

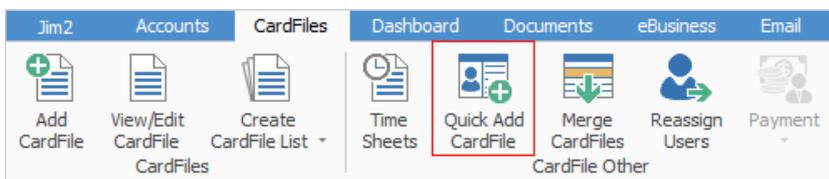
Add a Customer CardFile

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:

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



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

- Click Save.

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