

Create a Customer

Document #: 3004 **Product:** CenterPoint® Accounting

Customers are individuals or companies who purchase goods and/or services from your company. Customers are used when entering customer invoices and receipts.

Prerequisite

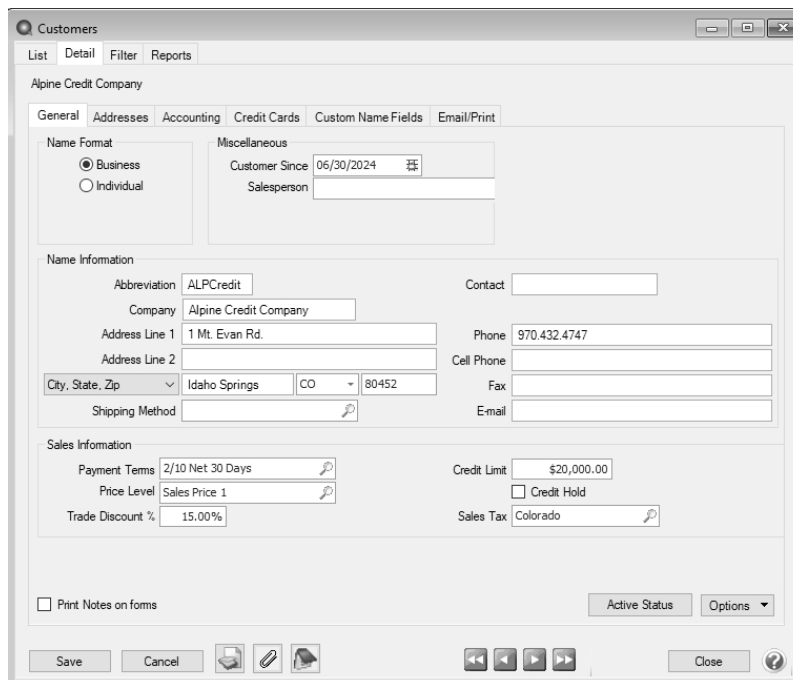
You must have the **Accounts Receivable** module purchased and registered in the module configuration manager (File > Administration > Module Configuration Manager) prior to creating customers.

General tab

1. Select **Setup > Customers**. Click the **New** button at the bottom of the screen.

 Note: Many of the fields have an option to set a selection as the default. Then when additional customers are added, they will automatically default to that selection. After making the selection, simply right-click on the field and select **Set As Default**. If you want to skip any fields when you create customers, you can remove fields from the tab order by clicking the **Options** button, selecting **Set Tab Stops**, and then removing the checkmark next to the fields you want to skip.

2. Select an appropriate **Name Format**. The Name Format selection is used to format the **Name** box to accept an individual's name, or a company name.



3. Under **Miscellaneous Information**, the **Customer Since** will default to the current date, change if needed.
4. If sales or customers are tracked by salesperson, assign the appropriate **Salesperson**.

5. In the **Abbreviation** box, enter up to ten characters that will easily identify the customer. To set how duplicate abbreviations are handled by CenterPoint, right-click and select **Allow Duplicates** (Use this option to reuse and not require the value in the Abbreviation box.), **Warn if Duplicate** (Use this option to receive a warning if a duplicate abbreviation is used. A confirmation message will display. To continue using the duplicate value, click Yes.), or **No Duplicates Allowed** (Use this option to require a unique value in the Abbreviation box. A message will display. Click OK to return and enter a unique value.).
6. Enter the customers full company name or individual's Last Name/Suffix/First Name/Middle Initial (the format of this field will depend on which option was selected in step 3).
7. Enter the appropriate address information.



Note: If you prefer to enter the zip code and have CenterPoint auto-fill the city & state information (instead of manually typing in the city, state and zip), then make that selection in Preferences (File > Preferences > General > Address Settings).

8. Enter the customer's **Phone, Fax, E-mail** address and **Shipping Method** (if applicable). If you've selected to e-mail invoices/billing statements to this customer, an e-mail address is required.
9. If this is a taxable customer, select the appropriate **Sales Tax**. This will be used when invoices are entered for the customer. If the customer is non-taxable, put a check mark in the **Not Subject to Tax** check box on the **Accounting tab** and enter their **Exemption Id**.



Note: If the customer is taxable, but occasionally purchases a sales item that is not subject to tax, leave the **Not Subject to Tax** check box unselected and enter an **Exemption Id**.

10. On the **General Tab**, select an appropriate **Payment Term**. The Payment Term is used in invoicing to calculate the Invoice Discount Due Date and Due Date.
11. Select the appropriate **Price Level** for this customers sales. Three different default prices can be assigned to each Sales Item, this field specifies which of those prices should be used for this customer.
12. If this customer should receive a **Trade Discount** on all sales, enter the percentage. Trade discounts will automatically deduct the specified percent from the assigned price for an item.
13. If applicable, enter a **Credit Limit** amount for this customer.
14. A customer can also be put on a **Credit Hold** by selecting the check box. If a customer is on credit hold, new invoices cannot be saved/posted unless they are paid in full; the File > Preferences > Customer Invoices > Credit Limits preference allows you to optionally require outstanding balances to be fully paid.
15. To select which companies/funds this customer is active in, click the **Active Status** button, select the companies/funds the customer is active in (the default is active for all companies/funds), and then click **OK**.
16. To add notes to this customer, click the **Notes** icon () , enter the notes, and then click **OK**. When notes are added from the Additional Notes icon, the icon will display with a yellow background.



Note: To add a time stamp to a note added or edited on the Additional Notes screen, click **Stamp**. If you are adding/editing a stamp in a database without security, the stamp will display "Edited on (current date and time)". If you are adding/editing a stamp in a database with security, the stamp will display "Edited by (username) on (current date and time)".

17. Select the **Print Notes on forms** check box to print notes entered on the Additional Notes screen on a sales order and invoice (basic and detail), when the Customer Notes field is added in Setup > Forms Designer > Sales Order Form Designer or Invoice Form Designer.

Addresses tab



Note: If you right-click in the Addresses for this Name List, you can select to display active/inactive addresses and add/remove/sort columns such as State/Province, Zip/Postal Code, etc.

- » In the **Location Type** box, click and select a location type, or type a location type. Name location types are a way to categorize addresses for a name. Typical location types are shipping, billing, business, etc. To create a new location type, right-click and select New, and then follow the [Name Location Types](#) topic. To set a location type as the default, right-click and select Set As Default. To clear the default location type, right-click and select Clear Default.
- » In the **Name** box, enter up to 50 characters of required information that describes the address (for example: Corporate Office, Warehouse, Home, etc.).
- » In the **Contact** box, enter up to 30 characters of optional information that describes the contact at this address. If the Print Contact on Forms check box is selected, the Contact Name will print on forms instead of the name entered on the General tab.
- » In the **Address Line 1** and **Address Line 2** boxes, enter the street address and any other information, for example, suite number or post office box number for this location type.
- » If your preferences are set to use the automatic Zip Code/Postal Code Lookup for addresses, in the Zip/Postal Code box enter the zip code or postal code. Then, select the appropriate city/state or city/province from the list. If your preferences are not set to use the automatic Zip Code/Postal Code Lookup for addresses, enter the City/State/Zip, City/Province/Postal Code, or Address 3 Foreign Address information.

 Note: To set a City/State/Zip, City/Province/Postal Code, or Address 3 Foreign Address as the default, right-click and select Set As Default. To clear the default City/State/Zip, City/Province/Postal Code or Address 3 Foreign Address, right-click and select Clear Default.

- » Select the **Print Contact on Forms** check box, the Contact Name will print on forms instead of the name entered on the General tab.
- » Under Use this Address as the Default for, select any combination of Billing, Shipping, Business, or Pay To.
 - » **Business** - The address that is entered on the General tab is referred to as the Business address.
 - » **Billing** - This address is used for billing statements and invoices.
 - » **Shipping** - This address is the address that can be used if the shipping address is different than the business address.
 - » **Pay To** - This address defaults with the Name field in transaction entry screens.
- » If this address is not active, unselect the **Active** check box.
- » Under Communication Methods for this Address, in the Information box, enter the information specific to the communication method (for example, phone number, cell phone number, e-mail address, etc.).

 Note: To create new communication methods, click Communication Methods at the bottom of the screen.

Accounting tab

18. Click on the **Accounting** tab. Select the appropriate default **Accounts Receivable**. If this is left empty, CenterPoint will use the Accounts Receivable account assigned in the Preferences (Files > Preferences > Transactions > Accounts Receivable).
19. Select the **Statement Type** for this customer, the options are Balance Forward or Open Item. Balance Forward is the default statement type.
20. Select the user-defined **Group** to assign the name to, for example Wholesale, Retail, Referral Partner. Groups are used in reporting and as a filter to limit the range of names in many reports.
21. If you want this customer to be subject to finance charges when they are calculated, select the appropriate **Finance Charge** code.
22. Enter additional information in the **Memo** box. This information will display in Processes > Sales > Customer Invoices in the Memo 2 box.

Credit Cards tab

23. The **Credit Cards** tab is used when a customer and your business have agreed to keep a customer's credit card on file for current or future purchases. To add a credit card to the customers file, click the **New** button.

- » Select the **Credit Card Type** (Credit Card Types are set up in Setup > Names > Credit Card Types).
- » Enter the **Name** of the credit card, the **Name on Card**, **Card Number**, **Security Key**, and **Expiration Date/Year**.
- » If more than one credit card is stored for a customer, determine which to **Use as Default Credit Card**.
- » Credit cards can be deleted from a customer after used to pay for an invoice.

Custom Names Fields tab

24. The **Custom Name Fields** tab can be used to track additional information regarding a customer that aren't already stored in a field in Setup > Customers, for example Web Login, Office Hours, Business Type, etc. Custom Name Fields are optional. To view a list of all Custom Name Fields and the Name the field is being tracked on, select Reports > Setup Lists > Names > Names Custom Field (the report can also be filtered for a specific Custom Name Field).
- » Click **New** to add a custom field.
 - » Enter an **Abbreviation** and **Name** for the type of information being tracked.
 - » Select the type of information being tracked, **Text**, **Date**, **Numeric**, or **Percentage**. If the type is Numeric, also enter the Number of Decimals.

Email/Print tab

26. Click on the **Email/Print** tab. The Email Addresses and Options fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor a customer. Use these options to set up multiple e-mail addresses where invoices, statements, sales orders, purchase orders, and receipts can be sent for this customer. You can also select how each e-mail is to be sent, **No Email**, **Send "To..."** (directly to the recipient), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (as a blind carbon copy, for example, the person sending the email may want to enter their own e-mail address so they have an audit trail of emails sent). The Email Addresses and Options settings will be used to set the default image on the Email button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. An envelope image with a check mark on it will mean the form will be emailed and an Envelope image with a cross-through on it will mean the form will not be emailed.

The screenshot shows the 'Customers' window with the 'Email/Print' tab selected. The window title is 'Customers'. Below the title bar are tabs: 'List', 'Detail', 'Filter', 'Reports'. The main content area has a sub-tab bar with 'General', 'Addresses', 'Accounting', 'Credit Cards', 'Custom Name Fields', and 'Email/Print'. The 'Email/Print' tab is active, showing a table titled 'Email Addresses and Options'. The table has columns: Name, Email Address, Invoices, Statements, Sales Orders, Purchase Orders, Checks (Advices), and Receipts. The first row shows 'John Jones' with email 'jones@testemail.com'. Below the table are 'Print Options' for each module: 'Print Customer Invoices' (No), 'Print Customer Statements' (Yes), 'Print Receipts' (No), 'Print Sales Orders' (No), and 'Print Purchase Orders' (No). At the bottom are 'Save', 'Cancel', and 'Close' buttons.

The **Print Options** fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor a customer. The available fields are: **Print Customer Invoices**, **Print Customer Statements**, **Print Receipts**, **Print Sales Orders**, and **Print Purchase Orders**. Use these options to determine if invoices, statements, sales orders, and purchase orders should be printed for this customer. The Print Options settings will be used to set the default image on the Print button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. A printer image with a check mark on it will mean the form will Print and a Printer image with a cross-through on it will mean the form will not print.

 Note: If you want to attach a document to this customer, see the [Scan and Attach Documents](#) topic for detailed information.

27. Click **Save**.