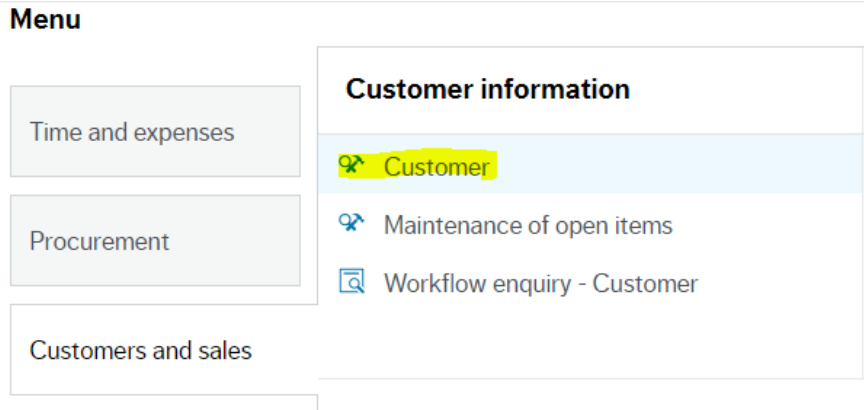


New Customer Requests and Amending Customers in ABW (Aberpeople)

This is to create new or amend existing external customers. Please do not create or amend staff or student records.

Click on the link to access the system <https://abw.aber.ac.uk/Agresso/>

From the menu, click on Customer and Sales and then Customer, this will return a blank screen. Before requesting a new Customer, you should check they do not already exist:



Click on the box with the three dots to search for existing customers:

The screenshot shows a form titled 'Customer'. It has a 'Lookup' field with a dropdown arrow and a small box containing three dots. Below this are two input fields: 'Customer ID' and 'Customer name *'.

This opens the following search box:

The screenshot shows a 'Value lookup' search box. At the top, there is a message: 'Your search produced more results than the maximum allowed. Please refine your search criteria or use the advanced search options.' Below this is a 'Search criteria' field containing the text 'aberystwyth'. There is an 'Advanced' section with a dropdown arrow and a 'Search' button. At the bottom, there is a table with columns: Customer ID, Name, Customer gro..., Customer group (...), Address, Town, Post Code, Company registration num..., and VAT registration num... The 'Name' column contains the text '*golf*'. A 'Filter' button is located at the bottom right of the table. A 'Close' button is at the bottom left.

Customer ID	Name	Customer gro...	Customer group (...)	Address	Town	Post Code	Company registration num...	VAT registration num...
	golf							
C00136	Aberystwyth...	COM	Commercial Deb...	C/O Simon Edwards Estates Office Gogerddan,				

Enter text in the search criteria and click Search. If you get too many results, enter some more details in the white boxes on the fields below to narrow down the criteria, then click on Search again, if you still have too many results you can filter on the results by adding more text in the fields and clicking on the filter button. Use * either side of the text if it is part of a name. Click on the Close button to exit the search.

If you are happy you cannot find the customer, then you can request a new one following the instructions below.

Click on the NEW button at the *bottom* of the screen.



Customer

Lookup

Customer ID

Customer name *

Classification

Customer group *

COM

Country *

GB

Customer ID: TAB over this field

Customer Name: Enter the name of the customer, do not use abbreviations. For individuals, use first name followed by surname, i.e. John Smith. Use Title Case, not block capitals.

Country: This defaults to the UK, start typing the country name if outside the UK to select the correct country.

Now click on the Contact Information Tab

Customer

Customer Contact information Payment Relation Balances and Transactions

Customer

Lookup

Address

<input type="checkbox"/>	Address type	Street address	Town	County	Post Code	Contact
Add	Delete					
⌵ Address details						

There are several fields that are mandatory. These are needed in the first instance to send the invoice to the customer, and if the customer does not pay the invoice on time they are used in the reminder/debt chasing process.

To open the address fields to complete click on the Add button.

Address details

Address	Phone numbers	E-mail and website	Contact person
<p>Address type * General</p> <p>Street address * 100 Main Street</p> <p>Country * United Kingdom</p> <p>Post Code * SY23 3AB</p> <p>Town * Aberystwyth</p> <p>County Ceredigion</p>	<p>Telephone * 01970 639874</p>	<p>E-mail * Admin@abergolf.ac.uk</p>	<p>Name</p> <p>Position</p>

Address Type: This defaults to general, tab to the next field

Street Address: This is a mandatory field, enter the street name and, if a long address, you may need to add an address line 2 in here

Country: Enter the country where the customer address is, this may be different from the field completed on the first tab.

Post Code: This is a mandatory field, enter the post code

Town: This is a mandatory field, enter the Town

County: This is not mandatory, for short addresses where you have already added the county in the town field, leave this blank, otherwise enter the county.

Telephone Number: This is required for debt chasing purposes and is a mandatory field.

Email: This is required for issuing invoices and debt chasing purposes and is a mandatory field. Wherever possible use generic email addresses rather than an individual within the company (i.e. Accounts@...). If you do not know the email address you must request it from the customer. Failure to complete a valid email address will result in the customer request being returned to you for completion.

Contact name: You may enter the contact details of someone at the customer if you have one.

You may need to scroll back to the top of the screen to see the tabs.

Now click on the Relation Tab

Customer

Customer Contact information Payment Relation Balances and Transactions

Customer

Lookup

Relation	Relation value	Description
Tax Area (TAXAREA)	1	
	1	United Kingdom
	2	European Union
	3	Rest of World


Add Delete

Tab past the field headed Relation to the Relation Value field

Tax Area: This is used in VAT reporting, either type in the one you need or type two spaces and select from the list. The valid values are 1 UK, 2 EU (Excluding UK) or 3 Rest of world.

Click on the SAVE button to the bottom left of the screen.

You should see the next pop up message:

 **Success**

Successfully saved. Customer ID C10252 is now created and is sent for approval.


OK

Your request has been submitted to the Finance Department for approval. You cannot raise an invoice on the customer until it has been approved.

Workflow Enquiry

If you want to check the customer has been sent for approval and who it is with you can use the workflow enquiry

Customer information




-  Customer
-  Maintenance of open items
-  Workflow enquiry - Customer

Workflow enquiry - Customer

Search type

Active items

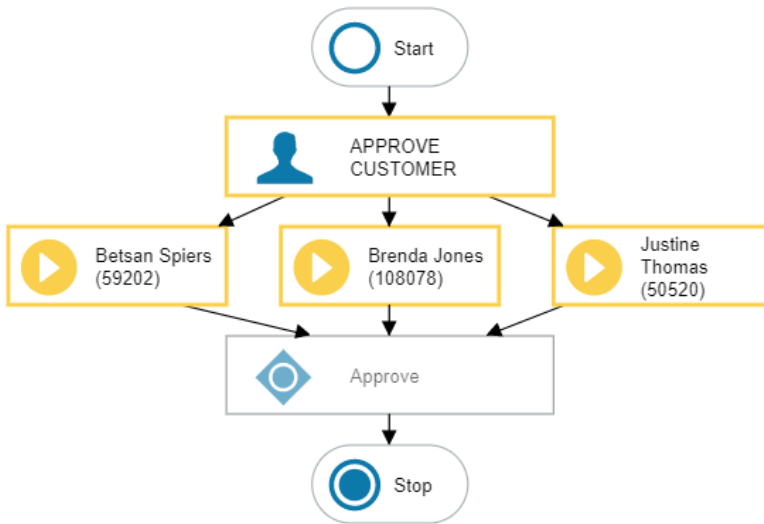
Historical items

Items									
Map	Process name	Process step	Version no.	Workflow state	Task owner	▼ CustomerID	Customer name	User	
							Aberystwyth*		<input type="button" value="Load"/>
	Customer Masterfile	Approve Customer	5	Workflow in progress	50520	C10252	Aberystwyth Sailing Club	100529	
	Customer Masterfile	Approve Customer	5	Workflow in progress	108078	C10252	Aberystwyth Sailing Club	100529	
	Customer Masterfile	Approve Customer	5	Workflow in progress	59202	C10252	Aberystwyth Sailing Club	100529	

The default screen will only show active workflow, so if your customer has already been approved you would need to tick the Historical Items field.

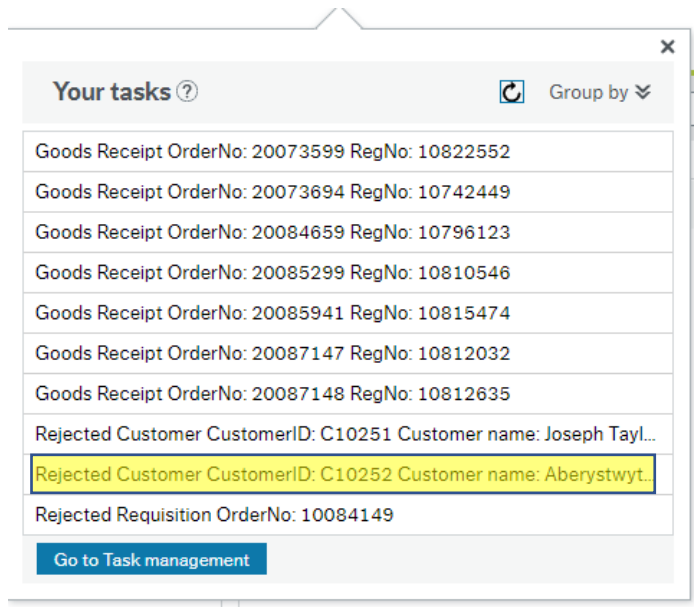
To narrow down the search you can enter the customer name, use * as a wildcard and click on load. The customer name field is case sensitive.

To view the map, click on the map symbol at the left of the row. The example above shows three times as it can be approved by three different users.



The above map shows who the new customer request has been sent to for approval.

If a request is rejected it will appear on your task list



Click on the task to open it

Master file approval

Information			
CustomerID	C10251	Customer name	Joseph Taylor
Post Code	SK14 4JB		

Workflow log (row 0)

19/02/2020 12:23 Betsan Spiers (59202) - Rejected - "email address not valid"
19/02/2020 12:14 [redacted] Distributed

(Enter a comment)

Copy

Details					
Map	Status	Field	Field associated with		New value
		Customer group			Commercial Debtors
		Customer name			Joseph Taylor
		Status			Active
		Address type	Contact information		General
		Address	Contact information		[redacted]
		E-mail	Contact information		none@aber

You will see the message from Finance as to why it has been rejected. If you need to add/correct information you can do this on the screen by clicking in the relevant field in the New Value Column

New value
Commercial Debtors
Joseph Taylor
Active
General
[redacted]
JTaylor999@gmail.com
Stockport

Enter the correct information then click on the accept button at the bottom left of the screen



This will send the request back to the Finance Department for approval.

If the customer was rejected because it was a duplicate, or that the amendment is incorrect and no longer needed, you should click on the Reject Button.

Customer Amendments

To request an amendment to an existing customer, load the customer record and then go to the field you want to update

Address				
<input type="checkbox"/>	Address type	Street address	Town	County
<input type="checkbox"/>	General	Bethania	Llanon	SY2

Add Delete

⤴ Address details

Address

Address type
General

Street address*

Phone numbers

Telephone*
+44 (0) 1974 272 111

E-mail and website

E-mail*
admin@tynant.com

If any mandatory fields are blank, i.e. the phone number is missing, you will need to add these fields in addition to the one you want. Mandatory fields are marked with an asterisk and highlight in red if you try and leave them blank.

Phone numbers

Telephone*

And an error message appear at the bottom of the screen.

! Please correct the following:

- Telephone:** This field must contain a value.

! Errors: 1

Click on SAVE and you should see the following pop-up message (you may have to click on save twice if you have not tabbed out of the field you have updated):

✓ Success
✕

Successfully saved. Changes in Customer ID C10216 will not take effect until they are approved.

OK

Click on OK to close the pop-up message.

This sends the request to Finance for approval and can be viewed in the workflow map if desired.