Setup Guide: Creating customers

Introduction

This short guide explains how to create customers
for your CloudBilling trial.

Creating customers is done in two steps:
1. Creation of individual Customer Clusters
2. Creation of Customers

Example data

For the purpose of this guide, assume that you have a customer with the following information.

Name	Inter8 NL BV
Debtor Number	101001
Billing start date	01-01-2019

1.   Creation of individual Customer Clusters

CloudBilling uses Customer Clusters to apply the appropriate pricing settings to each of your customers. Individual Customer Clusters allow you to set different prices for different customers. To create a Customer Cluster, follow the steps below.

1.   Login to your CloudBilling environment.
2.   In the top menu bar, go to Customers and select Customer Clusters from the drop-down menu.
3.   You will see a graph with two Customer Clusters already configured: 'All Customers' and in this example 'Netherlands'.
4.   Click the [+ Add] button to add a Customer Cluster.
5.   In the Tag Name field, enter the Debtor Number (or other unique ID) of the customer. In this example '101001'.
6.   In the Parent Clusters field, enter the country cluster. In this example 'Netherlands' and click the [+ Add] button.
7.   Click [Save & Return].

An individual Customer Cluster has now been created for this customer. This will be displayed in the graph with the Tag Name that you entered. Now you can proceed with creating the Customer itself.

2. Creation of individual Customer Clusters

In CloudBilling, Customers are the entities that receive invoices and contain all the relevant information that is needed on an invoice. To create a Customer, follow the steps below. Important: make sure that you have created an individual Customer Cluster for each Customer (see previous section).

1. In the top menu bar, go to Customers and select Customer Cockpit from the drop-down menu.
2. Click the [+] button in the top left of the screen to create a new Customer.
3. In the Customer Code field, enter the Debtor Number (or other unique ID) of the customer. In this example '101001'.
4. In the Name field, enter the name of the customer. In this example, 'Inter8 NL BV'.
5. In the Cluster field, enter the name of the individual Customer Cluster that you created in the previous section. In this example '101001'. You must select the corresponding Cluster from the drop-down menu that appears in the Cluster field.
6. In the Bill From field, select the date at which the first invoice must be created for this customer. In this example '2019/01/01'.
7. Click [Save & Return]. The Customer is now saved.

Repeat this process for every customer.