CUSTOMERS

How to Add and change Customer details

When creating a new customer, we suggest you use a code made up of part of the customer name, and perhaps some extra numerics where names are similar. If your business is in, say, Leeds, you would expect to have customers like Leeds Bake House, and Leeds Flower Shop: we suggest you abbreviate Leeds to LD in the customer code. This may apply to other cities / areas outside your own city / town.

- Click <New Customer>
- Enter the new <Customer Code>. Codes can be upper or lower case or a combination, but are case independent for data entry
- If you want to use the details of the customer you already had open (perhaps if you are adding another branch office), check the <Copy details from Current Record> checkbox.
- Click <OK> to proceed or Cancel to not add the new customer.
- Proceed through the fields on the customer screen, entering details for this customer.
- To add a delivery address, click <New Delivery> and enter delivery code and details.
- Credit limits and budgets can be set up for this customer, as well as departmental margins and overall margin.
- Tax rules can be set if they are different from the standard.
- Now this customer record can be used in jobs and quotes.
- Click <List> or <Esc> to reopen the list screen.
- Inactive customers can be flagged as such on the Accounts screen. If any transactions are posted to their account the flag is reset.

Add a new customer if using other accounting systems, eg MYOB
You can add a new customer either by putting the new customer in MYOB and re-exporting the customer list to Printcost, or you can simply add the customer(s) in Printcost using exactly the same customer code and name as in MYOB.

To change customer details:
Select the customer, click Details, and change details as required. Customer details can also be changed within a job or quote, where they will be changed for the job or quote only.

Customer codes can be changed. New codes can be upper or lower cases (or a combination) but are case dependent for data entry.

To merge the records of two customers into one:
Where two of your customers amalgamate their businesses, you can combine customer records by using the Change Code facility. Note that the records cannot be separated after they have been merged, and only one set of Notes is retained, so you need to copy (using cut and paste) the notes of the customer whose code you are changing, and paste them into the notes field of the newly amalgamated customers. To merge them:
Select the customer whose code is to be changed.
Click <Change Code> and enter the code of the other company. A message will advise you that the code is already used and ask if you want to merge the history of the 2 companies. Click Yes to proceed.
List Jobs will show the jobs for both customers, and older jobs will retain the old name of the customer whose name was changed.

How to Find Customer History

To find outstanding invoices for a customer:
<Customers> Find the customer whose history you want
<Activity> This opens the accounts receivable transaction list for this customer. It shows outstanding invoices and any posted transactions from the current month, but not older (fully allocated) transactions.
To find all transactions, click
<Select>
Untick the second line (Transaction status DT Alpha To 8) to delete it.
<OK>

The list will show all transactions for this customer, in date order. You can change the sort order by clicking on one of the columns on the list.
For credit control, select all transactions not fully allocated and use the credit control report in Customer Transactions.
Click the Job Deliveries button to see a list of all deliveries relating to an invoice, and then use the Job button to view the job.