



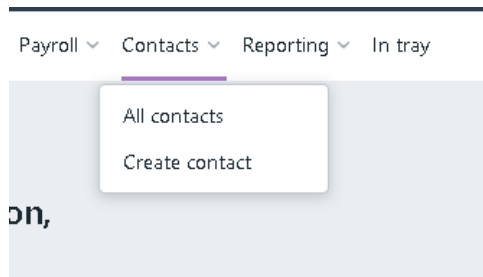
Social Soul

Standard Operating Procedure

Setting up a New Customer

ASSESSOR GUIDE

1. From the drop-down menu, go to contacts, Create Contact



2. In the Details section on the following screen enter:
 - a. Contact Type: customer
 - b. Choose whether the Designation is a Company or Individual
 - c. Enter the company name and ABN (if known)

Details

Contact type* Customer
 Supplier
 Personal

Designation Company
 Individual

Company name*

ABN

[Open ABN lookup website](#)

Contact ID ⓘ

Inactive contact

3. In the Billing Address section enter:
 - a. The address details, telephone number, contact person and email address. Choose whether the Shipping Address is the same as the Billing Address and if not, enter the Shipping Address Details.

Billing address

Country

Address

Suburb/town/locality

State/territory

Postcode

Contact person

Email

Fax

Phone

[+ Add another phone number](#)

Website

Shipping address

Same as billing address

4. Click Save