

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

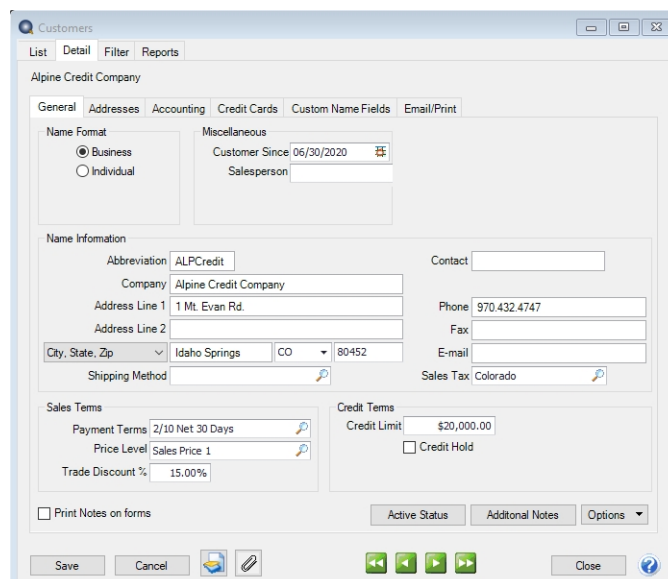
You must have the **Accounts Receivable** module purchased and registered in the module configuration manager (File > Administration > Module Configuration Manager) prior to creating customers.

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 first and last name, or a company/fund name.



The screenshot shows the 'Customers' window with the 'General' tab selected. The window title is 'Customers'. At the top, there are tabs for 'List', 'Detail', 'Filter', and 'Reports'. Below these, the 'Alpine Credit Company' is listed. The 'General' tab contains several sections: 'Name Format' with radio buttons for 'Business' (selected) and 'Individual'; 'Miscellaneous' with a date field 'Customer Since' set to '06/30/2020' and a dropdown for 'Salesperson'; 'Name Information' with fields for 'Abbreviation' (ALPCredit), 'Company' (Alpine Credit Company), 'Address Line 1' (1 Mt. Evan Rd.), 'Address Line 2', 'City, State, Zip' (Idaho Springs, CO, 80452), 'Shipping Method', 'Contact', 'Phone' (970.432.4747), 'Fax', 'E-mail', and 'Sales Tax' (Colorado); 'Sales Terms' with fields for 'Payment Terms' (2/10 Net 30 Days), 'Price Level' (Sales Price 1), and 'Trade Discount %' (15.00%); and 'Credit Terms' with a 'Credit Limit' field set to '\$20,000.00' and a 'Credit Hold' checkbox. At the bottom, there are buttons for 'Save', 'Cancel', 'Print Notes on forms', 'Active Status', 'Additional Notes', 'Options', and 'Close'.

3. If sales or customers are tracked by salesperson, assign the appropriate **Salesperson**.
4. 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.).

5. Enter the customers full company name or individuals first/last name (the format of this field will depend on which option was selected in step 3).
6. 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).

7. 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.
8. 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**.

9. 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.
10. 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.
11. 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.
12. The **Credit Limit** field will be available if the Credit Limit Preference (File > Preferences > Customer Invoices > Credit Limits) has been set. Enter the Credit Limit for this customer, if applicable. A customer can also be put on a **Credit Hold** by selecting the box. Customers with a Credit Hold status can no longer charge invoices.
13. 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**.
14. The **Additional Notes** button is optional and can be used to track internal notes regarding this vendor. When notes are added from the Additional Notes button, the button label will change to **Edit Notes** 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)".

15. 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

16. The **Addresses tab** is used if the customer has multiple shipping addresses or if a Pay To address should be printed on forms instead of the address on the General tab for this name (by selecting the Pay To check box). If the Print Contact on Forms check box is selected, the Contact Name from the Address tab will print on forms instead of the name on the General tab. To add a shipping address, click the **New** button. Select **Shipping** in the **Location Type** field and then begin entering the appropriate information. To inactivate a shipping address, unselect the Active check box.

Accounting tab

17. 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).

18. Select the **Statement Type** for this customer, the options are Balance Forward or Open Item. Balance Forward is the default statement type.
19. 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.
20. If you want this customer to be subject to finance charges when they are calculated , select the appropriate **Finance Charge** code.
21. Enter additional information in the **Memo** box. This information will display in Processes > Sales > Customer Invoices in the Memo 2 box.

Credit Cards tab

22. 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

23. 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' application window. The 'Email/Print' tab is selected, displaying the 'Email Addresses and Options' section. This section includes a table with columns for Name, Email Address, and various document types (Invoices, Statements, Sales Orders, Purchase Orders, Checks (Advices), Receipts). Each document type column has a dropdown menu to select the email method (e.g., Send 'To...', Send 'CC...', No Email). Below the table, there are 'Print Options' for each document type, with checkboxes or dropdowns to enable or disable printing. The bottom of the window features 'Save', 'Cancel', and 'Close' buttons, along with navigation icons.

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 or 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**.