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

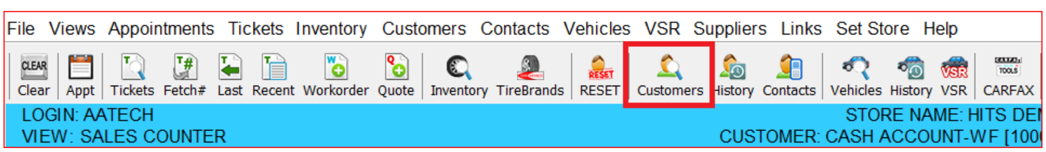
About:

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:

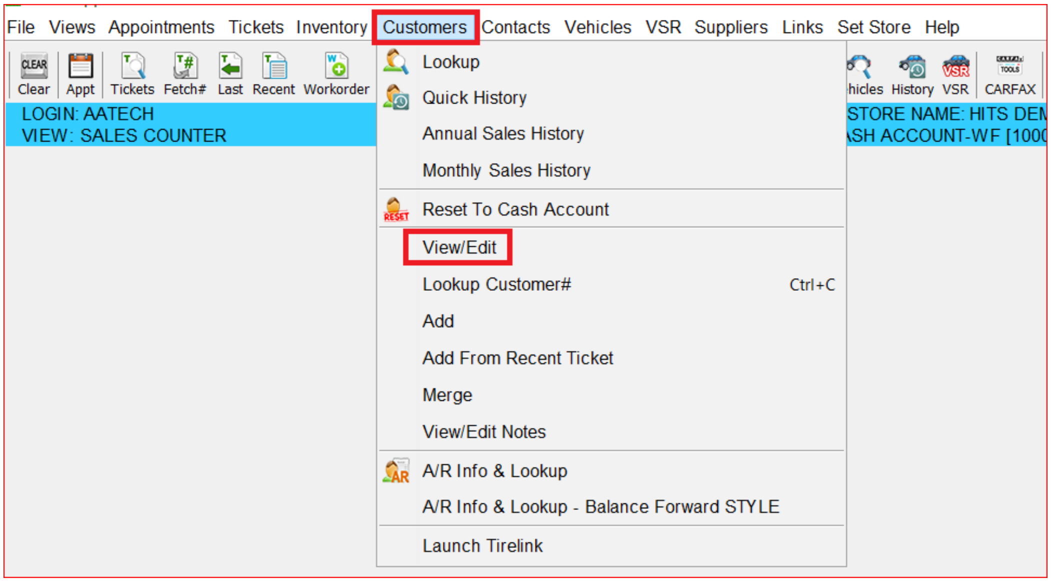
1. Find the Account # for the account you wish to direct all your charges to by going to **Views → Sales Counter**.

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 #):

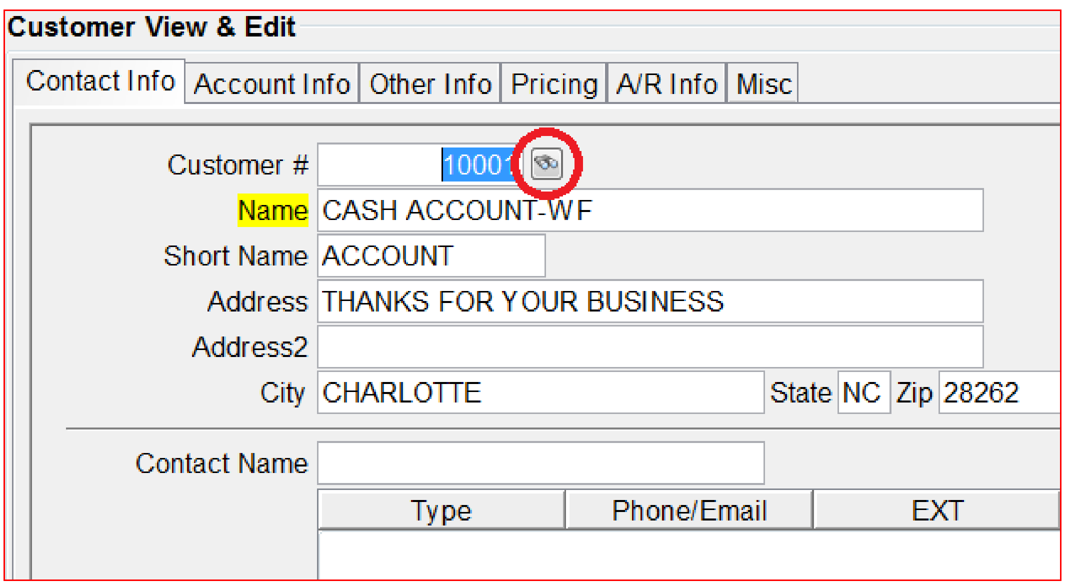


(Continued on next page)

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**:



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:

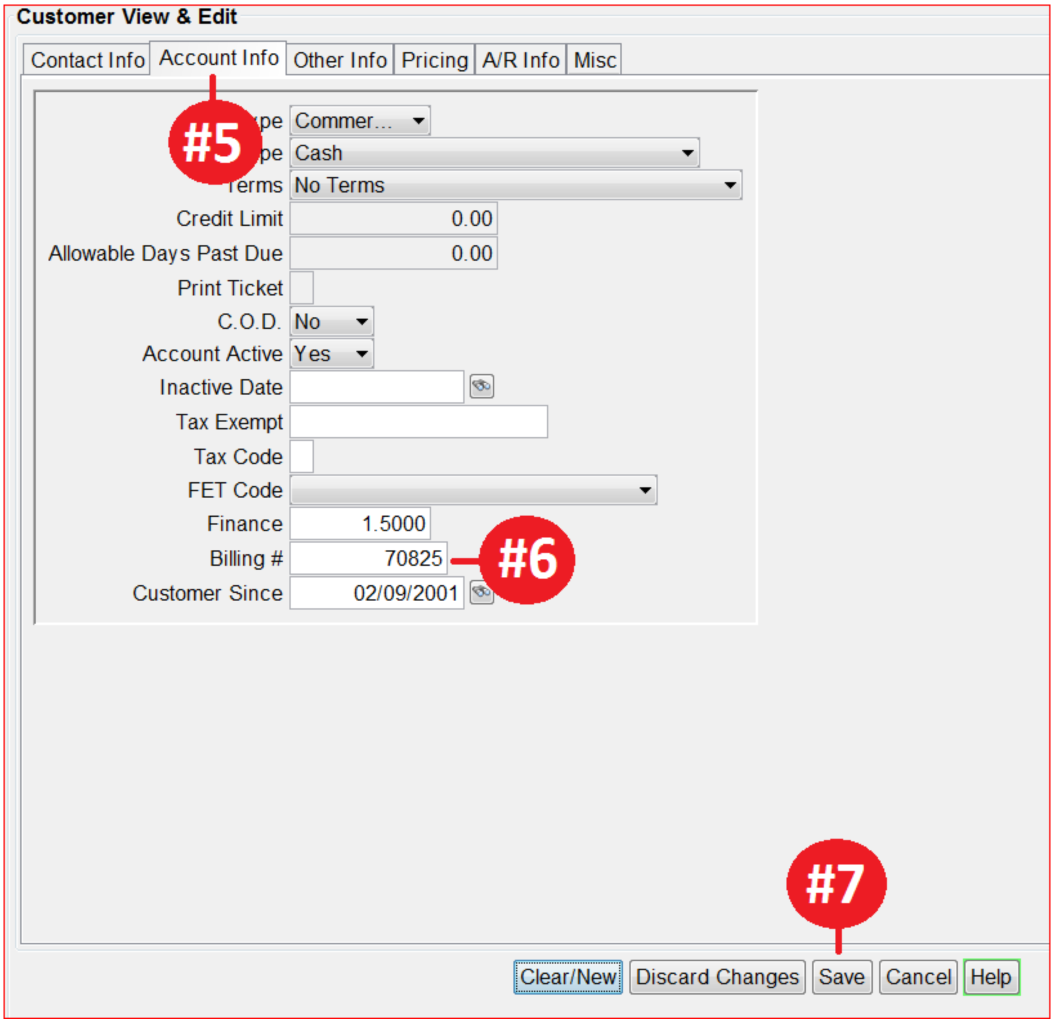


(Continued on next page)

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:



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

(Continued on next page)

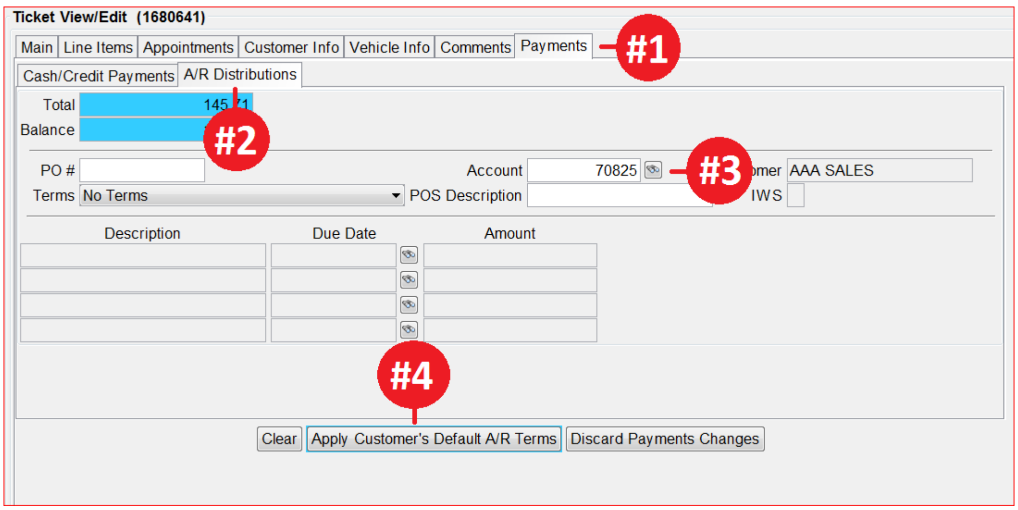
How to Manually Re-Direct an Invoice Balance at the Close of a Ticket:

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:



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.