

Customer Accounts Overview

When adding a new Customer some entries come from pre-established settings within BisTrack System Manager.

These include Customer Types and Invoicing Options. Customers may also have multiple Addresses and Contacts.

In this course we will step through adding and maintaining all four of these areas.

Customer Types are used to categorize Customers by their type of business.

Found on the 'General' tab of Customer Properties, the list displays the current options.

When adding new customers, select the 'Customer type' that best describes the account.

Some Reports that can be printed by 'Customer type' include:

- Customer Detail
- Customer Summary
- Customer Aged Balance by Date

The 'Invoicing' tab includes options that affect invoices generated for the customer.

'Payment terms' determine when a customer is required to pay for their invoices.

The 'Payment Terms' available for selection are shown in the drop down list.

Payment Terms also determine if discounts are available for early payment.

The terms '2% 15 Net 30 Days' indicates the possible discount percent available when an invoice is paid within 15 days of the invoice date.

The 'Tax area' typically represents the geographical region such as state, province, city or county that the customer belongs to for the purpose of calculating sales tax on invoices.

Should the customer be Tax Exempt use the related 'Tax area'.

Refer to the training course 'Sales Tax Overview' for more information on Tax Areas.

The Customer's address is entered using the 'Addresses' tab.

BisTrack allows Customers to have multiple Addresses on file.

These can be used as the 'Deliver to' and 'Invoice to' addresses on sales documents.

The 'Default' Address is noted by a red dot on the rolodex icon.

Buttons are available to 'Add' a new Address, change existing 'Properties', 'Remove' an Address and designate the 'Default'.

When adding a new address BisTrack automatically provides a numeric 'Code'.

This field only needs to be unique within this Customer so the same 'Code' can be used for a different account.

Consider using 'Main' for the default Address code and the numeric code generated by BisTrack for all additional Addresses.

The 'Sales rep' and 'Sales Area' are set to '(Customer Default)'.

Unless changed here, the Address record uses the same settings for these as were entered on the 'General' tab of Customer properties.

Use the 'Communication' tab for entry of 'Telephone', 'Fax', 'Email' and 'Web address' details.

A 'Contact name' and 'telephone' can be entered here.

This 'Contact name' is not added to the 'Contacts' on file for the Customer. We will discuss the Contact tab in the next section of this course.

Addresses can have settings that differ from the customer defaults including 'Tax area', 'Exemption Certificates' and 'Payment terms'.

When complete click the 'Add' button.

Enter another Address or 'Close' if finished.

Customers can have multiple 'Contacts' on file.

These can be accessed from within the Customer properties 'Contacts' tab or by using the 'Customer Contacts' option from the 'Views' pane.

Contacts are entered on sales documents and Notepads for keeping track of whom you are communicating with.

Buttons are available to 'Add', change existing 'Properties', 'Remove' a contact and designate the 'Default'.

The 'Add' option is selected.

On the 'General' tab, enter the 'First name', 'Last name', 'Telephone and 'Email' information.

The 'Identification' tab has two important settings for sales orders.

When checked, this Contact can authorize sales orders and is allowed as the Contact for a 'Quick sale'.

When finished entering the Contact click the 'Add' button.

Enter another Contact or 'Close' if finished.

You should now have a good understanding of preset Types and Invoicing Options used when adding new Customers in BisTrack.

We have also reviewed the steps needed to add both Customer Addresses and relevant Contacts.

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