

## Customer – Adding Charge Customers AV Ref # 623

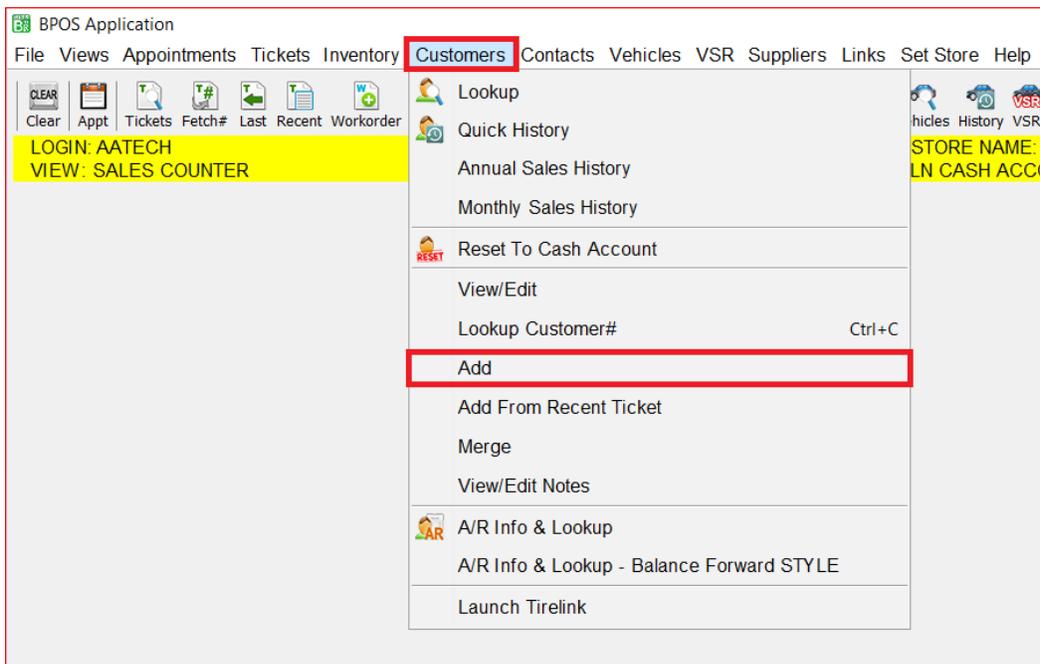
There is also a video showing how to perform this function:  
Customer – Adding Customers (2:13) – AV Ref# 388

### About:

When you have customers you wish to extend credit to, it is very easy to set up a customer in the system with A/R terms. You can edit an existing cash account customer and turn them into a charge account or you can add a brand new customer from scratch.

### How To Add A New Charge Customer:

1. Click on the **Customers** drop-down menu above the toolbar and select **Add**:



2. On the **Customer View/Edit** screen (shown below), key in your customer's name and address. (You will not enter a customer #, the system will generate one for you.)
3. Click on the **Save** button at the bottom to open up the Contacts box.
4. **Right-Click** in the Contacts box and select **Add** to add the customer's phone numbers and email addresses:

**Customer View & Edit**

Contact Info | Account Info | Other Info | Pricing | A/R Info | Misc

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Customer #

**Name**  #2

Short Name

Address

Address2

City  State  Zip

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Contact Name

Type	Phone/Email	EXT	Text Domain	Comments	Priority
PHONE	(704) 555-6487				Primary
TEXT	7045556487@vtext.com		vtext.com		Primary
EMAIL	fastestmanalive@centralcity.net				Primary

\*\*\* Right-Click Table To Add/Edit/Delete Customer Contact Info (Phone, Email, Etc.)... \*\*\*

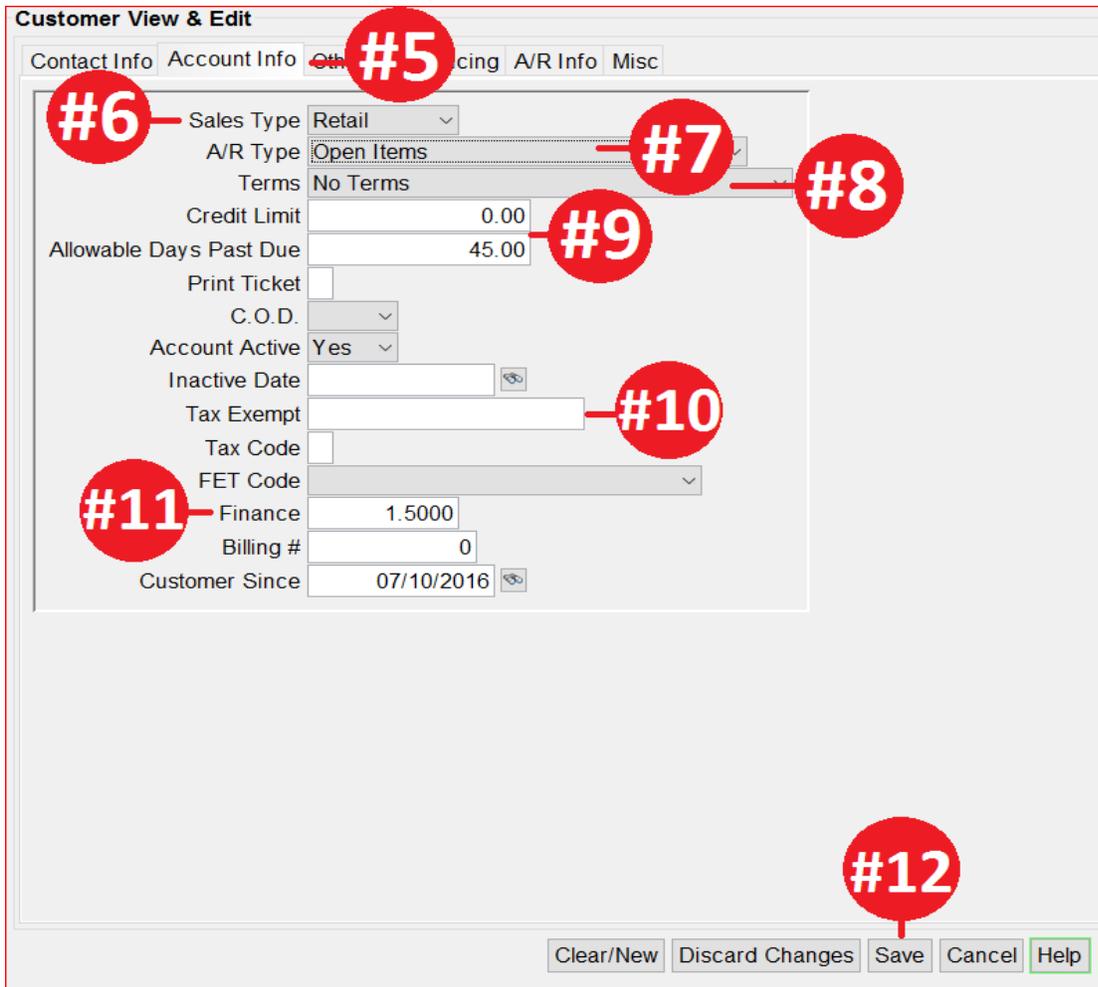
Track VSR

Send VSR Postcards

Notes

#3

5. On the **Customer View/Edit** screen (shown below), click on the **Account Info** tab.
6. Change the **Customer Type** if necessary.
7. Change the **A/R Type** from **Cash** to **Open Items**.
8. Edit the **Terms** as needed. (If you make no selection, it will default to Net 10 30.)
9. If you have enabled Credit Management in your system, key in the customer's **Credit Limit** and **Allowable Days Past Due**.
10. If the customer is Tax Exempt, you will need to make an entry in the **Tax Exempt** field. Please note that ANY entry into the tax exempt field will designate the customer as Tax Exempt.
11. Verify/edit the customer's **Finance** amount (this is a monthly % calculated on past due amounts).
12. Click **Save** at the bottom:



**Customer View & Edit**

Contact Info **#5** Account Info **#5** Other **#5** Billing A/R Info Misc

**#6** Sales Type Retail

A/R Type **#7** Open Items

Terms **#8** No Terms

Credit Limit **#9** 0.00

Allowable Days Past Due **#9** 45.00

Print Ticket

C.O.D.

Account Active Yes

Inactive Date

Tax Exempt **#10**

Tax Code

FET Code

**#11** Finance 1.5000

Billing #

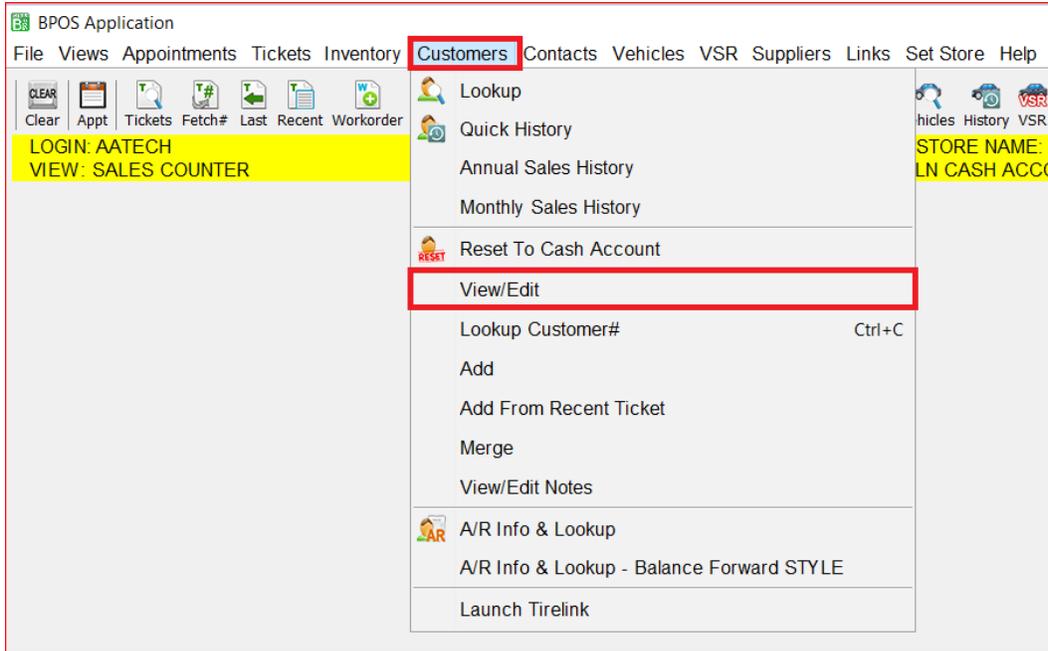
Customer Since

**#12**

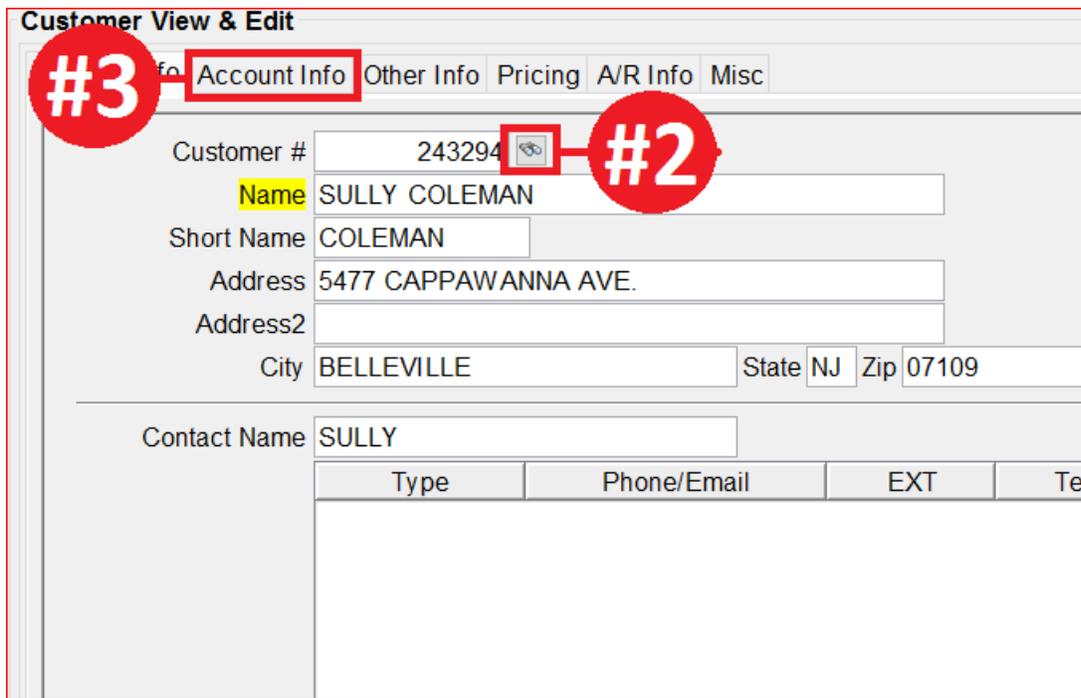
Clear/New Discard Changes Save Cancel Help

## How To Make An Existing Cash Customer A Charge Customer:

1. Click on the **Customers** drop-down menu above the toolbar and click on **View/Edit**:



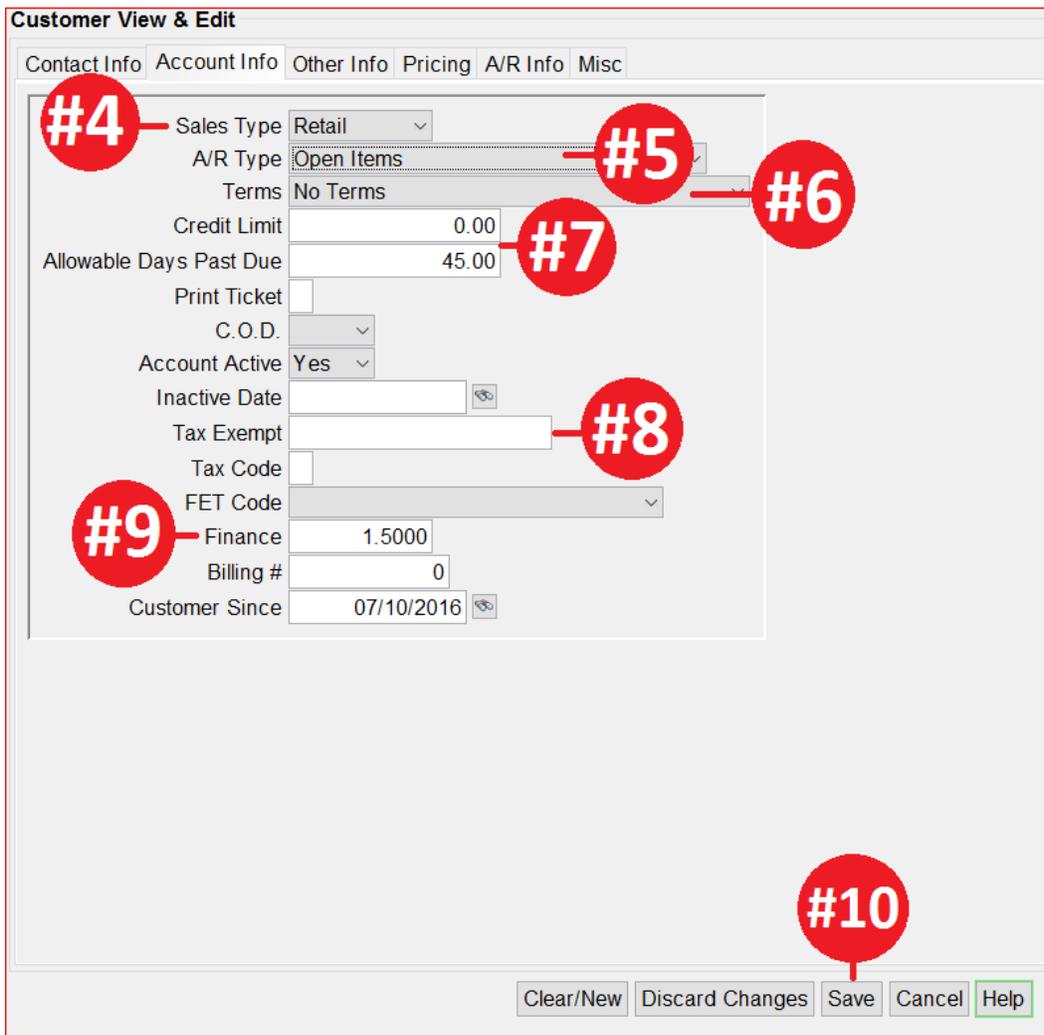
2. On the **Customer View/Edit** screen (shown below), click on the binoculars beside the **Customer #** field and find the customer in question. Double-click to bring them back to the View/Edit screen.
3. Click on the **Account Info** tab:



The screenshot shows the 'Customer View & Edit' interface. At the top, there are tabs for 'Account Info', 'Other Info', 'Pricing', 'A/R Info', and 'Misc'. The 'Account Info' tab is selected and highlighted with a red box and a red circle containing the number '#3'. Below the tabs, the 'Customer #' field contains the value '243294' and has a binoculars icon to its right, which is highlighted with a red box and a red circle containing the number '#2'. The 'Name' field is highlighted in yellow and contains 'SULLY COLEMAN'. Other fields include 'Short Name' (COLEMAN), 'Address' (5477 CAPPAWANNA AVE.), 'Address2', 'City' (BELLEVILLE), 'State' (NJ), and 'Zip' (07109). Below these fields is a 'Contact Name' field containing 'SULLY'. At the bottom, there is a table with columns for 'Type', 'Phone/Email', 'EXT', and 'Te'.

Type	Phone/Email	EXT	Te
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4. On the **Customer View/Edit** screen **Account Info** tab (shown below), change the **Sales Type** if necessary.
5. Change the **A/R Type** from **Cash** to **Open Items**.
6. Edit the **Terms** if needed. (If you make no selection, it will default to Net 10 30.)
7. If you have the Credit Management system enabled, you can add the customer's **Credit Limit** and **Allowable Days Past Due**.
8. If the customer is tax exempt, make an entry on the **Tax Exempt** field.
9. Verify/Edit the customer's **Finance** % amount (the % calculated on Past Due amounts each month).
10. Click **Save** at the bottom:



**Customer View & Edit**

Contact Info Account Info Other Info Pricing A/R Info Misc

#4 Sales Type Retail

A/R Type Open Items #5

Terms No Terms #6

Credit Limit 0.00

Allowable Days Past Due 45.00 #7

Print Ticket

C.O.D.

Account Active Yes

Inactive Date

Tax Exempt #8

Tax Code

FET Code

#9 Finance 1.5000

Billing # 0

Customer Since 07/10/2016

#10

Clear/New Discard Changes Save Cancel Help

## **Option Settings:**

For more information on Credit Management, see AV #252, #253, #552, #553.

**\*\*Note** – Users must have password permission to add a charge customer (P26). If you need to give a user permission to perform the above function, please contact your system administrator.