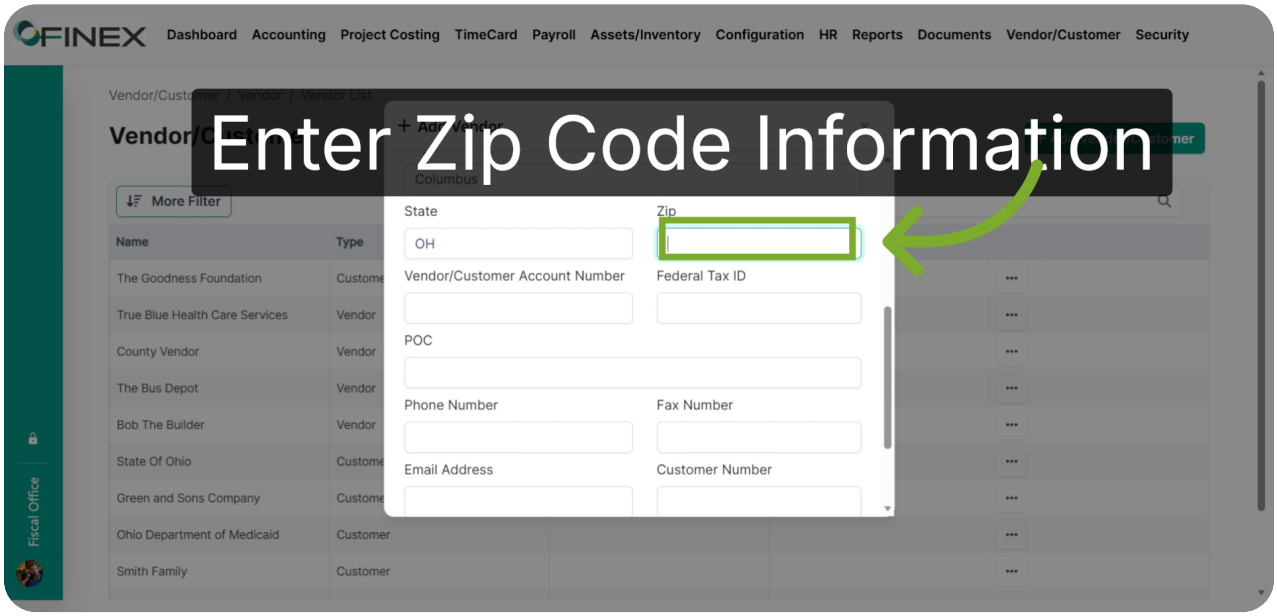
15 Select Zip Code Field

Click the Zip Code field.



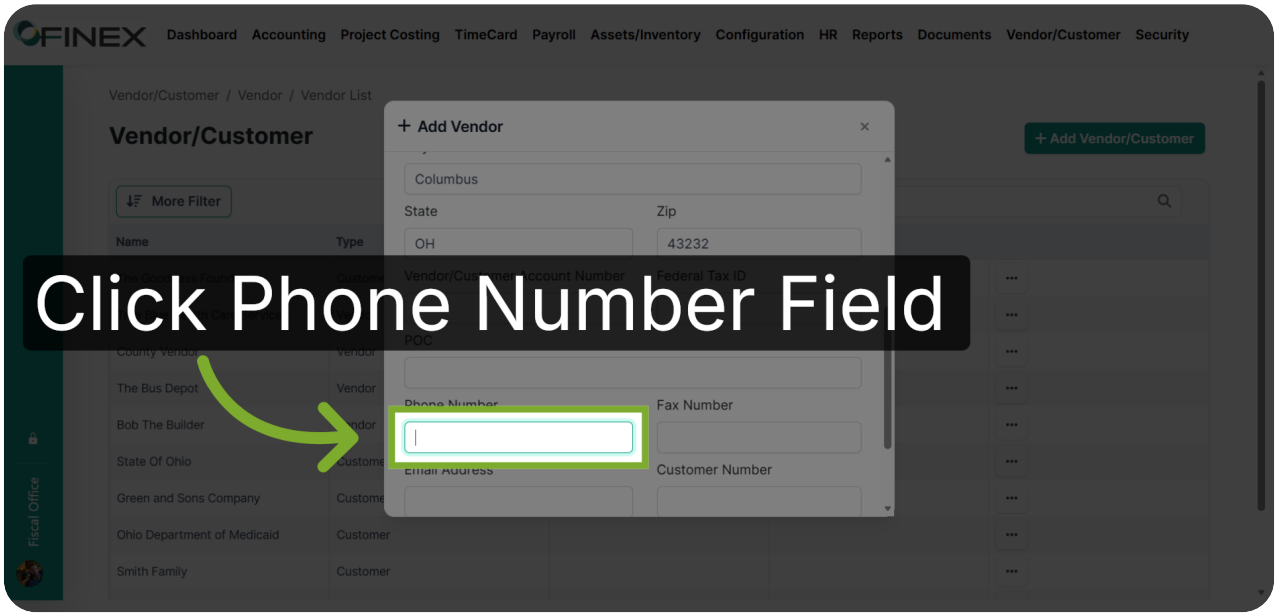
16 Enter Zip Code

Enter the Zip Code for your Customer's location.



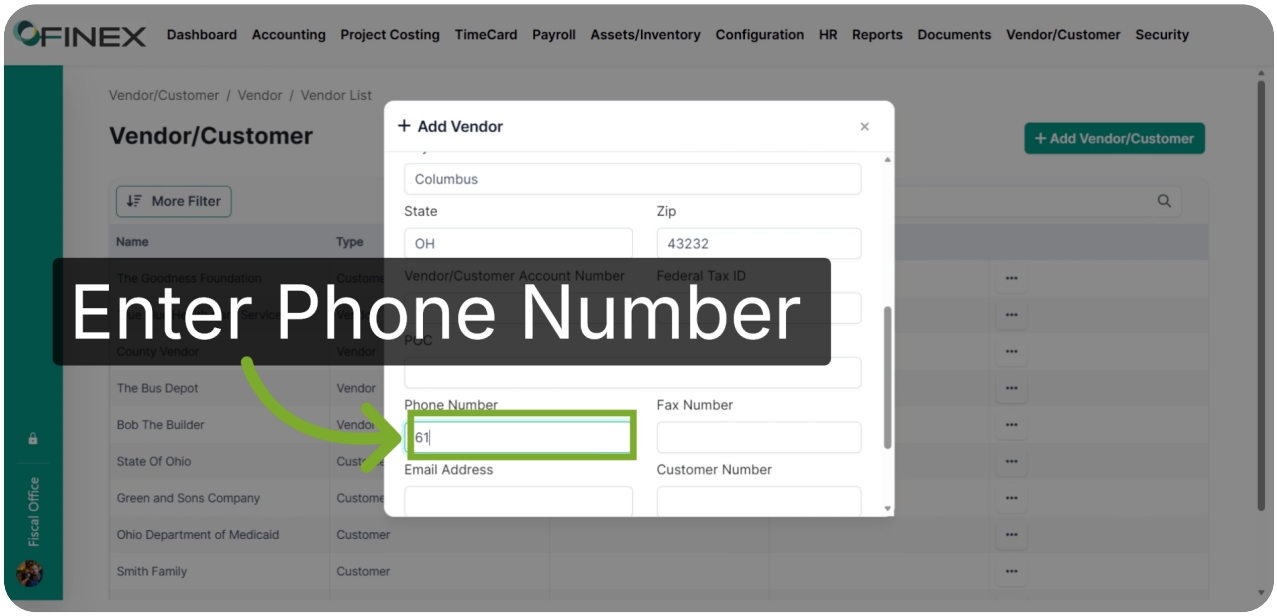
17 Select Phone Number Field

Click the Phone Number field.



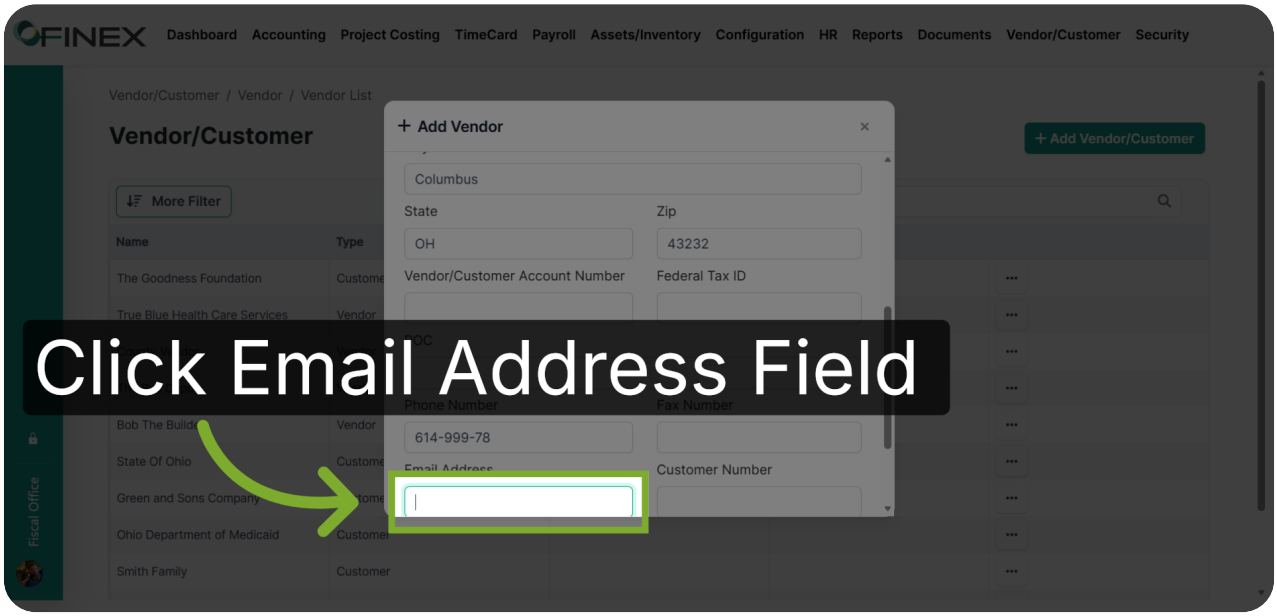
18 Enter Phone Number

Enter the Customer's phone number.



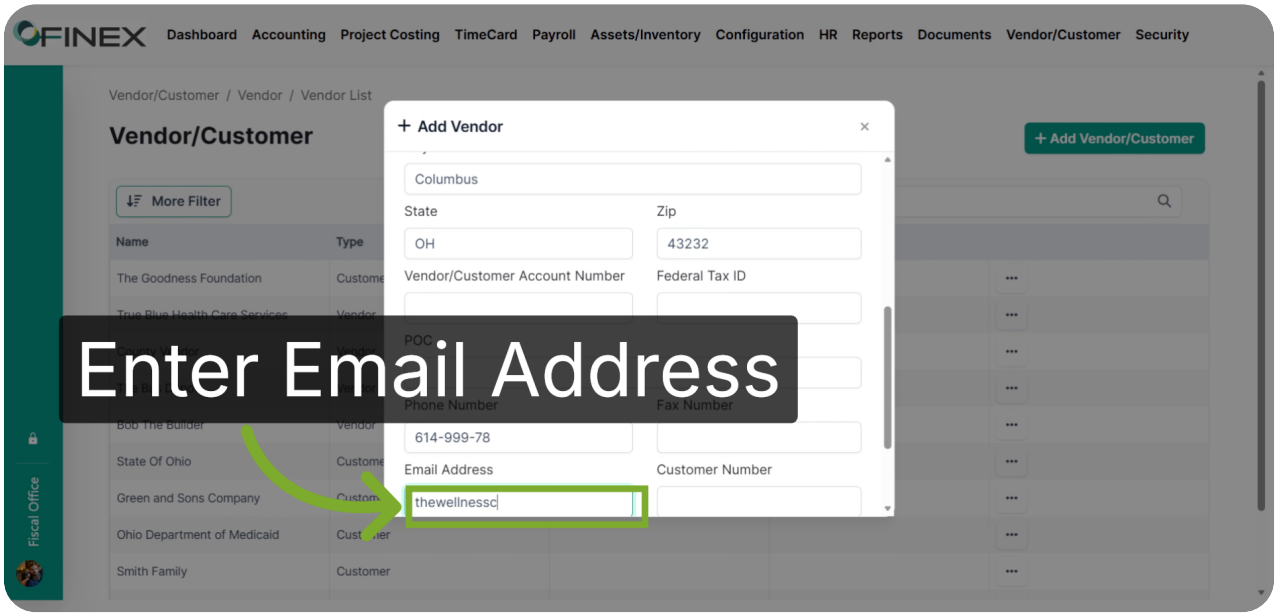
19 Select Email Address Field

Click the Email Address field.



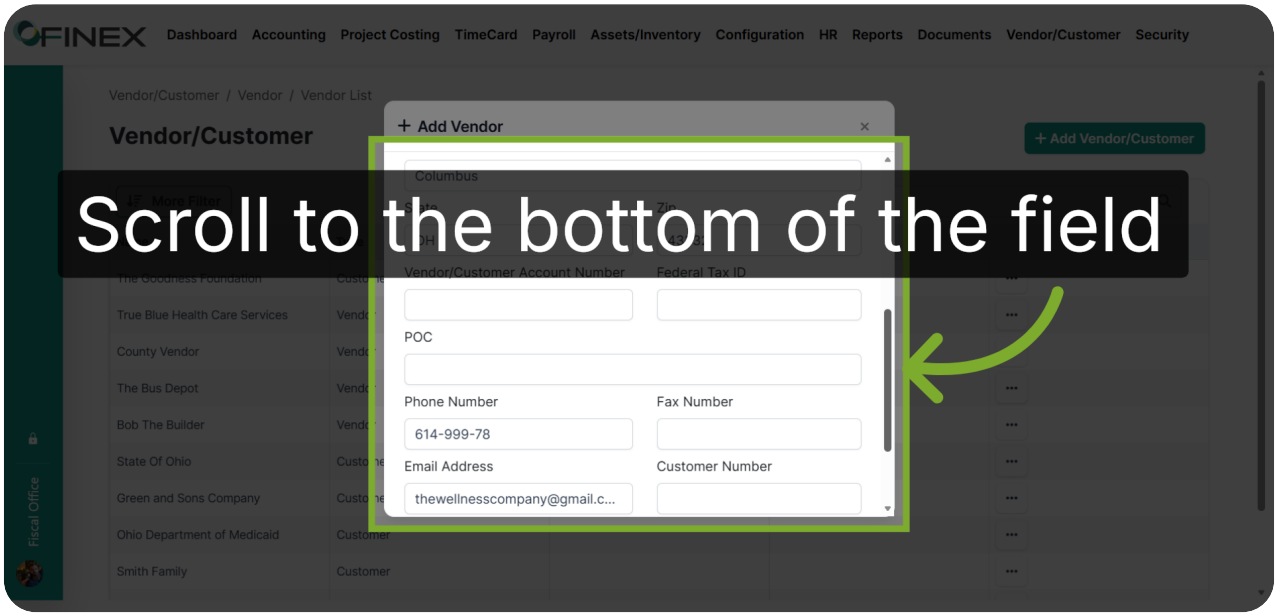
20 Enter Email Address

Enter the Customer's email address.



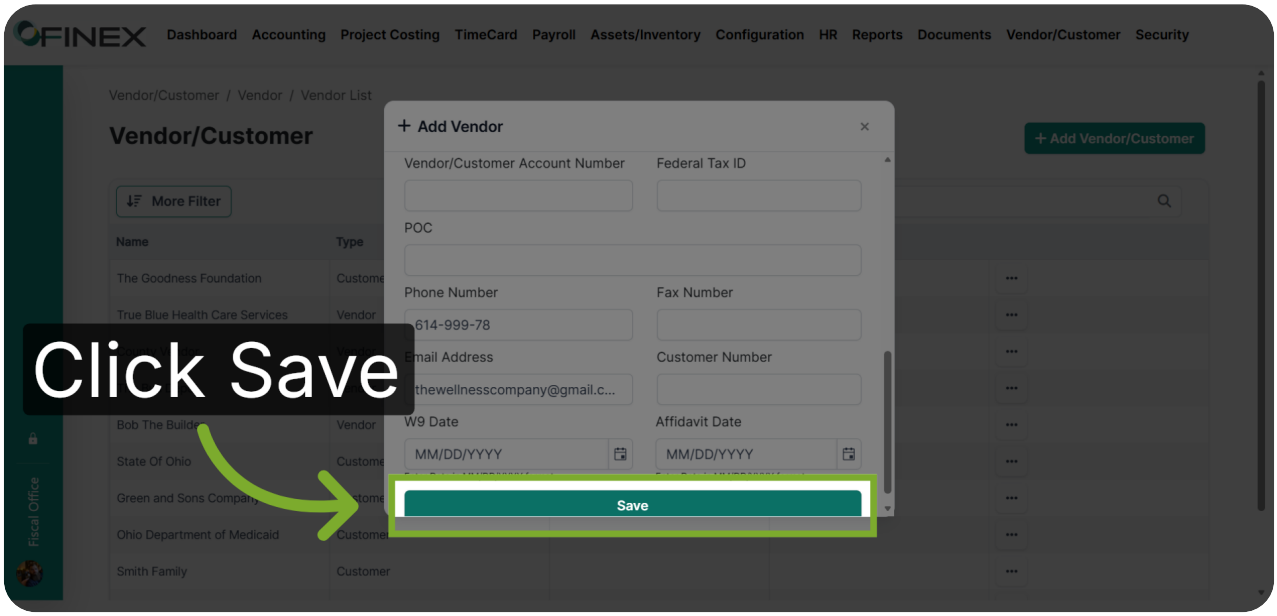
21 Review Entered Information

Scroll to the bottom of the Enter Vendor/Customer Window field.



22 Save Vendor Customer Record

Click Save to complete the Customer record.



You have now successfully created a new Customer in Finex.

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