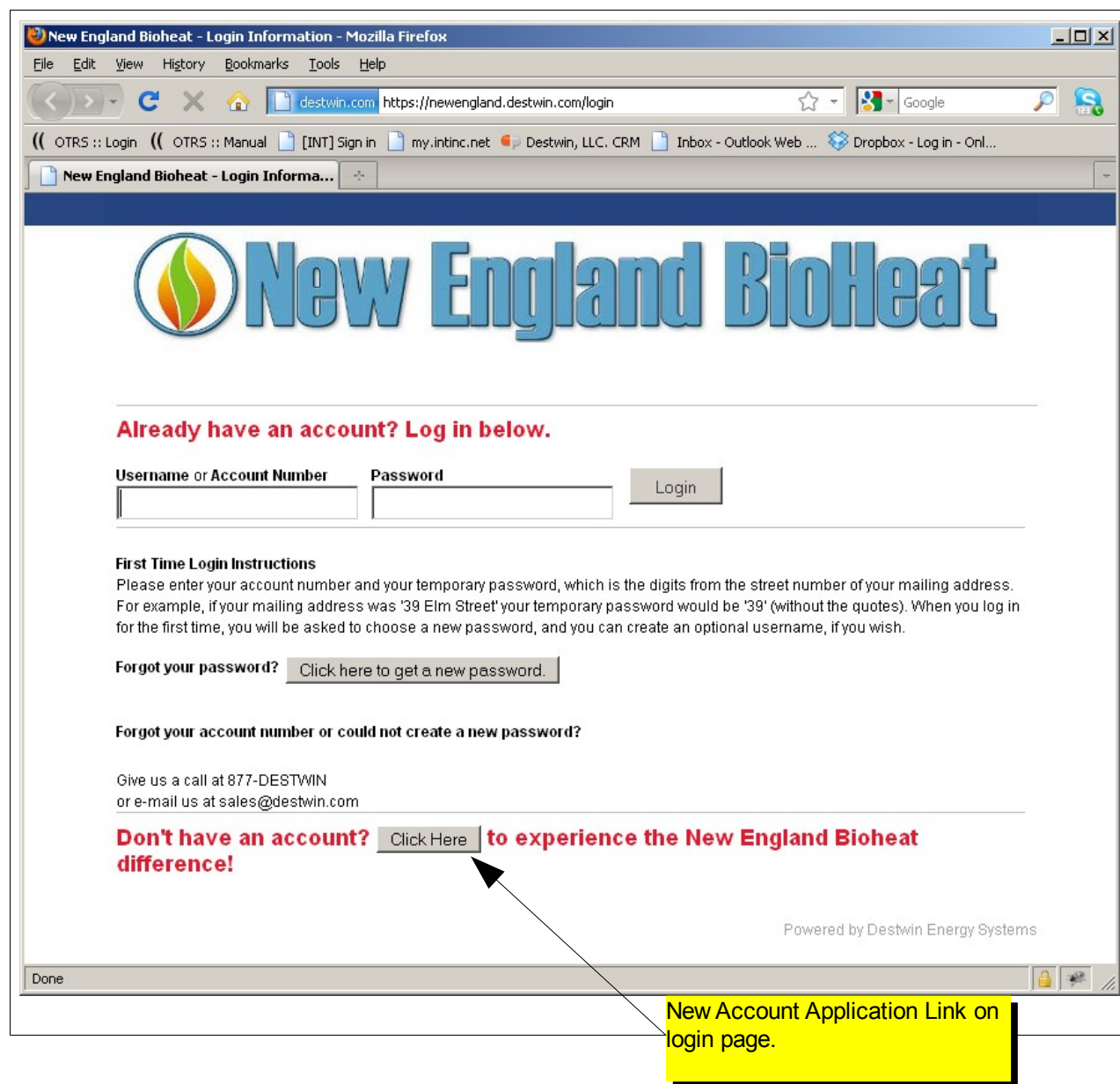Destwin Quick Reference
Console Version 2.0
How to manage New Customer Applications
25-AUG-11

This Quick Reference describes how to process information submitted by customers from the New Account Application link.

New Account Application Link on login page.

Typical New Customer Application page.

The New Cust App Log is accessed from the Contract Mgmt dropdown.

The system identifies possible matches within the database to allow you to assign the new application to an existing account if that is appropriate. To assign an account click first on the radio button that matches the new entry (if applicable) and then on the Assign button. If there are no matches, process the new customer accordingly. When done, you can change the status of the New Application by clicking on the Status field.

Click on the Name field for view information submitted in the application.

Assign button.

Status field.

Radio buttons to assign an existing account (if applicable).

Typical New Customer Application log

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