Customer – Adding Charge Customers
AV Ref # 623

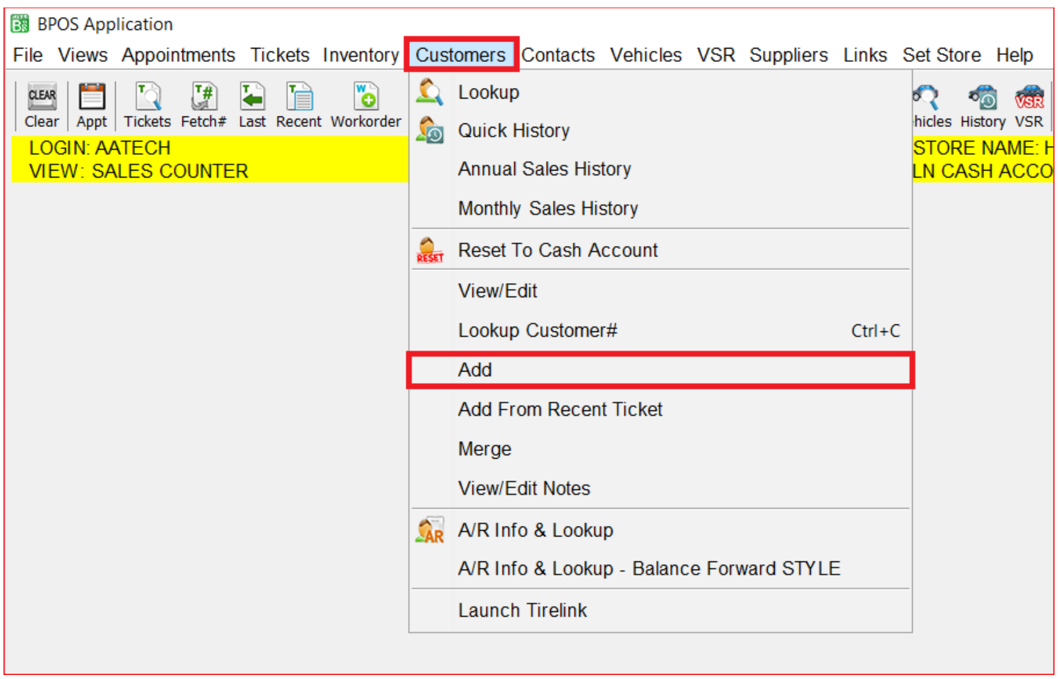
There is also a video showing how to perform this function:
Customer – Adding Customers (2:13) – AV Ref# 388

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**:



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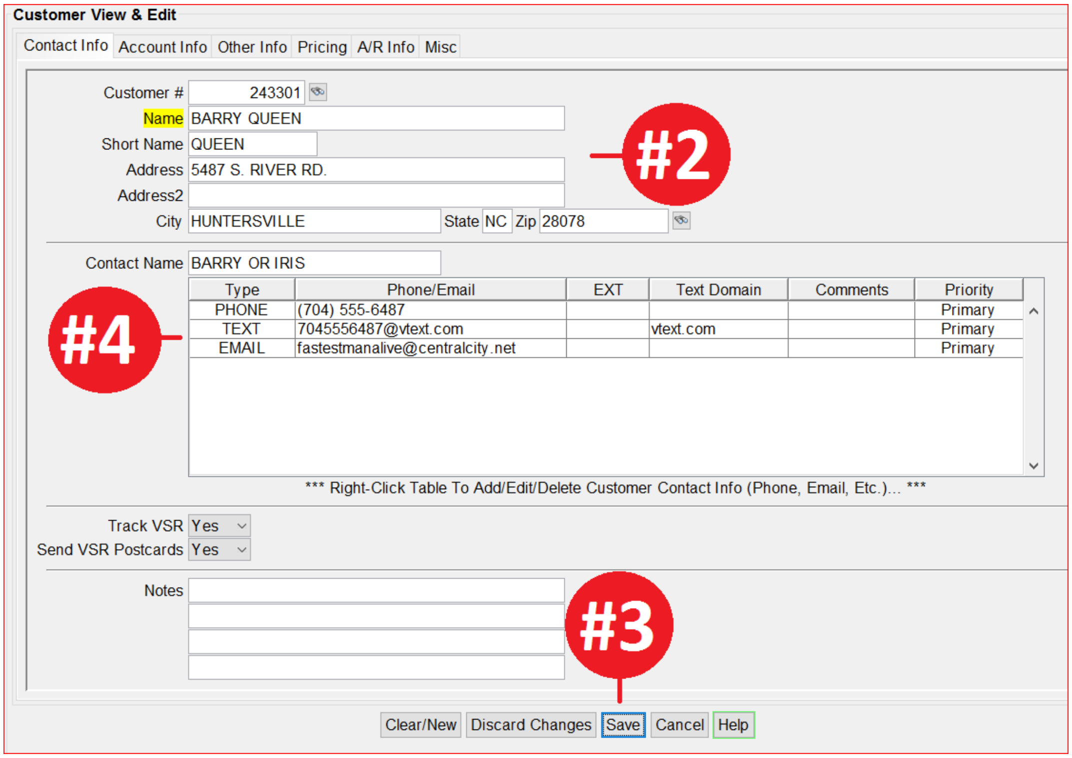
2. On the **Customer View/Edit** screen (shown below), key in your customer's name and address. (You will not enter a customer #, the system will generate one for you.)

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:



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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**.

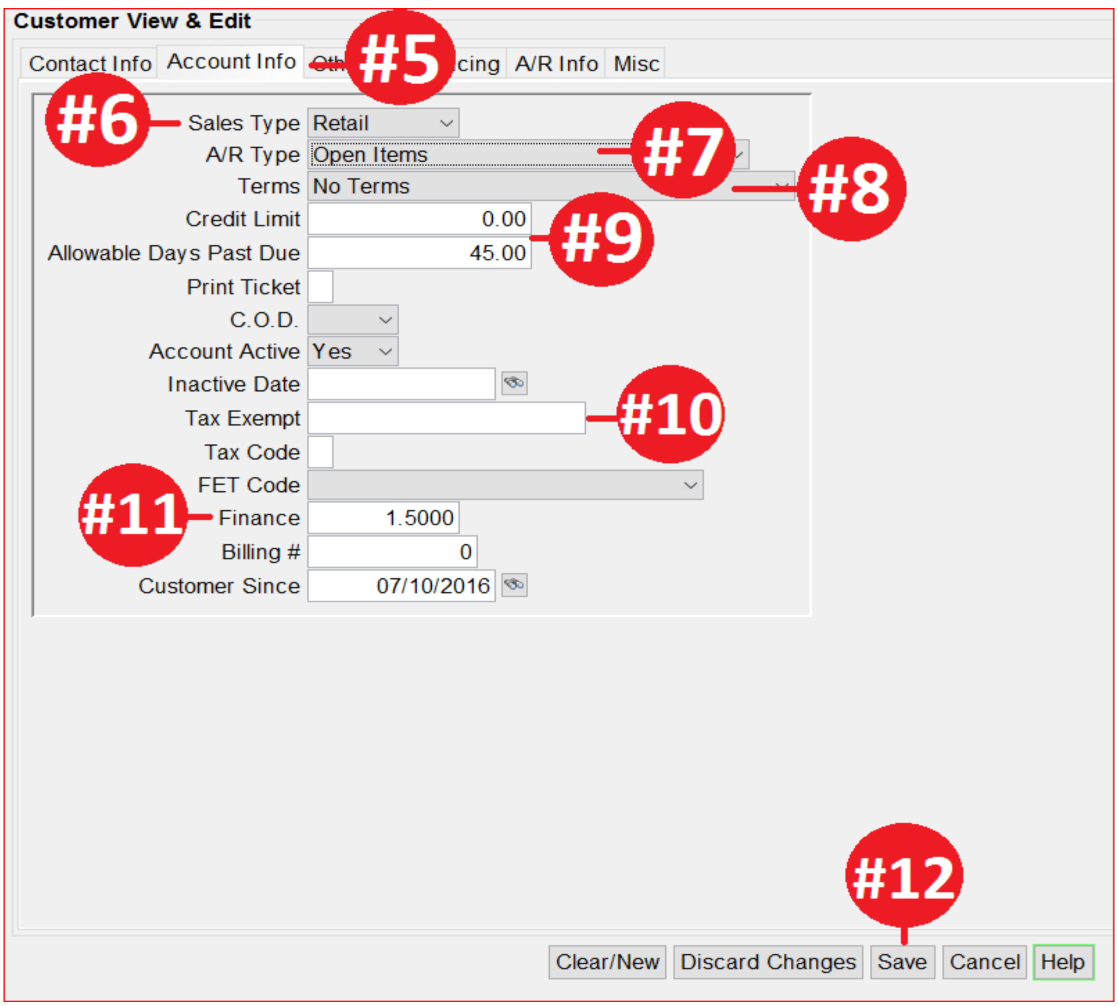
8. Edit the **Terms** as needed. (If you make no selection, it will default to Net 10 30.)

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.

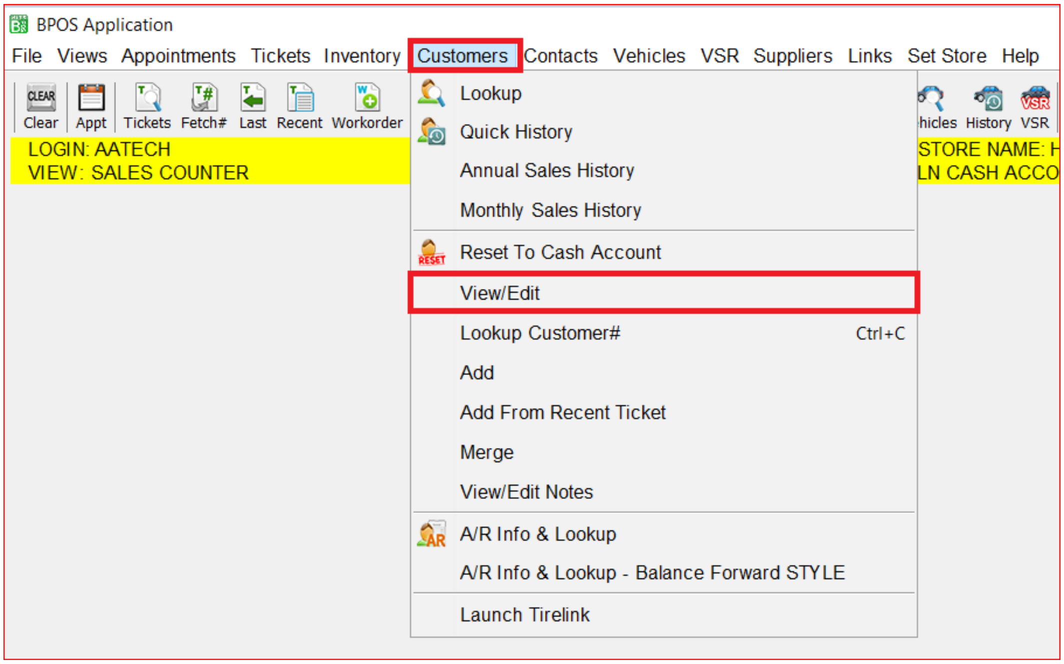
11. Verify/edit the customer's **Finance** amount (this is a monthly % calculated on past due amounts).

12. Click **Save** at the bottom:



How To Make An Exisiting Cash Customer A Charge Customer:

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



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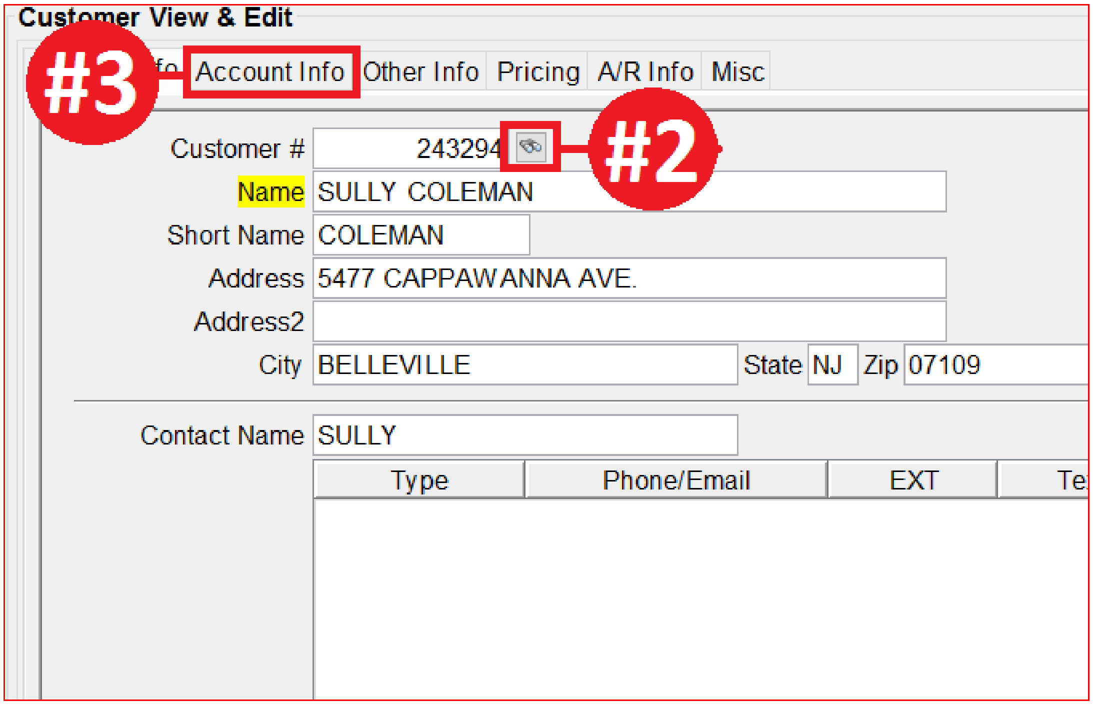
2. On the **Customer View/Edit** screen (shown below), click on the binoculars beside the **Customer #** field and find the customer in question. Double-click to bring them back to the View/Edit screen.

3. Click on the **Account Info** tab:



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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**.

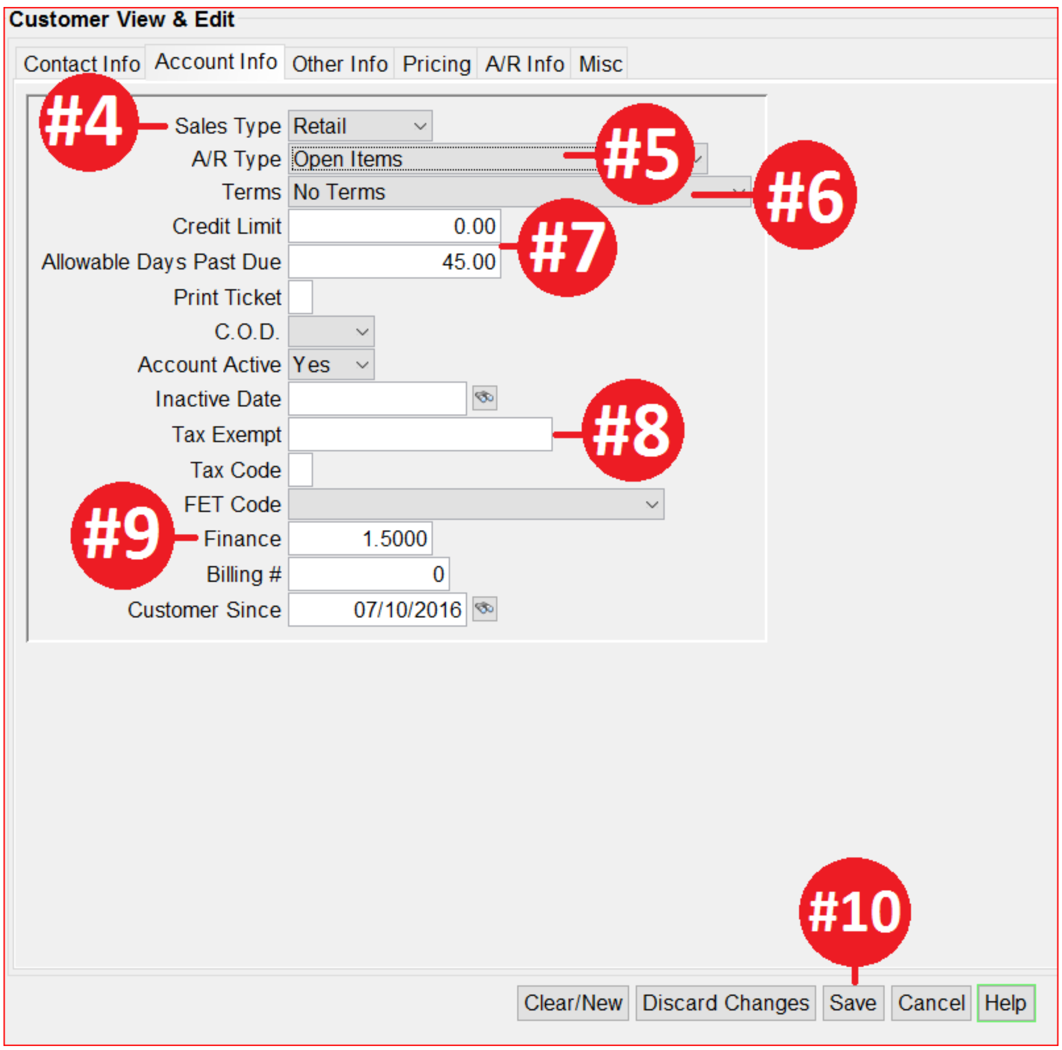
6. Edit the **Terms** if needed. (If you make no selection, it will default to Net 10 30.)

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:



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.