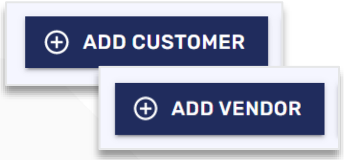


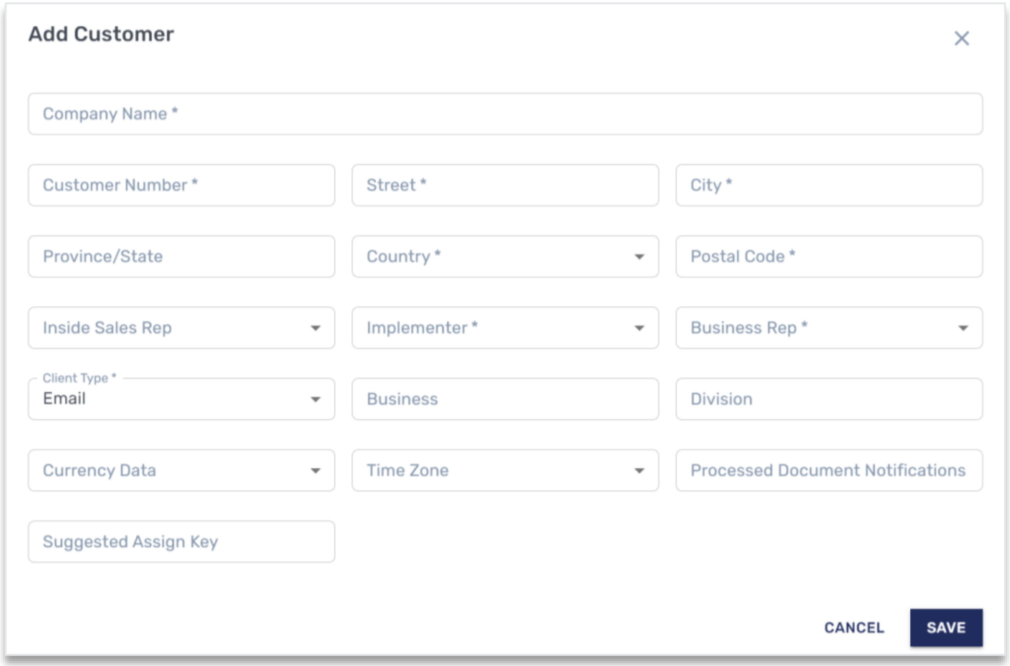
HOW TO: CREATE A NEW CUSTOMER/VENDOR

- In the left-hand navigation bar, click the Customers/Vendors tab. In the top-right above the list, click '<u>Add Customer'/Vendor.</u>

Field	Requested Data
Company Name	Account name - should be unique to the customer/vendor.
Customer/Vendor Number	Account number or identifier - must be unique to the customer/vendor.
Address fields	Select Country from the drop-down menu first, as some countries will convert the Province/State field into a dropdown menu. If other required address information is not available, these fields can be filled with N/A.
Inside Sales Rep Implementer* Business Rep**	The difference between these roles are the types of notifications that they receive. Assigning a role requires that the intended user is set up in Conexiom, which feeds the drop-down menu.
Client Type	Always defaults to 'Email' – do not change.
Business & Division	Optional fields that can be used to group customers/vendors or limit user access to customers/vendors.
Suggested Assign Key	Not required at creation, but usually set with the first sample documents and recommended before moving to Production.

*Implementer – Will receive notifications regarding test document uploads and assign key acceptance

**Business Rep – Will receive alert notifications (if applicable) and not processed document notifications



<u>Add Customer/Vendor Window</u>

- Add the appropriate information, where required fields are marked with an asterisk (*), and click Save when complete
- Any of these values can be updated later in the Customer/Vendor Details page
- After saving, click on the newly-created name to enter the Customer/Vendor Details page
- **Note**: If you are using First Pass Mapping, or have a customer or vendor list to add that exceeds 5 new customers or vendors, please speak to your Conexiom Representative