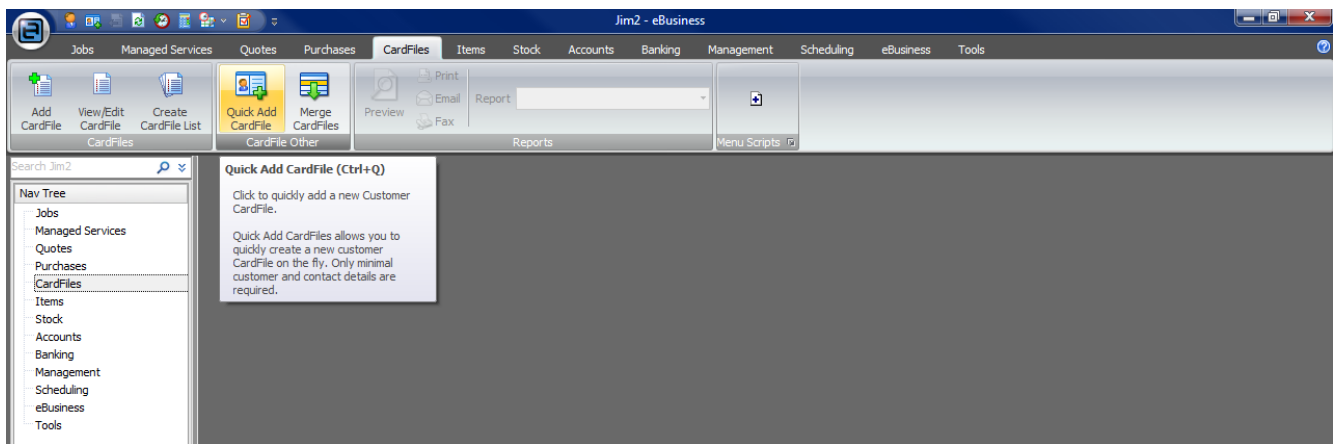


Adding a CardFile (Customer).

Who: **All users, all sites.**

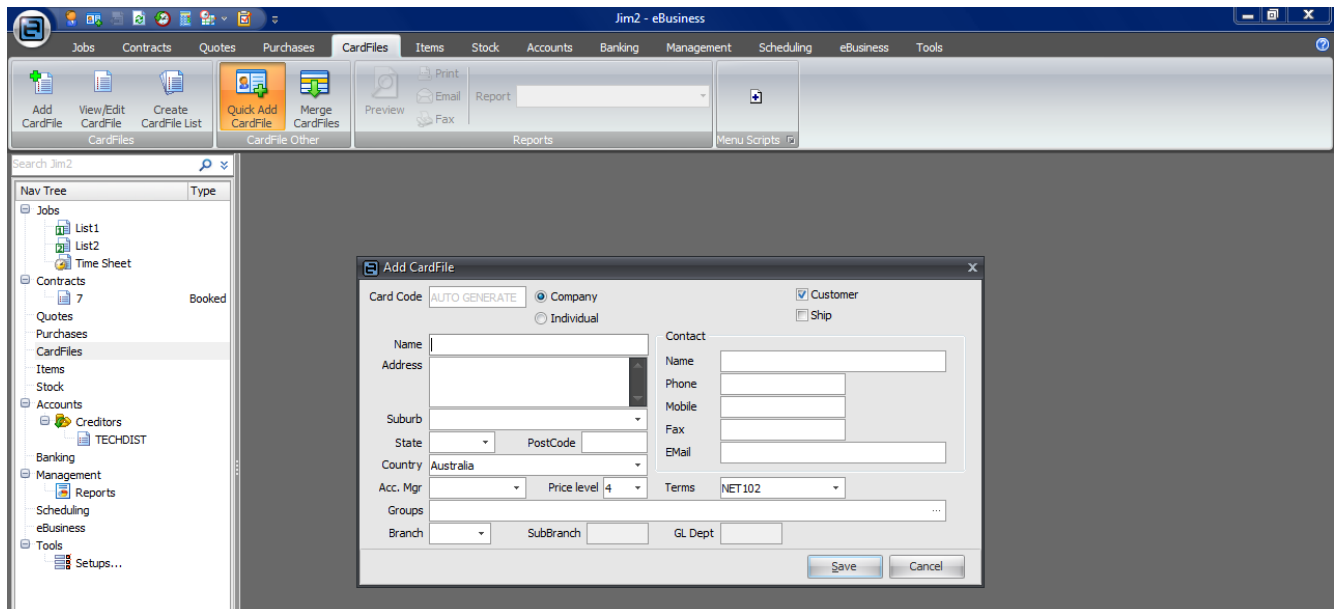
Describe: Add a CardFile, using Quick Add CardFile

Context: 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 top of the Jim2 window.
2. Click 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 Ship (to be Shipped to, is not invoiced) CardFile.
5. Press "Tab" button 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.
8. Tab to any other fields and enter the appropriate information.
9. Click Save.

