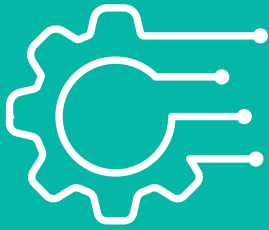


SET UP



OVERVIEW

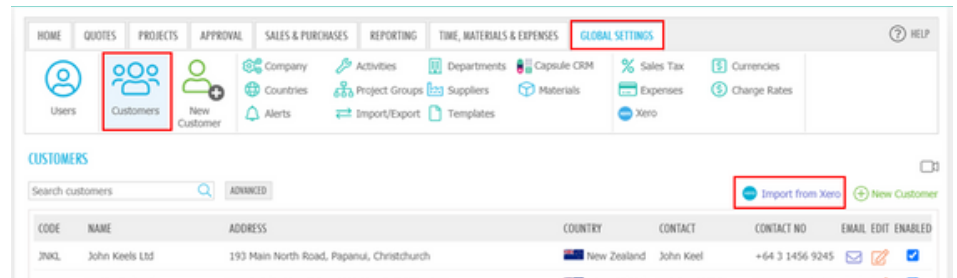
STEPS

Set up your Xero customers

In this module, learn how to add **customers** to your TidyStock account, using Xero. These are the individuals or companies who purchase stock from you.

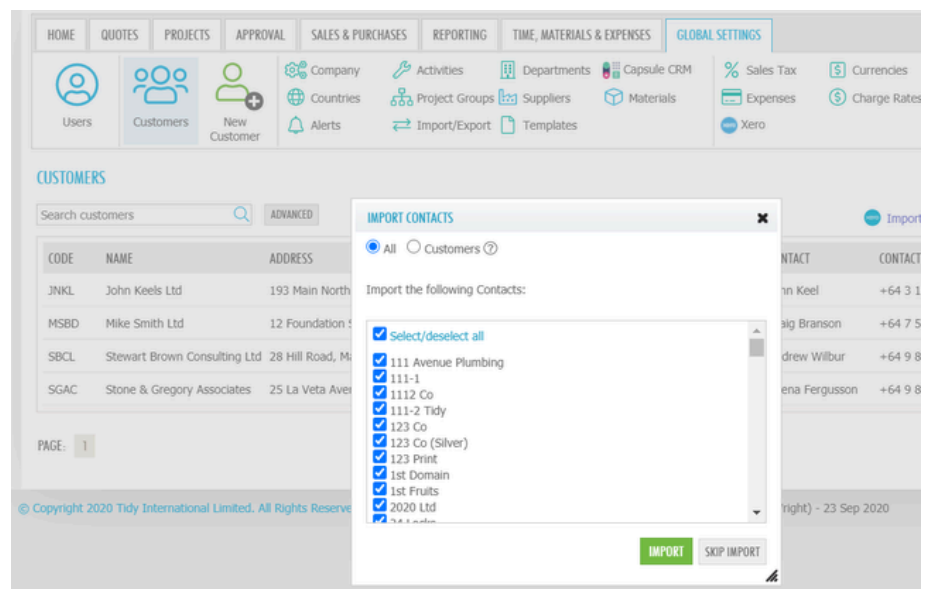
Go to **Customers** under **Global Settings**.

On the right, select **Import from Xero**.



You will be shown an option to **import all Xero customers**, or a chosen **subset** to import into TidyEnterprise.

Make your **selection** (or simply leave all your customers selected) and click **Import**. Once completed, you will receive **confirmation** of the names imported, and any contacts that were not (due to a **duplicate** name for example). Imported customers will now appear in your **Customer list**.



To **edit** a customer, simply click the **edit** icon and follow the steps above to change **customer information**. If you want to **delete** a customer, **uncheck** the tick icon, and click the **bin** icon.

