

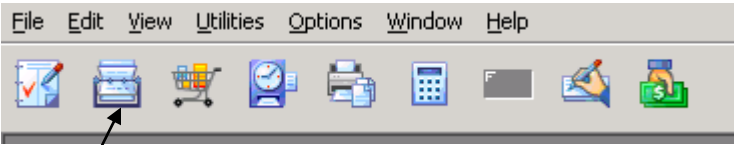
### 3. Customer Details

In this section:

- ❖ Introduction to the Customer Details Module
- ❖ Adding, Modifying and Deleting Customers

Notes

Introduction to the Customer Details Module



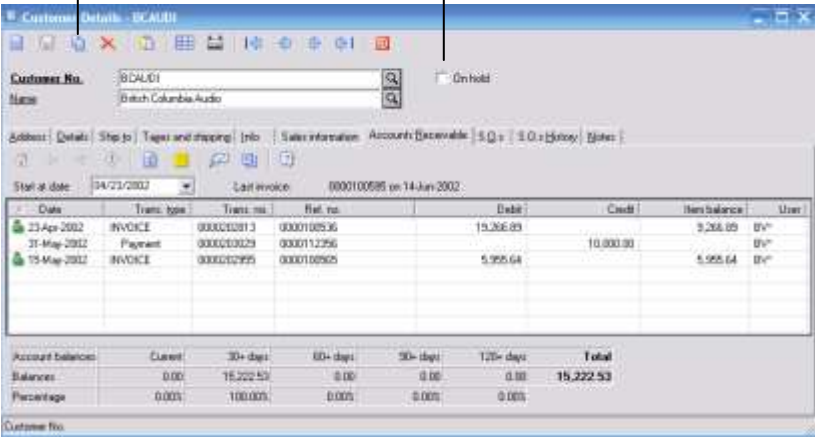
Customer Module

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.

The screenshot shows the 'Customer Details' window with the 'Address' tab selected. The window title is 'Customer Details - (Shift+F6)'. It contains several input fields for customer information: 'Customer No.' (with a search icon), 'Name' (with a search icon), 'Address' (four lines), 'City', 'Postal code', 'Province' (dropdown), 'Country' (dropdown), 'Tel No.' (dropdown), 'Fax No.' (dropdown), and 'E-mail' (dropdown). There are also fields for 'Contact #1', 'Name', 'Tel No.', 'Fax/Cel', 'E-mail', and 'Web page'. At the bottom right, it shows 'Created: 00/00/0000 by' and 'Last modified: 00/00/0000 by'. The status bar at the bottom shows 'Customer No.'.

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.

The screenshot shows the 'Customer Details' window with the 'Details' tab selected. The window title is 'Customer Details - REVENUE CANADA GST'. It contains several input fields for pricing and credit information: 'Customer No.' (with a search icon), 'Name' (with a search icon), 'Price disc. code' (dropdown), 'Discount %' (0.00%), 'Credit type' (dropdown), 'Credit limit' (dropdown), 'Special code' (checkbox), 'Statements' (dropdown), and 'Invoices' (dropdown). There are also checkboxes for 'Prompt for tax', 'e-Commerce', 'Transfer to ledger', 'Post due notices', and 'Printing statements'. The status bar at the bottom shows 'Customer No.'.

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

### Notes

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.

The screenshot shows a software window titled "Customer Details - (Default)". It features a standard Windows-style toolbar at the top. Below the toolbar, there are several input fields and buttons. The "Customer No." field is at the top left, followed by a "Name" field. To the right of these is a "Print" button. Below the "Name" field is a tabbed interface with tabs for "Address", "Details", "Ship to", "Terms and shipping", "Info", "Sales information", "Accounts Receivable", "S.O.s", "S.O.s History", and "Notes". The "Details" tab is currently selected. Within this tab, there are fields for "Trading Code", "Salesperson", "Shipping method" (set to "BESTWAY"), "Best way", "Selling price level" (set to "01"), "VAT number", "Sales tax 1" (set to "0001" with a "G.S.T." label), "Sales tax 2" (set to "0002" with a "P.S.T." label), and "Exemption No.". Each of these fields has a small "Browse" button to its right. At the bottom left of the window, there is a label "Customer No.".

#### 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”.

The screenshot shows the 'Customer Details - GST' window. The 'Customer No.' field contains 'GST' and the 'Name' field contains 'Receiver General GST'. The 'On hold' checkbox is unchecked. The 'Taxes and shipping' tab is selected, displaying various settings. The 'Price disc. code' is set to a dropdown menu, and the 'Discount %' is 0.00%. The 'G/L receivables' field is set to '1210-0-00-' and the 'GST Receivable' field is set to 'GST Receivable'. The 'Credit type' is 'Unlimited' and the 'Credit limit' is empty. The 'Prompt for tax' checkbox is unchecked. The 'Special code' checkbox is unchecked. The 'Statements' dropdown is set to 'Form' and the 'Invoices' dropdown is set to 'Form'. The 'e-Commerce' section has three checkboxes: 'Transfer to verification' (unchecked), 'Print due notices' (unchecked), and 'Monitor statements' (unchecked).