AOS Customer Set-up

This document describes the basic steps for setting up a new customer in AOS.

1. Open AOS and click Customers (see Figure 1).

The Customer Search window will appear (see Figure 2).



Figure 1

2. Click the new customer icon on the Customer Search window (see Figure 2). The Customer Maintenance screen will appear, (see Figure 3).

inter the Ship-to Name of the	e Customer You Are Searching For:	[Search Type Ship To:	⊂ Bill	·To:
	Buyer				
		Phone Number			
A & J CRANES INC.	00000000-001 @0000994-001			De	-
ABACUS	@0001167-001			-0	12
ABC CO	@0001314-001				
ABC CO	@0001344-001				
ABC CO	@0001353-001				-
ABC CO ABC COMPANY	@0001353-001 @0001358-001				
Oisplay Oisplay Oisplay	C Web Pricing NOT Created	C Web Pricin	Created		777

Figure 2

- 3. Complete the Customer Master tab. (Notes on key fields shown in Figure 3).
- 4. When complete, click the Customer Master Options tab.



- 5. Complete the Customer Master Options tab. (Notes on key fields shown in Figure 4).
- 6. When complete, click the Billing / Miscellaneous tab.

Limit per Invoice Field

This field is inactive.

198-Line Limit per Invoice

SAP does not allow order lines on a single invoice to exceed 198 lines. For orders with more than 198 lines, SAP automatically creates an additional invoice starting at the 199th line of the order. Another invoice is automatically added every time the order reaches the 198 line per invoice limit.

Note:

If the order lines must be grouped in a specific way on invoice pages for a customer, please submit a separate order for each group.

Customer Maintenance - New Customer - @0010013-001
Call Scheduling Shipment Invoice
Erequency Enclose Invoice with Shipment Area Code Ship to Agent Charge Freight to Agent Price Package List
Backorder Status ick Orders Last Order Last Order Date Amount
P Options Descriptions on Invoice Not Transmit Without P0 # Complete (Including Sizes) H illing for Confirming P0 # Verce / Web Options
Customer's Pricing to Website a price book with a base commission code story)
<u>Add</u>
Read/ Ship to Agent Checkbox Figure 4 This option requires approval from District/Regional sales management.
Cancel Backorder Checkbox Do not use this option. Allow backorders is the default option in SAP.

- 7. Complete the Billing/Miscellaneous tab. (Notes on key fields shown in Figure 5).
- 8. When complete, click the Reference Handling tab.

🎸 Customer Maintenan	ce - New Customer - @00100	13-001			
Customer Master	Customer Master Options	Billing/Misc	ellaneous	Reference/H	landling
P0#		Description			
l					
	N				
Contacts for This Lo	cation	Title			
		Dept.	<u> </u>		— IIII
		Work	, 		
		E-Mali	Active?	O Yes	C No
			Can Buy?	O Yes	C No
Right-click your mouse (Add, Edit, Delete)	over ar other options		Default Pu		C No.
Condit Cord Informat			Derault Du	iyer: o res	
Card Tupe					
AE - American Expres	5				
MC - Master Card VS - Visa					
				Add	<u>C</u> ancel
					00,000,00011
eady		\vdash	JEUGIN_AUT	J)	06/02/2011 //
PO # Field	d - 35-Character Limit			. –	
PO Numbe	rs with more than 35 charac	cters will not	appear on S	AP generated	I documents.
Accounts the	nat were created in Lawson	's legacy sys	tems may ha	ave PO Numb	bers that exceed
SAP 35 cha	aracter limit. If you have a P	O Number th	nat is longer t	than 35 digits	, send the order
e-mail:Or	derEntry.Department@laws	conproduct.cc	om		
fax: 800	0-942-5260				

9. Complete the Reference/Handling tab (notes on key fields shown in Figure 6).

Customer Maintenance - New Customer - @0010	012-001
Customer Master Customer Master Options	Billing/Miscellaneous Reference/Handling
- References	
Bank Reference	
Irade Reference	
andling	
pecial Handling	
Cu mer Price Override	
Ho ould the system automatically select the price for it	ems previously sold this customer?
omer m	aintain the last price when the price decreas
should you be notified when the price	How should you be notified when the price has decreased since the item was last sold?
isplay Price Alert Message	C Display Price Alert Message
pund a Beep splay Price Alert Message & Sound a Beep	C Sound a Beep C Display Price Alert Message & Sound a Be
rease the Price, No Alert Is Necessary	C Maintain the Price, No Alert Is Necessary
Last Quantity?	· Ose Settings in Agent Hereinces
Yes C No 📀	Use Settings in Agent Preferences
	Add
Ready	JLOGIN_A/ 27/2011
rigure o	
Bank Reference Field	
(free freight, carrier, etc.).	Trade Reference Field
	Enter pricing tier in this field.
	Note: This must match what you enter in the Price Method field on the Customer

10. Click the Add button to complete the new Account creation process.