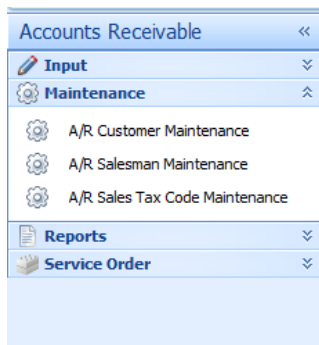




# A/R Customer Maintenance

Enables you to keep accurate up-to-date information on all your customers

From the Main Menu (Accounts Receivable > Maintenance > A/R Customer Maintenance)



## Account Information:

**Account ID:** This is set to A/R control account you can change the control account by typing in a different number.

**Customer ID:** This can be alpha, numeric, or alphanumeric.

Note: If you are creating a new customer, you can click on the "Next Available Number" button. This feature will find the last customer number and increment the number by 1.

**File As:** This field can be left blank. If, for example, the customer's name is John Doe, you will want to put Doe, John in this field. When looking for this customer alphabetically, this customer will appear with the D's. Another example would be if the customer's name is the ABC Company. By putting ABC Company in this field, this customer will appear with the A's.

A screenshot of a software form titled "Account Information". The form has a blue header. It contains three rows of input fields. The first row is labeled "Customer:" and has two text boxes: the first contains "120000" and the second contains "RUSPLU". To the right of these boxes is a checkbox labeled "Inactive". The second row is labeled "Name:" and has a text box containing "Rushing Plumbing, INC". The third row is labeled "File as:" and has an empty text box.

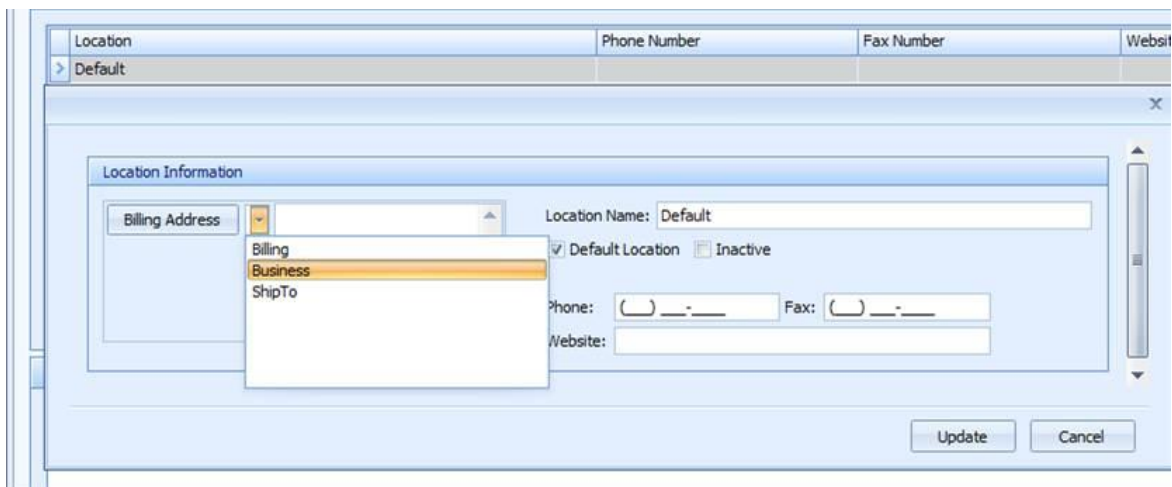
**Default Location:** Double click default location, here you will enter the customer's default location. Default location can be the billing address and/or business address. Click on the drop down box and you can select. Note: You can have both addresses associated with this customer. If they have a billing address and a business address, enter them under default location.

**Phone Number:** Customer Phone Number can have multiple numbers.

**Fax Number:** Customer Fax Number can have multiple fax numbers.

**Email Address:** Customer Email address can have multiple email addresses.

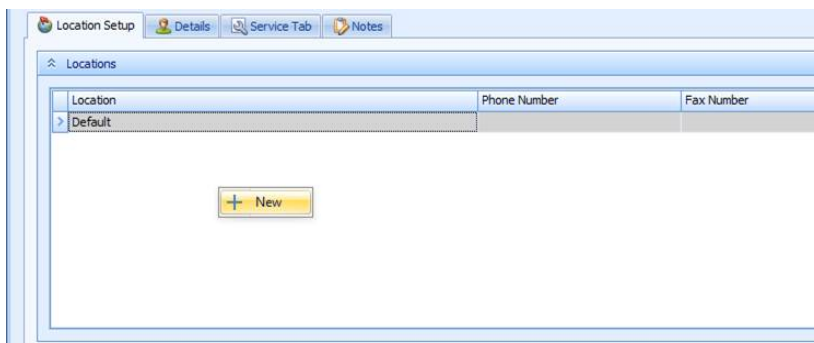
**Websites:** Customer Websites can have multiple websites.



**To enter a location or additional location:** Right click in "Locations" and click "New". You can call the location whatever you would like.

Multiple addresses can be entered for each location. Enter phone number, fax number, and website here.

You can also make a location default or inactivate a location here. Click "Update" when you are done editing.



**Contacts:** You can add as many contacts as you would like. Right click on the bottom under contacts. Click "New" to add or right click and select delete to delete a contact. Here, you can enter name, email, multiple phone numbers, extension, title, etc. Select which location you want the contact associated with. If you only have one location, select "Default".

*Note: Every Contact MUST have a location attached to it*

Primary Contact	Name	Email	Office Phone	Ext.	Cell
> <input type="checkbox"/>	John Doe		(901) 900-2000	821	(901) 299-3

**Details:** Service Contract OR E-10 Plan choose one

**A/R Credit limit:** This is where you can limit how high a customer's balance gets, you can set different limits for each customer or they don't have to have one at all.

**Invoice Terms:** Payment terms for their invoices (you can customize for each customer if needed)

**Commission Percent:** Set your commission Percent

**Tax ID:** You probably won't need this for a customer but if you do it is here! (You need tax ID's for when your company does the 1099 form).

**A/R Interest Charge:** Check here if you want to charge interest

Location Setup | Details | Service Tab | Notes

Service Contract       E-10 Plan

A/R Credit Limit:

Invoice Terms:

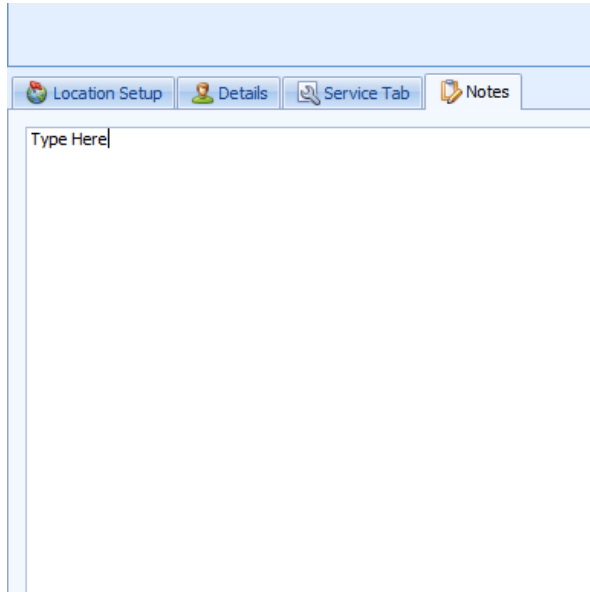
Commission Percent:

Tax Id:

Do Not Charge Damage Waiver

A/R Interest Charge

**Notes:** You can store important information here



The image shows a software interface with a light blue header bar. Below the header bar, there are four tabs: 'Location Setup' (with a globe icon), 'Details' (with a person icon), 'Service Tab' (with a document icon), and 'Notes' (with a notepad icon). The 'Notes' tab is currently selected. Below the tabs, there is a large text input area with a light blue border. The text 'Type Here' is visible at the top left of this area, indicating it is a placeholder for user input.