Maintaining House Accounts

Customer Maintenance Overview

Account Maintenance helps you track and manage your customers. You can use it to set customer settings and codes, lookup transaction or payment history, and review authorized personnel.

In your Eagle Browser, locate it under Accounts Receivable.

Use the dropdown menu to select a Customer. You can also type a name or number, and Eagle finds the matching customer.

If you want to add a new customer, select New Record and enter their details.

The Sort Name field allows for easy lookup at Point of Sale.

Bill To tells Eagle to bill this account's purchases to another customer.

If your store participates in a Loyalty program, the customer's Loyalty ID number displays here.

There are 10 tabs that offer a variety of functions and fields for you to manage customers.

The Main Tab.

The left section contains their address and contact information.

In the Credit Decisions section, you can set their Credit Limit, assign Trade Discounts, and assign codes to help manage your customer database.

Use the Account Options section to set options for allowing charge cards, checks, and more.

Use the fields on the Credit tab view the customer's account information and set Charge options and Controls.

The Department, Sales, and Payment tabs are informational tabs. The Department tab displays their purchase information broken down by department and period. The Sales tab shows their total sales.

The Payment tab gives you detail into their payment history and frequency.

The Misc tab holds a wide variety of fields. You can find Account Codes, a Tax Override Plan Option, and some contact preferences.

The Contacts tab lists the people associated with this account. At Point of Sale, you can select a contact from this list that will print on the invoice.

Use the Notes tab to keep notes on the customer, and control when and where they appear.

If you have any user defined fields, you can find them on the Custom Fields tab.

The Analytics tab lets you dig further into your customers' information using pre-built queries to create charts and tables.

Open the QUERIES section and make your selection. If you have access to Compass Analytics you can add your own custom queries directly into this tab.

About Epicor

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