Customer Master Tables Transcript

Before you can import or add new customers in BisTrack, a number of master table entries must be in place. In this course we'll explore adding Customer Types, Payment Terms, Price Profiles, and Sales Reps. Then we'll examine how each is referenced within Customer Properties.

Customer Types allow you to group similar customers into categories. You can assign descriptive names like Home Builders, Roofers, or Retail as identifiers. These groupings can then be used for sales analysis reporting to help you recognize the kinds of customers you sell to, the margins you make, and the product groups being sold to them.

From the Customers view of System Manager, select Customer Types. The system shows any types previously added. To add a Type, right-click in the blank area, and then select New from the menu.

Begin by entering an alphanumeric Code. For example, you could use the letters PTR to represent Painters. Now enter a descriptive Name for the code. Certain Reports and Cubes allow you to use the Code or the Name, so make sure the naming convention makes sense.

Payment Terms are the conditions under which customers will pay for the goods they buy from you. They determine the due date of invoices and discount amount, when available. From the Customers view in System Manager, select Customer Payment Terms. To add a term, either click the New icon or select New from the right-click menu.

Enter a Code that does not have any spaces or special characters that briefly describes the terms. Then enter a more customer-friendly Name. BisTrack references the Code on Customer Imports. The Name appears in Customer properties and prints on invoices. Enter a more detailed Description to further explain the conditions.

Next, set the method for calculating the Due date. For this example, invoices will be due 30 days from the sale date. We will set the due date calculation method to Invoice date.

Now choose the length of time to use in the calculation and specify that this number represents days. The dialog box automatically displays the calculation based on the selections made. To ensure the accuracy of the Due date calculation, click the Test button.

The Result is based on the Calculation method of 30D and the Document date shown. Click OK to accept the Calculation and return to the Payment Terms form. We are also going to allow a 2 percent discount on invoices paid within 10 days of the invoice date. When we Test the calculation, we see that the 2 percent discount is available 10 days after the Document date.

Click the Add button to save the Payment Terms. For this next example, we'll add a term that uses a specific day of the month as the due date. Enter the Code, Name, and Description. Then set the Due date calc to End of Current Month

+10 Days. Click the Test button. The Result indicates a due date that is the 10th day of the month following the Document date.

When adding new terms, select a few Document dates for testing such as the 1st of the month, 15th, and 30th to ensure you get the results expected. When you're not offering a discount on a term, a Best Practice is to set the Discount date calculation to the same as the Due date, and zero for the discount percent. Click Add when finished.

Payment terms can range from basic to complex. For further assistance entering calculations and to view additional examples, refer to the Help available by clicking the Information icon. Click the red X to close the Help.

Price Profiles allow you to arrange customers into groups that can be used to set pricing strategies. You can then assign selling rules by Profile instead of individual customer accounts. Be careful that you don't confuse Price Profiles with Customer Types.

Types allow you to broadly categorize your customers for sales reporting purposes. Price Profiles let you identify customers by the pricing they receive. For example, all Roofers are assigned to the same Customer Type but can have distinct Price Profiles according to the sales volume you do with them.

From the Pricing view of System Manager, select Customer Price Profiles. Right-click in the blank area and then select New from the menu. Enter the Code and Name for the Price Profile. The Code can be a number or letters like we used in this example. When finished, click Add.

Sales Reps are assigned to each customer and are used for sales reporting, communication, or as a filter to view transactions. In the System Manager, General view, select Sales Reps. The results area shows those already on file. Right-click in the blank area and then select New from the menu.

Enter a Code and then the sales reps Name. When the sales rep has also been added as a BisTrack User, select their name from the drop-down list. Finally, select the Department where applicable. Click the Add button to finish the entry. It is possible to create a generic Sales Rep such as a House Account. When doing so, leave the User set to None.

You can reference all of the master table entries within Customer Properties. You set the Customer type, Sales rep, and Default price profile on the General tab. According to system option settings, each field defaults to the first entry in the drop-down list. We'll change the Customer type, Sales Rep and Default price profile using the new entries added to the master tables.

Set Payment terms on the Invoicing tab. From the drop-down list, select the desired terms. Customers with multiple locations can have different Payment terms, Price Profiles, and Sales Reps assigned for each Address. To do so, open the Addresses tab, and then click the Add button.

You set the Sales rep on the General tab of the Address record. Open the Options tab to set the Price profile and Payment terms. When left unchanged, the Customer Default is used.

Some simple set up is required before being able to add new Customers. You should now be able to add Customer types, Payment terms, Customer Price Profiles, and Sales Reps to the master tables. You should also recognize where the system applies these fields within Customer properties.

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
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