



This document will explain:

How to add a CardFile using Quick Add CardFile as all quotes and jobs require customer CardFiles to be entered.
 Quick Add CardFile allows for simple CardFile creation.

## **Skill Steps:**

- 1. Select the CardFiles tab from the Jim2 ribbon.
- 2. Click the Quick Add CardFile icon.



- 3. Choose whether the new CardFile is a company or individual type CardFile.
- 4. Choose whether the new CardFile is a Customer (to be invoiced) or a Ship (to be shipped to, is not invoiced) CardFile.
- 5. Tab to the Name field and enter the CardFile name.
- 6. Tab to the Address field and enter the address, suburb, state and postcode information.
- 7. Tab to the Contact Name field and enter the contact name.
- 8. Tab to any other fields and enter the appropriate information.

🔁 Quick Add	CardFile			$\times$
Card Code	GENERAL.EN   Company Vende  Individual	or 🔽 Cu	ustomer 🗌 Ship	
Name	General Engineering Pty Ltd			
Address	24 Mt Arthur Drive	Contact		
		Name	Phillip Hawkins	
Suburb	NARRABEEN	Phone	02 9671 7652	
State	NSW V Post Code 2101	Mobile	0411 904 134	
Country	Australia	Fax	02 9671 7653	
Customer		EMail	p.hawkins@geneng.com.au	
Acc. Mgr	V Price level 1 V			
Terms	7DAYS 🗸			
Statement via	Email & Print V Invoice via Email & Print V			
Groups			•••	
Branch	SubBranch V G	GL Dept		
			<u>S</u> ave Cancel	

9. Click Save.

For further information please go to Jim2 online Help file at http://jim2help.happen.biz/index.html and search CardFile.

