3. Customer Details

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Introduction to the Customer Details Module

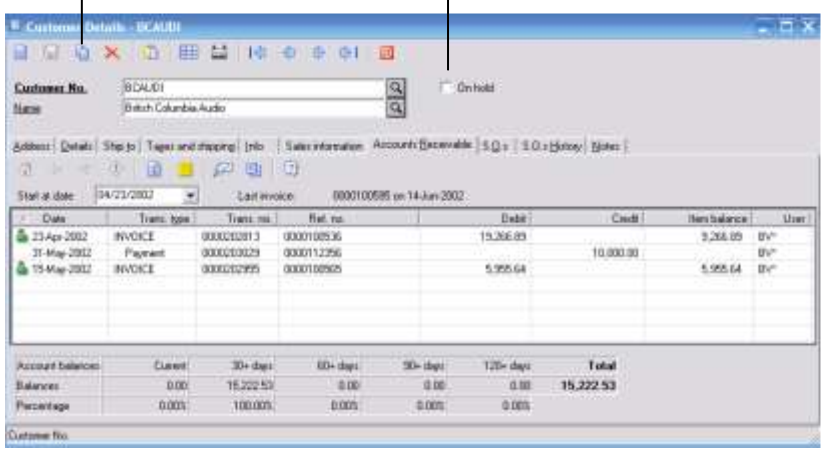
Customer Module

The Customer Details module is where you maintain customer data such as mailing, and contact information. This is useful for recording any hall rentals where the event will happen at some time in the future. However, it is also a convenient place to view other information related to a customer such as accounts receivable balances and history. Also, an unlimited number of notes may be attached to a customer and viewed in the details module.

Optionally, you may place a customer on hold. You may also copy the customer's address to Window's clipboard to be pasted into another program such as a word processor. You can even copy the customer record to ease the creation of a new customer with similar details.

Copy customer information

Place customer on hold

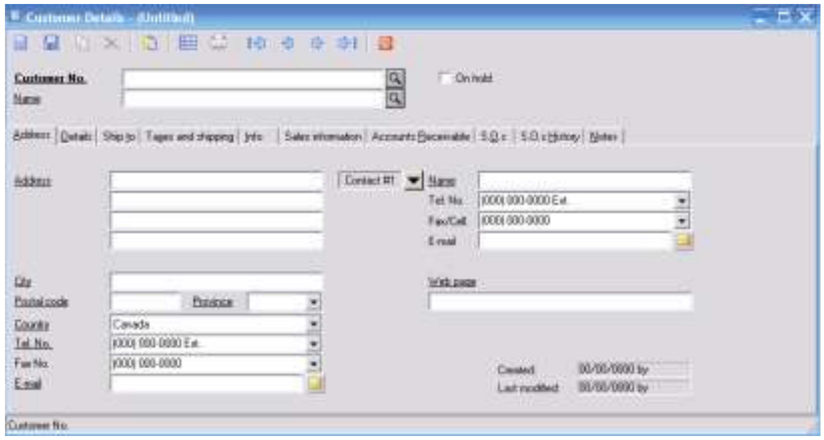


Notes

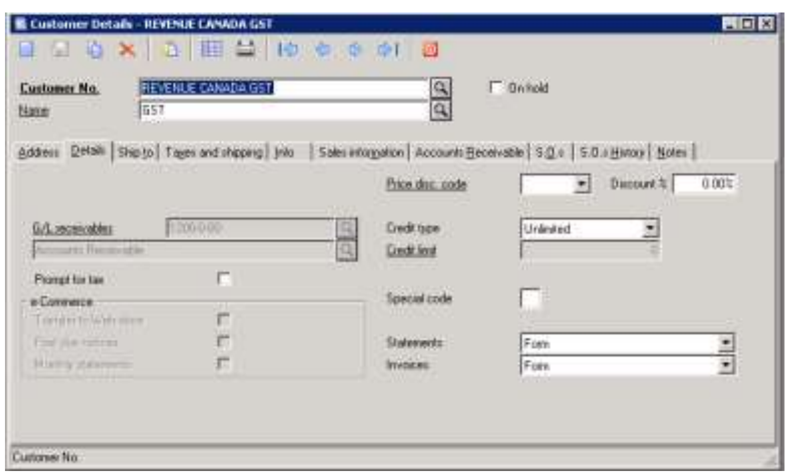
Adding, Modifying and Deleting Customers

To Add a New Customer:

1. Open the *Customer Details* window.



2. The window opens to the **Address** tab by default. Enter the *Customer Number* (which can be any unique alpha code up to 20 characters long), *Name, Address* (note that there are a total of four lines per address in addition to City, Province and Country), *Telephone Number, Fax Number* and *E-mail Address.* Note that each customer record can contain separate telephone and fax numbers, and email addresses for up to three separate contacts. You may also add a *Web Page*. The system tracks when and by who the customer record was first created and last modified.



3. Select the **Details** tab to enter pricing and credit information. You may also select a unique Accounts Receivable (i.e. 1200-4-00 – Accounts Receivable Hall) control account on this page (and, optionally, default

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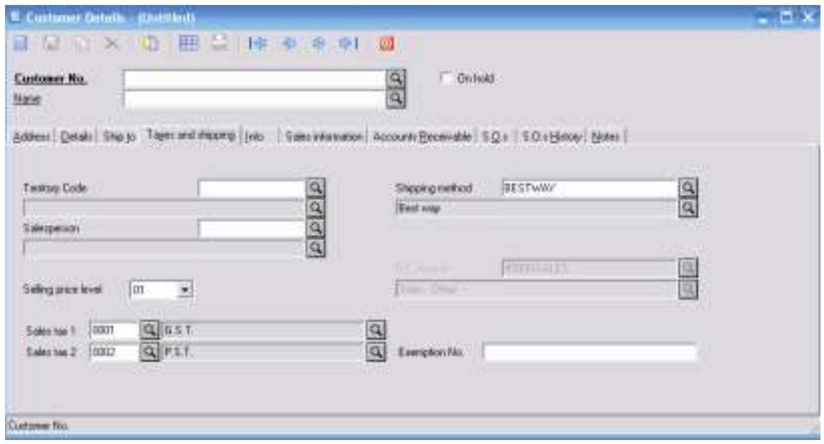
revenue account) if the system has been set up to allow for this. This page is also where you determine how statements and invoices should be processed for this customer (the default is printed).

The Special Code field is an optional single character field that can be used for your own unique purposes such as an indicator or warning for special treatment and can be used in conjunction with the Custom Report Writer.



To Modify a Customer:

1. Open the *Customer Details* window.
2. Click the *Browse* button to the right of the *Customer Number* field to select the appropriate customer.
3. Make the necessary changes and click the *Save* button or press *Ctrl-S.*
4.

To Delete a Customer:

1. Open the *Customer Details* window.
2. Click the *Browse* button to the right of the *Customer Number* field to select the appropriate customer.
3. Click the *Delete* button or press *Ctrl-D* then confirm by selecting *Yes*.

Note: A customer cannot be deleted if they have an outstanding balance in *Accounts Receivable*.

Also, the sales history for a deleted customer will be maintained but the *Customer Name* will appear as "**Customer not on file**" in the *Sales Analysis* module and blank on reports.

Notes

Revenue Canada as a Customer

Setting up Revenue Canada GST as a customer. Enter the necessary information as you would for entering any customer.

Select the “Taxes and Shipping” tab and change the G/L income default to:

1210-0-00-, GST Receivable, so that your claims received are posted to the “GST Receivable Account”.