

Make a Purchase

[Go to full article](#)

Overview

Service providers can use Emersion to sell products to customers in a number of ways:

- An [outright purchase](#), where the goods are provided to the customer and the customer is either invoiced immediately or at the end of their next billing period.
- Under an [instalment plan](#), which provides a way for the customer to pay off the total purchase over a period of time.
- Via a [recurring purchase](#), which is a simple way to charge the customer a defined amount at regular intervals over a period of time.

Starting a New Product Purchase

To begin a new product purchase, follow these steps:

1. Log in to Cumulus and go to **Customers > Customer List**.
2. Use the customer search to find the customer who will be making the purchase.
3. Click **Create Purchase** (shopping cart icon pictured below).

Customer List

Account ID:

Customer Name:

Account Group:

For Franchise zz agent
Franchise Y group
Store - Backburn
Test group

Account Profile:

All

Account Status:

Preadive
Active
Inactive
Cancelled
Suspended

Primary Contact Name:

Primary Contact Phone:

Primary Contact Mobile:

Billing Contact Name:

Billing Contact Phone:

Billing Contact Mobile:

Upload Source Reference:

Export Reference:

Registration No.:

Date Filtering:

Select

From:

To:

☐ Display Agent Accounts

Search

Clear

Create New Customer

Account Balance

Red

 : has an overdue invoice greater than 14 days.

Yellow

 : has an overdue invoice less than 14 days.

Clear

 : does not have any overdue invoices.

36 Results Found | Download results as CSV

Account ID	Customer Name	Export Ref	Type	Account Profile	Status	Billing Contact	Billing Phone	Billing Mobile	Billing Email	Start Date	End Date	Active Services	Active Purchase	Invoice Period Start	Invoice Period End	Account Balance	
1539901	Dean Testuser			New Default	Active	Dean Testuser	0444444444	0444444444	emersiontest@gmail.com	12 Jun 2016		1	0	12 Jun 2016	12 Jul 2016	0.00	
1492650	Deano Testyy			New Default	Preadive	Deano Testyy	0444444444	0444444444	emersiontest@gmail.com	25 May 2016		0	0			0.00	
1468287	Test UserGuy			Emersion Test Default Account Profile	Preadive	Test UserGuy	0386589400		test@test.com	10 Mar 2016		0	0			0.00	
1461703	Test Joelast			Emersion Test Default Account Profile	Preadive	Test Joelast	0411111111	0411111111	testemail@testemersionemail.com	1 Mar 2016		0	0			0.00	
1457563	My Best Ory Test Eva Pty Ltd T/A Lollies R Us	test000		Emersion Test Default Account Profile	Active	Vanessa Testychick	0266666666		test@testing.com	15 Jan 2016		1	0	1 Jun 2016	1 Jul 2016	100.00	
1434019	Michelle Test			Emersion Test Default Account Profile	Preadive	Michelle Test	041411111111	041411111111	michelle.musconich@communitytelco.com.au	20 Jan 2016		0	0			0.00	

Alternatively, if you are on the Customer screen, you can begin a purchase by going to **Customer > Purchase**.

Related Pages

- [Make a Purchase](#)
- [Associate a Profit Centre to a Product Purchase](#)
- [Create an Instalment Plan](#)
- [Product Purchases Import](#)
- [Create an Outright Purchase](#)
- [Show Purchases](#)
- [Purchase](#)
- [Price Books](#)
- [Price Points](#)
- [Commissions Config Products POS](#)
- [Recurring Purchases](#)
- [Associate a Profit Centre to a Product](#)
- [Product Instance Locking](#)
- [Product Fundamentals](#)
- [Product Categories](#)