Create new customer Client / Backend

- E-Mail Subscription
- no interface
- JSon API
- Connector
- Create new customer

E-Mail Subscription

If you do not have an interface via a connector to your ERP system, it is necessary to subscribe to the e-mail subscription "New customers created". This sends an e-mail to the desired address with all data from the client. These data must then be entered manually into the ERP system.

No Activity can take place on the client using this method.

Setting "Debtor number range" remains empty.

no interface

In order for the new customer to be edited directly in the client, a configuration via the backend in the Basic configuration – Settings – "New customers number range" section is necessary. This can only be carried out by DeDeNet. Together with your Project manager at DeDeNet, you determine how the Customer number should be structured, e.g. N00001.

Link generated Customer number with ERP system

To link the Customer number from the ERP with that from DeDeSales, go directly to the DeDeSales backend after creating the new customer in the ERP.

In the menu item "Master data" – "Customer assignment" you can store the relationship Old Customer number (generated Customer number from the e-mail subscription or client) / New Customer number (generated Customer number from your ERP system).

After a Total import, the new customer with the ERP Customer number is available in the client.

JSon API

Offline

It is possible to have the new Customer number generated on the client and passed to the ERP system via the JSon API, so that it does not have to be linked manually in the backend.

In this case, DeDeNet writes "clientgenerated" into the New customers number range field.

Connector

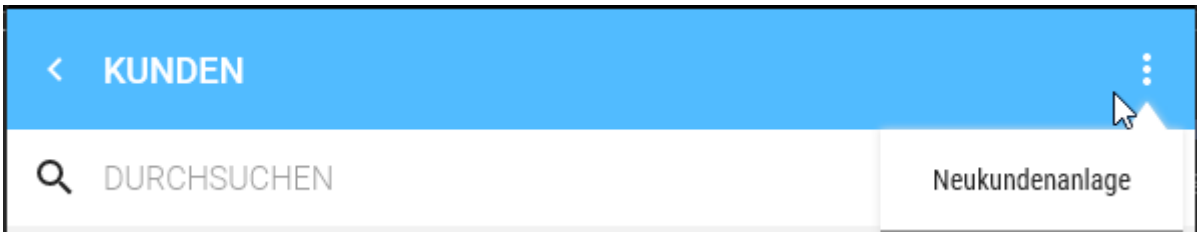
If the communication between your ERP and DeDeSales is via a connector, it can also handle the Create new customer process in your ERP system.

For SAP, for example, there is a function module that must be integrated on your side. You can request this from your Project manager at DeDeNet.

Create new customer

General

Activate the Create new customer: Basic configuration / Role / <Role> / BASIS - Create new customers



How new customers are further processed depends on your ERP system and other settings. See E-mail for shipping notification, no interface, JSon API or Connector.

Functions in the title bar

Icon	Explanation
	The AI function business card scan is only available for mobile devices (iOS and Android). The image is scanned and sent to the server. It is then evaluated there and the corresponding data record is sent back to the client. That means the device must have an online connection.

Field	Right	Reference
Client		
Name 1		
Name 2		
Name 3		
Street		
Postal code		

Field	Right	Reference
Location		
Telephone		
Mobile Phone		
Fax		
E-mail		
E-mail for shipping notification		
Homepage		
Attribute 1		Prospect attribute 1-6
Country		
Language		
Price list		Code table: Price lists prospects

CRM definitions (from version 19)

If there is more than one CRM definition for the Create new customer, a selection list is offered. If there is only one CRM definition, the CRM form is displayed directly.

The data recorded here is sent exclusively via the E-mail subscription.