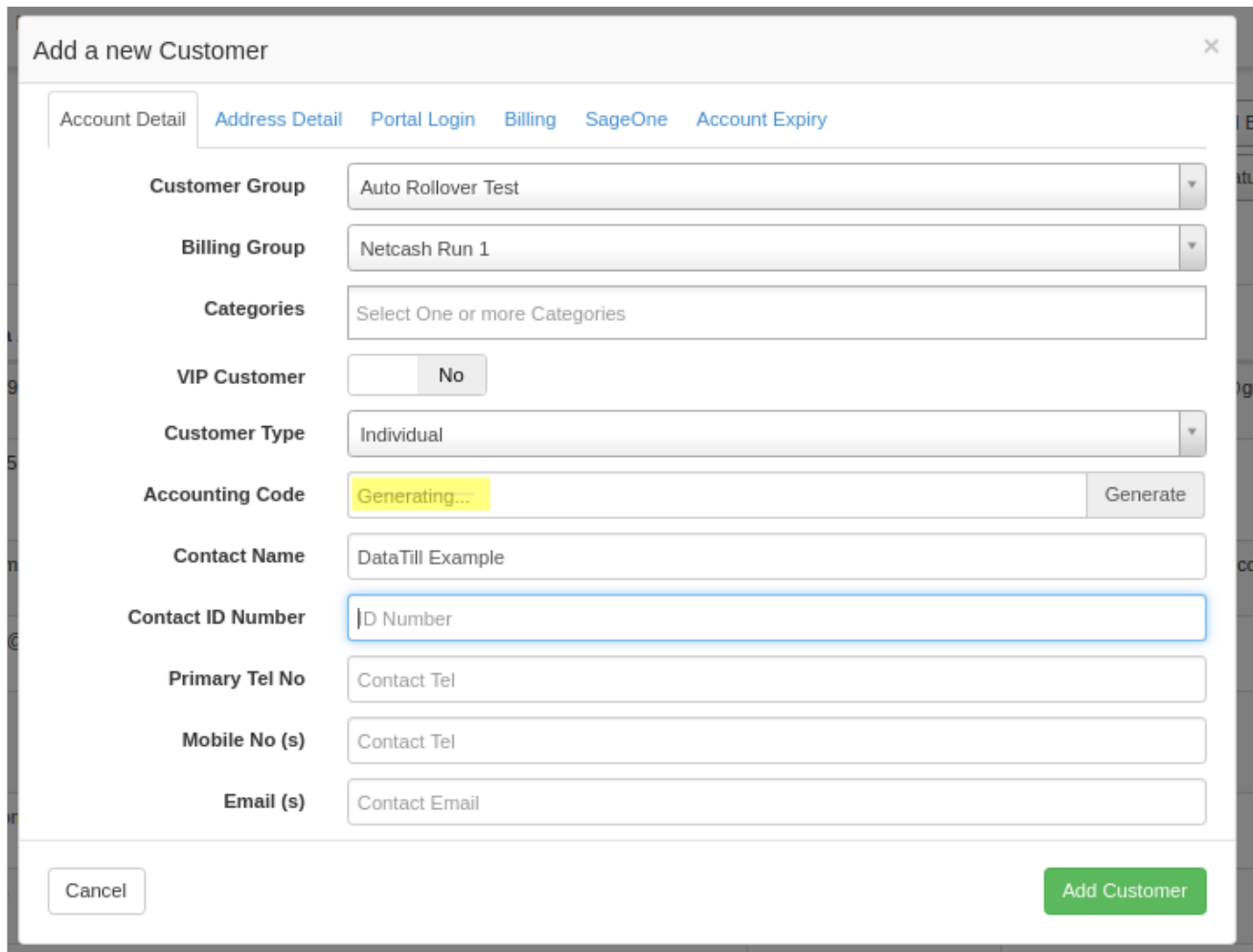


When creating a customer you might have noticed that while adding the Customer or Company name the Accounting Code gets generated automatically.



The screenshot shows a web form titled "Add a new Customer" with a close button (X) in the top right corner. The form has several tabs: "Account Detail" (selected), "Address Detail", "Portal Login", "Billing", "SageOne", and "Account Expiry". The "Accounting Code" field is highlighted in yellow and contains the text "Generating...". A "Generate" button is located to the right of this field. Other fields include "Customer Group" (Auto Rollover Test), "Billing Group" (Netcash Run 1), "Categories" (Select One or more Categories), "VIP Customer" (No), "Customer Type" (Individual), "Contact Name" (DataTill Example), "Contact ID Number" (ID Number), "Primary Tel No" (Contact Tel), "Mobile No (s)" (Contact Tel), and "Email (s)" (Contact Email). At the bottom left is a "Cancel" button, and at the bottom right is a green "Add Customer" button.

HeroTill will generate a code with the first three letters of the Customer or Company name, followed by three numbers relevant to the amount of times the first three letters have been used.

After the customer has been created the Accounting Code can not be changed or amended, so it is good to double check if the preferred account code is being used before the customer is initially created.

If you prefer to use your own format of Accounting Codes then you have to make sure that before the customer is created that you type out the preferred Accounting Code in the field after the other details has been filled out.

The system will notify you if you are entering an Account Code that is already in use:

Accounting Code

JES001

Generate

This accounting code is already in use

Note:

The Accounting Code can not be changed after the customer has been added.