

Customer – Alternate Billing Number AV Ref # 574

There is also a video showing how to perform this function: **Customer – Alternate Billing Number** (2:52) – AV Ref# 399

About:

BPOS allows you to re-direct the balance of one invoice to another customer's account. This usually comes in handy in cases where you have a parent company that pays the invoices for multiple local businesses. Sometimes it is a government account, sometimes it's a corporation. Regardless, BPOS lets you re-direct any invoice balance to another account. You can do it on the fly when closing an invoice or you can set the primary account to automatically re-direct every time without your sales staff ever having to do a thing.

How to Assign Alternate Billing # in the Customer's Master File:

- Find the Account # for the account you wish to direct all your charges to by going to Views → Sales Counter.
- 2. Click on the **Customers** icon on your toolbar to find your customer and then write down their account number (this will be the Billing #):



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3. Next, you will assign the alternate billing number to your primary account. This is the account who will be having the actual work done. Click on **Customers** → **View/Edit**:

File Views Appointments Tickets Inventory	Cus	tomers Contacts Vehicles VSR Suppliers I	Links	Set Store Help
Cear Appt Tickets Fetch# Last Recent Workorder	<u>يک</u> هو	Lookup Quick History		hicles History VSR
LOGIN: AATECH VIEW: SALES COUNTER		Annual Sales History	STORE NAME: HITS DEN ISH ACCOUNT-WF [1000	
	RESET	Monthly Sales History Reset To Cash Account		_
		View/Edit		_
		Lookup Customer# Add	Ctrl+C	
		Add From Recent Ticket		
		Merge View/Edit Notes		
	A/R Info & Lookup A/R Info & Lookup - Balance Forward STYLE			_
				_
		Launch Tirelink		

4. On the **Customer View & Edit** screen (shown below), lookup your customer by clicking the binoculars beside **Customer #**. Find your customer and double-click to make them the Active customer:

Customer View & Edit							
Contact Info Account Info Other Info Pricing A/R Info Misc							
Customer #	10001						
Name	CASH ACCOUNT-WF						
Short Name	ACCOUNT						
Address	THANKS FOR YOUR BUSINESS						
Address2							
City	CHARLOTTE		State NC	Zip 28262			
Contact Name							
	Туре	Phone/Email		EXT			

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- 5. On the **Customer View & Edit** screen (shown below), click on the **Account Info** Tab.
- 6. Key in the primary company's (the account responsible for paying the bill) account number in the **Billing #** field. Remember, this is the account to which all A/R charges will be re-directed.
- 7. Click **Save** at the bottom:

Customer View & Edit				
Contact Info Account Info Other Info Pricing A/R Info Misc				
H5 pe	Commer			
pe	Cash			
-Terms				
Credit Limit	0.00			
Allowable Days Past Due	0.00			
Print licket				
C.O.D.				
Account Active	Yes V			
Tax Exempt				
Tax Code				
FEI Code	▼			
Finance	1.5000			
Billing #	70825 HO			
Customer Since	02/09/2001			
1				
#7				
	Clear/New Discard Changes Save Cancel Help			

All invoices for this account will now be automatically re-directed to the primary account whose account *#* is listed in the Billing *#* field.

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How to Manually Re-Direct an Invoice Balance at the Close of a Ticket:

- 1. From the **Ticket View/Edit** screen (shown below), when you are ready to close your invoice, click on the **Payments** Tab.
- 2. Click on the A/R Distribution tab:
- 3. Click on the binoculars beside the **Account** field to find the account you wish to re-direct the charge to and double-click on them to select them **OR**, if you already know the account number, you can type it into the **Account** field and hit <**enter**>.
- 4. Click on the Apply Customer's Default A/R Terms button:

Ticket View/Edit (1680641)						
Main Line Items Appointments C	ustomer Info Vehicle Info Comments	Payments _ #1				
Cash/Credit Payments A/R Distributions						
Total 145.41						
Balance #2						
PO#	Accou	nt 70825 🔊 - #3 omer AAA SALES				
Terms No Terms POS Description IWS						
Description	Due Date Am	punt				
	<u></u>					
#4						
	Clear Apply Customer's Default A/R	Terms Discard Payments Changes				

5. You can now print and close your ticket as you normally would.

There is no limit to the number of accounts that can share the same Billing #. The only account that needs to be set as an A/R Charge account is the Corporate or Parent account.

***Note* – Users must have password permission to edit the customer file (P25, P26). Users must have password permission to manually re-direct an A/R charge to a different account when closing an invoice (P7). If you need to give a user permission to have the permission setting, please contact your system administrator.