



Social Soul

New Customer Policy

Purpose of the Policy

All new customers to the business must be reviewed and accepted in accordance with this policy.

Procedures

Choosing a New Customer

A new customer must support our business with good credit quality and prompt payment. For each new customer, the following information table must be completed before agreeing to services. All new customers must be set up as customers in MYOB.

Customer Background Information

- Business name of customer
- Location of customer
- Customer telephone number
- Customer email address
- Name of business owner/ sales representative

New Customer Set Up Procedure

The following sales settings apply to all customers:

1. Payment due: 14 days from invoice date
2. Invoice layout: Service
3. Default payment method: Direct deposit
4. Discount days: 0
5. Discount amount: 0%

All new customer files are to be set up in MYOB Essentials with the following:

1. Business name
2. Business address
3. Contact name
4. Business telephone number
5. Business email address