Adding New Customer Accounts

Both Cash and Credit Customers are added from the 'Customers' view using the 'New' option.

This training course will introduce you to the key entries found on the General, Accounts, Options and Invoicing tabs of Customer properties.

From the 'Customers' view right-click, and select 'New'.

Choose between adding an 'Operational Cash' or an 'Operational Credit' customer.

Select 'OK'.

The top section of the General tab is for setting the customer 'Code' and 'Name' fields.

The 'Generate' button can be used to automatically assign the 'Code'.

The 'Generate' option works with numbers only and assigns the first available number.   You can configure BisTrack to have a starting point which assigns the next number available after that.

Codes can also be alphanumeric.

The 'Short Name' can be used as an additional name to use when searching for this customer. If you don't have a different search name, enter the customer name here.

Enter a 'Display name' for the customer. It is used when displaying the customer name in BisTrack and on sale documents.

The 'Trading as' is automatically taken from the 'Display name' but can be changed to the legal name if different. The 'Trading As' name prints on the statement

When selecting to add a ‘Cash’ customer, the checkbox for ‘This is a cash account’ is automatically selected.

Key fields in this section set the ‘Customer type’, ‘Sales rep’, ‘Sales area’ and ‘Default price profile’. Each is chosen from a drop down list of options previously configured.

The ‘Customer Type’ is used for reporting by category.

The ‘Sales Rep’ is the person responsible for servicing this customer.

The ‘Sales Area’ is used for reporting the location that the sales are coming from.

The ‘Default Price Profile’ is used for identifying the pricing level that this customer will receive.

Set the ‘Home branch’ to the location where this customer typically buys from.
The ‘Addresses’ tab allows entry of the address, telephone number and email address.

You are required to enter a default Address.

There are just a few fields on the ‘Accounts’ tab when adding a ‘Cash’ customer.

With the ‘Customer status’ set to ‘Operational’, you can begin entering sales orders immediately once the record is added.

Add ‘Contractors registration’ and ‘Tax Exemption’ certificates when applicable.

These same fields are available when adding ‘Credit’ customers.

With a ‘Credit’ customer the ‘Accounts’ tab has many more settings.

A customer may go through a credit application process and their status should not reflect ‘Operational’.

You can change this status once they are approved.

Options for setting credit limits are covered in the ‘Maintaining Customer Accounts’ training course.

Most ‘Options’ are pre-set for you.

For Customers that have a policy of requiring Purchase Orders set the ‘Reference required’ to ‘Yes’.

Additional settings for ‘Reference mask’ can be set when the reference needs to be entered in a specific format.

Click the box for more information on setting a mask.

Another setting for consideration is to ‘Enforce entry of contact and telephone in order entry’.

When set to ‘Yes’ all sale types except ‘Quick sale’ would require the selection of a ‘Contact name’ and ‘Contact number’.

Two ‘Invoicing’ settings are mandatory when adding a new Customer.

First, select the applicable ‘Tax Area’ from the drop down list.

Second, select the ‘Payment terms’ from the drop down list.

For ‘Cash’ customers select the terms code that has been setup with zero days to pay.

With the required fields set, click the ‘Save and Close’ button.

The new Customer is added.

While there are many entries available when adding a new Customer, you should now be able enter the key settings found on the General, Accounts, Options and Invoicing tabs.

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