How Do You Set up a New Customer?

Tammy Mason - 2022-07-18 - in Customers

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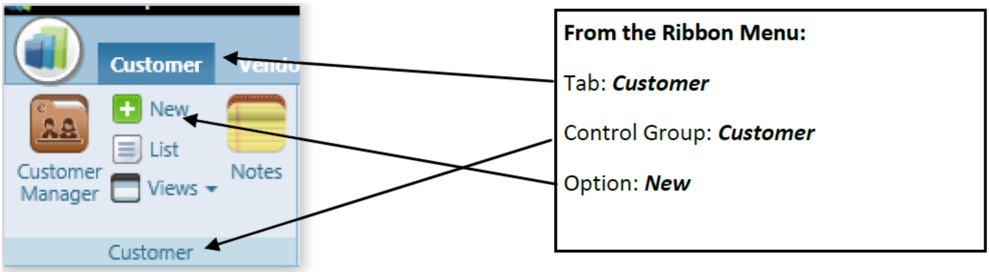
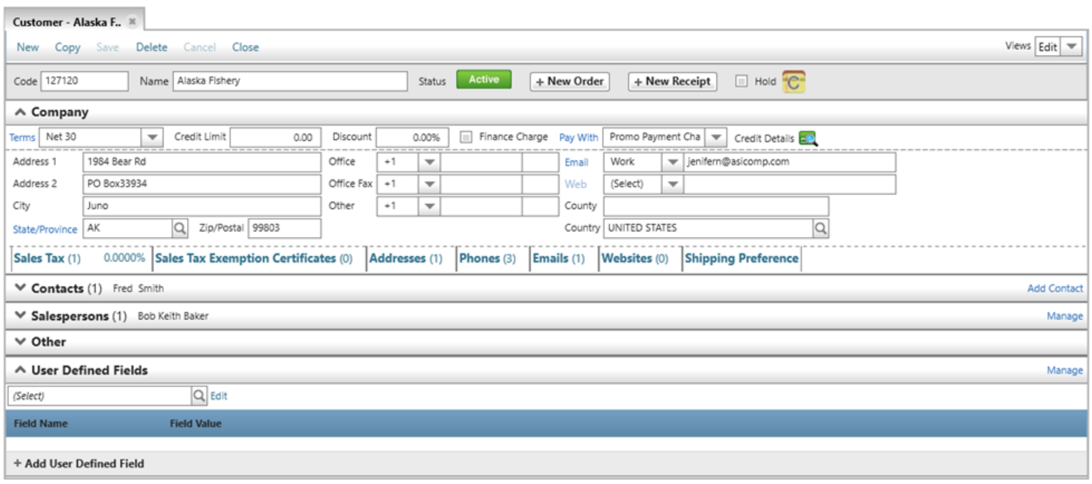
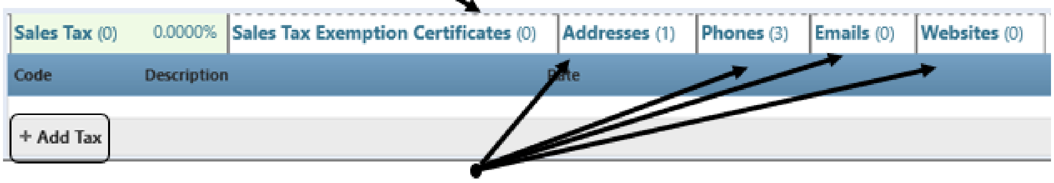
Short answer: Customer, New.



New Customer: Allows you to enter all the Customer information. This information will default into the Customer orders, quotes, invoices and receipts.

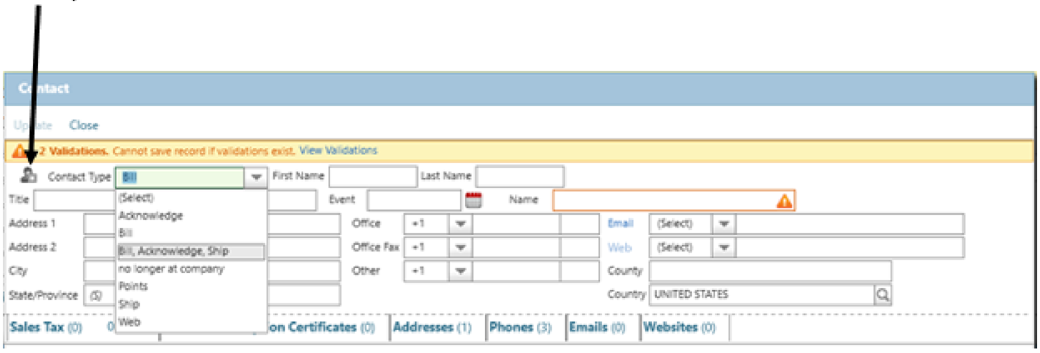


1. The **Company** expander allows you to apply the correct tax rate to a customer by clicking "Add Tax" and selecting the correct tax code resource from the list. If the Customer is tax exempt, then an exempt tax code can be selected, as well as adding the Sales Tax Exemption Certificate information.

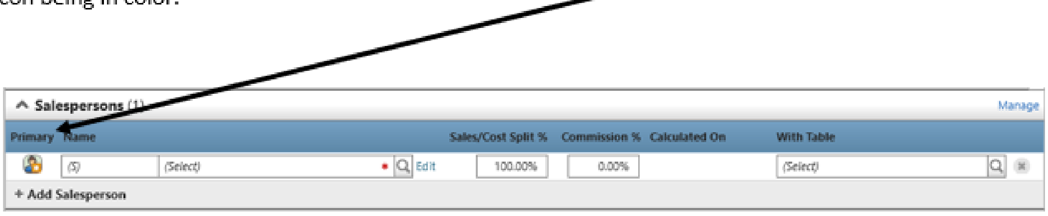


Unlimited Addresses, Phones, Emails and Websites addresses can be entered.

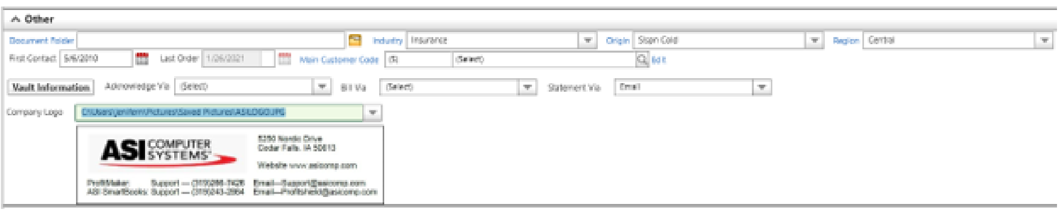
2. The **Contacts** expander allows you to add contacts for the New Customer. These can be added individually for Acknowledge, Bill, Ship, and Web contacts or you can create a single contact type of Bill, Acknowledge, Ship that contains the same information for all three contact types. More than one contact can be entered for each Contact type; however, only one can be the Primary (default) for that contact type and will be in color. This can be changed by clicking the contact to change who is the Primary.



3. The **Salespersons** expander. A Salesperson can be added if the Customer has a designated Salesperson. More than one can be added, if needed. The primary salesperson will be designated by the icon being in color.



4. The **Other** expander is a useful tracking tool and can be used for storing Customer information.



Document Folder: Used to hold Customer logos, documents, and other files related to the Customer.

Industry, Origin, and Region: These can be used for tracking purposes to determine where your customers come from.

First Contact: The date that they first became your Customer. (this does default to current date but can be changed).

Last Order: Displays the most recent order date based on the customer's order records. This includes open or closed orders ad is not affected by quotes or invoices.

Main Customer Code: If you have more than one subsidiary of a Main Customer, it will link them to that main customer.

Acknowledge Via, Bill Via and Statement Via: How this customer wants their forms delivered. This will overwrite what is in Company Setup for this Customer. Left at **(Select)** this will use Company Setup selections.

Company Logo: This is the logo that will print on all forms for this Customer. Logos are entered in Company Setup and will show and can be selected here.

User Defined Fields: Provides the ability to add user defined fields for tracking information you need for your customers.