

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.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2021 Epicor Software Corporation. All rights reserved.

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.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746

USA

Toll Free: +1.888.448.2636

Direct: +1.512.328.2300

Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104

Plaza Central, Col. Santa Maria

Monterrey, Nuevo Leon, CP 64650

Mexico

Phone: +52.81.1551.7100

Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena

Downshire Way

Bracknell, Berkshire RG12 1PU

United Kingdom

Phone: +44.1344.468468

Fax: +44.1344.468010

Asia

238A Thomson Road #23-06

Novena Square Tower A

Singapore 307684

Singapore

Phone: +65.6333.8121

Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,

100 Pacific Highway

North Sydney, NSW 2060

Australia

Phone: +61.2.9927.6200

Fax: +61.2.9927.6298