Maintaining Customer Job Accounts

Job accounts are accounts within a customer account. They are used for financial and reporting purposes.

Job accounts are linked to the master customer account but can have different pricing structures, terms codes, and credit limits.

This course shows how to create and maintain customer job accounts.

Objectives

- Set Up Job Accounts
- Maintain Job Accounts

Set Up Job Accounts

Before setting up job accounts, you must enable the *Allow job accounts* feature.

Open the **Options** window.

Use the Search function to locate the option you want

or press Ctrl + I to locate an option by its ID.

The option ID for **Allow job accounts** is 83.

Enter 83 in the **Option ID** field.

Select **OK**.

Make sure the **Current Value** column is set to **Yes**.

Note that you cannot add job accounts to customers if this value is **No**.

Open **Customer Maintenance**.

Enter a valid customer ID in the **Customer** field.

The **Job** field displays the customer's existing job accounts in a drop-down list.

This customer has no job accounts. The master account ID is zero.

To add a job account, enter the next numeric value in the **Job** field. In this case, 1.

Select **Add**.

The Has Jobs text with a check mark appears after you add a job account.

The master account is shown in the **Main Acct** field.

The system allows up to 998 job accounts for a single customer account.

You can also add job accounts in **Point-of-Sale.**

To use this feature, you must set option 5432 – Allow quick add of customers/jobs in POS to **Yes**.

For more information on adding job accounts, refer to the Help documentation.

Maintain Job Accounts

You maintain a job account like a customer account.

Select the job account you want to edit from the **Job** drop-down menu. You can change the name of the job account or retain the master account's name.

Job account maintenance often requires changes to the customer's credit limit, tax code, and terms code.

Remember to select **Change** if you make any adjustments.

When you no longer need a job account, you can delete it.

Before you delete a job account, make sure its running balance is zero.

In **Customer Maintenance**, open the job account you want to delete.

Select **Delete**.

Confirm the deletion.

The system stores the deleted job account in job account number 999.

You can reuse it when needed.

Recap

In this course, we showed how to set up and maintain job accounts.

ePICOR

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298