

CUSTOMER DATA WEB UI USER GUIDE

The logo for StiboSystems, featuring the word "StiboSystems" in a white, sans-serif font. The letter "i" in "Stibo" has a small crown-like symbol above it. The logo is positioned on the left side of the page, within a large orange triangle that points to the right.

StiboSystems

STEP Trailblazer

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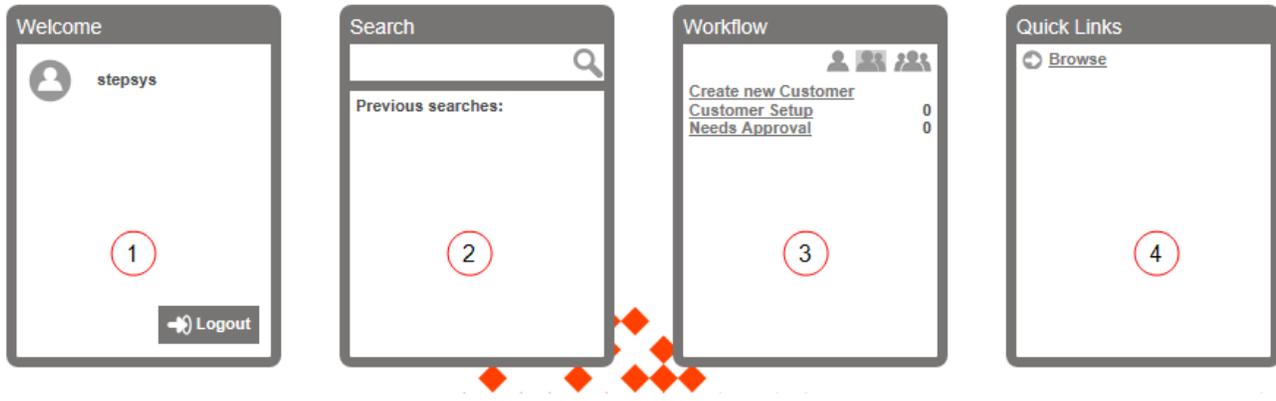
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STEP Customer Data Web UI

The purpose of the STEP Customer Data Web UI is to allow users to create and maintain customer data, i.e., data that describes a customer and associated data such as accounts, contact persons and addresses.

User interface



The home page screen has got 4 widgets:

1. Welcome: Information about what user is logged into the Web UI plus a button to log out.
2. Search: Finds customer data with an ID or name matching the search phrase.
3. Workflow: Shows task count for a STEP Workflow, which is automatically generate when creating a user Web UI. For more information, see [STEP Workflow](#).
4. Quick links: This provides quick navigation to navigate the node tree [Browsing for products and assets](#).

Logging In

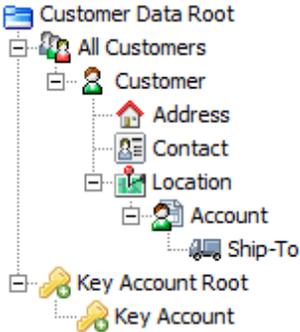
To log in to the STEP Customer Data Web UI you must enter a valid user name and password. Then click the Login button.

STEP Customer Data Portal

You will now be logged in to the STEP Customer Data Web UI and are able to create, edit and view customer data and associated data based on the privileges applied to you by your administrator.

Data model

The data model used for the Customer Data Web UI is:



Customer

This is the object representing the actual customer that you do business with.

Location

A Customer can have one or more Locations, e.g. different storage buildings.

Account

A Customer can have multiple accounts that you want to invoice individually. In many cases there is a one to one relationship between a Location and an Account.

Ship-To

The Ship-To object represents the place where you want to deliver your goods.

Address

An Address object represents is a real world physical place. It can be referenced to a Customer, an Account, a Location or a Ship-To. An Address object is always placed as a child node to a Customer in the Customer hierarchy.

Contact Person

Contact Persons of various types can be referenced to a Customer or an Account. A Contact Person object is always placed as a child node to a Customer in the Customer hierarchy.

Key Account

Customers can, for reporting purposes, be linked to Key Accounts.

Creating a Customer

1. Click the **Create new Customer** link in the New Customer box in the left hand side navigation panel.



The **Initiate New Customer** screen appears:

The image shows the 'Initiate New Customer' screen. At the top is the StiboSystems logo. Below it is the title 'Initiate New Customer' with a settings gear icon, 'EN All All', 'Main', and a home icon. The main section is titled 'Customer Information' and contains a 'Customer Name*' text input field. Below the field is a note: 'Once you have entered the Customer Name you can check for duplicate candidates by clicking the Find Similar button below'. At the bottom are three buttons: 'Save and Submit', 'Reset', and 'Find Similar'. The bottom right corner of the screen has a decorative pattern of orange diamonds.

2. In the Customer Name field, enter the name of the customer.

You can now check if the customer already exists in the database, before actually saving.

Check for duplicates

To see if possible duplicate customers exist in the database, click the **Find Similar** button.

For this to work properly a STEP.Matching license is needed and a Matching Algorithm must be created to handle the comparisons.

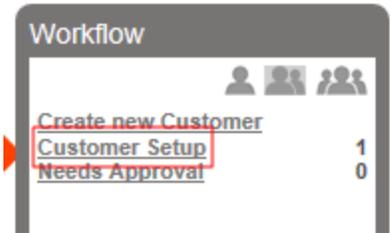
Find Similar

For more details regarding the Find Similar setup when using an Initiate Screen, see the **Find Similar** documentation in the **Web User Interfaces / Using a Web UI** documentation.

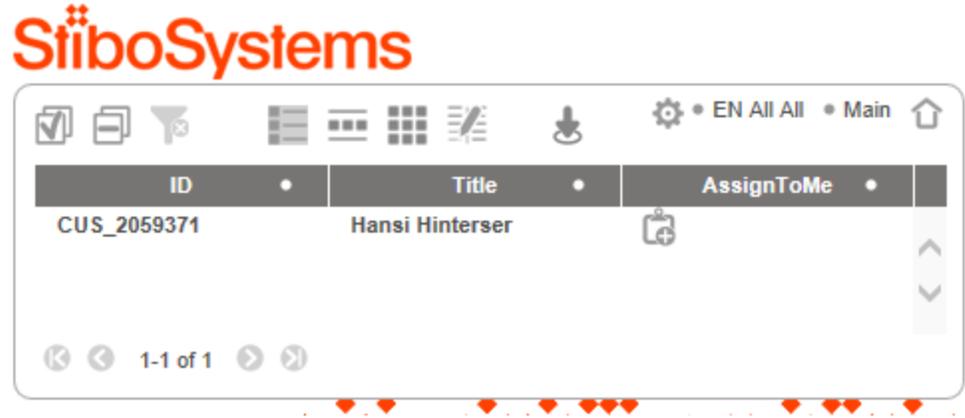
Enriching Customer and associated objects through STEP Workflow

Once a Customer object has been initiated through the workflow as described above, you can enrich in the next step of the workflow.

1. Click the **Customer Setup** link in the **New Customer** box in the left hand side navigation panel:

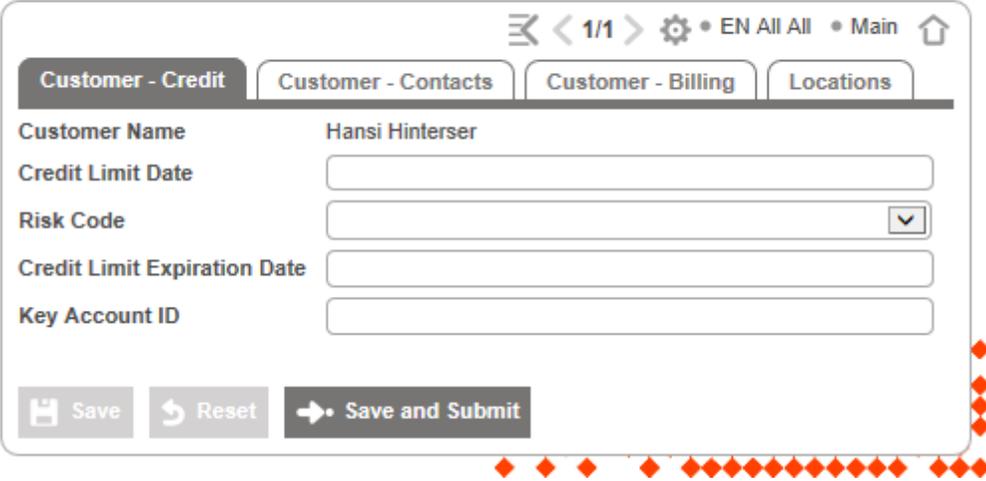


The list of Customers available for the **Customer Setup** workflow state appears:



2. Click the **ID** of the **Customer** that you want to enrich.

A Customer maintenance screen appears:



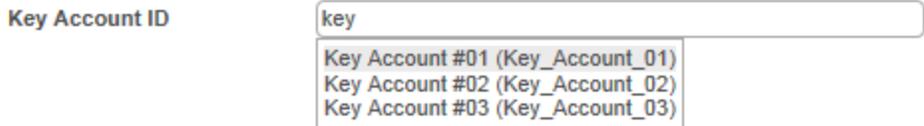
In this screen you are able to maintain data relevant for the Customer object itself, create and link Contact Persons and Addresses, link to Key accounts and also create Location Objects.

Special features are described below:

Key Account

On the **Customer - Credit** tab you find the **Key Account ID** field. This is where you link a Customer to a Key Account:

1. Place the cursor in the field.
2. Start keying in the Name or ID of the Key Account. Suggestions will appear:



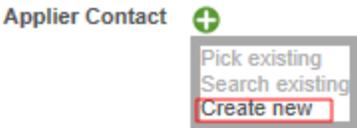
3. Select the Key Account that fits the purpose.

Contact Persons

On many of the objects in the Customer data model you can create, link and maintain Contact Persons. The following is an example from the **Customer - Contact Persons** tab on the Customer object.

Creating a Contact Person

1. Click the green plus icon and select the **Create New** menu item.



- 2. A **Create New** dialog appears.
- 3. Fill in the fields and click the **Save** button.

A Contact Person object is now created on the Customer and preview box is displayed:

The screenshot shows a 'Create new' dialog box with a header 'Create new' and a sub-header 'Contact Details'. Below the sub-header are six input fields: 'Title', 'First name', 'Last name', 'Telephone', 'FAX Number', and 'E-mail address'. All fields are currently empty.

- 4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object and the Contact Person can be edited and referenced by other objects, i.e. Customers or Accounts.

Editing an existing Contact Person

- 1. Click the pen icon in the preview box.

The screenshot shows a preview box for an 'Applier Contact'. The box contains the following text: 'Some title', 'Some first name', 'Some last name', '2000000000', and 'email@at.com'. To the right of the text are three icons: a green checkmark, a red 'X', and a pen icon. Below the preview box is a green plus sign.

An editor appears:

The screenshot shows an 'Edit Item' dialog box with a header 'Edit Item' and a sub-header 'Contact Details'. Below the sub-header are six input fields: 'Title', 'First name', 'Last name', 'Telephone', 'FAX Number', and 'E-mail address'. The fields contain the following values: 'Some title', 'Some first name', 'Some last name', '2000000000', an empty field, and 'email@at.com'.

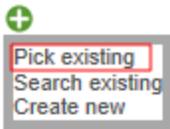
- 2. Edit the values of your choice and click the **Save** button.

The changes to the Contact Person object is now saved and the preview box will reflect the changes.

Picking an existing Contact Person

Instead of creating a new Contact Person, you can pick an existing Contact Person already linked to the Customer:

1. Click the green plus icon and select the **Pick existing** menu item.



A list of already created Contact Persons appears.



2. Pick one of the Contact Persons from the list.
3. Click the **Save** button in the Pick existing dialog.

The selected Contact Person is now displayed in the preview box.

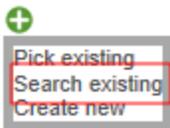
4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object.

Searching for an existing Contact Person

Instead of creating a new Contact Person, you can pick an existing Contact Person already linked to the Customer:

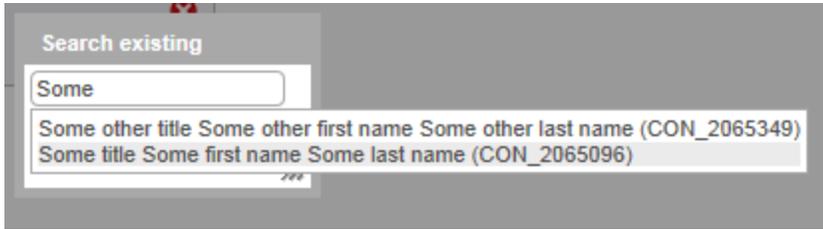
1. Click the green plus icon and select the **Search existing** menu item.



A **Search existing** dialog appears.

2. Start keying in the Contact Person you want to find.

Suggestions will appear:



3. Click the suggestion you find suitable, then click the **Save** button in the **Search existing** dialog.

The selected Contact Person is now displayed in the preview box.

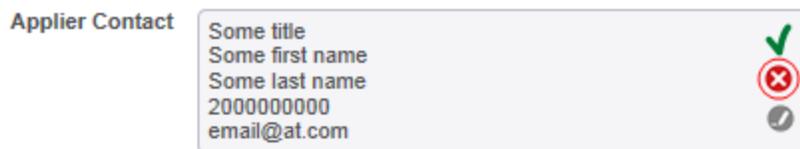
4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object.

Delete reference to Contact Person

If you don't want a Contact Person to be referenced by the Customer any longer, you can delete the reference:

1. Click the red cross icon in the preview box:



The preview box will disappear.

2. Click the **Save** button on the Customer maintenance screen.

Note: The Contact Person object will not be deleted by clicking the red cross. Only the reference from the Customer object to the Contact Person object is deleted.

Addresses

On many of the objects in the Customer data model you can create, link and maintain Addresses. The following is an example from the **Customer - Billing** tab on the Customer object.

Customer - Credit | Customer - Contacts | **Customer - Billing** | Locations

Customer Name: Hansi Hinterser

Exempt From Printed Invoice: No Yes

Billing Address: +

Invoice Contact: +

Statement Contact: +

EDI GroupID:

Save | Reset | Save and Submit

Creating an Address

1. Click the green plus icon and select the **Create New** menu item.



2. A **Create New** dialog appears.

Create new

Address Information

Address search

Country

State

City

Zip Code

Street

Latitude

Longitude



Save Cancel

3. In the **Address search** field, start typing in the address you want to create.

Suggestions will appear as you type:

1234

- 1234 Luxembourg
- 1234 Veyrier, Schweiz
- 1234, Slovenien
- 1234, Chiang Rai 57110, Thailand
- 5th Street Northeast, Massillon, Ohio 44646, USA
- 1234, Vašuokėnai, Litauen
- Preston Lane, Donaldsonville, Louisiana 70346, USA
- 1234, 260 51 Ekeby, Sverige

4. Select a suitable suggestion.

The detail fields for the address will automatically be populated, and the map will be updated accordingly.

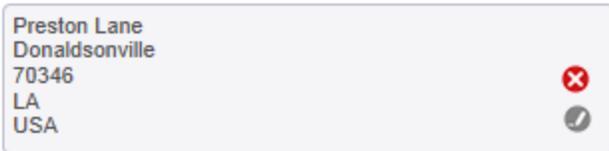
Tip: You can move the red pin on the map and thereby update the address.

Tip: Editing one of the detail fields will update the map and the Address Search field.

Tip: Longitude and Latitude values can be entered manually.

5. Click the **Save** button in the **Create New** dialog.

An Address object is now created and linked to the Customer object, and preview box is displayed:

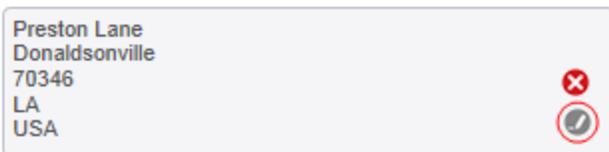


6. Click the **Save** button on the Customer maintenance screen.

The Address is now referenced by the Customer object and the Address can be edited and referenced by other objects, i.e. Customers, Locations, Accounts and Ship-Tos.

Editing an existing Address

1. Click the pen icon in the preview box.



An editor appears:

Edit Item

Address Information

Address search

Country

State

City

Zip Code

Street

Latitude

Longitude



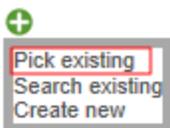
2. Edit the values of your choice and click the **Save** button.

The changes to the Address object is now saved and the preview box will reflect the changes.

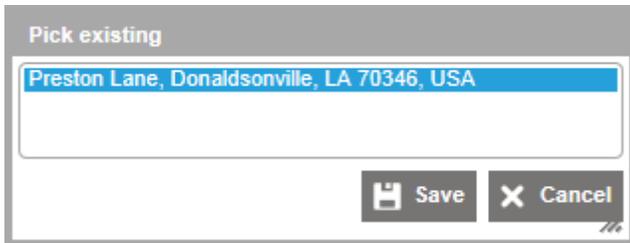
Picking an existing Address

Instead of creating a new Address, you can pick an existing Address already linked to the Customer:

1. Click the green plus icon and select the **Pick existing** menu item.



A list of already created Addresses appears.



2. Pick one of the Addresses from the list.
3. Click the **Save** button in the Pick existing dialog.

The selected Address is now displayed in the preview box.

4. Click the **Save** button on the Customer maintenance screen.
- The Address is now referenced by the Customer object.

Searching for an existing Address

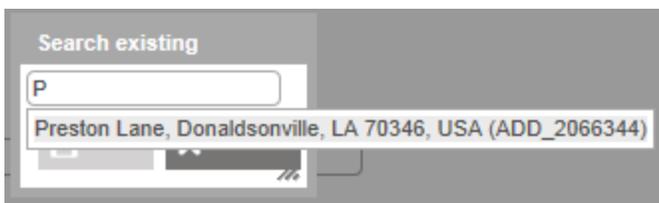
Instead of creating a new Address, you can pick an existing Address already linked to the Customer:

1. Click the green plus icon and select the **Search existing** menu item.



A **Search existing** dialog appears.

2. Start keying in the Address you want to find.
- Suggestions will appear:



3. Click the suggestion you find suitable, then click the **Save** button in the **Search existing** dialog.
- The selected Address is now displayed in the preview box.
4. Click the **Save** button on the Customer maintenance screen.
- The Address is now referenced by the Customer object.

Delete reference to an Address

If you don't want an Address to be referenced by the Customer any longer, you can delete the reference:

1. Click the red cross icon in the preview box:



2. Click the **Save** button on the Customer maintenance screen.

Note: The Address object will not be deleted by clicking the red cross. Only the reference from the Customer object to the Address object is deleted.

Locations

A Location is a child object to the Customer object. To navigate to an existing Location, or to create a new one, you must first select a Customer, then click the Locations tab.

Create a Location

1. On the Customer maintenance screen, select the **Locations** tab.
2. Click the **New Location** link.

The screen changes to the Location maintenance screen.

3. Fill in (at least) the required values.
4. Click the **Save** button.

The Location object is now saved

Navigate to a Location

1. On the Customer maintenance screen, select the **Locations** tab.
2. In the locations list, click the ID of a location.

You will now be taken to the location maintenance screen.

Accounts

An Account is a child object to the Location object. To navigate to an existing Account or to create a new one you must first select a Location, then click the **Accounts** tab.

Create an Account

1. On the Customer maintenance screen, select the 'Locations' tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.
3. Click the **New Account** link.

The screen changes to the Account maintenance screen.

4. Fill in (at least) the required values.
5. Click the **Save** button.

The Account object is now saved

Navigate to an Account

1. On the Customer maintenance screen, select the **Locations** tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.
3. In the accounts list, click the ID of an Account.

You will now be taken to the Account maintenance screen.

Ship-Tos

A Ship-To is a child object to the Account object. To navigate to an existing Ship-To, or to create a new one, you must first select an Account, then click the Ship-Tos tab.

Create a Ship-To

1. On the Customer maintenance screen, select the **Locationstab**.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.

The Account maintenance screen appears.

3. On the Account maintenance screen, select the **Ship-Tos** tab.

4. Click the **New Ship-To** link.

The screen changes to the Ship-To maintenance screen.

5. Fill in (at least) the required values.
6. Click the **Save** button.

The Ship-To object is now saved

Navigate to a Ship-To

1. On the Customer maintenance screen, select the **Locations** tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.

The Account maintenance screen appears.

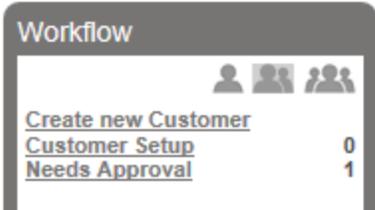
3. On the Account maintenance screen, select the **Ship-Tos** tab.

4. In the Accounts list, click the ID of a Ship-To.
You will now be taken to the Ship-To maintenance screen.

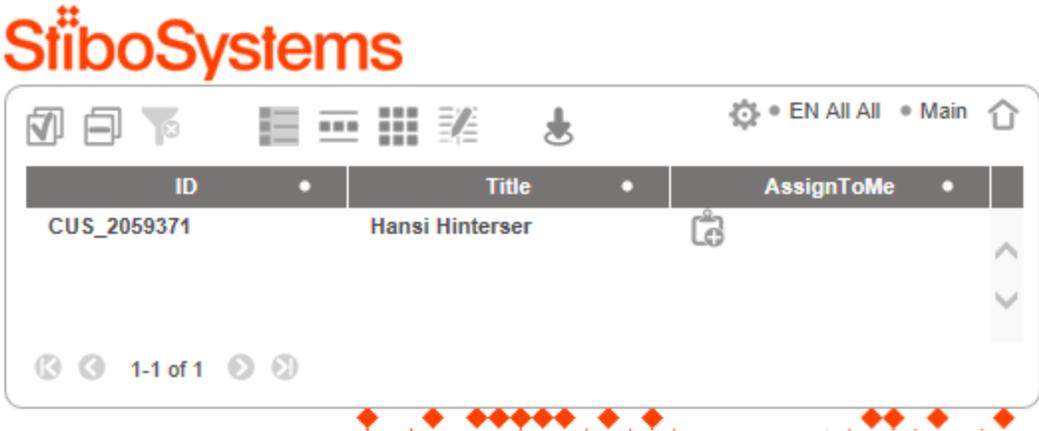
Approving Customer and associated objects through STEP Workflow

Once a Customer and it's associated objects have been enriched, as described in the previous chapter, it is ready to be approved.

1. Click the **Needs approval** link in the **New Customer** box in the left hand side navigation panel:



The list of Customers available for the **Needs approval** workflow state appears:



2. Click the **ID** of the **Customer** that you want to enrich.

A Customer maintenance screen appears. The screens for the Needs approval state are the same as the screens used in the Enrich step, except there are both a **Submit** button and a **Reject** button available:

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Customer - Credit Customer - Contacts Customer - Billing Locations

Customer Name: Hansi Hinterser

Credit Limit Date:

Risk Code: ▼

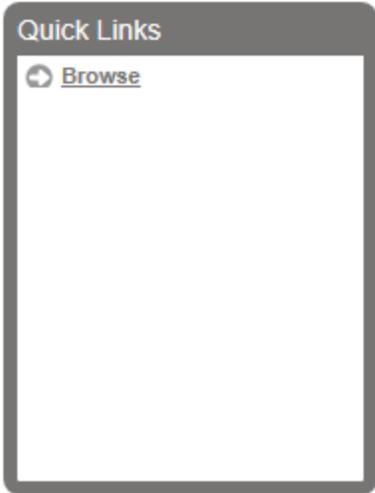
Credit Limit Expiration Date:

Key Account ID:

Save **Approve** **Reject** Reset

Searching

Using Advanced Search, you can search for Customer, Location, Account, Ship-To, Address and Contact Person objects from the Search panel. You get to the advanced search dialog by clicking "Browse" on the Quick Links widget on the home page screen.



Search criteria

A number of search criteria are available:

- ID/Name: This allows you to search for an object's ID or Name.
- Type of Object: Here you can select which object type(s) to search for. Multiple object types can be selected.
- Attribute value search (more search criteria): Here you can choose between a list of attributes to search within.



The different search criteria can be combined.

ID/Name

Object Name/ID

Enter the ID or the Name for the object you want to search for. The search will perform a wildcard search.

Type of object

Types of objects

- [all]
- Account
- Address
- Contact
- Customer

Select one or more object types to search for. Use shift/ctrl keys to multi-select.

More search criteria

More search criteria

-
-
- Exempt From Interest Charges
- Lockbox Number
- Statement Policy Code

1. Select one of the attributes from the drop down list.

A value field will appear (in this example, it is a list of values to choose from).

Exempt From Interest Charges [v]

-
No
Yes

+

2. Select/enter the value you want to search for.

Tip: You can add as many of these search criteria by clicking the green plus icon.

Search Statistics

Once you have specified the search criteria, you can start the search by clicking the **Search** button. A Search result statistics screen will appear:

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Number of search results: 54 [gear] • EN All All • Main [home]

- Address (26)
- Customer (19)
- Contact (7)
- Location (2)
- All (54)

This will give you an overview of the number of hits, distributed on object types. Clicking an object type will give you the Search Result List, displaying the hits of that particular object type. You can also click the **All** link which will give you all the hits across all object types.

Search result list

The search result list displays the objects found:

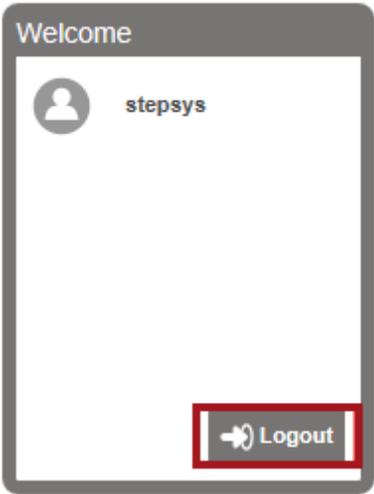
Thumb	ID	Name
	ADD_2005129	383 Gilpark Road, Dendr
	ADD_2005130	30 Main Street, Buffalo, I
	ADD_2005131	30 Main Street, Huntingt
	ADD_2048924	1600 Pennsylvania Aven
	ADD_2049007	1600 Pennsylvania Aven
	ADD_2049096	1600 Pennsylvania Aven
	ADD_2049266	asdf, Oklahoma City, OK
	ADD_2049271	1602 Pennsylvania Aven
	ADD_2049335	11 Axel Kiers Vei. Høibie

You can navigate to a selected object by clicking the ID of that object.

Tip: You can sort the result list by clicking the table headers, i.e. ID, Name or Type header.

Log out

To log out of the Web UI you must click the "Logout" button on the Welcome widget on the home page screen.



This will log your out and take you to the login screen.

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Username

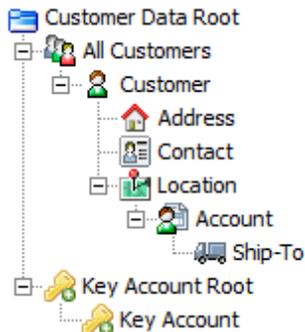
Password

 You are now logged out of the portal



Data Model

The data model used for the Customer Data Web UI is:



Customer

This is the object representing the actual customer that you do business with.

Location

A Customer can have one or more Locations, e.g. different storage buildings.

Account

A Customer can have multiple accounts that you want to invoice individually. In many cases there is a one to one relationship between a Location and an Account.

Ship-To

The Ship-To object represents the place where you want to deliver your goods.

Address

An Address object represents a real world physical place. It can be referenced to a Customer, an Account, a Location or a Ship-To. An Address object is always placed as a child node to a Customer in the Customer hierarchy.

Contact Person

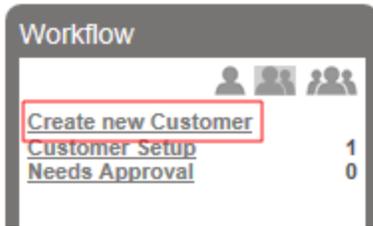
Contact Persons of various types can be referenced to a Customer or an Account. A Contact Person object is always placed as a child node to a Customer in the Customer hierarchy.

Key Account

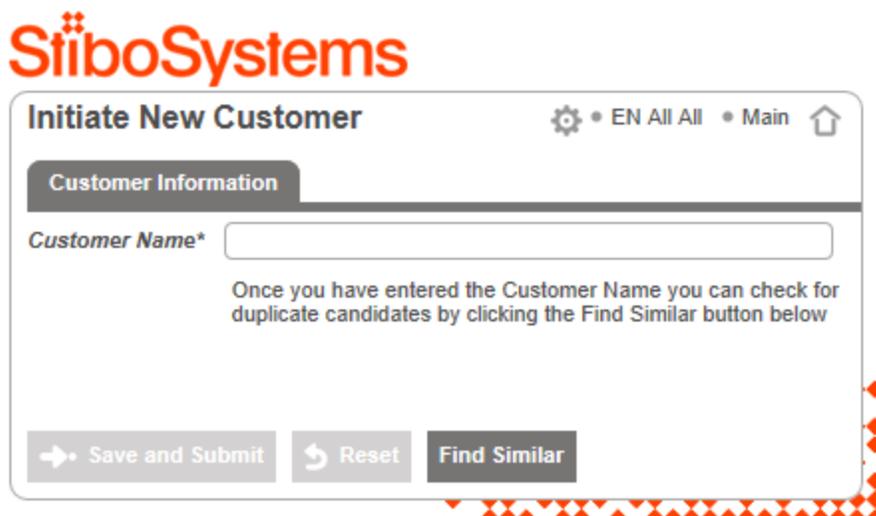
Customers can, for reporting purposes, be linked to Key Accounts.

Creating a Customer and Checking for duplicates

1. Click the **Create new Customer** link in the New Customer box in the left hand side navigation panel.



The **Initiate New Customer** screen appears:



2. In the Customer Name field, enter the name of the customer.

You can now check if the customer already exists in the database, before actually saving.

Check for duplicates

To see if possible duplicate customers exist in the database, click the **Find Similar** button.

For this to work properly a STEP.Matching license is needed and a Matching Algorithm must be created to handle the comparisons.



For more details regarding the Find Similar setup when using an Initiate Screen, see the **Find Similar** documentation in the **Web User Interfaces / Using a Web UI** documentation.

Once you have established that no duplicate exists, you can save the Customer object by clicking the **Save and Submit** button:

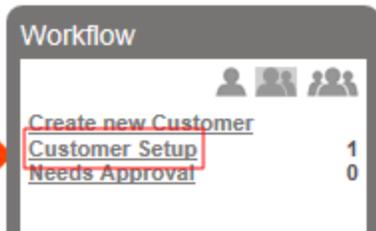
→ Save and Submit

The Customer object has now been saved to the data base and is ready to be enriched in the next step of the workflow.

Enriching Customer and Associated Objects through STEP Workflow

Once a Customer object has been initiated, you can enrich in the next step of the workflow.

1. Click the **Customer Setup** link in the **New Customer** box in the left hand side navigation panel

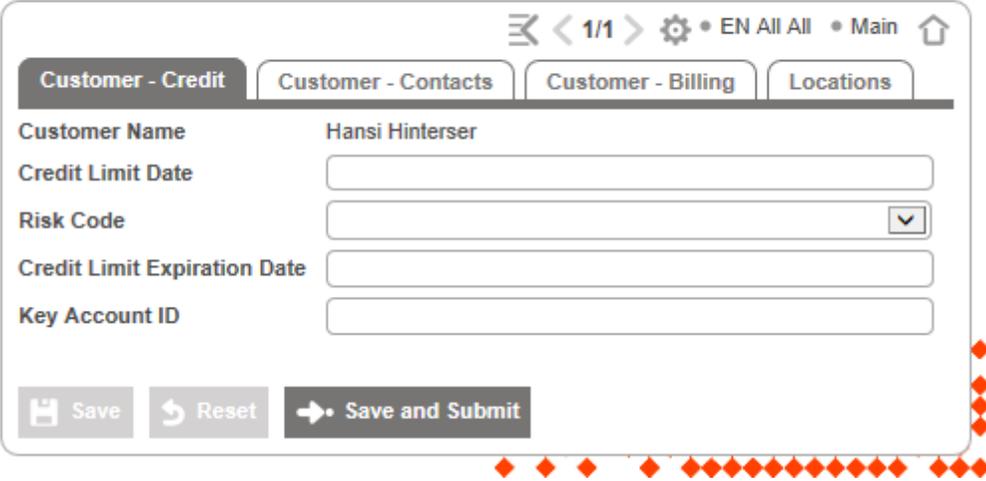


The list of Customers available for the **Customer Setup** workflow state appears:



2. Click the **ID** of the **Customer** that you want to enrich.

A Customer maintenance screen appears:



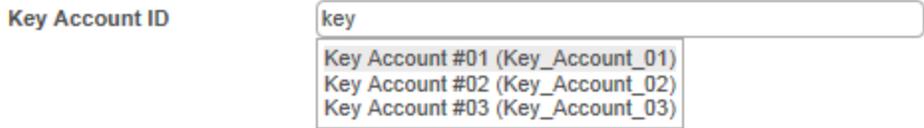
In this screen you are able to maintain data relevant for the Customer object itself, create and link Contact Persons and Addresses, link to Key accounts and also create Location Objects.

Special features are described below:

Key Account

On the **Customer - Credit** tab you find the **Key Account ID** field. This is where you link a Customer to a Key Account:

1. Place the cursor in the field.
2. Start keying in the Name or ID of the Key Account. Suggestions will appear:



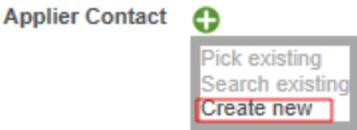
3. Select the Key Account that fits the purpose.

Contact Persons

On many of the objects in the Customer data model you can create, link and maintain Contact Persons. The following is an example from the **Customer - Contact Persons** tab on the Customer object.

Creating a Contact Person

1. Click the green plus icon and select the **Create New** menu item.



- 2. A **Create New** dialog appears.
- 3. Fill in the fields and click the **Save** button.

A Contact Person object is now created on the Customer and preview box is displayed:

The screenshot shows a 'Create new' dialog box with a title bar. Below the title bar is the heading 'Contact Details'. There are six input fields: 'Title', 'First name', 'Last name', 'Telephone', 'FAX Number', and 'E-mail address'. Each field is currently empty.

- 4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object and the Contact Person can be edited and referenced by other objects, i.e. Customers or Accounts.

Editing an existing Contact Person

- 1. Click the pen icon in the preview box.

The preview box is titled 'Applier Contact'. It contains a list of fields with their values: 'Some title', 'Some first name', 'Some last name', '2000000000', and 'email@at.com'. To the right of the list are three icons: a green checkmark, a red 'X', and a pen icon. Below the preview box is a green plus sign.

An editor appears:

The screenshot shows an 'Edit Item' dialog box with a title bar. Below the title bar is the heading 'Contact Details'. There are six input fields: 'Title', 'First name', 'Last name', 'Telephone', 'FAX Number', and 'E-mail address'. The fields contain the following values: 'Some title', 'Some first name', 'Some last name', '2000000000', an empty field, and 'email@at.com'.

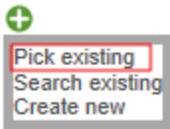
- 2. Edit the values of your choice and click the **Save** button.

The changes to the Contact Person object is now saved and the preview box will reflect the changes.

Picking an existing Contact Person

Instead of creating a new Contact Person, you can pick an existing Contact Person already linked to the Customer:

1. Click the green plus icon and select the **Pick existing** menu item.



A list of already created Contact Persons appears.



2. Pick one of the Contact Persons from the list.
3. Click the **Save** button in the Pick existing dialog.

The selected Contact Person is now displayed in the preview box.

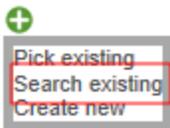
4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object.

Searching for an existing Contact Person

Instead of creating a new Contact Person, you can pick an existing Contact Person already linked to the Customer:

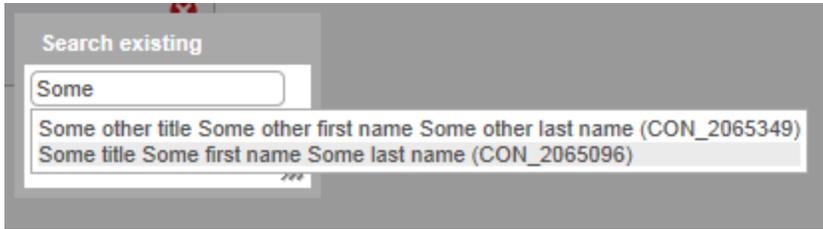
1. Click the green plus icon and select the **Search existing** menu item.



A **Search existing** dialog appears.

2. Start keying in the Contact Person you want to find.

Suggestions will appear:



3. Click the suggestion you find suitable, then click the **Save** button in the **Search existing** dialog.

The selected Contact Person is now displayed in the preview box.

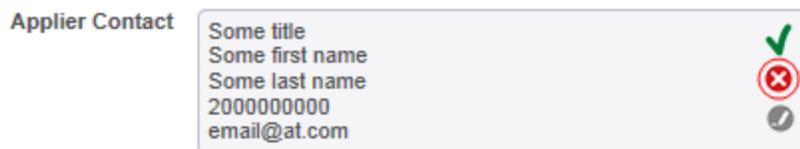
4. Click the **Save** button on the Customer maintenance screen.

The Contact Person is now referenced by the Customer object.

Delete reference to Contact Person

If you don't want a Contact Person to be referenced by the Customer any longer, you can delete the reference:

1. Click the red cross icon in the preview box:



The preview box will disappear.

2. Click the **Save** button on the Customer maintenance screen.

Note: The Contact Person object will not be deleted by clicking the red cross. Only the reference from the Customer object to the Contact Person object is deleted.

Addresses

On many of the objects in the Customer data model you can create, link and maintain Addresses. The following is an example from the **Customer - Billing** tab on the Customer object.

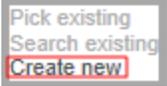
The screenshot shows a web application interface for 'Customer - Billing'. At the top, there are navigation tabs: 'Customer - Credit', 'Customer - Contacts', 'Customer - Billing' (which is active), and 'Locations'. In the top right corner, there are links for 'EN All All' and 'Main', along with a home icon. The main form area contains the following fields and controls:

- Customer Name:** Hansi Hinterser
- Exempt From Printed Invoice:** Two radio buttons, 'No' (selected) and 'Yes'.
- Billing Address:** A green plus icon (+).
- Invoice Contact:** A green plus icon (+).
- Statement Contact:** A green plus icon (+).
- EDI GroupID:** An empty text input field.

At the bottom of the form, there are three buttons: 'Save', 'Reset', and 'Save and Submit'.

Creating an Address

- 1. Click the green plus icon and select the **Create New** menu item.\



- 2. A **Create New** dialog appears.

Create new

Address Information

Address search

Country

State

City

Zip Code

Street

Latitude

Longitude



Kort Satellit

Save Cancel

3. In the **Address search** field, start typing in the address you want to create.

Suggestions will appear as you type:

1234

- 1234 Luxembourg
- 1234 Veyrier, Schweiz
- 1234, Slovenien
- 1234, Chiang Rai 57110, Thailand
- 5th Street Northeast, Massillon, Ohio 44646, USA
- 1234, Vašuokėnai, Litauen
- Preston Lane, Donaldsonville, Louisiana 70346, USA
- 1234, 260 51 Ekeby, Sverige

4. Select a suitable suggestion.

The detail fields for the address will automatically be populated, and the map will be updated accordingly.

Note: You can move the red pin on the map and thereby update the address. Also, editing one of the detail fields will update the map and the Address Search field.

Note: Longitude and Latitude values can be entered manually.

5. Click the **Save** button in the **Create New** dialog.

An Address object is now created and linked to the Customer object, and preview box is displayed:



6. Click the **Save** button on the Customer maintenance screen.

The Address is now referenced by the Customer object and the Address can be edited and referenced by other objects, i.e. Customers, Locations, Accounts and Ship-Tos.

Editing an existing Address

1. Click the pen icon in the preview box.



An editor appears:

Edit Item

Address Information

Address search

Country

State

City

Zip Code

Street

Latitude

Longitude



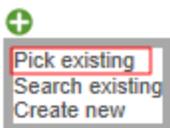
2. Edit the values of your choice and click the **Save** button.

The changes to the Address object is now saved and the preview box will reflect the changes.

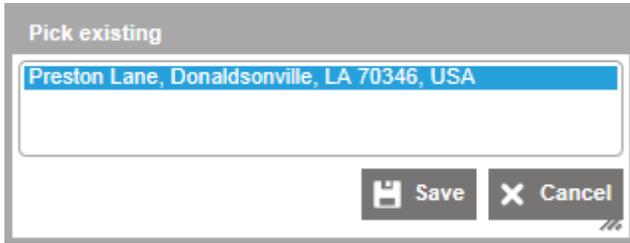
Picking an existing Address

Instead of creating a new Address, you can pick an existing Address already linked to the Customer:

1. Click the green plus icon and select the **Pick existing** menu item.



A list of already created Addresses appears.



2. Pick one of the Addresses from the list.
3. Click the **Save** button in the Pick existing dialog.

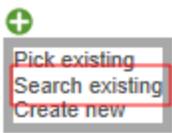
The selected Address is now displayed in the preview box.

4. Click the **Save** button on the Customer maintenance screen.
- The Address is now referenced by the Customer object.

Searching for an existing Address

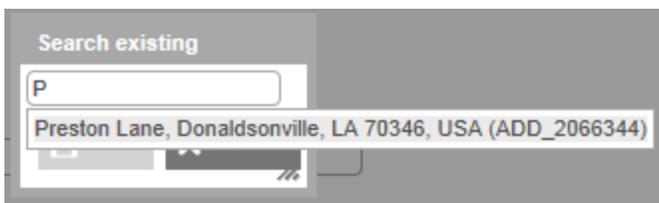
Instead of creating a new Address, you can pick an existing Address already linked to the Customer:

1. Click the green plus icon and select the **Search existing** menu item.



A **Search existing** dialog appears.

2. Start keying in the Address you want to find.
- Suggestions will appear:



3. Click the suggestion you find suitable, then click the **Save** button in the **Search existing** dialog.
- The selected Address is now displayed in the preview box.
4. Click the **Save** button on the Customer maintenance screen.
- The Address is now referenced by the Customer object.

Delete reference to an Address

If you don't want an Address to be referenced by the Customer any longer, you can delete the reference:

1. Click the red cross icon in the preview box:



2. Click the **Save** button on the Customer maintenance screen.

Note: The Address object will not be deleted by clicking the red cross. Only the reference from the Customer object to the Address object is deleted.

Locations

A Location is a child object to the Customer object. To navigate to an existing Location, or to create a new one, you must first select a Customer, then click the Locations tab.

Create a Location

1. On the Customer maintenance screen, select the **Locations** tab.
2. Click the **New Location** link.

The screen changes to the Location maintenance screen.

3. Fill in (at least) the required values.
4. Click the **Save** button.

The Location object is now saved

Navigate to a Location

1. On the Customer maintenance screen, select the **Locations** tab.
2. In the locations list, click the ID of a location.

You will now be taken to the location maintenance screen.

Accounts

An Account is a child object to the Location object. To navigate to an existing Account or to create a new one you must first select a Location, then click the **Accounts** tab.

Create an Account

1. On the Customer maintenance screen, select the 'Locations' tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.
3. Click the **New Account** link.

The screen changes to the Account maintenance screen.

4. Fill in (at least) the required values.
5. Click the **Save** button.

The Account object is now saved

Navigate to an Account

1. On the Customer maintenance screen, select the **Locations** tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.
3. In the accounts list, click the ID of an Account.

You will now be taken to the Account maintenance screen.

Ship-Tos

A Ship-To is a child object to the Account object. To navigate to an existing Ship-To, or to create a new one, you must first select an Account, then click the Ship-Tos tab.

Create a Ship-To

1. On the Customer maintenance screen, select the **Locations** tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.

The Account maintenance screen appears.

3. On the Account maintenance screen, select the **Ship-Tos** tab.

4. Click the **New Ship-To** link.

The screen changes to the Ship-To maintenance screen.

5. Fill in (at least) the required values.
6. Click the **Save** button.

The Ship-To object is now saved

Navigate to a Ship-To

1. On the Customer maintenance screen, select the **Locations** tab.

The Location maintenance screen appears.

2. On the Location maintenance screen, select the **Accounts** tab.

The Account maintenance screen appears.

3. On the Account maintenance screen, select the **Ship-Tos** tab.

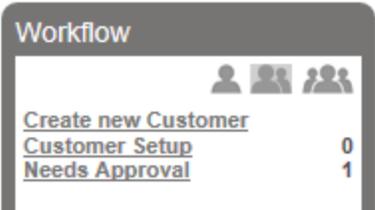
4. In the Accounts list, click the ID of a Ship-To.

You will now be taken to the Ship-To maintenance screen.

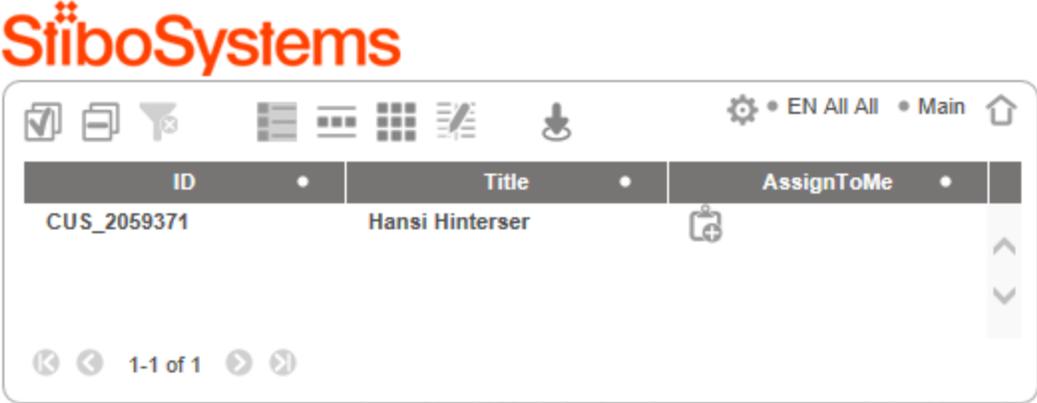
Approving Customer and associated objects through STEP Workflow

Once a Customer and it's associated objects have been enriched, it is ready to be approved.

- 1. Click the **Needs approval** link in the **New Customer** box in the left hand side navigation panel:



The list of Customers available for the **Needs approval** workflow state appears:



- 2. Click the **ID** of the **Customer** that you want to enrich.

A Customer maintenance screen appears. The screens for the Needs approval state are the same as the screens used in the Enrich step, except there are both a **Submit** button and a **Reject** button available:

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☰ < 1/1 > ⚙ • EN All All • Main ⬆

Customer - Credit | Customer - Contacts | Customer - Billing | Locations

Customer Name: Hansi Hinterser

Credit Limit Date:

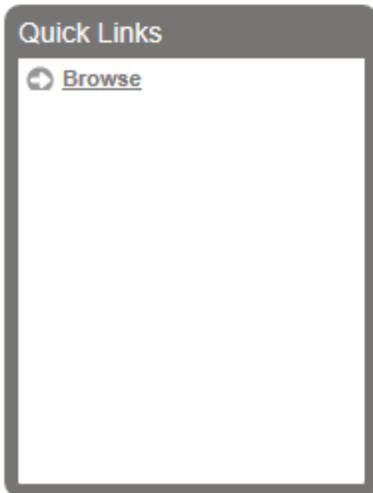
Risk Code: ▼

Credit Limit Expiration Date:

Key Account ID:

Searching

Using Advanced Search, you can search for Customer, Location, Account, Ship-To, Address and Contact Person objects from the Search panel. You get to the advanced search dialog by clicking "Browse" on the Quick Links widget on the home page screen.



Search criteria

A number of search criteria are available:

- ID/Name: This allows you to search for an object's ID or Name.
- Type of Object: Here you can select which object type(s) to search for. Multiple object types can be selected.
- Attribute value search (more search criteria): Here you can choose between a list of attributes to search within.



Tree <

Advanced search

Object Name/ID

Types of objects

- [all]
- Account
- Address
- Contact
- Customer

More search criteria

--

+ Search Reset

The different search criteria can be combined.

ID/Name

Object Name/ID

Enter the ID or the Name for the object you want to search for. The search will perform a wildcard search.

Type of object

Types of objects

- [all]
- Account
- Address
- Contact
- Customer

Select one or more object types to search for. Use shift/ctrl keys to multi-select.

More search criteria

More search criteria

--

--

Exempt From Interest Charges

Lockbox Number

Statement Policy Code

1. Select one of the attributes from the drop down list.

A value field will appear (in this example, it is a list of values to choose from).

Exempt From Interest Charges [v]

-
No
Yes

+

2. Select/enter the value you want to search for.

Note: You can add as many of these search criteria by clicking the green plus icon.

Search Statistics

Once you have specified the search criteria, you can start the search by clicking the **Search** button. A Search result statistics screen will appear:

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Number of search results: 54 [gear] • EN All All • Main [home]

- Address (26)
- Customer (19)
- Contact (7)
- Location (2)
- All (54)

This will give you an overview of the number of hits, distributed on object types. Clicking an object type will give you the Search Result List, displaying the hits of that particular object type. You can also click the **All** link which will give you all the hits across all object types.

Search result list

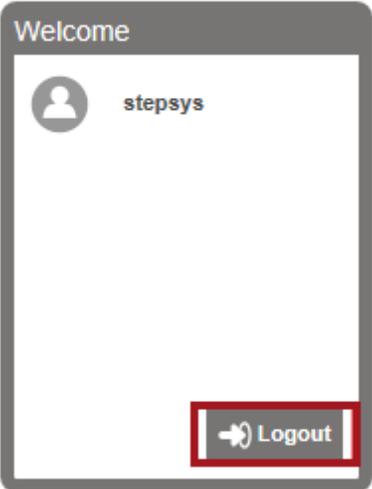
The search result list displays the objects found:

Thumb	ID	Name
	ADD_2005129	383 Gilpark Road, Dendr
	ADD_2005130	30 Main Street, Buffalo, I
	ADD_2005131	30 Main Street, Huntingt
	ADD_2048924	1600 Pennsylvania Aven
	ADD_2049007	1600 Pennsylvania Aven
	ADD_2049096	1600 Pennsylvania Aven
	ADD_2049266	asdf, Oklahoma City, OK
	ADD_2049271	1602 Pennsylvania Aven
	ADD_2049335	11 Axel Kiers Vei. Høibie

You can navigate to a selected object by clicking the ID of that object.

Note: You can sort the result list by clicking the table headers, i.e. ID, Name or Type header.

Logout



Clicking Logout will return you to the login screen.

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